SharePoint Online 'Examining' Sites Administrator Guide

SharePoint Online (SPO) Examining Sites – Administrator Guide

Contents

SharePoint Online (SPO) 'Examining' Sites – Administrator Guide

Introduction to the SPO Examining Sites Administrator Guide

This guide is for use by administrators to enable them to effectively manage the new SharePoint Online[1] 'examining' sites that are being rolled out during Michaelmas Term 2021.

This guide provides an overview of the new sites and details of how to manage and maintain them, including:

1. An '**Introduction to SPO Examining Sites**' that outlines key information about the new sites – this is **key for you to know** to be able to effectively the manage the sites

2. A '**Getting Started**' section outlining **key steps you need to complete** to finalise your sites ready for use within your department

3. Information about **maintaining your site** and **getting support**

4. **Detailed step-by-step guidance** covering key details about how you complete key activities such as
   a. Managing access to the site
   b. Managing folder permissions
   c. Managing content within the site

See the Contents section for a full list of the areas and help topics covered in this guide.

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[1] SharePoint Online (the latest version of SharePoint) is the University's preferred secure document management platform that is currently being rolled out across Oxford

Introduction to SPO Examining Sites – Key Details

SharePoint Online (SPO) 'examining' sites have been created for each department to provide a consolidated space for sharing documents relating to paper setting, exam boards and marking.

The new SPO 'examining' sites replace both the 'exam board' sites and the 'secure sites' previously provided via WebLearn (which is in the process of being decommissioned).

The new 'examining' sites enable markers, examiners and exam board members (including external examiners) to access and collaborate on documents securely. They also allow document sharing with other departments, for example in the joint schools context or with central departments who require access to documents e.g. Information Compliance.
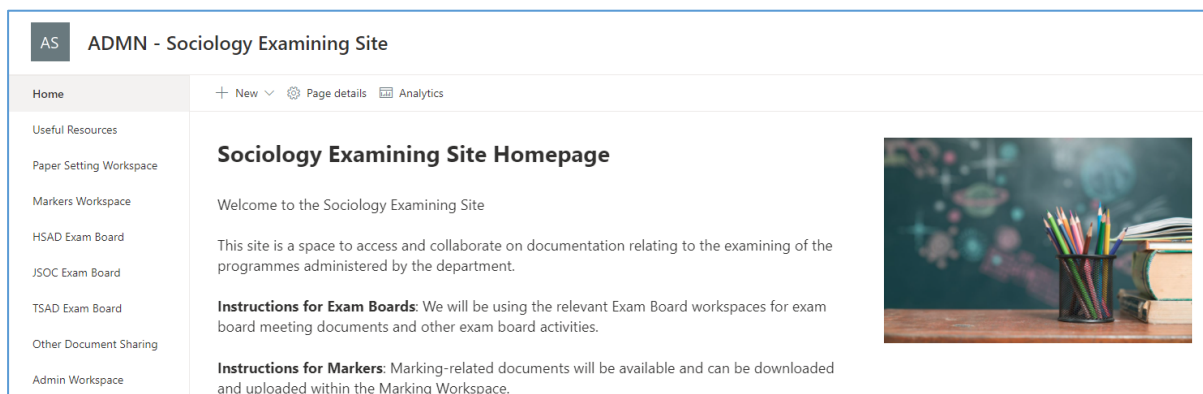
An example of a SPO Examining Site Homepage

SharePoint Online 'examining' sites are supplied 'pre-built' for departments and include:

1. A number of **standard 'sections' or workspaces** for useful resources, paper setting, marking, and document sharing with other departments
2. **Department-specific workspaces for exam boards** administered by the department
3. A number of **SharePoint groups** via which you can give relevant users access to the appropriate sections of the site

Departments will typically be supplied with an 'examining' site **per study-level** (i.e. a UG and a PG examining site) depending on the exam boards administered within the department or unless only one consolidated site is required for your department.

Each SPO examining site has **1TB of storage space** and the largest file size that can be attached to a SPO site is **100GB**. Files of a wide variety of types can be uploaded to SPO sites including **Latex files**.

The sites are accessible to **external users**, e.g. external examiners, and there's a separate external user login guide – 'How to Access Oxford Examining Sites (Non-Oxford User)' – that can be provided to external users to help them access the sites.

Whilst the SPO 'examining' sites have been 'pre-built' ready for use, departments will need to complete a number of steps to set up the site for use in their department e.g. add users and create folders as appropriate – see the steps outlined in the 'Getting Started' section of the guide.

In addition, please note that department have the flexibility to add folders in the structure preferred in their departments and to customise the sites as required for their local context e.g. to add, move and delete sections etc. Details about how to do all of these things is provided in the guide.

Introduction to SPO Examining Sites – The Site 'Sub-Sections'

SPO 'examining' sites are supplied pre-built with the following 'sections':

#	Section	Purpose
1	**Home page**	• A page for **welcome / guidance text** for all users that have access to the site (via a SharePoint group) • Generic text and an image have been added to the Home page but those can be amended as required by the department
2	**Useful Resources**	• A place to share **useful resources relevant to all users** of the site e.g. exam conventions, regulations etc. • NB you can add links to webpages, if applicable, as well as uploading documents
3	**Paper Setting Workspace**	• A place to share, edit, and securely store **documents relating to paper setting** • This workspace also includes a standard folder '**Final Copies for Exam Schools**' that the Exam Schools team have access to and that should be used for sharing final copies of exam papers with them
4	**XXXX Exam Board**	• A separate space for <u>each</u> **exam board** within the 'examining' site to view, share and collaborate **on documents relating to the exam board** • The exam board workspaces within your site should include the exam boards administered (at the study-level) by your department
5	**Markers Workspace**	• A space to share **documents for access by markers** who are marking exams or course work submissions • e.g. mark / feedback sheets, and submissions (if those are not being viewed on Inspera)
6	**Other Document Sharing**	• A space to **share documents with other departments** e.g. joint schools departments; Education Policy Support; Information Compliance etc. ➢ *Please note*: completed **results templates** should continue to be shared with ARO via the separate ARO-managed site ➢ *Please note*: **appeals-related documentation** should continue to be shared with the Proctors via links they share with you
7	**Admin Workspace**	• A **workspace for Administrators** within the department who manage the exam boards and marking process • e.g. for master documents or templates
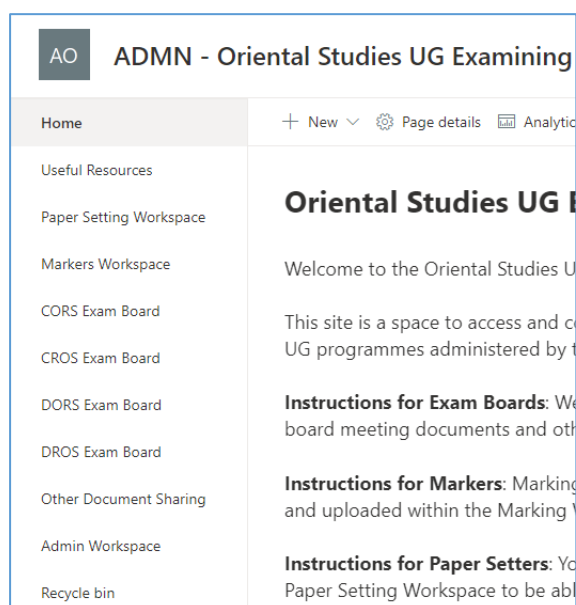
Example of the 'Sections' within an Examining Site

Departments are free to add folders in whatever structure is appropriate for them within the different sections of the examining sites.

The Recycle Bin

In addition to the 'pre-built' sections, SPO sites include a 'Recycle bin' by default. Deleted items are sent to the recycle bin and are retained for 93 days (3 months) from the time they are deleted. During that time they can be restored if required – see 'How do I restore a deleted item?'

Introduction to SPO Examining Sites – Overview of How to Manage Access

Access to an examining site – and the different sections within it – is managed via **SharePoint Groups**.

SharePoint groups are the best way to give access to defined areas of a site and allow you to manage the individuals who have access to the site and various sections within it in a straightforward way.

In addition to SharePoint groups you can also use **folder permissions** within the different sections of the site to manage access within sections in a more granular way where necessary. For example:
- To manage access to folders for specific markers in the Markers Workspace
- To manage access to Mitigating Circumstances folders in an Exam Board workspace

It is even possible to control who can see and access **specific documents / files** where needed.

In summary:
- **SharePoint groups** are used to manage access **TO** the different sections of a site
- **Folder/file permissions** are used to manage access **WITHIN** the different sections of a site

In some exceptions, you may give users access to a specific folder only in a site (and not add them to a SharePoint group also) e.g. when sharing specific folders with colleagues in other departments. See '**How do I give users from other departments access to a folder?**'
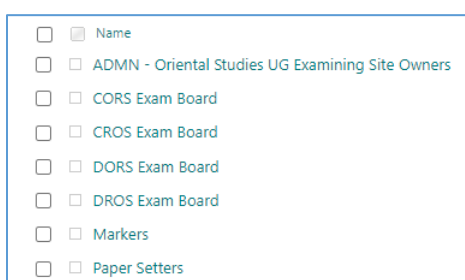
Pre-Built 'Examining Site' SharePoint Groups
Examining sites have been 'pre-built' with a number of SharePoint groups as follows:

#	SharePoint Group	Purpose
1	**Markers**	A group for markers – to give markers access to the Home page, Useful Resources, and the Markers Workspace
2	**Paper Setters**	A group for paper setters – to give paper setters access to the Home page, Useful Resources, and the Paper Setting Workspace
3	**XXXX Exam Board** (a group for each exam board within each site)	A group for the exam board members (including external examiners) for each exam board within a site – to give exam board members access to the Home page, Useful Resources, and the relevant Exam Board workspace
4	**Owners**	A group for administrators – allowing administrators in your department to access and manage any part of the site

As part of getting your exam board site ready for use, once you have set up the relevant folders in the site and added the required content, you should add the relevant users to the pre-built SharePoint groups so that they have access to the relevant parts of the site. See the 'Getting Started' section of the guide for more details.

Where applicable, individuals can be added to more than one SharePoint group so that they have access to all relevant parts of a site. This might apply where an individual is a member of more than one exam board or assists with paper setting and also does marking, for example.

Example of Pre-Built SharePoint Groups in an Examining Site

Which Sections of an Examining Site do the 'Pre-Built' SharePoint Groups have Access to?

The 'pre-built' SharePoint groups have been set up with **access to specific sections of the site** as outlined in the following table (NB all of the SharePoint groups have access the Home page and Useful Resources):

#	Examining Site Section	SharePoint Group(s) that have access	Permission Level
1	**Home page**	• XXXX Exam Board groups • Markers group • Paper Setting group • Owners group (Department Admins)	• Read-only • Read-only • Read-only • Full Control
2	**Useful Resources**	• XXXX Exam Board groups • Markers group • Paper Setting group • Owners group (Department Admins)	• Read-only • Read-only • Read-only • Full Control
3	**Paper Setting Workspace**	• Paper Setting group • Owners group (Department Admins)	• Contribute • Full Control
4	**XXXX Exam Board** (one for each exam board)	• XXXX Exam board group (each Exam Board group has access to the corresponding Exam Board workspace) • Owners group (Department Admins)	• Contribute • Full Control
5	**Markers Workspace**	• Markers group • Owners group (Department Admins)	• Contribute • Full Control
6	**Other Document Sharing**	• Owners group (Department Admins)	• Full Control
7	**Admin Workspace**	• Owners group (Department Admins)	• Full Control

Once users have been added to one or more of the SharePoint groups they are able to access the appropriate sections of the site as outlined above.

