

# Using SharePoint for Research

When to use it, organization, and sharing

Instructor: Llewellyn Fernandes

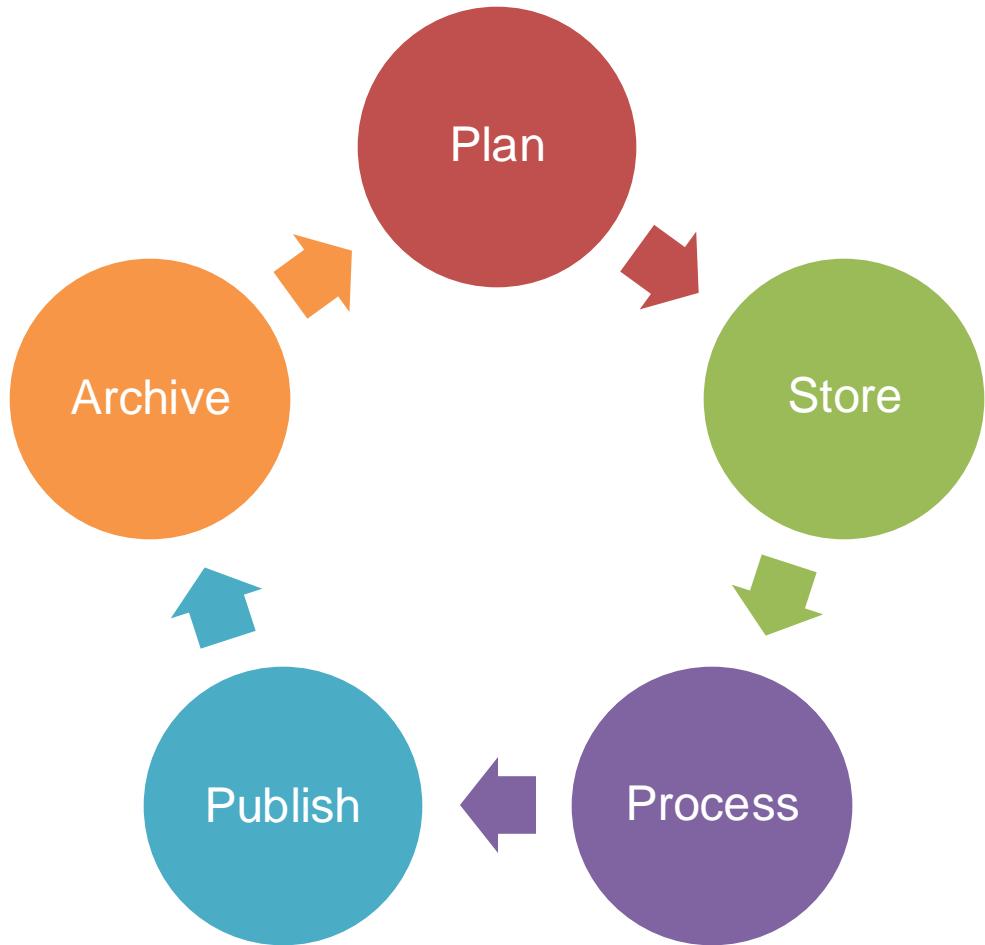
Date: November 6, 2024

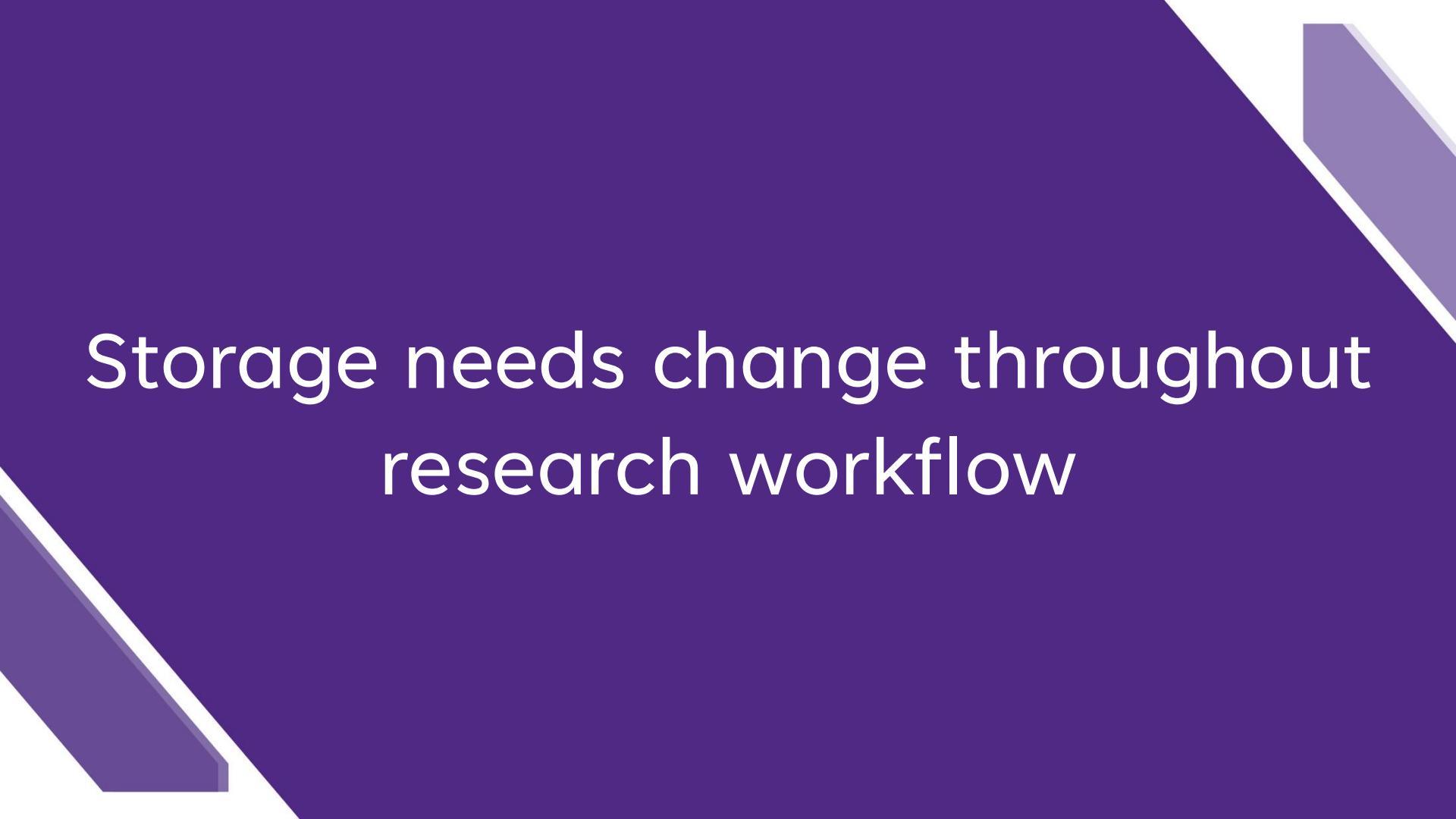
Materials: <https://github.com/nuitrcs/rdm-workshops>

# Outline

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

# Research Data-Cycle





Storage needs change throughout  
research workflow

# Types of storage

What do you want to do with your data?

| PROCESS                       | SHARE                        | STORE                         | ARCHIVE                      |
|-------------------------------|------------------------------|-------------------------------|------------------------------|
| Clean, Analyze, and Visualize | Collaborate                  | Ensure data integrity         | Retain data long-term        |
| Fast storage                  | Access for all group members | Access for core group members | "Cold" storage               |
| Near compute source           | Collaboration Tools          | Replication                   | Less accessible              |
| Costly                        | Free*                        | Versioning                    | Inexpensive retention period |

\* licensing changes, pricing/limits may apply

# Storage Options

What do you want to do with your data?

