SharePoint / Intranet – Recommended Best Practices

This document is designed to provide recommended best practices in the use of **SharePoint**, which is the software Purdue's College of Education uses for their Intranet system. SharePoint facilitates the sharing of documents and information that are internal and not suitable for public distribution. Because our top-tier public-facing web sites need to be clean and easy to use, they should not contain large amounts of office documents that will be used by a very limited subset of web site visitors. SharePoint is the recommended platform for web-based document sharing by departments and offices.

1. What is an Intranet?

An Intranet is a private network, or information sharing system, that is accessible to an organization's internal staff.

2. What is SharePoint?

SharePoint is a server maintained by ITaP that has both a web interface and file storage capacity. Each academic department at Purdue is provided with one high-level "site collection" that can be used to create "sites" and "sub-sites" as needed. In the College of Education, SharePoint is primarily used to create "document lists" that facilitate the sharing or distribution of office productivity documents. However, SharePoint has other features such as calendars, forms, wikis.

3. Who should use SharePoint as an Intranet?

Departments, Offices, Committees, Faculty members, Staff members.

4. What are appropriate uses of SharePoint?

In short, SharePoint is designed for active and living documents that have a known target audience.

In the College of Education, SharePoint is used for private password-protected document sharing.

SharePoint is subject to, and users should be familiar with, the following Purdue Policies:

Purdue IT Acceptable Use Policy
http://www.purdue.edu/policies/information-technology/viia2.html.

Policy for Purdue Pages on the World Wide Web
http://www.purdue.edu/policies/information-technology/c-42.html.

5. What are inappropriate uses of SharePoint and the Intranet?

Within the College of Education, SharePoint and our Intranet is not a substitute for: (a) top-tier public-facing web sites, or (b) file servers. We do not recommend the use of SharePoint as a public web content management system because we have a separate College-wide content management system that serves this role under the direction of the College Communication Office. Nor do we recommend the indiscriminate copying of a large body of files and folders to SharePoint (which can adversely affect overall server responsiveness). SharePoint must not be used as a backup solution or a document archival solution. SharePoint must not to be used as a repository for restricted data (e.g. data protected by: Purdue Policy; FERPA; HIPAA; GLBA; other federal/state/local laws, etc.). If your office needs a solution for backup or document archival, please contact the Education IT team for assistance.

6. Document Retention – How long should documents remain on the Intranet?

As a general rule, it is recommended that documents be removed from the Intranet when they are no longer being actively used. For example, if documents have not been used in a year, then we strongly recommend that they be moved outside of the Intranet to another location, such as the College file server. As a reality check when uploading documents, ask yourself: How many people are actually going to take the time to find and view these particular documents? If the number is small, then perhaps a better approach would be to ask people to contact you or your office if they need specific and proprietary information (vs. putting everything "out there" and hoping people can find what they need).

Among the compelling reasons to remove stale documents and information from SharePoint are:

(a) Avoid the possibility of an inadvertent exposure. As people come and go from committees and offices, it is easy to lose track of the sensitive nature of the materials, and how complex the underlying access controls are for a given set of documents. For example, new people joining a committee, office or workgroup may not be authorized to see documents that the previous people were privy to.

(b) Eliminate liability that may be associated with stale information. If a stale document makes inaccurate promises about eligibility, requirements, or financial costs, this can be misleading and have adverse consequences.

(c) There is limited space. The SharePoint servers, and the back-end databases that underpin SharePoint, have a finite amount of space. We are part of a Purdue-wide community of users of this service, it is a common courtesy to use only the resources that are needed so resources are available to others.

(d) Our experience has shown that very large SharePoint document repositories (hundreds of megabytes in size) tend to have more sluggish response times. So the rule of thumb should be to use as little storage space as possible while still getting the job done.

7. What is the recommended process for reviewing Intranet content?

We recommend that Intranet documents be reviewed at least once a year by someone who is authorized to remove stale web content. The site owner should designate someone for this task. For example, a committee chair may want to refer to the *document retention policy* for their committee and remove documents from the Intranet that fall outside the policy. In general, historical College, department and office documents should be stored on the College file server, or on secure external storage media.

Stale web content can be exported and backed up locally before removal if local copies do not already exist. As noted above in this document, the general rule of thumb is to remove documents from when they are no longer being actively used, or not likely to be actively used by significant numbers.