SharePoint groups can have one of 6 'permission levels' but all of the 'pre-built' SharePoint groups have one of the following 3 permission levels (per site section) as the following levels provide all of the required access rights:

- **Read** – allows users to view and download documents and files
- **Contribute** - allows users to view/download, upload, edit, delete files (and folders)
- **Full Control** – allows users to manage groups, permissions, and to access all content

As you can see in the table above, the permission level of each SharePoint group can differ in different parts of the site – so that it is possible for individuals to only view and download documents in one section of a site (e.g. Useful Resources) but to upload and edit documents in another section of the site (e.g. the Markers Workspace).

You are able to change which groups can access which parts of the site, if appropriate, and you can also create additional SharePoint groups within a site (and give the groups access to relevant areas within the site) as needed for your department. Details of how to do these things are all outlined in the guide.

As well as giving users access to the relevant sections of a site (via SharePoint groups), you can use folder permissions (within the different sections of the site) to manage access in a more granular way where that is necessary. It is also possible to give SharePoint groups access to specific folders where that is required.

Examples of what Different Users See and have Access To

Depending on the SharePoint groups that users have been added to, they will see different workspaces when they access the examining site – see the following examples:

An individual added to the **Markers group**, for example, will see the following 'sections' of the examining site:
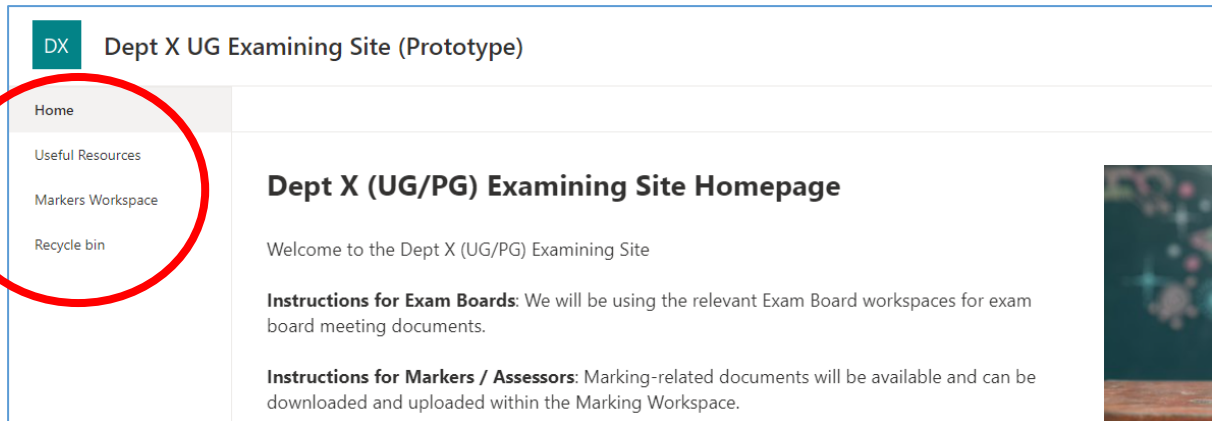
Example of a user's view if added to the Markers group

An individual added to an **exam board group** will see the following sections of the examining site, for example:
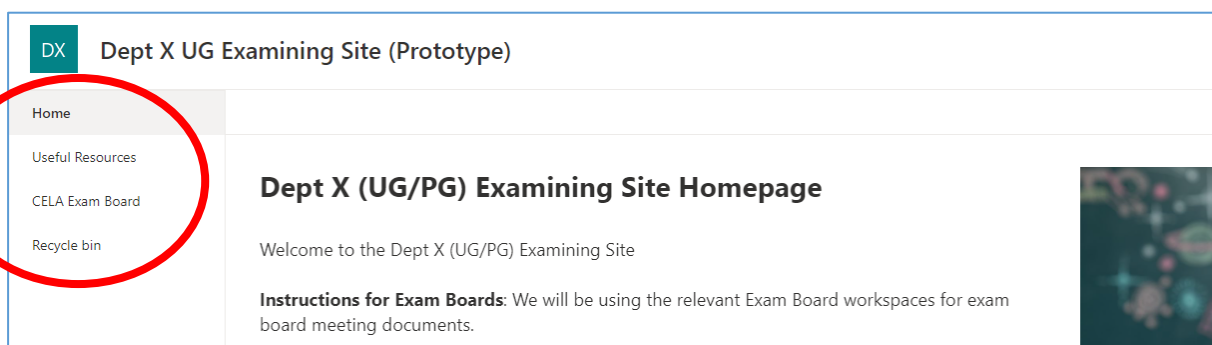
Example of a user's view if added to an Exam Board group

An individual added to multiple groups will see the following sections of the examining site, for example:
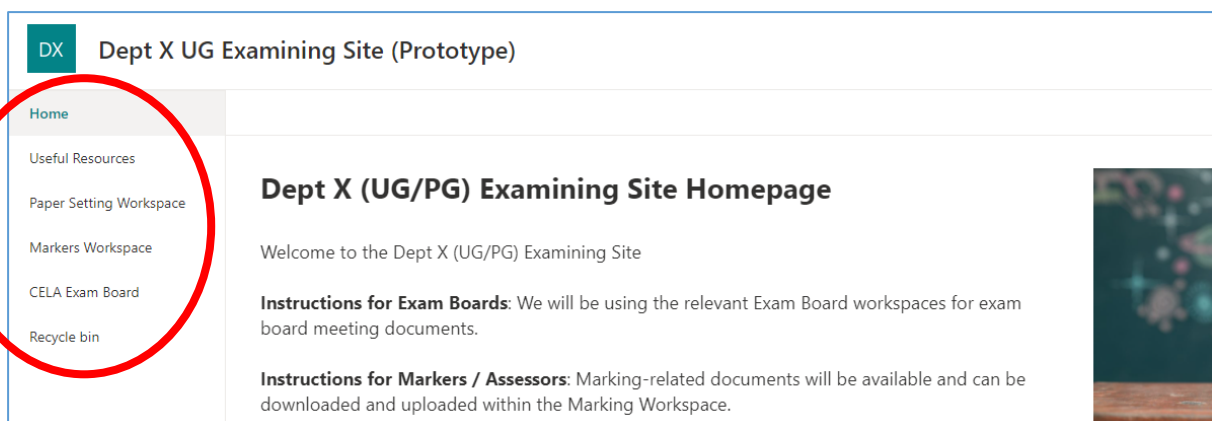
An example of a user's view if added to multiple SharePoint groups

Getting Started – How to get your SharePoint Online Examining Sites Ready for Use

As outlined above, key aspects of the 'examining' sites have been 'pre-built'; however, there are a number of actions that you need to complete to *finalise* the setup of the sites ready for use in your department.

Must Do: Setting up Your 'Examining' Sites Ready for Use

You must complete the following steps to get your examining sites ready for use within your department:

| #	What	Why	How
1	**Give other Administrators access to the site as needed**	So that other administrators within your department who don't already have access can access and administer the site	See 'How do I give access to other Administrators in my Department?'
2	**Update the text on the Homepage**	So that it is applicable to your department and ways of working e.g. adding a contact email	See 'How do I edit the text on an examining site Home page?'
3	**Create the required folders within each section of the site**	So that the paper setting, exam board workspaces, and the markers workspace are ready for use	See 'How do I create folders within examining sites?'
4	**Restrict access to specific folders, where required**	So that not all users within SharePoint groups can access folders that should be restricted to a subset of users e.g. folders for specific markers or Mitigating Circumstances folders	See 'How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?'
5	**Upload the required documents / files (and folders, if applicable)**	So that the relevant initial documentation is available to users once they have access	Use the 'Upload' function with workspaces and folders
6	**Add the relevant users to the SharePoint groups within the site**	So that the relevant users (including external users) have access to the appropriate parts of the site	See 'How do I add users to SharePoint groups within SPO examining sites?'

Setting up Your Examining Sites – Timing

Note that you may not need to create folders in all workspaces OR add users to all SharePoint groups at the same time depending on when you need specific sections of the site (e.g. the marking workspace or the exam board workspaces) to be accessible to the relevant individuals.

If you want to release the site to different users at different times, depending on what activities happen when in your department, then complete steps 2-5 above for each sub-section of the site when appropriate.

Setting up Your Examining Sites – Checks

You may also want to check that a number of users have the right access e.g. where you have restricted access to certain folders, so that you are confident that the site is ready to share with all relevant individuals.

Where you feel this would be appropriate, email a subset of users to ask them to check their access.

Optional: Customising Your 'Examining' Sites

In addition to the above 'must do' steps, you are free to customise your examining site(s) as needed for use in your department e.g. by adding additional sections or SharePoint groups (in addition to those that have been pre-built) or updating or removing existing workspaces, if applicable.

If this is something that would be relevant for your department then complete one or both of the following actions (in addition to the 'Must Do' steps outlined above).

You may need to complete the following steps depending on the set up required for your department:

#	What	Why	How
1	**Create additional SharePoint groups and manage which parts of the site they can access**	So that you can manage access to site sections and folders within them in a more granular way as required in your department	'How do I create a new SharePoint group in an 'examining' site?' / 'How do I give SharePoint groups access to workspaces within an examining site?' / 'How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?'
2	**Create additional site sections / workspaces and manage which groups can access them**	So that you can have additional sub-sections (in addition to folders) within your site as needed for your department	'How do I create a new workspace / section within an examining site?' / 'How do I give SharePoint groups access to workspaces within an examining site?' / How do I change the order of the site sections in the LH site menu?
3	**Update the order of the sections in the LH site menu**	So that sections are in the order you need them in for your department's use	How do I change the order of the site sections in the LH site menu?
3	**Rename / remove existing workspaces**	If you want to amend or remove any workspaces for any reason	How do I change the name of a workspace / section within a site? / How do I delete a workspace / section of a site that my department doesn't need?

Maintaining & Managing Your SPO Examining Sites

There are essentially three aspects of managing a SPO examining site:

1. Managing **user access to the site** via SharePoint groups and folder permissions.

Specific areas include:
   a) Managing Users within SharePoint Groups
   b) Managing Access to Folders
   c) Managing Access to Documents / Files
   d) Managing External Users

2. Managing the **structure of the site** itself

Specific areas include:
   a) Managing Folders
   b) Managing the Home page
   c) Managing SharePoint Groups
   d) Managing the Sections of a Site

Details of how to do all of the above are outlined in this guide.

3. Managing the **documentation** within the site and **completing regular housekeeping**

In relation to this third area, the following housekeeping is recommended to ensure that sites do not become unnecessarily full (and run out of storage space) – and that you're abiding by the University's data retention guidelines:

Clear out documents, where applicable, at least annually so that the sites can be re-used on an ongoing basis. For example, delete copies of scripts and submissions (submitted via Inspera) that have been shared on examining sites, once marking is complete.

If the retention timelines on Inspera are not sufficient (scripts and submissions are retained on Inspera for 2 years after submission) then you may consider saving copies of submissions in a department shared drive (in line with University data retention guidelines).

It may also be relevant to retain some documents on examining sites for a longer period of time, for example if they relate to appeals processes etc.

If (despite housekeeping) space becomes an issue within your examining sites then please contact the support team for SPO examining sites – see the details below.

Getting Support

If you need advice and support in relation to SPO 'examining' sites during MT21 then please contact the e-Assessments project team on: e-assessmentproject@it.ox.ac.uk.

The project team will be providing 'early life support' during MT21 after which ongoing support arrangements will be confirmed and communicated.

SPO Examining Sites – Home Page

Introduction to the Examining Site Homepage

The Home page within SharePoint Online 'examining' sites is intended to be a space on which introductory welcome / guidance text is available to all users of the site.

As part of examining sites being 'pre-built' ready for use by departments, default text has been provided but this should be updated to make it department-specific prior to the examining site being used in the department.