## PROCESS

Clean, Analyze, and Visualize

Quest

## SHARE

Collaborate

SharePoint



## STORE

Ensure data integrity

Research Data Storage Service (RDSS)

Cloud Storage (AWS, GCP, Azure)

## ARCHIVE

Retain data long-term

Research Data Archival Service



# 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



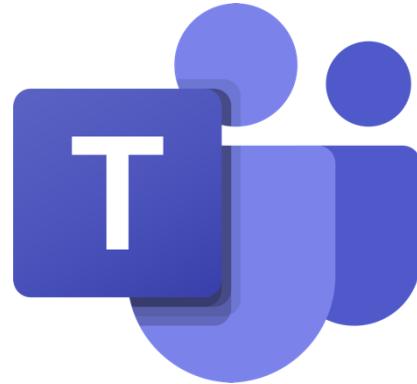
# Related Microsoft Products



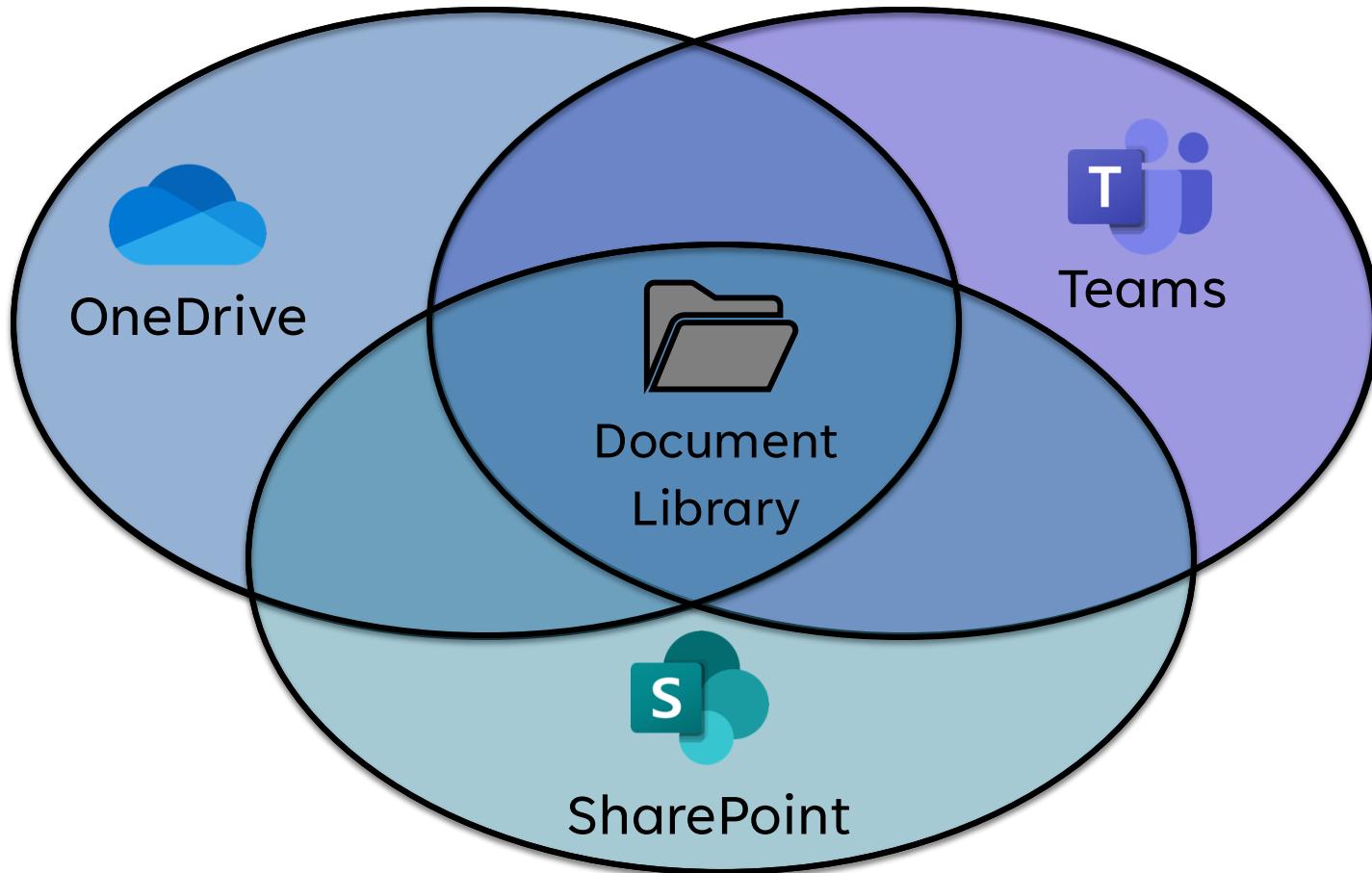
OneDrive  
Personal Files



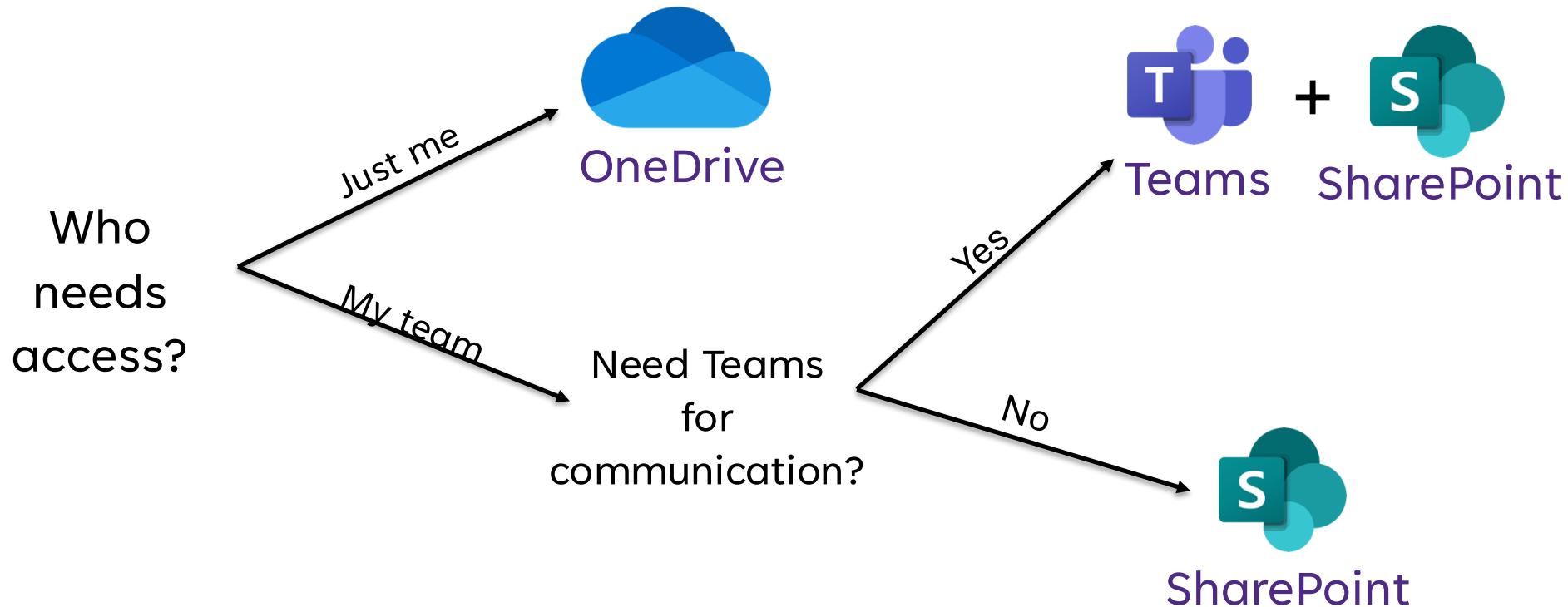
SharePoint  
Team files



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

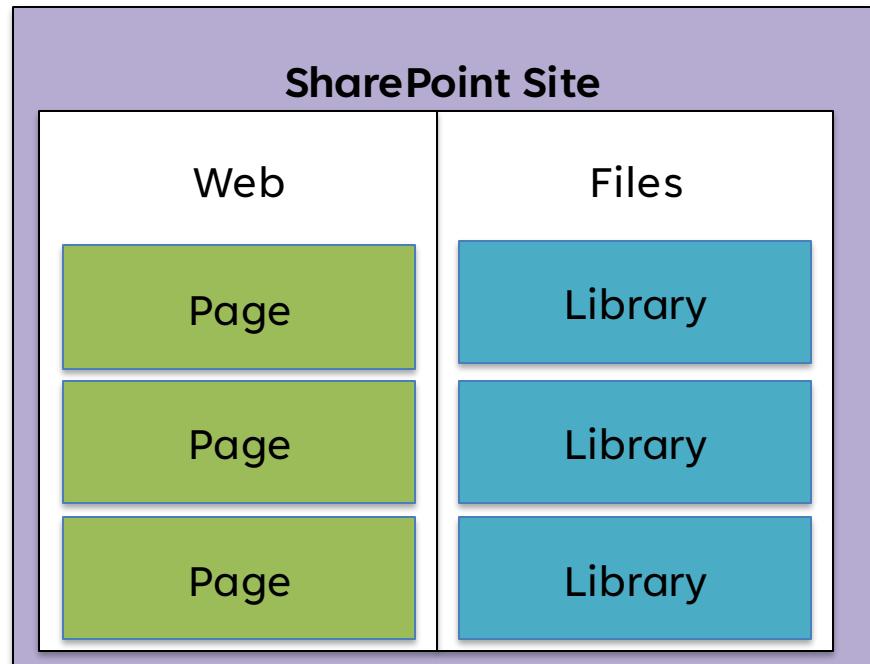
- Store files that need to be accessible to groups of users
- Collaborate on documents
- Share with people who don't have NetIDs

