

PDC PROJECT MANAGEMENT GUIDE

PMG-E01: SHAREPOINT SYSTEM

PURPOSE: To describe the Owner's (UF/PDC) project collaboration and document-sharing system, outline the process for gaining access, and briefly describe the use of SharePoint.

A. Introduction

UF Planning Design & Construction (PDC) uses **Microsoft SharePoint** to create, store, and share documents for both major and minor construction UF projects. SharePoint is a web-based system that is designed to facilitate and support the sharing of information and communication of ideas among people working towards a common goal. This type of online cooperative environment encourages workgroup support for the flow of information, sharing of tasks, calendars, and document management. Ultimately, this software promotes group productivity and helps organizations achieve their goals more efficiently. In addition, SharePoint allows for online submittals of invoices and payment applications, change orders, and other financial transactions and documents.

B. Instructions for Obtaining Access

- 1) To gain access to and use SharePoint, each user must obtain a UF identification number (UFID) and create a "Gatorlink" account.
- 2) Non-UF employees who have not previously obtained a UFID must complete the [UFID Request Form](#) (available on the *Forms & Standards page of the PDC website*) and submit it to the UF Project Manager. If a team member already has a UFID, provide the UFID number to the UF PM to ensure proper department affiliation.
- 3) Once a UFID has been established, the team member must create a Gatorlink ID by visiting the Gatorlink website: <http://gatorlink.ufl.edu/>
- 4) After a Gatorlink ID has been created, the team member must request access to one or more project SharePoint sites by sending an email to PC-IT staff (fpcit@admin.ufl.edu). Include the Gatorlink username and the project name or number in the email.
- 5) Once access has been granted, the team member will receive a notification email with instructions on how and where to sign in.
- 6) When logging into SharePoint a user's Gatorlink ID should be prefaced with "UFAD\".

C. SharePoint Navigation & Security

- 1) Major project sites are created from a template to ensure conformity across projects. Document libraries are grouped into five headings on the left menu – also called the Quick Launch. These headings are as follows: Project Docs, Design Docs, Construction Docs, Financial Docs, and Closeout as well as a Calendar, Project Directory, Team Discussion and Photo Library.
- 2) The navigation menu at the top is a "breadcrumb" navigation, which can be used to navigate back up the project document hierarchy.
- 3) Security is setup based on the user's role on the project team. A security matrix template has been developed that identifies each team (AE, CM, DB or Cx) and their level of access.

Permission levels include: Contribute (Add, Edit & Delete), Add Only, Edit Only, Read Only or any combination thereof.

D. Using SharePoint

- 1) Once a library has been selected, additional library tools will appear in a ribbon across the top. This ribbon has two tabs, Documents and Library. The Document menu allows a user to interact with the documents in the library, including uploading, downloading, viewing or editing document properties or setting up alerts on the library. The Library menu allows a user to customize the library views as well as open the library in a Windows Explorer view. This is especially helpful when uploading or downloading multiple documents at a time.
- 2) To view most documents (Word, Excel, PDF, etc.), clicking on the filename should open the document in the browser window. To download a copy of a file, select the file by placing a check in the checkbox next to the filename. Click on the "Documents" tab in the "Library Tools" section and select the "Download a Copy" icon. To upload a document, select the "Upload Document" icon from the "Documents" tab in the "Library Tools" section or, alternatively, click on the "Add Document" icon located below the list of documents in the library.
- 3) SharePoint calendars and contact lists can be synched to Outlook from the Calendar or List menu. Users will need to click "Yes" when prompted to allow access to SharePoint from within Outlook. Once in Outlook new appointments or contacts can be easily added and will automatically be synched to SharePoint without any additional tasks.
- 4) To be notified when a document has been edited or added to a library a user can set an alert. To create an alert, navigate to the appropriate library. Click on the "Library" tab under the "Library Tools" section. Click on the "Alert Me" icon and select "Set alert on this library." Fill out the form to customize various settings (such as when to send alerts and how often) and click "OK."
- 5) Unlike most other document types (Word, Excel, PDF, etc), AutoCAD and Revit (BIM) files cannot be opened directly from SharePoint. These types of files will need to be downloaded, edited locally and uploaded back to the SharePoint library. Project teams should discuss and thoroughly plan the protocols for the use and editing of BIM files. SharePoint includes versioning capabilities that can assist and ensure files are properly tracked and named, but model users and viewers must still be in synch with respect to access, the timing of updates, etc.
- 6) Files saved to SharePoint must be smaller than 250MB and must not contain any of the following characters in the filename: \$ % & # ! * ?. If files over 250MB need to be stored in SharePoint a special "Connector" library can be created upon request that will allow files up to 2G. Coordinate with the Project Manager and FPC-IT staff if a "Connector" library is needed.