Each department is free to add whatever text is relevant, from a department perspective, to the Home page and to change the default image on the Home page if desired also.

You may want to consider updating the image to your department logo, for example, or another image specific to the department, if relevant.

In addition to updating the text and image as required you are also free to configure the Home page as you would like to, using the standard SharePoint web parts that are available within the Edit view.
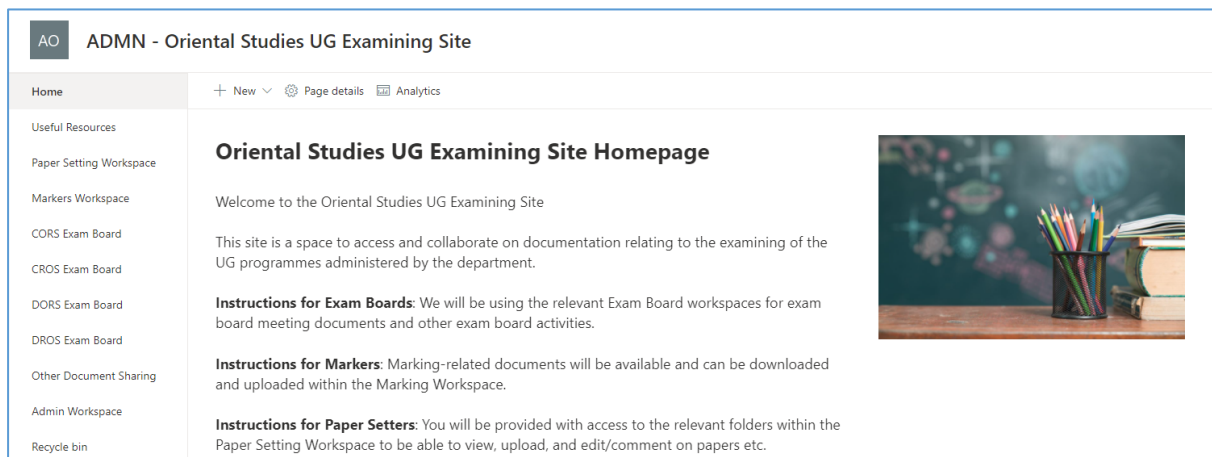
An example of an Examining Site Home Page

Who Can Access the Home Page?

The Home page of a SharePoint Online 'examining site' is accessible to users added to any of the site's SharePoint groups.

The only users who will not be able to access the Home page are those users who are given access solely to individual folders within the site and are not added to any SharePoint groups. This is expected to be an exception – for example in instances where a folder or small number of documents are being shared with another department.

Home Page – Key Guidance Topics

- How do I edit the TEXT on an examining site Home page?
- How do I change the IMAGE on an examining site Home page?
- How do I change the name of an examining site?

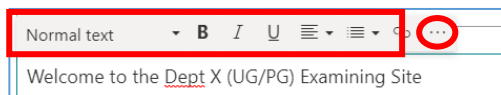**How do I edit the TEXT on an examining site Home page?**

To edit the text on an examining site Home page:

1. From the Home page, click on 'Edit' on the right hand side of the page

2. Update the title and text as relevant:

   a) Use the formatting options as required (e.g. to bold text or change the font size etc.) – the format 'bar' will appear when you click onto any of the existing text:


You can access more formatting options by clicking on the ellipsis '…' at the end of the bar

   b) To add an email address:
   - Type the email address in the relevant location in the Home page text
   - Highlight the address
   - Click on the hyperlink icon in the formatting bar
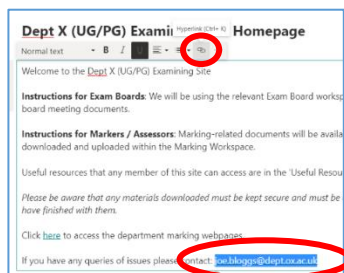
   - Type 'mailto:' and the email address into the 'Address' field in the 'Insert link' window e.g. mailto:joe.bloggs@dept.ox.ac.uk
   - Click 'Save'
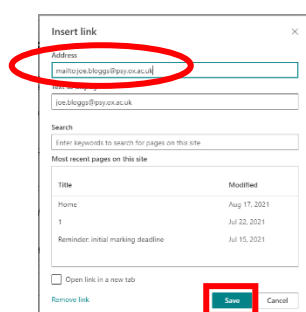
   c) To add a link to a webpage
   - Type the text that will become a hyperlink in the relevant location in the Home page text
   - Highlight the text that you want to become a hyperlink
   - Click on the hyperlink icon
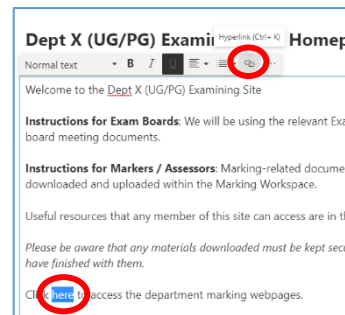
   - Type or copy the url of the webpage into the 'Address' field in the 'Insert link' window
   - Click 'Save'
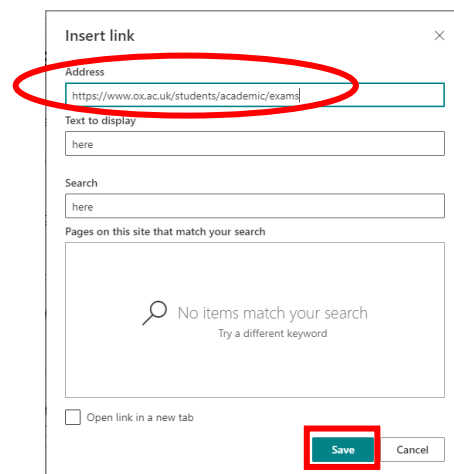
3. Once you have finished editing the Home page text as required click on the 'Republish' button in the top right hand corner of the page
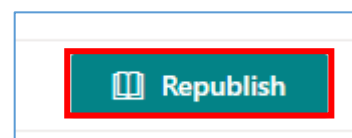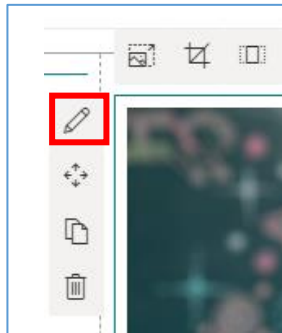
How do I change the IMAGE on an examining site Home page?

To change the image on an examining site Home page:

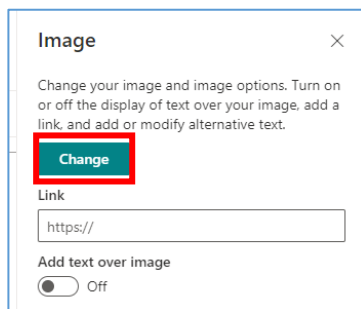1. From the Home page, click on 'Edit' on the right hand side of the page

2. Click on the 'Edit web part' pencil icon next to the image
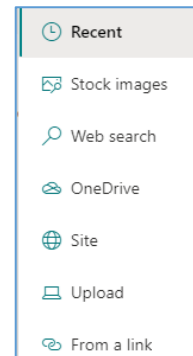

That will open the 'Image' window on the right hand side of the screen.

3. Click on the 'Change' button in the 'Image' window

You will then be presented with a choice including to choose an image from 'Stock images' or to 'Upload' an image from your computer or 'OneDrive'.

4. Click on the relevant option e.g. 'Upload' or 'Stock images':

5. Select or upload the image (depending on whether you are uploading an image or selecting one from 'Stock images')

6. Click 'Add image' if you're uploading an image or 'Insert' if you're choosing an image from the 'Stock images' area (the relevant button will be displayed at the bottom of the window)

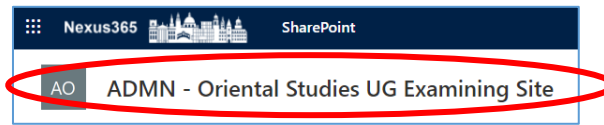7. Add the relevant Alt text into the 'Alternative text' box back in the 'Image' window
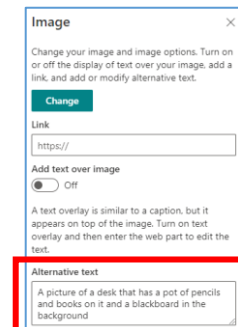
8. Finally, click on the 'Republish' button in the top right hand corner of the page
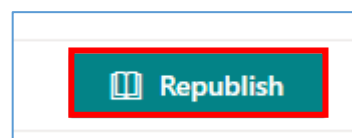
**How do I change the name of an examining site?**

The name of an examining site is displayed at the top left of a site:

Please only change the name of an examining site if strictly necessary as the sites names follow a common naming convention.

To change the name of an examining site:

1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

2. Select '**Site information**' from the list
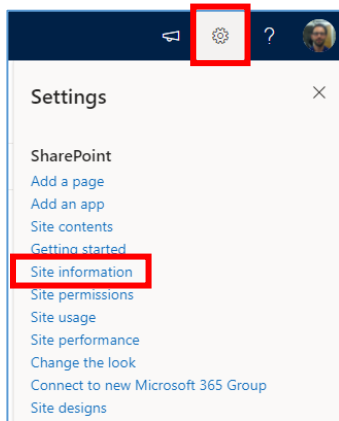
3. Within the '**Site Information**' sidebar update the 'Site name' field and click '**Save**'
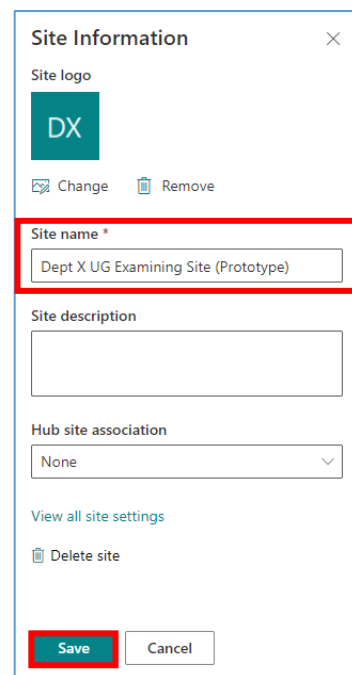
Note that the title of the site on the Home page can be separately updated by following the steps outlined in the '**How do I edit the TEXT on an examining site Home page?**' section
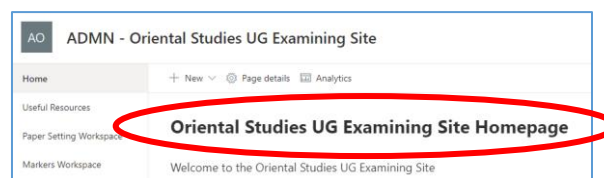
SPO Examining Sites – Managing Access and Permissions

Introduction to Managing Access to Examining Sites

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SharePoint groups are the best way to give access to defined areas of a site and allow you to manage the individuals who have access to the site and various sections within it in a straightforward way.

In addition to SharePoint groups you can also use **folder permissions** within different sections of the site to manage access within sections in a more granular way where necessary. For example:

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It is even possible to control who can see and access **specific documents / files** where needed.

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- **SharePoint groups** are used to manage access **TO** the different sections of a site
- **Folder/file permissions** are used to manage access **WITHIN** the different sections of a site

However, in some exceptions, you may give users access to a specific folder only in a site (and not add them to a SharePoint group also) e.g. when sharing specific folders with colleagues in other departments. See '**How do I give users from other departments access to a folder?**'

Details about how to manage folder and document permissions within 'examining' sites are available in the 'SPO Examining Sites – Managing Folders' section of the guide.

For details about how to give other administrators in your department access to 'examining' sites see the details outlined in the next section of this guide.

SPO Examining Sites – Managing Department Administrator Access

How do I give access to SPO examining sites to other Administrators in my Department?