## When not to use it

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

# SharePoint Structure

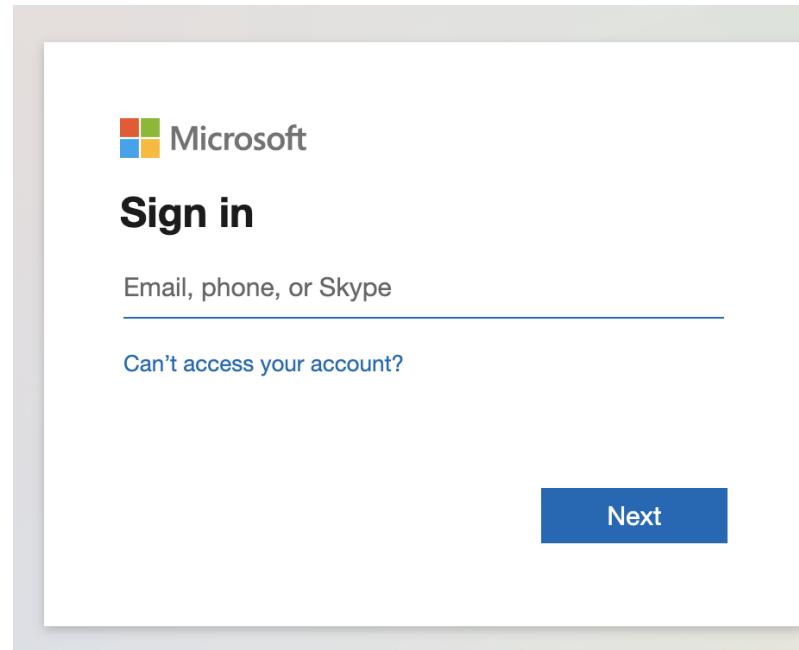
- **Sites** are made up of **pages** and **libraries**
- **Pages:** Organize content (like a webpage)
- **Libraries:** Store documents



# SharePoint Overview

# Log In

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



# 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

The screenshot shows the SharePoint interface for the 'RCDS-TEST' site. The left navigation bar includes links for Home, Notebook, Documents (which is selected), Pages, Site contents, Recycle bin, and Edit. The main content area displays the 'Documents' library, which contains three shared folders: 'Brian's Shared', 'Kevin's Shared folder', and 'Tobin's Shared'. The 'Name' column is used for sorting.

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

The screenshot shows the OneDrive interface for the 'RCDS-TEST' site. The top navigation bar includes options for Add shortcut to My files, Pin to Quick access, Sync, and more. The main content area shows the 'Documents' library, which lists three shared folders: 'Brian's Shared', 'Kevin's Shared folder', and 'Tobin's Shared'. The 'Name' column is used for sorting.

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

# Teams site example

The screenshot displays a Microsoft Teams site interface with three main panes:

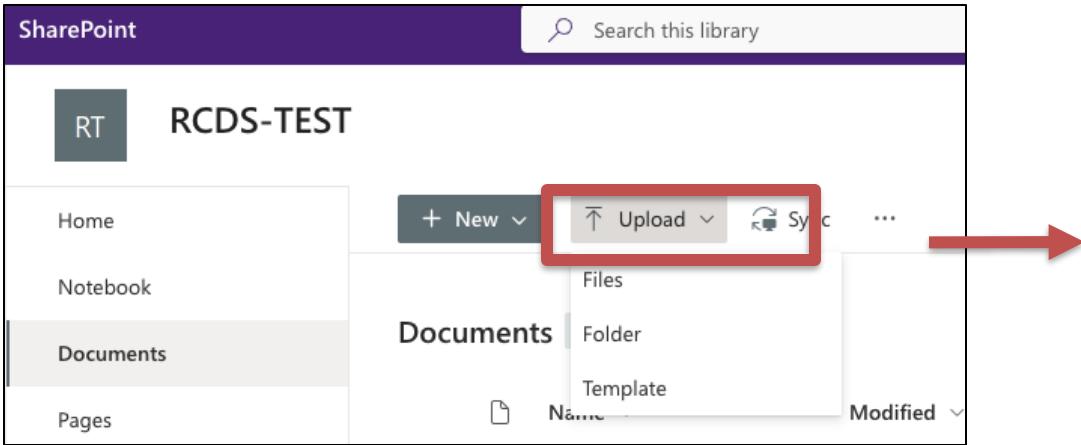
- Left Pane:** Shows the "Research Data Management" page. It includes a "Documents" section with a table listing folder names and modification dates.
- Middle Pane:** A "Documents" library view. The breadcrumb navigation shows "Research Data Management > Documents". It lists items under "In channels" and "In site library". A detailed table below shows the contents of the "General" folder.
- Right Pane:** A "General" team page. The breadcrumb navigation shows "Documents > General". It includes a "New" button, file upload, share, and copy link options.