The intention of this recommendation is to prevent "document build-up" (i.e. the gradual and unintentional accumulation of stale documents) which can increase liability and adversely affect the overall health and responsiveness of SharePoint.

8. How can folders/documents be easily exported from SharePoint and stored offline?

SharePoint has a feature that allows users to quickly and easily export large groups of folders and files from a document list using "Windows Explorer-like" drag and drop functionality. You can use this feature to quickly move or remove groups of stale folders and files when you locate them. For example, if a search committee wants to archive last year's searches, they can easily move the documents to a file server, a local computer, or secure external storage media. Documents that have been exported in this way can also be easily imported if/when needed (though unique permissions on specific individual files/folders may be lost).

9. What considerations should be given to permissions?

Permissions, or access controls, in SharePoint are one of the most important things to keep in mind. Permissions prevent unauthorized users from seeing documents which may be inappropriate, embarrassing, offensive, unethical, or illegal for them to view. Permissions can become complex over time so great care should be taken to ensure that private documents are not inadvertently shared with unauthorized users or made public. It is possible to set unique permissions on almost any object within SharePoint, such as: individual documents, folders, document lists, sites, and sub-sites. Without training and careful observation, it may not be clear who has access to a given site, folder or document in SharePoint. Over time, as people come and go at the University, permissions may become obscured leaving data in an uncertain state of security/privacy. So we recommend that permissions be kept front and center whenever you are using SharePoint; check and re-check permissions whenever using and making updates to documents and sites. We recommend that documents be removed from SharePoint when they are no longer in use to avoid the possibility of an inadvertent exposure. Please consult with the Education IT team for assistance and/or training with SharePoint permissions.

10. What are the physical limitations of SharePoint?

The default maximum file size for SharePoint 2013 is 200 MB; for SharePoint 2010 the limit is 50 MB. In general, large document library lists have an adverse impact on SharePoint responsiveness; so keeping SharePoint document collections as small as possible will help the overall health and responsiveness of SharePoint.

Video Tip: SharePoint is not designed for sharing video files. While it is possible to place small video files (highly compressed MP4 files) into SharePoint, it is recommended that you use of the Purdue Kaltura video server for distributing video: Click Here For More Info About Kaltura. If you have special requirements for restricted-access video, please contact the Education IT team (edit@purdue.edu) for assistance.

11. How can I obtain a new SharePoint site?

Please contact the Education IT team at edit@purdue.edu to request a new SharePoint site. Include the following information:

1. The name of the person who will be the owner and responsible for the site.
2. Department/office requesting the site.
3. Brief title and description of the site.
4. Is the site private or public?
5. If the site is private, provide the names of the Purdue people who should have access.

6. How long will the site be needed?

12. How can I obtain SharePoint training?

1. The Education IT team is available to meet with individuals and groups to provide basic SharePoint training (contact edit@purdue.edu)
2. A SharePoint 2010 Quick Reference from the Education IT team, with screenshots and common tasks, is available here:
   a. SharePoint 2010 Quick Reference:
      http://social.education.purdue.edu/edit/wp-content/uploads/2013/12/SharePoint-2010-Quick-Reference.pdf
3. Online courses from Lynda.com can provide both introductory and in-depth training that you can view at your own pace. This is a good investment in your professional development. Here are two examples:

   a. SharePoint 2013 Essential Training
      https://www.lynda.com/Office-tutorials/SharePoint-Server-2013-Essential-Training/121679-2.html
   b. SharePoint 2010 Getting Started
      https://www.lynda.com/SharePoint-2010-tutorials/getting-started/65715-2.html

13. How do I remove a SharePoint site that is no longer needed?

Please contact the Education IT team at edit@purdue.edu and we will help you delete the site and also back up site documents when possible.

14. What other "personal collaboration" resources are available for faculty and staff to use @ Purdue?

We recommend the use of OneDrive for personal document sharing and collaboration. Purdue has licensed OneDrive for all faculty and staff with a 1 TB quota for each person. OneDrive allows real-time document editing by multiple users. For more information about how to share a document using OneDrive, see the following PDF document and video:

How to share a document using OneDrive:
http://edit.education.purdue.edu/ts/Share-A-File-Using-OneDrive.pdf   (PDF)
http://edit.education.purdue.edu/ts/Share-A-File-Using-OneDrive.mp4   (Video)