It is likely that there are other administrators in your department who are or could be responsible for administering the department's examining site(s), including at times when you are out of the office.

To give other administrators in your department – who should have full access to all parts of the examining site – access to a site, you should make them 'Site Collection Administrators':

1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site
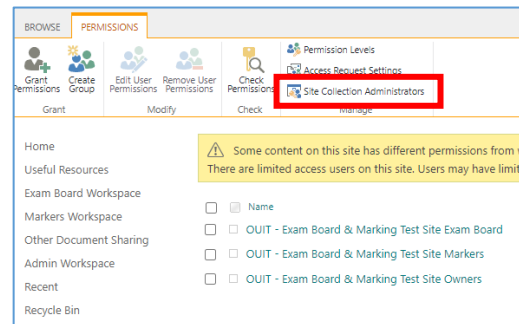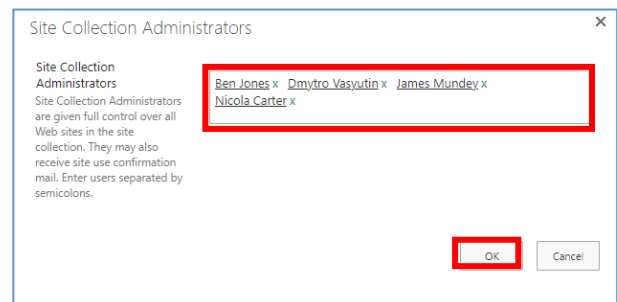
2. Select '**Site Permissions**' from the list
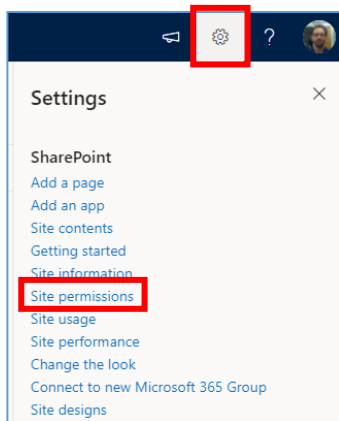
3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
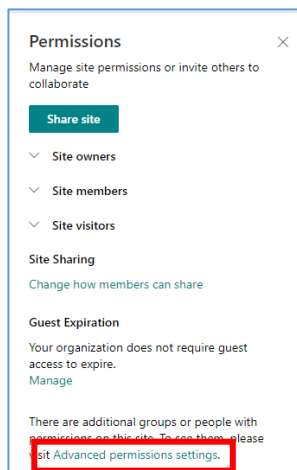
4. In the site permissions view, click on 'Site Collection Administrators'

5. Search for and select the relevant individuals (one by one) in the 'Site Collection Administrators' pop-up window and click '**OK**'

In addition, add the administrators to the site 'Owners' SharePoint group – see: 'How do I ADD users to the examining site SharePoint groups?' This will mean that they are notified of any access or sharing requests along with yourself.
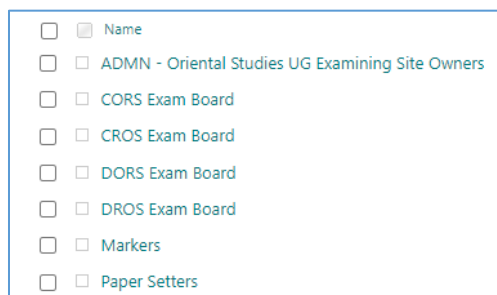
SPO Examining Sites – Managing SharePoint Groups

Introduction to SharePoint Groups in Examining Sites

Examining sites have been 'pre-built' with a number of SharePoint groups as follows:

#	SharePoint Group	Purpose
1	**Markers**	A group for markers – to give markers access to the Home page, Useful Resources, and the Markers Workspace
2	**Paper Setters**	A group for paper setters – to give paper setters access to the Home page, Useful Resources, and the Paper Setting Workspace
3	**XXXX Exam Board** (a group for each exam board within each site)	A group for the exam board members (including external examiners) for each exam board within a site – to give exam board members access to the Home page, Useful Resources, and the relevant Exam Board workspace
4	**Owners**	A group for administrators – allowing administrators in your department to access and manage any part of the site

As part of getting your exam board site ready for use, once you have set up the relevant folders in the site and added the required content, you should add the relevant users to the pre-built SharePoint groups so that they have access to the relevant parts of the site.

Where applicable, individuals can be added to more than one SharePoint group so that they have access to all relevant parts of a site. This might apply where an individual is a member of more than one exam board or assists with paper setting and also does marking, for example.

Example of the 'pre-built' SharePoint Groups in an Examining Site

Which Sections of an Examining Site do the 'Pre-Built' SharePoint Groups have Access to?

The 'pre-built' SharePoint groups have been set up with **access to specific sections of the site** as outlined in the following table (NB all of the SharePoint groups have access the Home page and Useful Resources):

#	Examining Site Section	SharePoint Group(s) that have access	Permission Level
1	**Home page**	• XXXX Exam Board groups • Markers group • Paper Setting group • Owners group (Department Admins)	• Read-only • Read-only • Read-only • Full Control
2	**Useful Resources**	• XXXX Exam Board groups • Markers group • Paper Setting group • Owners group (Department Admins)	• Read-only • Read-only • Read-only • Full Control
3	**Paper Setting Workspace**	• Paper Setting group • Owners group (Department Admins)	• Contribute • Full Control

#			
4	**XXXX Exam Board** (one for each exam board)	• XXXX Exam board group (each Exam Board group has access to the corresponding Exam Board workspace) • Owners group (Department Admins)	• Contribute • Full Control
5	**Markers Workspace**	• Markers group • Owners group (Department Admins)	• Contribute • Full Control
6	**Other Document Sharing**	• Owners group (Department Admins)	• Full Control
7	**Admin Workspace**	• Owners group (Department Admins)	• Full Control

Where applicable, individuals can be added to more than one SharePoint group so that they have access to all relevant parts of a site. This might apply where an individual is a member of more than one exam board or assists with paper setting and also does marking, for example.

You are able to create additional SharePoint groups within a site (and give the groups access to relevant areas within the site) if needed for your department.

Introduction to SharePoint Group Permissions Levels

SharePoint groups can have one of 6 'permission levels' but all of the 'pre-built' SharePoint groups have one of the following 3 permission levels (per section of the site) as the following levels provide all of the required access rights:

- **Read** – allows users to view and download documents and files
- **Contribute** - allows users to add, edit, delete, upload, download, move/copy files and folders
- **Full Control** – allows users to manage groups, permissions, and to access all content

As you can see from the following table, the permission level of each SharePoint group can differ in different parts of the site – so that it is possible for individuals to only view and download documents in one section of a site (e.g. Useful Resources) but to upload and edit documents in another section of the site (e.g. the Markers Workspace):

#	SharePoint Group	Site Section	Permission Level
1	**Markers**	• Home page • Useful Resources • Markers Workspace	• Read • Read • **Contribute**
2	**Paper Setters**	• Home page • Useful Resources • Paper Setting Workspace	• Read • Read • **Contribute**
3	**XXXX Exam Board** (a group for each exam board)	• Home page • Useful Resources • XXXX Exam Board	• Read • Read • **Contribute**
4	**Owners**	• All site sections	• **Full Control**

It is also possible to amend the permission level of SharePoint groups within different parts of an examining site and even within different folders within sections. See the relevant help topics in the 'SharePoint Groups – Key Guidance Topics' section for more details on how to do this if necessary.

It is recommended that SharePoint groups that are for users who are not department administrators (e.g. for exam board members, markers etc.) should always have a **Read** or **Contribute** permission level – as other permissions (e.g. the 'Edit' permission level) allow users to amend site settings.

As well as giving users access to the relevant sections of a site (via SharePoint groups), you can use folder permissions (within the different sections of the site) to manage access in a more granular way where that is necessary. It is also possible to give SharePoint groups access to specific folders where that is required.

SharePoint Groups – Key Guidance Topics

A) Managing Users within SharePoint Groups
- How do I ADD users to SharePoint groups?
- How do I REMOVE users from SharePoint groups?
- How can I see which users have been added to a specific SharePoint group?
- How can I see which at a glance SharePoint groups a user has been added to?

B) Managing SharePoint Groups
- How do I create a new SharePoint group in an 'examining' site?
- How do I give SharePoint groups access to workspaces within an examining site?
- How do I remove a SharePoint group's access to a workspace within an examining site?
- How do I change the 'permission level' of a SharePoint Group within a specific section of a site?
- How do I change the 'permission level' of a SharePoint Group at the top level of a site?
- How do I change name of a SharePoint Group?

How do I ADD users to SharePoint groups within SPO examining sites?

For information about the SharePoint groups that have been specifically 'pre-built' within examining sites, see the brief 'Introduction to SharePoint Groups in Examining Sites'.

To add users to the exam board SharePoint groups:

6. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site
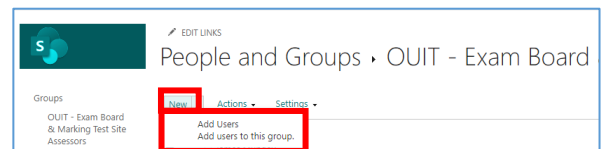
7. Select '**Site Permissions**' from the list
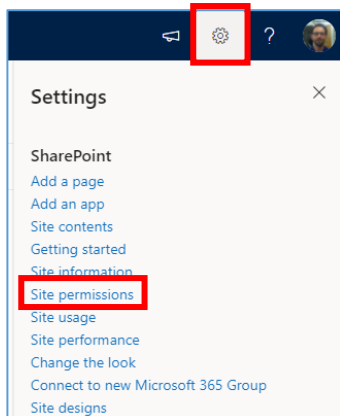
8. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
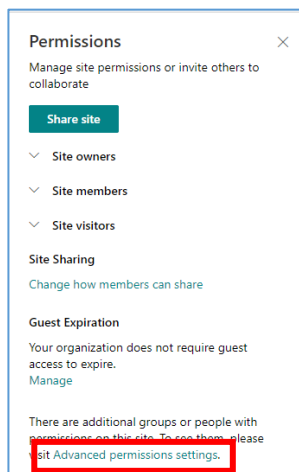
9. In the site permissions view, click on the **SharePoint group** that you would like to add users to:
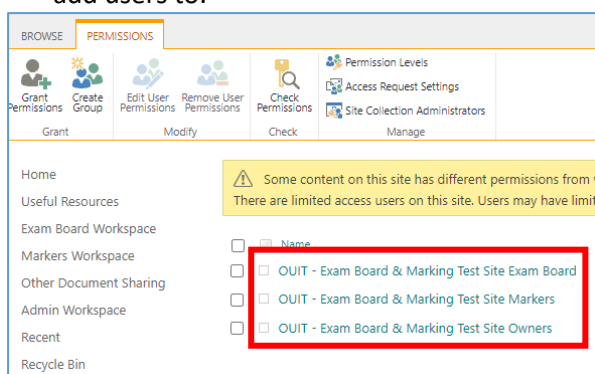
10. Within the SharePoint group click on '**New**' and select '**Add Users**'

11. In the Invite people window, **select / specify the users** to add to the group:
    a. You can search for individuals by typing their name; and/or
    b. You can paste in one or more email addresses – this is how you can give external users access