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

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

# Transferring files in and out of SharePoint

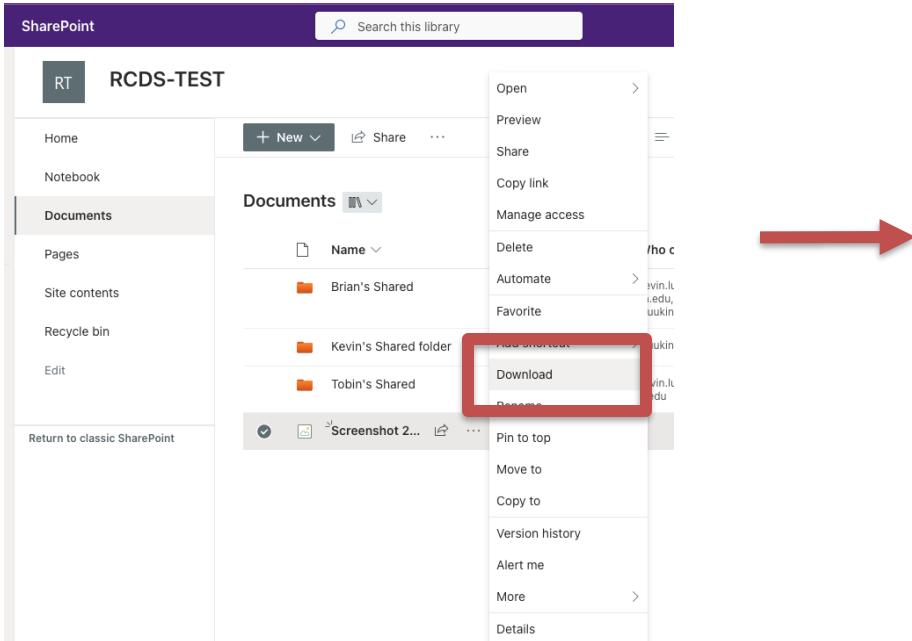
# Upload



Opens file browser window

Or drag and drop

# Download



Downloads to downloads  
folder

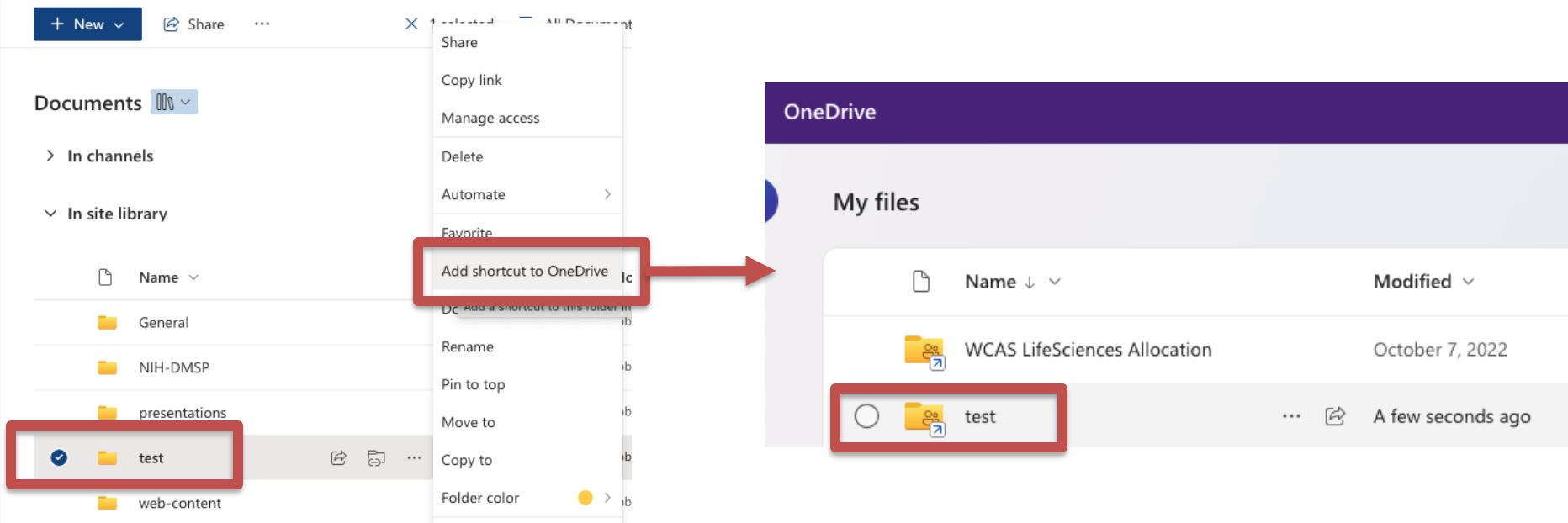
# Syncing to your computer

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

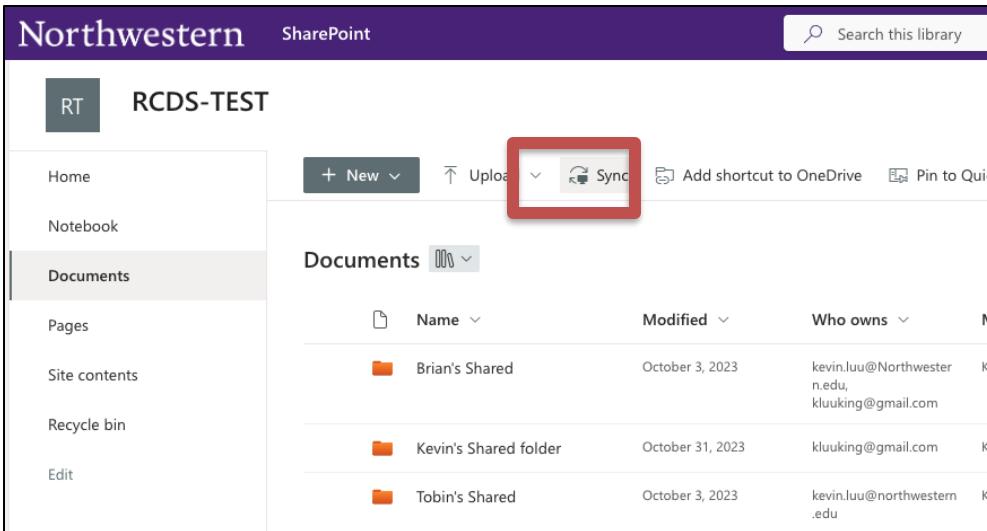


<https://support.microsoft.com/en-us/office/sync-sharepoint-files-and-folders-87a96948-4dd7-43e4-ac01-53f3e18bea9b>

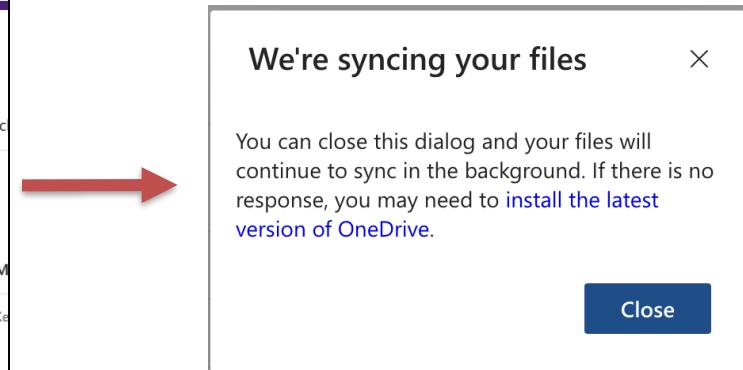
# Add Shortcuts to OneDrive



# Sync Document Library



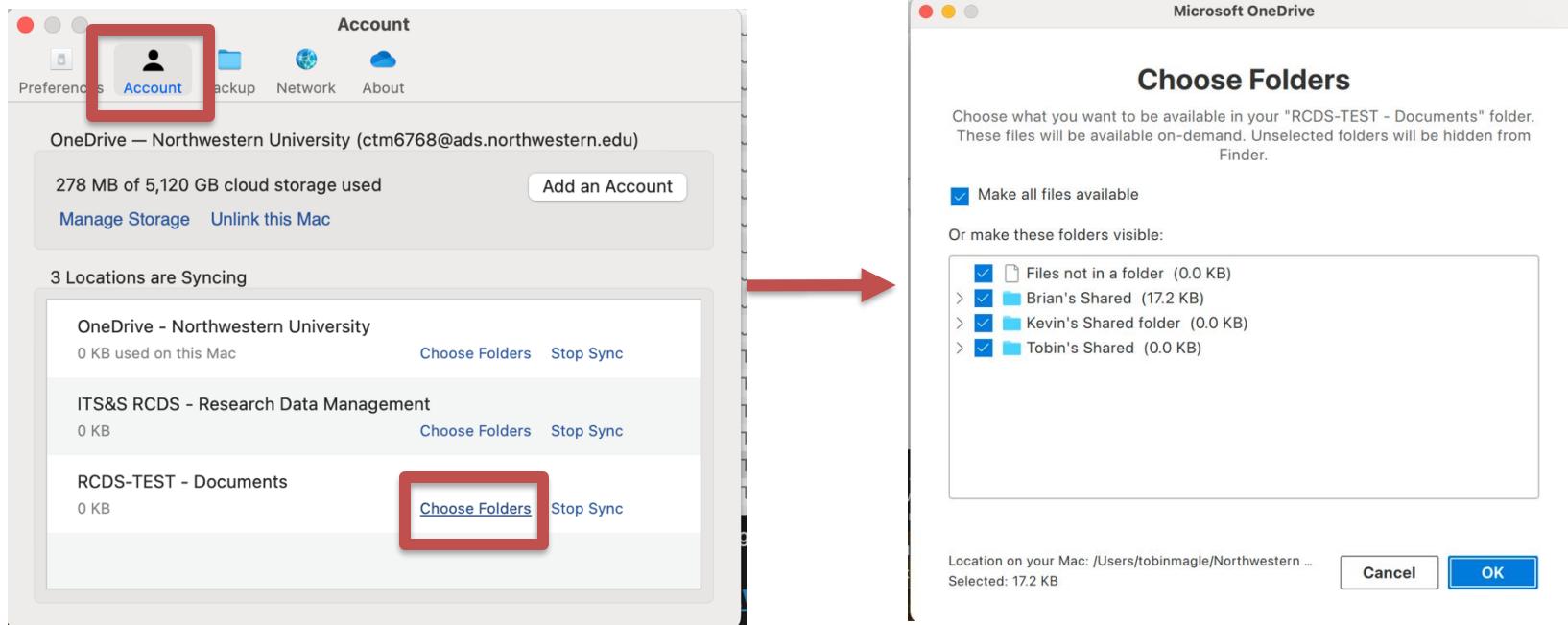
A screenshot of a SharePoint document library interface. The top navigation bar shows "Northwestern" and "SharePoint". The page title is "RCDS-TEST". On the left, a sidebar menu includes "Home", "Notebook", "Documents" (which is selected), "Pages", "Site contents", "Recycle bin", and "Edit". The main content area shows a list of documents under the heading "Documents". The first three items in the list are "Brian's Shared", "Kevin's Shared folder", and "Tobin's Shared". At the top of the content area, there are buttons for "+ New", "Upload", "Sync" (which is highlighted with a red box), "Add shortcut to OneDrive", and "Pin to Quick Launch". A search bar at the top right says "Search this library".



Document Library > 300,000 files

# Choose files

Open OneDrive App



# Globus data transfer tool

Move large amount 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 GB                           |
| 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 |

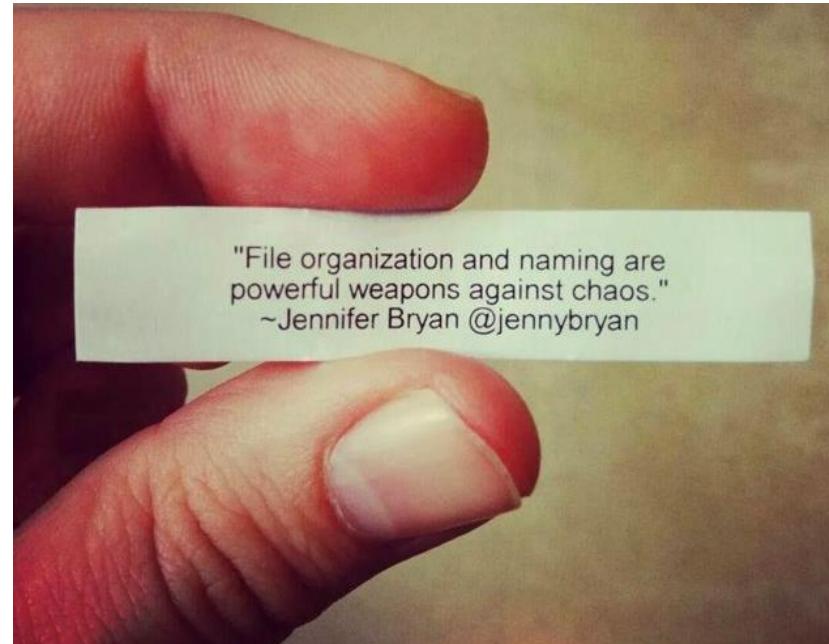
<https://learn.microsoft.com/en-us/office365/servicedescriptions/sharepoint-online-service-description/sharepoint-online-limits>

# 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

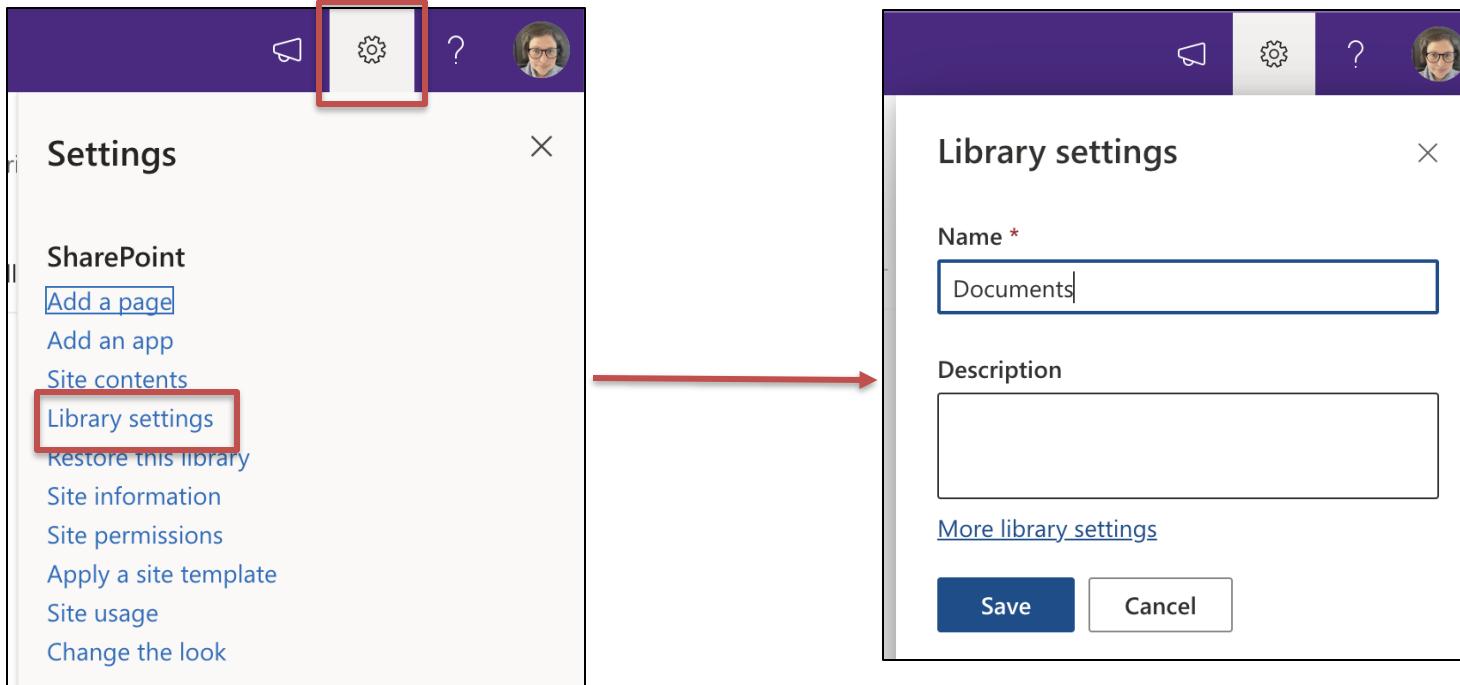
- Keep the number of files <100,000
- Organize based on who needs access
- E.g.: A library for files only visible to your team and a separate library for content shared outside your team
- Rename your Libraries descriptively

# 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

Path Length Limit 400 characters

# Rename library



# Create a new Library

Research Data Management

Home

Documents

Recycle bin

Edit

+ New

List

Document library

Page

Space

News post

News link

Plan

App

presentations

Create new document library

Blank library

From existing library

Copies metadata fields

Templates

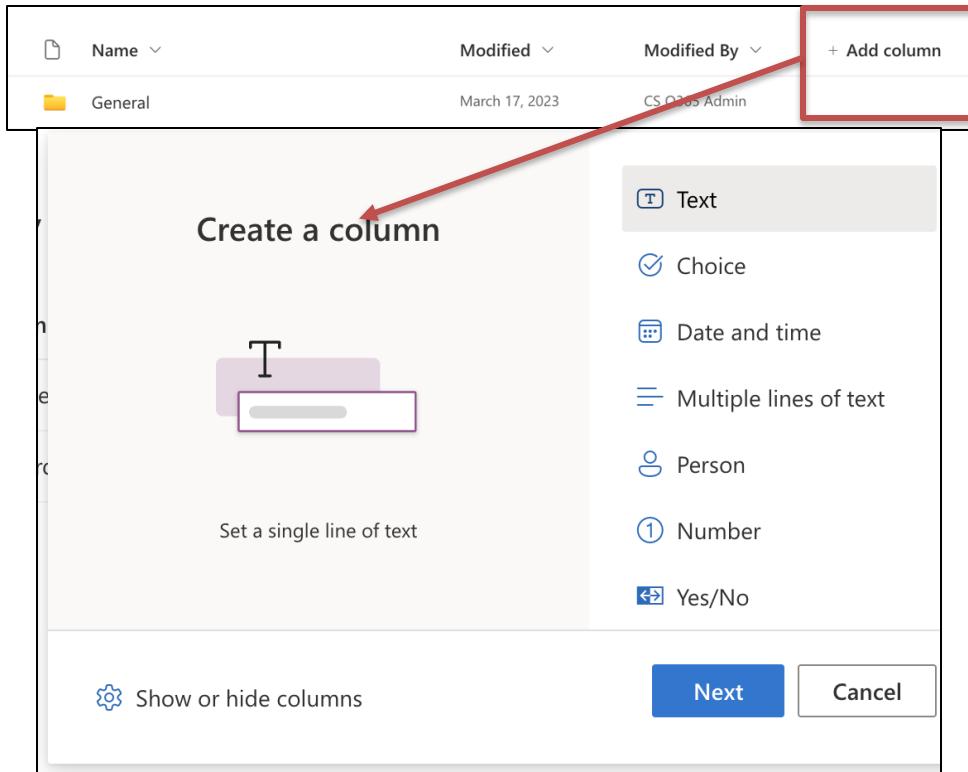
Media library

Invoices

Learning



# Add Metadata



# Custom Metadata

The image shows two overlapping windows from a Microsoft SharePoint interface. The left window is titled 'Create a column' and displays a list of column types: Text, Choice, Date and time, Multiple lines of text, Person, Number, and Yes/No. The 'Text' option is highlighted with a red box and selected. The right window is also titled 'Create a column' and provides more detailed settings for the chosen 'Text' type. It includes fields for 'Name \*' (with a placeholder 'New column'), 'Description' (with a placeholder 'A single line of text'), 'Type' (set to 'Single line of text'), 'Default value' (with a placeholder 'Enter a default value'), and a checkbox for 'Use calculated value'. A red arrow points from the 'Text' option in the left window to the 'Type' dropdown in the right window.

Create a column

T

Set a single line of text

Text

Choice

Date and time

Multiple lines of text

Person

Number

Yes/No

Next Cancel

Create a column

Name \*

Description

Type

Single line of text

Multiple lines of text

Number

Yes/No

Person or Group

Date and time

Choice

Hyperlink

Currency

Location

Image

Managed metadata

Lookup

Save Cancel

# System Metadata

The image shows two overlapping windows from a Microsoft SharePoint interface. The left window, titled 'Create a column', displays a text input field with a placeholder 'Set a single line of text'. Below it is a list of column types: Text (selected), Choice, Date and time, Multiple lines of text, Person, Number, and Yes/No. A red box highlights the 'Text' option. The right window, titled 'Edit view columns', lists various metadata fields with checkboxes. Most checkboxes are checked, except for 'Compliance Asset Id', 'Description', 'ID', 'Content Type', 'Created', 'Created By', 'Check In Comment', 'File Size', and 'Item Child Count'. A red arrow points from the 'Text' option in the first window to the 'Edit view columns' window.