NB once external users have successfully accessed any Oxford SPO site you'll be able to search for them as if they were internal users.
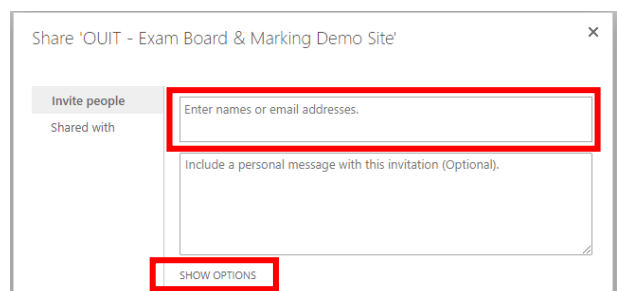
12. If you would prefer the users being added to the group NOT to receive a notification from SharePoint when you share the site with them (e.g. if you will share a link to the site with them at a later date), click on '**SHOW OPTIONS**' and **untick** 'Send an email invitation', which is ticked by default (see screenshot below)
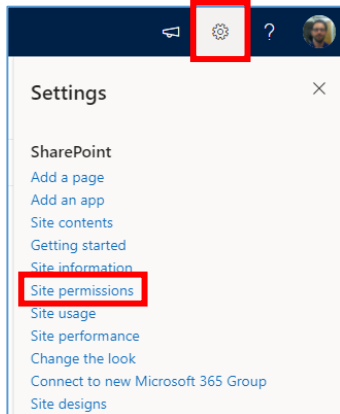
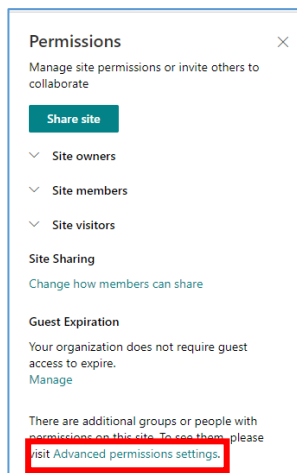13. Finally, click '**Share**'
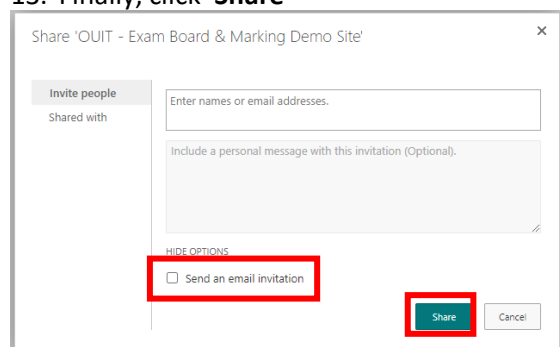
How do I REMOVE users from SharePoint groups within SPO examining sites?

To remove users from exam board SharePoint groups:

1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

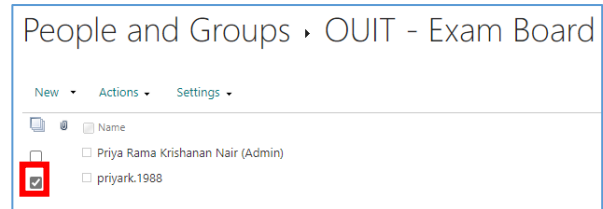2. Select '**Site Permissions**' from the list

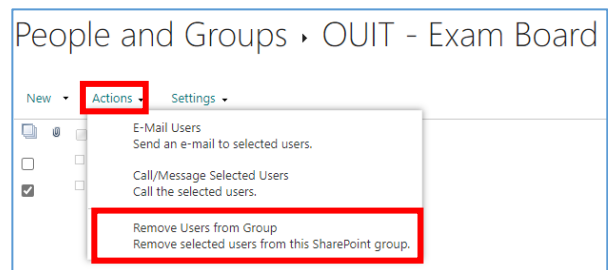3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar

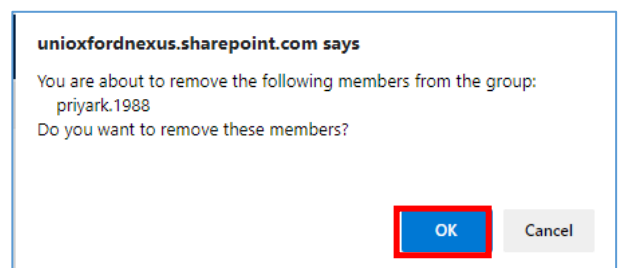4. In the site permissions view, click on the **SharePoint group** that you would like to remove users from:
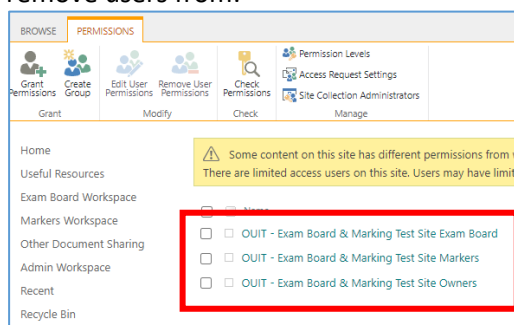
5. Within the SharePoint group, select the user(s) to remove from the group by **ticking the checkbox** next to their name

6. Click on '**Actions**' and select '**Remove Users from Group**'

7. Click **OK** when the verification message window appears

8. The user(s) will now have been removed from the group

How can I see which users have been added to a specific SharePoint group?

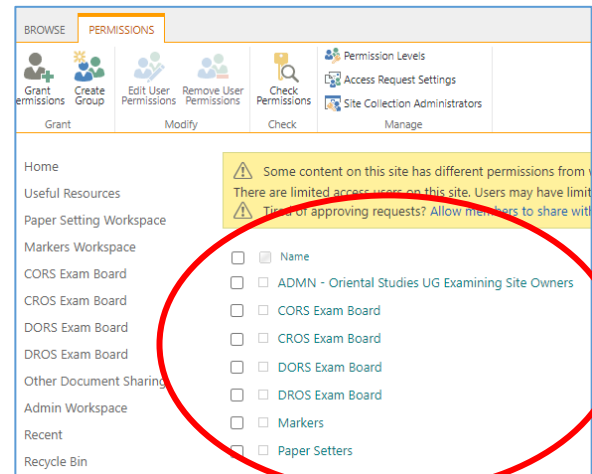To see which users have been added to a SharePoint group:

1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

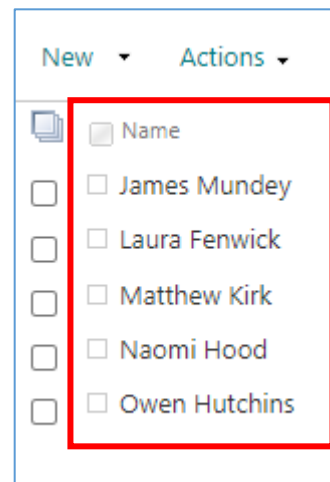2. Select '**Site Permissions**' from the list
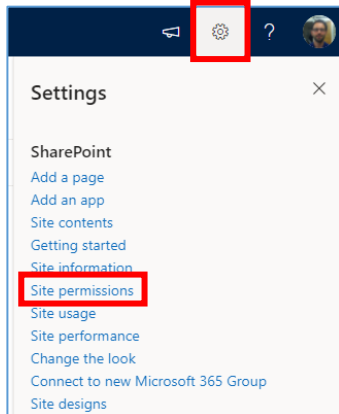
3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
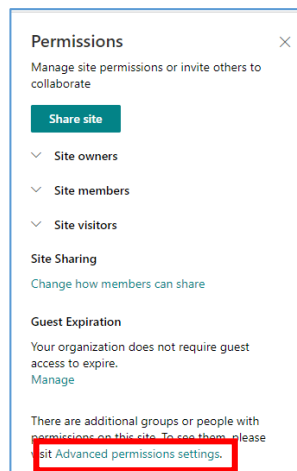
4. In the site permissions view, click on the name of the **SharePoint group** for which you want to confirm which users have been added to the group:


5. You will be able to see the users that have been added to the SharePoint group:

How can I see at a glance which SharePoint groups a user has been added to?

To see the SharePoint group(s) that a user has been added to within an examining site and whether they have they have been given direct access to any folders / files:
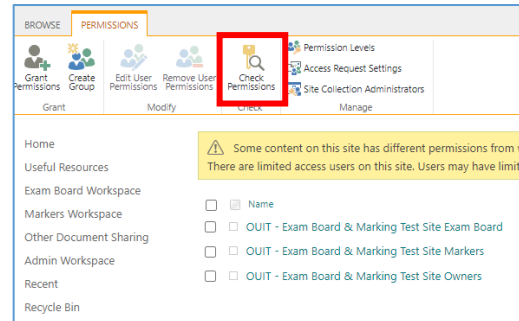
1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

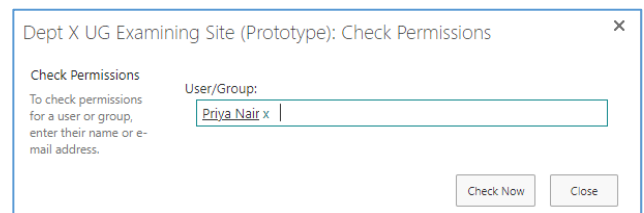2. Select '**Site Permissions**' from the list
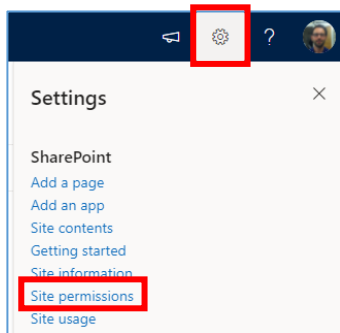
3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
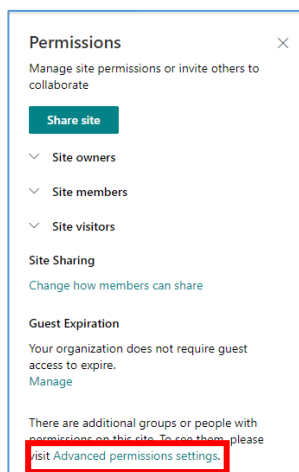
4. In the site permissions view, click on '**Check Permissions**'

5. Within the 'Check Permissions' pop-up window:
   a. Search for and select the name of the user whose SharePoint group membership you want to check
   b. Click on 'Check Now'

Depending on whether the user has been added to any SharePoint groups and/or been given direct access to any folders / file, the results may include:

a) The SharePoint groups the individual has access to (if they have been added to any groups)

b) Other items (files or folders) which the user has been given access to directly – these are displayed as 'Given directly' **but no details of the specific folders / files the user has been give direct access to are displayed (or the location of the folders / files)**

See the screenshot on the next page for an example of a user who has both been given access to SharePoint groups (the 4 of which are listed) AND has been given direct access to a number of other (unidentified) items:

6. If applicable, remove the user from the SharePoint groups displayed in the results – see: '**How do I remove users from SharePoint groups within SPO examining sites?**'


Related Topics

To identify the specific files and folders a user has been given access to see '**How can I see who has access to a folder within a workspace?**' for details of how to do that.

Alternatively, if you simply want to remove a user's access from all files or folders that they've been given direct access to within a workspace (without knowing which files and folders those are), complete the steps outlined in '**How do I remove an individual's access to all folders that they have been given 'direct access' to within a workspace?**'

How do I create a new SharePoint group in an 'examining' site?