Create a column

Set a single line of text

Text

Choice

Date and time

Multiple lines of text

Person

Number

Yes/No

Next Cancel

Show or hide columns

Apply

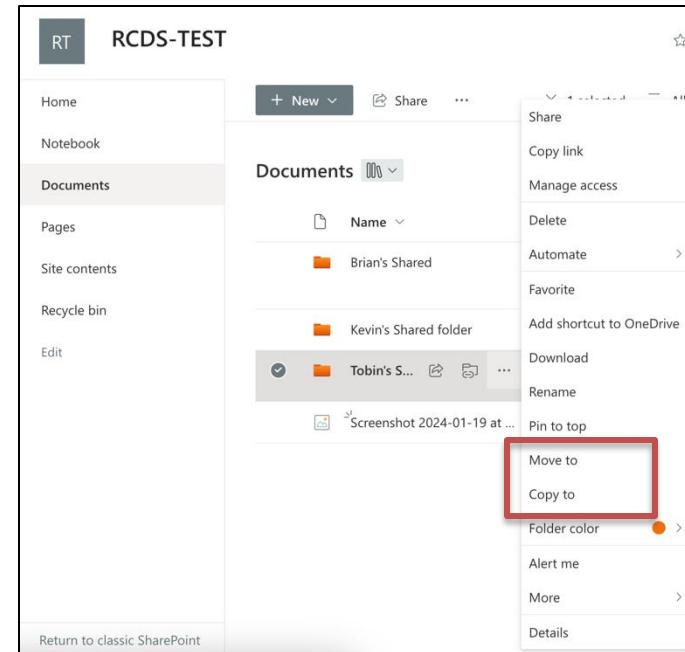
Edit view columns

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

# 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 the 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>

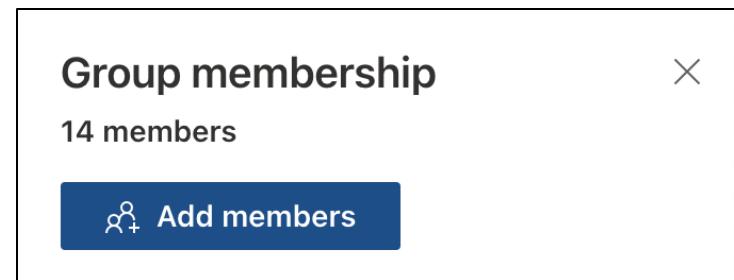
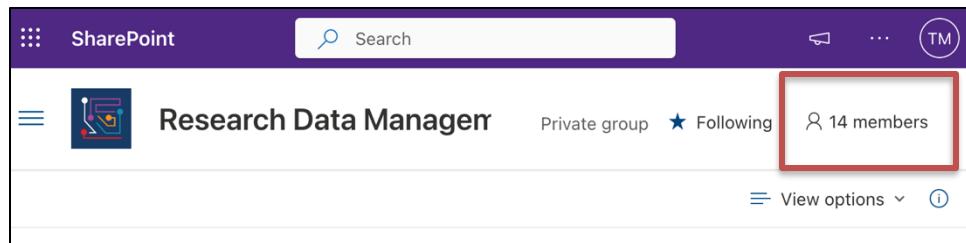
# Access and Sharing

# Access best practices

- **Tradeoff** between openness and security
- **Least privilege** - limit access to a 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** on the site
- Includes documents (unless otherwise specified)
- **Roles:** Owner, Member, Visitor



# 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.

The image shows two screenshots from a SharePoint site's settings. The left screenshot shows the 'Settings' page under 'SharePoint'. The 'Site permissions' link is highlighted with a red box. The right screenshot shows the 'Permissions' page, which manages access to the site. It includes sections for 'Add members', 'Site owners - full control', 'Site members - limited control', 'Site visitors - no control', 'Site Sharing', 'Guest Expiration', and a note about additional permissions. A red box highlights the 'Advanced permissions settings' link at the bottom of the page.

# Custom groups

The screenshot shows the SharePoint Permissions page for a site collection. The top navigation bar includes the App launcher, Northwestern logo, SharePoint title, settings gear, help question mark, and user profile. Below the navigation is a toolbar with tabs: BROWSE (selected), PERMISSIONS (highlighted in orange), and a search icon. The PERMISSIONS tab has four main sections: Grant Permissions, Create Group, Edit User Permissions, Remove User Permissions, Check Permissions, Permission Levels, Access Request Settings, and Site Collection Administrators. Under the Check Permissions section, there are four buttons: Grant, Modify, Check, and Manage.

The left sidebar lists site navigation items: Home, Documents, Recent, NU Libraries, test, Galter, testq, Recycle Bin, and EDIT LINKS.

A yellow callout box contains a warning message: "⚠ Some content on this site has different permissions from what you see here. [Show these items.](#)" followed by the sub-instruction: "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.](#)"

The main content area displays a table of permissions:

|                                     | Name                              | Type             | Permission Levels |
|-------------------------------------|-----------------------------------|------------------|-------------------|
| <input type="checkbox"/>            | Galter                            | SharePoint Group | Edit              |
| <input checked="" type="checkbox"/> | NU Libraries                      | SharePoint Group | Edit              |
| <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              |

# 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

Select the permissions to include in this permission level.

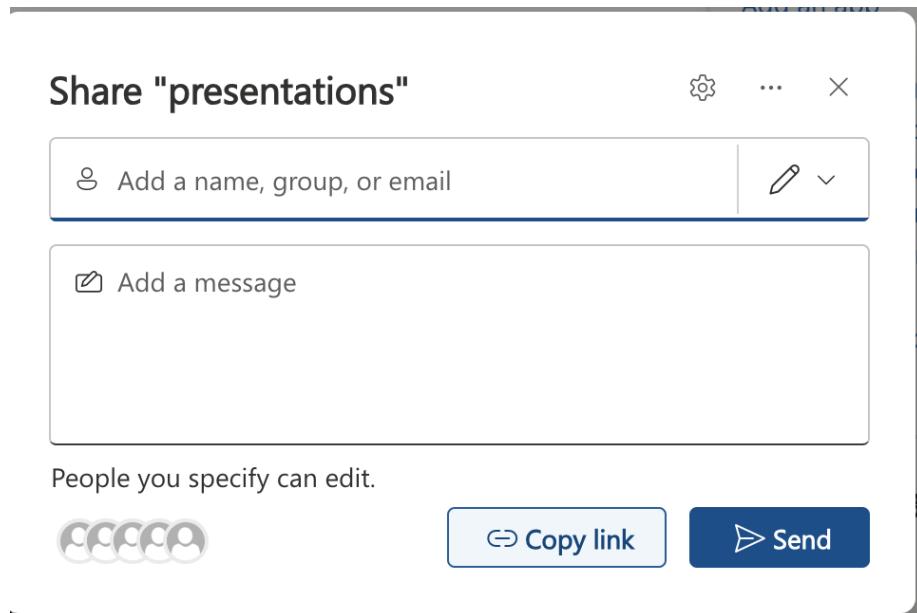
**Select All**

### 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



# 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

The image shows a comparison between two OneDrive sharing interfaces. On the left, a 'Share' dialog is open over a list of files in a folder named 'Research Data M...'. The dialog has fields for 'Add a name, group, or email' and 'Add a message'. A red box highlights the gear icon at the top right of the dialog. Below it, a note says 'People you specify can edit.' followed by a list of user icons. At the bottom are 'Copy link' and 'Send' buttons. A red box highlights the 'Send' button. On the right, a 'Sharing settings' modal is shown for the file 'RCDS Data Management Team Meetings.docx'. It lists sharing options: 'Anyone' (selected, highlighted with a red box), 'People in Northwestern University', 'People with existing access' (with a small group icon), and 'People you choose'. Under 'More settings', there are options for 'Can edit', date range, and download blocking. A red arrow points from the 'Send' button in the dialog to the 'Sharing settings' modal.

**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

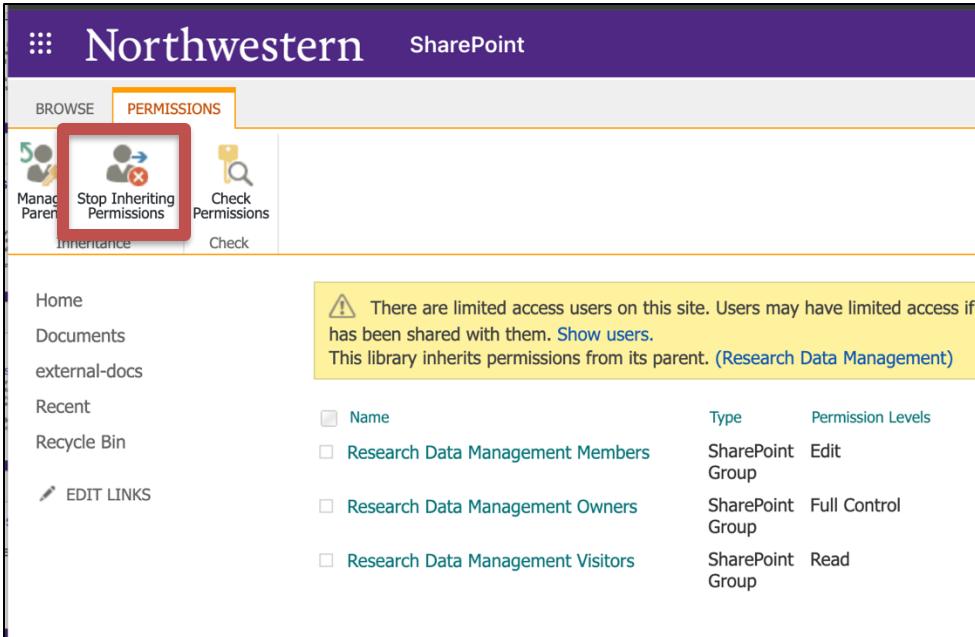
Settings >  
Library Settings >  
More Library Settings>

The screenshot shows the 'Documents' settings page in SharePoint. At the top, there's a navigation bar with 'EDIT LINKS' and the title 'Documents > Settings'. Below the title, there's a sidebar with links: Home, Documents, external-docs, Recent, and Recycle Bin. The main content area has two columns: 'List Information' and 'General Settings'. Under 'List Information', the 'Name' is 'Documents', 'Web Address' is 'https://nuwildcat.sharepoint.com/teams/gl\_NUIT\_RCSDataManagement/Shared Documents/Form', and 'Description' is 'Form'. Under 'General Settings', there's a list of settings: 'List name, description and navigation' (which is highlighted with a blue border), 'Versioning settings', 'Advanced settings', 'Validation settings', 'Column default value settings', 'Audience targeting settings', 'Rating settings', and 'Form settings'. To the right of these settings is a 'Permissions and Management' section. This section contains a list of permissions: 'Permissions for this document library', 'Manage files which have no checked in version', 'Workflow Settings', and 'Enterprise Metadata and Keywords Settings'. The 'Permissions for this document library' item is also highlighted with a red border. At the bottom of the page, there's a 'Columns' section with a table showing a single column named 'Column (click to edit)' with type 'Type' and 'Required' status.