To create an additional exam board SharePoint group, if you want to manage an additional specific group of users for any reason:
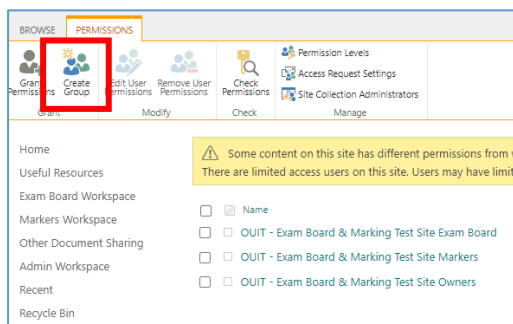
1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

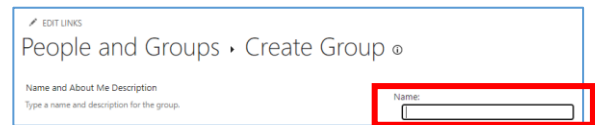2. Select '**Site Permissions**' from the list
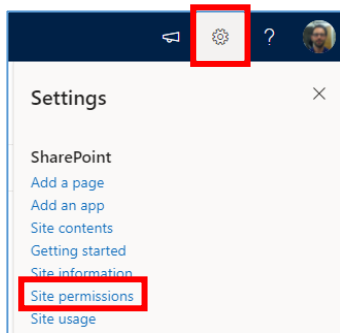
3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
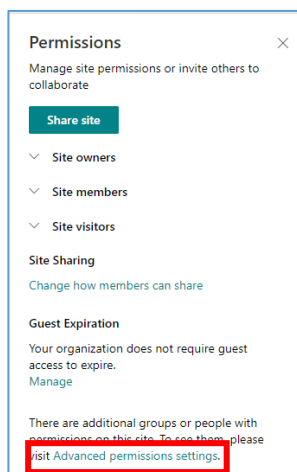
4. In the site permissions view, click on '**Create Group**'

5. In the 'Create Group' view add a **Name** for the group:

6. Update the '**Group owner**' to the existing site 'Owners' group rather than that being yourself (so all of the department administrators who are part of the existing 'Owners' group can update the membership of the group when needed):

   a. Firstly, delete your name from the '**Group owner**' field by clicking on the 'x' next to your name:
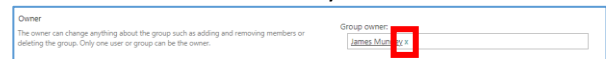
   b. Then search for and select the '**Owners' group** for the site – you'll need to know the **full name** of the 'Owners' group to find and select it – tip: it will start with 'ADMN':
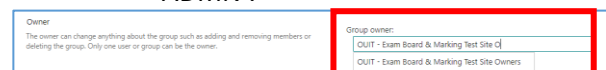
7. In the '**Give Group Permission to the Site**' select the '**Read**' option (you may separately give the group other permission levels within specific sections of the site but not here at the top level):
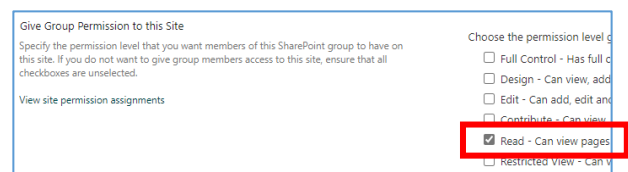
8. Click on the '**Create**' button to create the group

9. Next you will need to ensure that the group has the right access to the relevant sections of the site – see '**How do I specify which sections of the site the new group should have access to?**'

10. Then you will need to add the relevant users to the group – see '**How do I ADD users to the exam board SharePoint groups?**'

How do I give SharePoint groups access to workspaces within an examining site?

If you create a new SharePoint group within a SPO examining site then by default the group will have access to the Home page and Useful Resources (as those sections inherit their permissions from the top level of the site).

However, by default, users added to the new SharePoint group **won't have access to any other sections of the site**, as all of the other sections have 'unique permissions' – so that only users in relevant SharePoint groups can access them.

As a result, you will need to update the permissions for the specific sections of the site that you would like the new group to have access to – following the steps outlined below.

In the same way if you want to give existing SharePoint groups access to a section of the site that the group does not have access to you need to complete the steps outlined below.

To manage which SharePoint groups have access to a specific section of an exam board site:

1. Click on name of the section of the site in the **LH site menu** in which you want to update the groups that have access to that section (e.g. the Paper Setting Workspace):
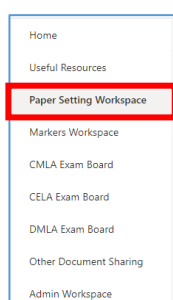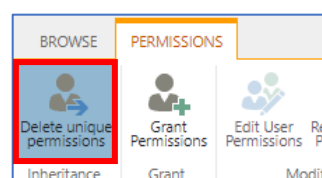

2. Then click on the **Settings 'cog' icon** in the top right hand corner of the site and select '**Library settings**'
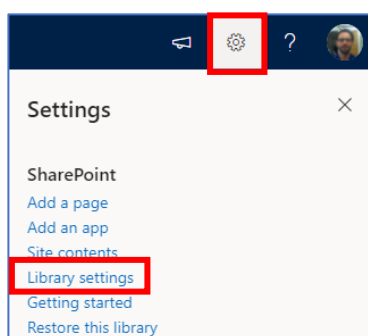
3. Within the workspace '**Settings**' window, click on the '**Permissions for this document library**' option
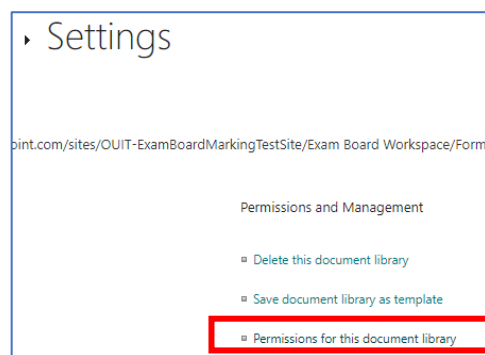
4. In the workspace permissions view, click on '**Delete unique permissions**'

5. Then click **OK** when the verification window appears
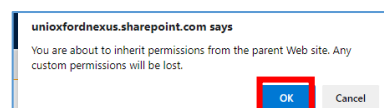
The permissions for this section of the site will now be inherited from the top level of the site and will match the permissions at the top level of the site – that means that any user in any group will at this point have access to this section of the site.

To create new unique permissions for this section of the site (so that only users in relevant groups, including the new group, can

access this section of the site), complete the following steps:

6. Click on '**Stop Inheriting Permissions**'

7. Then click **OK** when the verification window appears
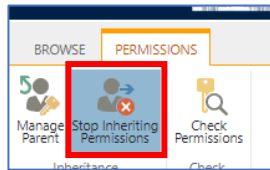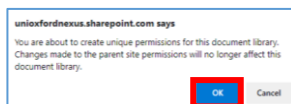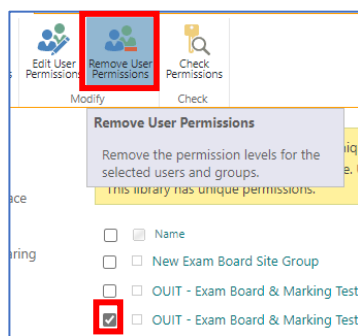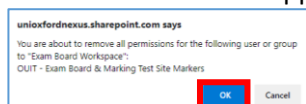

8. Next, **delete any groups that you do not want to have access to this section of the site** by completing the following actions:

   a. **Tick** the **checkbox** next to the name(s) of the SharePoint group(s) that you **do not want to have access** to this section of the site
   b. Click on '**Remove User Permissions**'

   c. Then click **OK** when the verification window appears

NB If you accidentally delete the wrong groups, repeat steps 4-8 again.

9. Finally, **update the permission levels of the remaining groups** – if any of the groups should have 'Contribute' access to this section of the site, for example – by completing the following actions:

   a. **Tick** the **checkbox** next to the name(s) of the SharePoint group that you wish to change the **permission level** for AND then click on '**Edit User Permissions**':
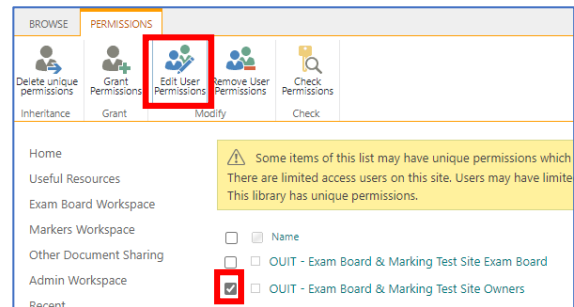
   b. Within the '**Edit Permissions**' view **untick** the existing permission level and then **tick** the required permission level:
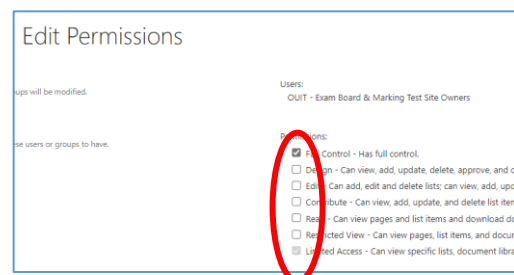
   c. Click **OK** to save the changes to the permission level for the group within the section of the site

   d. Finally, repeat steps 9 a-c for any other groups that require a different permission level in this section of the site

Note that you may need to repeat all of the steps in this section if you also want the new SharePoint group to have access to another workspace within the SPO site.

How do I remove a SharePoint group's access to a workspace within an examining site?

To see which sections of a SPO examining site the 'pre-built' SharePoint groups have access to see 'Which Sections of an Examining Site do the 'Pre-Built' SharePoint Groups have Access to?'

If you want to remove the access that a SharePoint group has to a section of the site then you should complete the steps outlined below.

1. Click on name of the section of the site in the **LH site menu** in which you want to update the groups that have access to that section (e.g. the Paper Setting Workspace):

2. Then click on the **Settings 'cog' icon** in the top right hand corner of the site and select '**Library settings**'
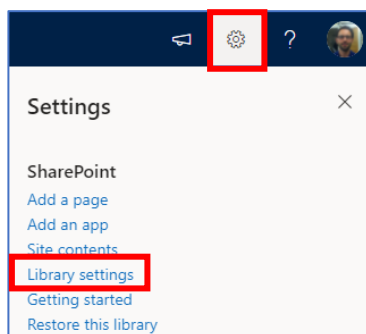
3. Within the workspace '**Settings**' window, click on the '**Permissions for this document library**' option
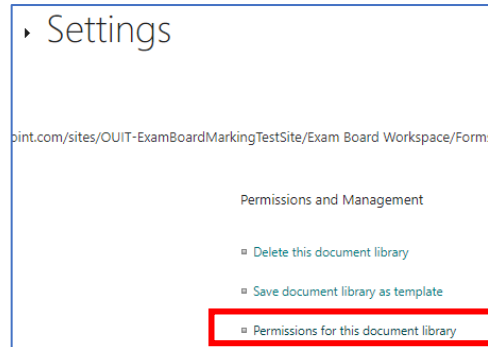
4. In the workspace permissions view:
   a. **Tick** the **checkbox** next to the name(s) of the SharePoint group(s) that you **do not want to have access** to this section of the site
   b. Click on '**Remove User Permissions**'
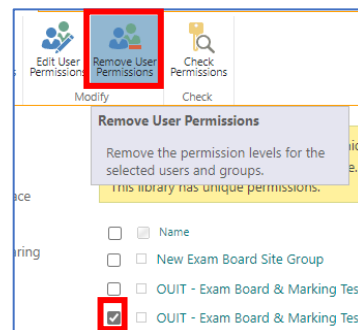
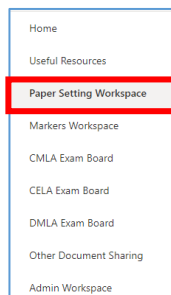   c. Then click **OK** when the verification window appears
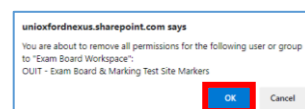
How do I change the 'permission level' of a SharePoint Group within a specific section of a site?

The permission levels of the 'pre-built' exam board SharePoint groups within an examining site (at both the top level and within specific sections of the site) are as follows:

#	SharePoint Group	Permission Level (top level of site)	Permission Level (per section)
1	Markers	Read	• Home page – **Read** • Useful Resources – **Read** • Markers Workspace – **Contribute**
2	Paper Setters	Read	• Home page – **Read** • Useful Resources – **Read** • Paper Setting Workspace – **Contribute**
3	XXXX Exam Board (a group for each exam board)	Read	• Home page – **Read** • Useful Resources – **Read** • XXXX Exam Board – **Contribute**
4	Owners	**Full Control**	• All site sections – **Full Control**

Note that groups for users who are not department administrators (e.g. for exam board members or markers) should have either a **Read** or **Contribute** permission level – more information about permission levels is available here.