# Breaking Inheritance

Settings >  
Library Settings >  
More Library Settings>

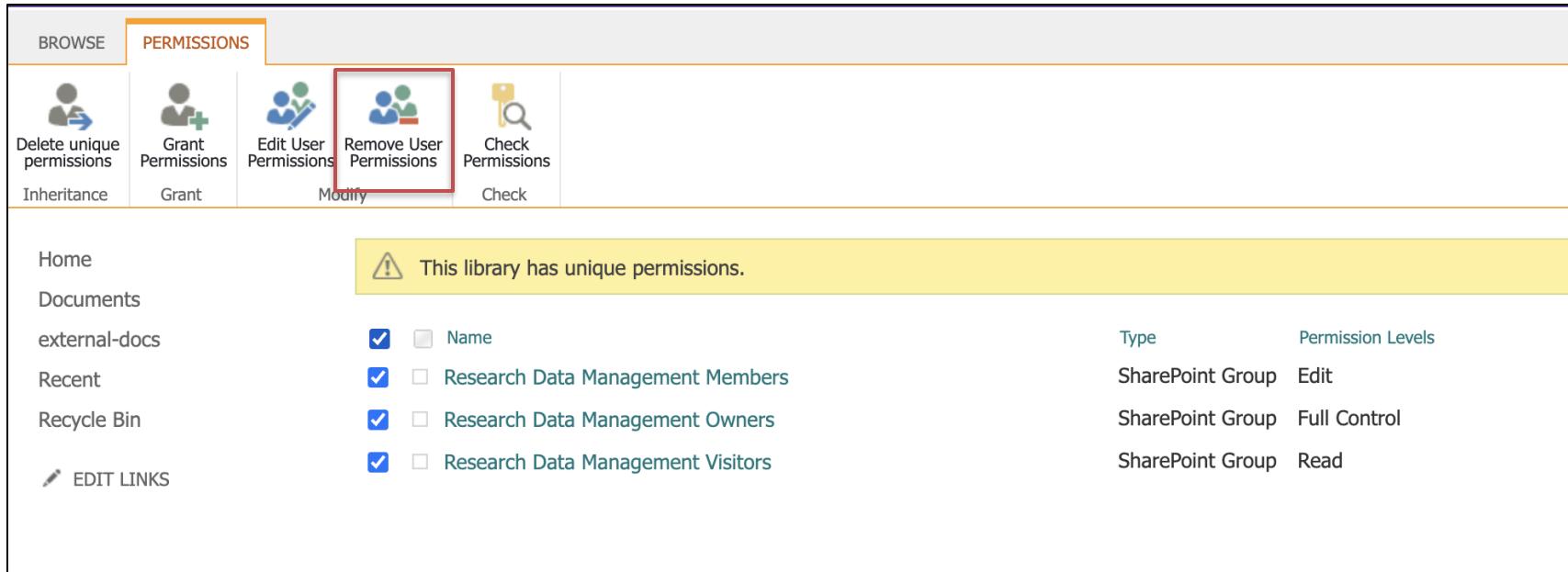
Permissions for this  
Document Library >  
Stop Inheriting Permissions



The screenshot shows a SharePoint interface titled "Northwestern SharePoint". The "PERMISSIONS" tab is selected. A red box highlights the "Stop Inheriting Permissions" button, which has a user icon with a red "X" over it. Below the button are links for "Manage Parent Permissions", "Inheritance", "Check Permissions", and "Check". On the left, there's a navigation bar with links: Home, Documents, external-docs, Recent, Recycle Bin, and "EDIT LINKS". A yellow warning box contains the text: "There are limited access users on this site. Users may have limited access if has been shared with them. [Show users.](#)" and "This library inherits permissions from its parent. ([Research Data Management](#))". On the right, a table lists permissions:

| Name                              | Type             | Permission Levels |
|-----------------------------------|------------------|-------------------|
| Research Data Management Members  | SharePoint Group | Edit              |
| Research Data Management Owners   | SharePoint Group | Full Control      |
| Research Data Management Visitors | SharePoint Group | Read              |

# Remove Group permissions



The screenshot shows the SharePoint ribbon with the 'PERMISSIONS' tab selected. Below the ribbon, there are several permission-related buttons: 'Delete unique permissions', 'Grant Permissions', 'Edit User Permissions', 'Remove User Permissions' (which is highlighted with a red box), and 'Check Permissions'. The 'Remove User Permissions' button has a tooltip 'Remove User Permissions' over it. The main content area displays a list of unique permissions for the library. A yellow warning bar at the top states 'This library has unique permissions.' Below this, a table lists the 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 | Edit              |
| <input checked="" type="checkbox"/> <input type="checkbox"/> Research Data Management Owners   | SharePoint Group | Full Control      |
| <input checked="" type="checkbox"/> <input type="checkbox"/> Research Data Management Visitors | SharePoint Group | Read              |

# Add other users

The image shows two overlapping windows. The left window is a 'PERMISSIONS' tab within a SharePoint interface. It has tabs for 'BROWSE' and 'PERMISSIONS'. Under 'PERMISSIONS', there are several options: 'Delete unique permissions', 'Grant Permissions' (which is highlighted with a red box), 'Inheritance', 'Grant', 'Edit User Permissions', 'Remove User Permissions', 'Modify', 'Check Permissions', and 'Check'. A red arrow points from the 'Grant Permissions' button in the SharePoint interface to the 'Invite people' section of a sharing dialog window on the right.

Share 'external-docs' and its contents

Shared with  SharePoint Admins and  gl\_NUIT\_RCSDataManagement Owners

**Invite people**

Shared with

Enter names or email addresses...

Include a personal message with this invitation (Optional).

Share everything in this folder, even items with unique permissions.

SHOW OPTIONS

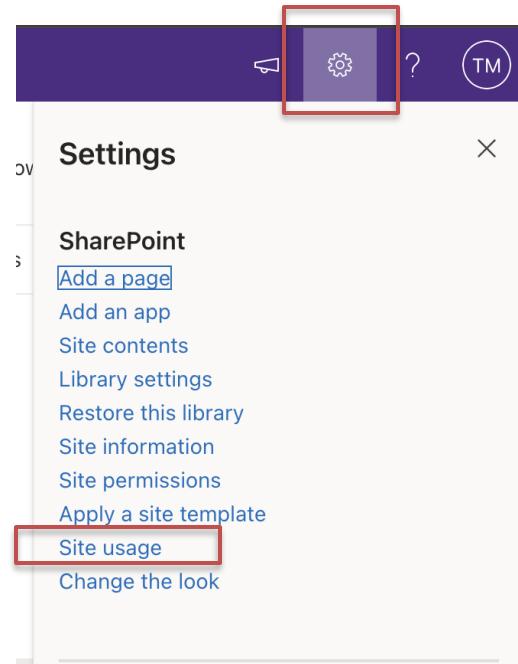
Share Cancel

# 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 ↓   |
|  | Run report          |              |
|  | _sitelcon_.jpg      | 15 hours ago |
|  | Data-Archiving.aspx | 5 days ago   |

# Audit Report

The screenshot shows a Microsoft Excel spreadsheet titled "Research Data Management\_2024-1-17-16-49-0\_1". The spreadsheet has a header row with columns for Resource Path, Item Type, Permission, User Name, User Email, User Or Group Type, Link ID, Link Type, and AccessViaLinkID. The data is organized into four main sections: "File", "Role", "Who", and "Link Sharing". The "File" section lists various SharePoint lists and their permissions. The "Role" section maps permissions to SharePoint groups. The "Who" section lists individual users and their email addresses. The "Link Sharing" section contains a large empty box, likely for a chart or summary. The "Link Type" and "AccessViaLinkID" columns are also present.

| Resource Path        | Item Type    | Permission                        | User Name                          | User Email | User Or Group Type | Link ID                                 | Link Type | AccessViaLinkID                      |
|----------------------|--------------|-----------------------------------|------------------------------------|------------|--------------------|---|-----------|--------------------------------------|
| File                 |              |                                   |                                    |            |                    |   |           |                                      |
| Role                 |              |                                   |                                    |            |                    |   |           |                                      |
| Who                  |              |                                   |                                    |            |                    |   |           |                                      |
| Link Sharing         |              |                                   |                                    |            |                    |   |           |                                      |
| 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                        | mike.lasky@northwestern.edu        |            | 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    | c5167a74-ca88-44e6-8f27 Specific People |           |                                      |
| teams/gl_NUIT_Folder | Contribute   | tobin.magle                       | tobin.magle@gmail.com              |            | External           |   |           | c5167a74-ca88-44e6-8f27-d8cc630a4b68 |
| teams/gl_NUIT_Folder | Contribute   | Tobin Magle                       | tobin.magle@northwestern.edu       |            | Internal           |   |           | c5167a74-ca88-44e6-8f27-d8cc630a4b68 |
| 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    | c5f93680-0044-4a0e-be40 Specific People |           |                                      |
| teams/gl_NUIT_docx   | Contribute   | Annie M Speicher                  | annie.speicher@northwestern.edu    |            |                    |   |           | c5f93680-0044-4a0e-be40-63151296277a |
| teams/gl_NUIT_docx   | Contribute   | Christina Maimone                 | christina.maimone@northwestern.edu |            |                    |   |           | c5f93680-0044-4a0e-be40-63151296277a |

# Reach out!

## FIND WHAT YOU NEED



### PLANNING

- Writing a Data Management Plan
- Protecting the Sensitive Information in My Data



### DATA COLLECTION AND STORAGE

- Choosing Appropriate Storage
- Documenting Your Research
- Transferring Data to or from Northwestern
- Sharing Data with an External Collaborator



### DATA SHARING AND ARCHIVING

- Making Your Data Reusable
- Sharing Data Publicly
- Archiving Data When a Project is Done



### SUPPORT AND RESOURCES

- Talk to a Data Management Expert
- Northwestern Research Data Management Resources
- External Research Data Management Resources

### [Research Data Management Website](#)

Office Hours: Every Monday  
3 p.m. – 4 p.m.  
Mudd Library,  
Genomics Lab

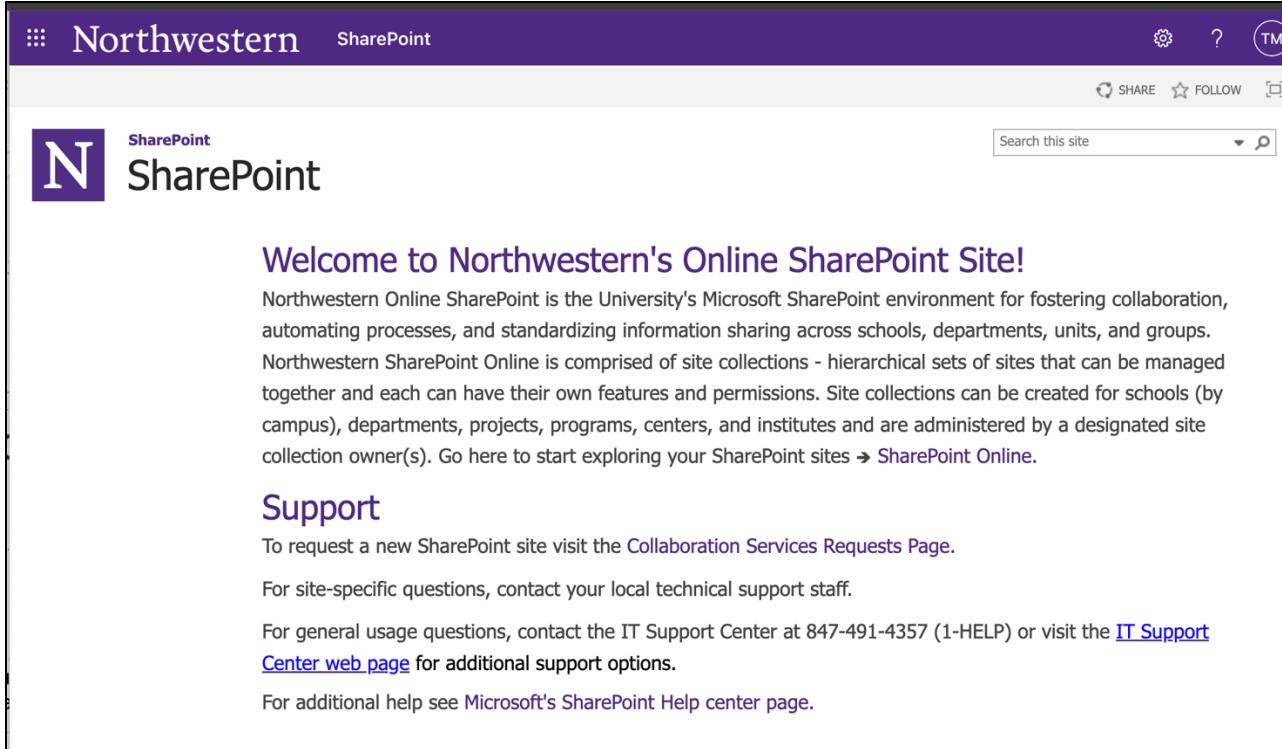
Emails:  
[researchdata@northwestern.edu](mailto:researchdata@northwestern.edu)

### [Consultation Calls](#)

# Thank You

# Appendix

# Landing page



The screenshot shows the Northwestern SharePoint Online landing page. The header features the Northwestern logo and the word "SharePoint". The top right has navigation icons for gear, help, and trademark. Below the header is a secondary navigation bar with "SHARE", "FOLLOW", and a search bar labeled "Search this site". The main content area has a purple header with the "N" SharePoint logo. The main heading is "Welcome to Northwestern's Online SharePoint Site!". Below it, text explains the purpose of SharePoint Online and describes site collections. A "Support" section follows, with links for requesting new sites, contacting local support, and general IT support. A link to Microsoft's SharePoint Help center is also provided.

Northwestern SharePoint

SHARE FOLLOW

Search this site

N SharePoint

## 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

The screenshot shows a SharePoint Online site page. At the top, there's a purple header bar with the Northwestern logo, the word "SharePoint", and a red-bordered button labeled "Click". Below the header is a white navigation bar with the "SharePoint" logo, the word "SharePoint", and a search bar. The main content area has a purple header with the text "Welcome to Northwestern's Online SharePoint Site!". Below this, there's a paragraph of text about the SharePoint environment, followed by a section titled "Support" with several bullet points.

Northwestern

SharePoint

Click

SHARE FOLLOW

Search this site

N SharePoint

SharePoint

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 shows the SharePoint 'Your Sites' page with a purple header bar. The header includes the SharePoint logo, a search bar with the placeholder 'Search in SharePoint', and icons for settings, help, and a trademark symbol.

The main content area is divided into three sections:

- Following:** A list of sites the user follows, each with a star icon for favoriting.
  - Team Site Example
  - RCDS-Teams
  - CoP - Cloud
  - Research Data Management
  - ITS&S RCDS
- Frequent sites:** A grid of six site cards, each with a star icon for favoriting.
  - 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
  - RDMG**: Research Data Management Group
    - You viewed Home on 1/2/2024
    - Page not found is popular
  - OH**: OneDrive Home
- Recent:** A list of recent activity on the SharePoint site, showing who viewed what pages.
  - SharePoint
  - ITS&S RCDS
  - Weinberg College Commons
  - Ithaka Data Study
  - OneDrive Home

At the bottom right of the frequent sites section, it says 'There's no recent activity on this site.'

# Sites you've visited

The screenshot shows the SharePoint homepage with a purple header. The header includes the SharePoint logo, a search bar with the placeholder "Search in SharePoint", and various navigation icons.

The main content area features a "Frequent sites" card with a red border. This card displays a grid of frequently visited sites:

- ITS&S RCDS** (Starred): 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.
- Weinberg College Commons** (Starred): 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.
- Ithaka Data Study Group** (Starred): You viewed Interviewees\_Ithaka\_Study\_2023 5 hours ago. You viewed Home on 1/8/2024. Data Management Guide for Ithaka study is popular.
- SharePoint** (Starred): 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.
- OneDrive Home**: There's no recent activity on this site.

On the left sidebar, there are sections for "Following" and "Recent".

- Following** includes: Team Site Example (starred), RCDS-Teams (starred), CoP - Cloud (starred), Research Data Management (starred), ITS&S RCDS (starred). A "See all" link is also present.
- Recent** includes: SharePoint (starred), ITS&S RCDS (starred), Weinberg College Commons (starred), Ithaka Data Study (starred), OneDrive Home (starred). A "See all" link is also present.

# Sites you follow

The screenshot shows the SharePoint homepage with a purple header. The header includes the SharePoint logo, a search bar with the placeholder "Search in SharePoint", and various navigation icons.

The main content area is titled "Following" and displays a list of sites:

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

A red box highlights the "Following" section. Below it is the "Recent" section:

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

On the right side, there's a "Frequent sites" section with three cards:

- 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.

Below these is another row of cards:

- N** SharePoint: You viewed Home 3 minutes ago. Page not found is popular. How To Use This Library is popular.
- R** 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 shows the homepage of a SharePoint site named "Ithaka Data Study". The top navigation bar includes the SharePoint logo, a search bar, and various site settings icons. On the left, a vertical navigation menu lists "Home" (selected), "Conversations", "Documents", "Notebook", "Pages", "Site contents", "Recycle bin", and "Edit". The main content area features a "News" section with a "Keep your team updated with news on your team site" message, an "Add News" button, and an illustration of a smartphone displaying a news feed. Below this is an "Activity" section with a "See all" link. To the right, there's a "Quick links" section with links to learn about team sites and add pages, and a "Documents" section with a "See all" link and a "Name" filter dropdown.