To change the permission level of a group within a specific section of an examining site:

1. **Click on name of the section of the site in the LH site menu** that you want to amend a group's permission level for (e.g. the Exam Board Workspace) AND then click on the **Settings 'cog' icon** in the top right hand corner of the site
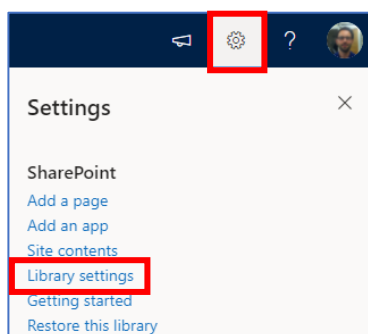
2. Select '**Library settings**' from the list

3. Within the workspace '**Settings**' window, click on '**Permissions for this document library**'

4. In the workspace permissions view, **tick** the **checkbox** next to the name(s) of the

SharePoint group that you wish to change the **permission level** for **AND** click on '**Edit User Permissions**'

5. Within the '**Edit Permissions**' view **untick** the existing permission level and then **tick** the required permission level

6. Click **OK** to save the changes to the permission level for the group within the section of the site

How do I change the 'permission level' of a SharePoint Group at the top level of a site?

See the details outlined in '**How do I change the 'permission level' of a SharePoint Group within a specific section of a site?**' as you may not need to change the permission level of a SharePoint group at the top level of a site. That's because it's possible to have different permission levels for a group within each section of the site – so that relevant users can add and edit documents in some workspaces but not in others.

If what you actually want to do is change the permission level of a SharePoint group within a specific section of the site – see '**How do I change the 'permission level' of a SharePoint group within a specific section of a site?**'

Note it is recommended that the permission level for any SharePoint group, except for the 'Owners' groups, at the top level of a site should be **Read** as the permission level for the group can be set to **Contribute** in the relevant workspaces. However, users should only have read access to the Home page and Useful Resources and access to those is determined by the permission level at the top level of the site.

To change the permission level of a group at the top level of the site:

1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

2. Select '**Site Permissions**' from the list

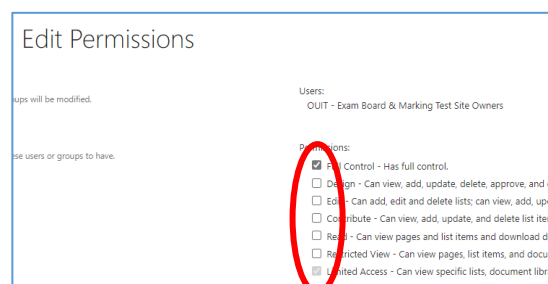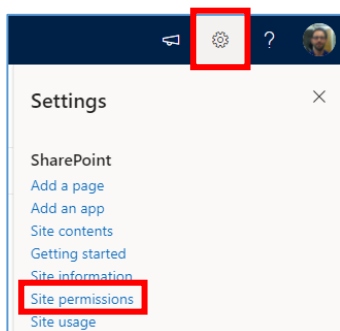3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
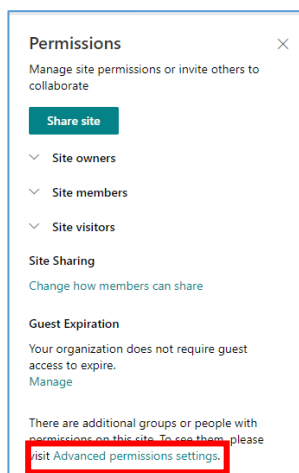
4. In the site permissions view, **tick** the **checkbox** next to the name(s) of the SharePoint group that you wish to change the **permission level** for **AND** click on '**Edit User Permissions**'

5. Within the '**Edit Permissions**' view **untick** the existing permission level and then **tick** the required permission level

6. Click **OK** to save the changes to the permission level for that group

How do I change name of a SharePoint Group?

To change the name of a SharePoint Group complete the following steps:

1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

2. Select '**Site Permissions**' from the list
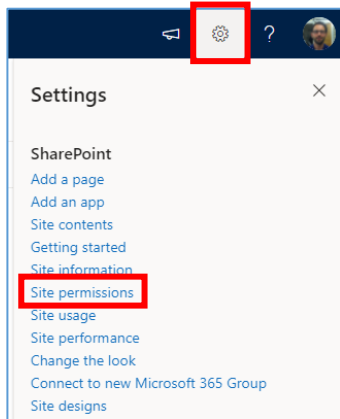
3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
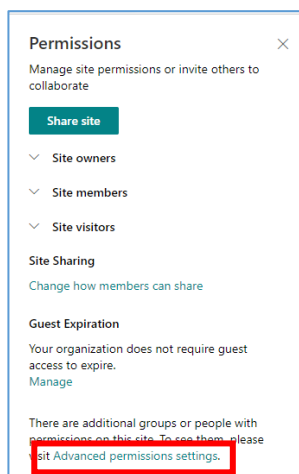
4. In the site permissions view, click on the name of the **SharePoint group** whose name you want to amend:
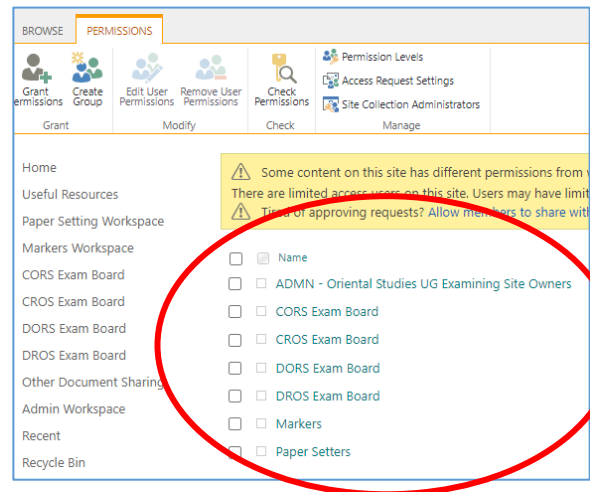
5. Within the SharePoint group view click on Settings and select the 'Group Settings' option
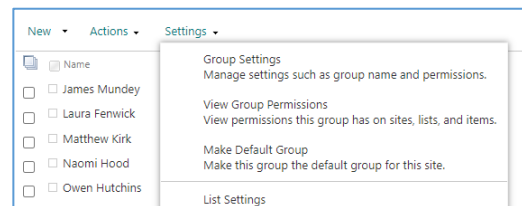
6. Update the **Name** of the group in the 'Change Group Settings' view and click '**OK**'
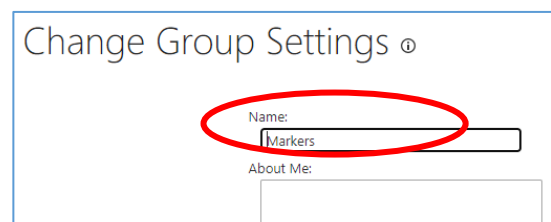
How do I delete a SharePoint group?

If for any reason you need to delete a SharePoint group e.g. you create one in error, complete the following steps:
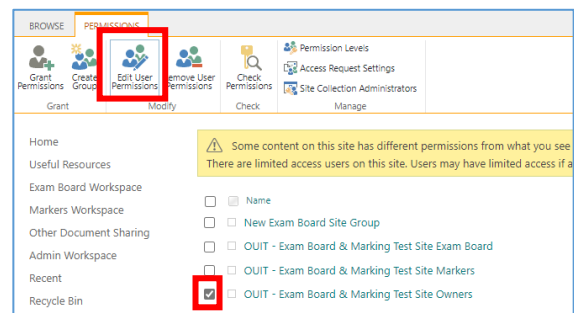
1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site
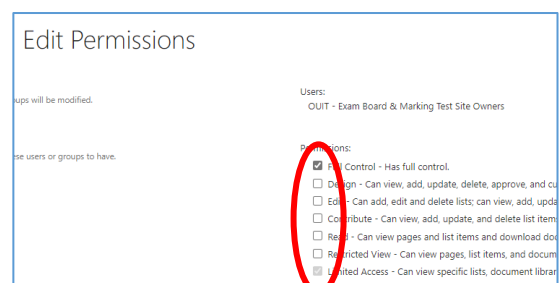
2. Select '**Site Permissions**' from the list
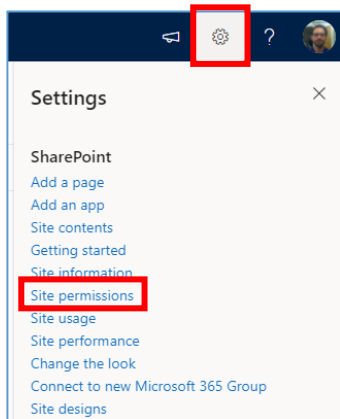
3. Click on '**Advanced permissions settings**' in the 'Permissions' sidebar
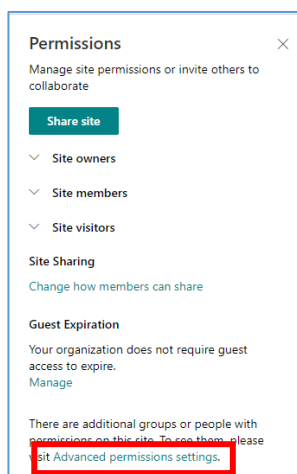
4. In the site permissions view click on the name of the **SharePoint group** whose name you want to amend:
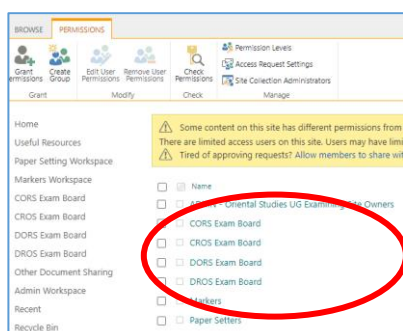
5. Within the group, click on '**More…**' in the LH side 'Groups' menu to navigate to People and Groups
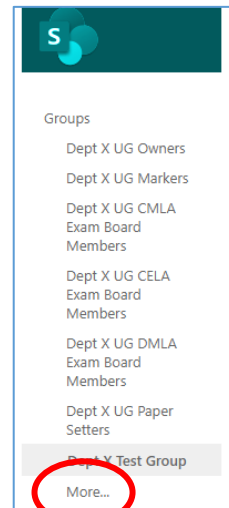
6. Within the People and Groups view click on **Edit icon** for the group you want to delete
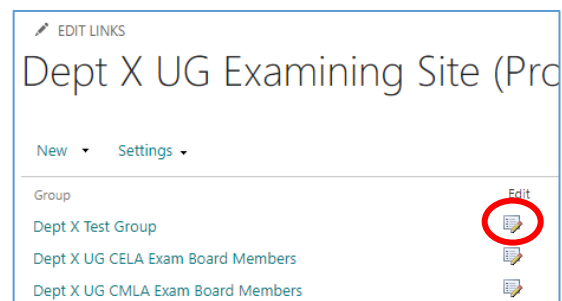
7. Within the 'Change Group Settings' view click '**Delete**' and click '**OK**'
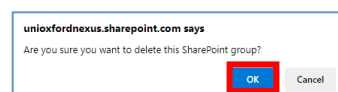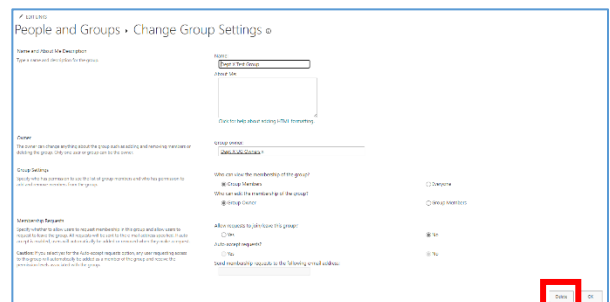
Managing Site 'Sections' / Workspaces

SPO 'examining' sites are supplied pre-built with the following 'sections':

#	Section	Purpose
1	Home page	• A page for **welcome / guidance text** for all users that can access to the site via a SharePoint group • Generic text and an image has been added to the Home page but those can be amended as required by the department
2	Useful Resources	• A place to share **useful resources relevant to all users** of the site e.g. exam conventions, regulations etc. • You can add links to webpages, if applicable, as well as uploading documents
3	Paper Setting Workspace	• A place to share, edit, and securely store **documents relating to paper setting** • This workspace also includes a standard folder '**Final Copies for Exam Schools**' that the Exam Schools team have access to and that should be used for sharing final copies of exam papers with them
4	XXXX Exam Board	• A separate space for <u>each</u> **exam board** within the 'examining' site to view, share and collaborate **on documents relating to the exam board** • The exam board workspaces in the site should be the exam boards administered (at the study-level) by your department
5	Markers Workspace	• A space to share **documents for access by markers** who are marking exams or course work submissions • e.g. mark / feedback sheets, and submissions (if those are not being viewed on Inspera)
6	Other Document Sharing	• A space to **share documents with other departments** e.g. joint schools departments; Education Policy Support; Information Compliance etc. ➢ *Please note that*: completed **results templates** should continue to be shared with ARO via the separate ARO-managed site ➢ *Please note that*: **appeals-related documentation** should continue to be shared with the Proctors via links they share with you
7	Admin Workspace	• A **workspace for Administrators** within the department who manage the exam boards and marking process • e.g. for master documents or templates

You may want to add, rename, delete a site workspace / section or change the order of the sections in the LH site menu. See the relevant help topic below for details of how to do any of these things where appropriate.

Managing Site 'Sections' / Workspaces – Key Guidance Topics

- How do I change the name of a workspace / section within a site?
- How do I create a new workspace / section within an examining site?
- How do I change the order of the site sections in the LH site menu?
- How do I delete workspace / section of a site that my department doesn't need?

How do I change the name of a workspace / section within a site?

To change the name of a workspace / section within an examining site:

1. **Click on name of the section of the site in the LH site menu** that you want to change the name of AND then click on the **Settings 'cog' icon** in the top right hand corner of the site

2. Select '**Library settings**' from the list
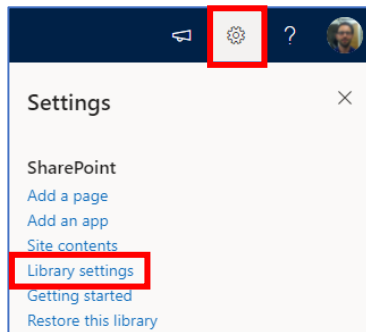
3. Within the workspace '**Settings**' window, click on '**List name, description and navigation**'
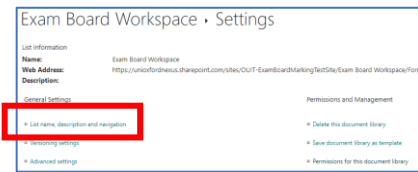
4. Update the **Name** as required and click '**Save**'
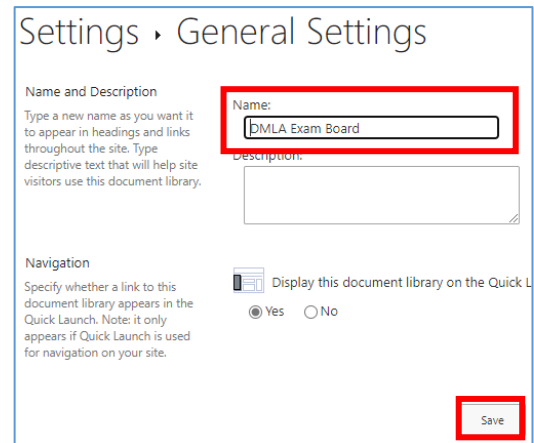
How do I create a new workspace / section within an examining site?

To create a new workspace / section within an examining site:
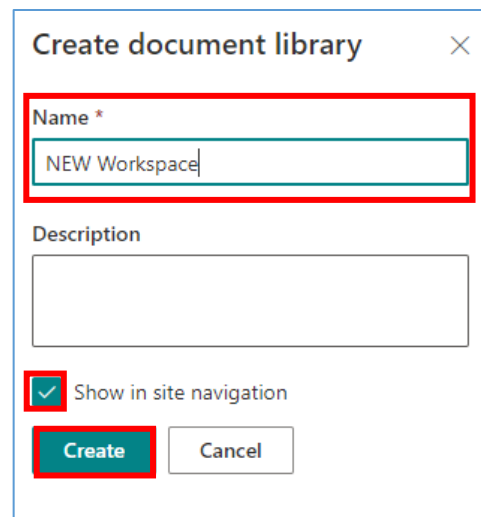
1. From the Home page, click on the **Settings 'cog' icon** in the top right hand corner of the site

2. Select '**Site contents**' from the list
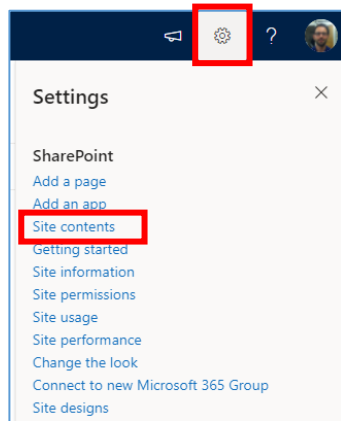
3. Within the '**Contents**' page click on **'New'** and select '**Document library**'
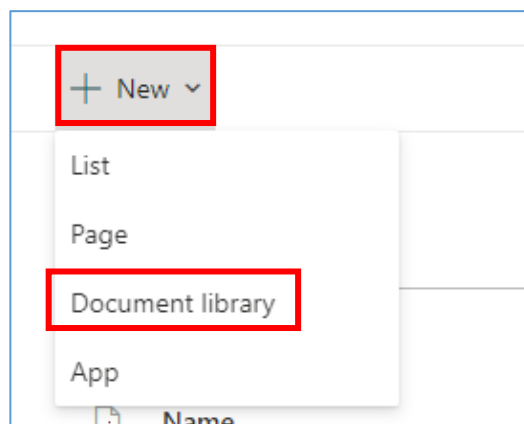
4. In the 'Create document library' side bar:
   a. Add a **Name**

   b. Ensure that '**Show in site navigation**' is ticked (so the new workspace appears in the LH site menu)

   c. Click '**Create**'

How do I change the order of the site sections in the LH site menu?

To change the order of the site sections in the LH site menu:

1. Click on '**Edit**' at the bottom of the LH site menu
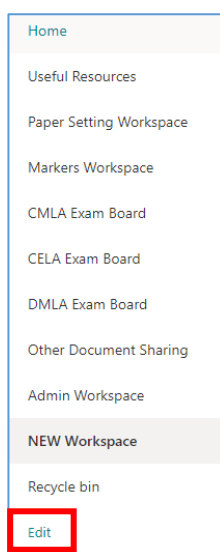
2. **Click and drag** the workspace / section to the **relevant position** in the site menu and click '**Save**'
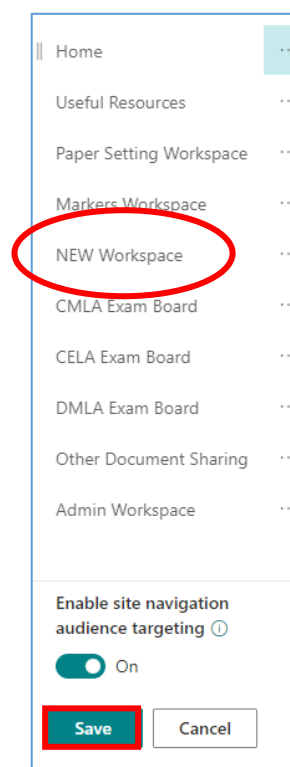
How do I delete a workspace / section of a site that my department doesn't need?

To delete a workspace / section within an examining site:

1. **Click on name of the section of the site in the LH site menu** that you want to delete AND then click on the **Settings 'cog' icon** in the top right hand corner of the site

2. Select '**Library settings**' from the list
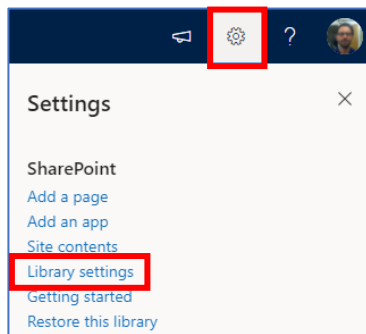
3. Within the workspace '**Settings**' window, click on '**Delete this document library**'
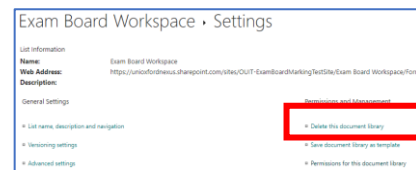
4. Click '**OK**' when the verification message appears
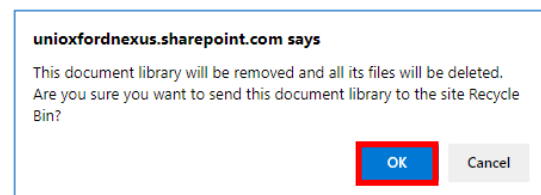
Note that it is possible to restore workspaces and all of the contents within them, if necessary (within 93 days of them being deleted). To do this:
- *Navigate to the Recycle bin*
- *Select the item to restore*
- *Click 'Restore'*

SPO Examining Sites – Managing Folders

Introduction to Managing Folders in SharePoint Online Sites

It is straightforward to **create**, **rename**, and **delete** folders within any section of an examining site and to apply specific permissions to those folders where appropriate.

You are free to add folders in whatever structure is appropriate for your department within an examining site.

It is also possible to **copy** and **move** folders where required – this is a helpful way of relocating or duplicating folders (and any documents within them) without having to manually create new folders and re-upload documents:

- **MOVING** folders **relocates** the folders (and the content within them) to another location so that they are no longer in their original location
    - This feature may be useful to move mark sheets, for example, from the Markers Workspace to an Exam Board Workspace once marking has been completed

- **COPYING** folders **duplicates** them so that the original folders stay in the original location and a copy of the folders (and the content within them) is created in another location within the same or another site
    - This feature may be useful to replicate the folder structure you require within the exam board sections of a site, for example

NOTE: if you move or copy folders that have unique (restricted) permissions, or that individuals have been given direct access to, you should double check whether the unique permissions and individuals who have been given direct access have been retained once the folder has been copied or moved.

For more information about managing folder permissions see the 'SPO Examining Sites – Managing Folder Permissions' section.

Who can 'Manage' Folders in a SharePoint Examining Site?

As an administrator with 'Full Control' you are able to manage (i.e. create, rename, delete and copy/move) folders throughout the site. You can also **share** folders.

Users are not able to 'manage' folders in sections or folders they only have 'Read' access to.

Users with 'Contribute' access to a section or folder within any SharePoint site can create, rename, delete, move and copy folders and documents within the sections and folders they have 'Contribute' access to. However, users with 'Contribute' access **cannot share** folders with anyone else.

The same details and rules outlined above apply to **documents/files** within SharePoint sites also.

Managing Folders – Key Guidance Topics

- How do I **create** folders within examining sites?
- How do I **rename** a folder?
- How do I **copy (duplicate)** one or more folders?
- How do I **move (relocate)** one or more folders?
- How do I **delete** one or more folders?

For details about how to **manage folder permissions** see the 'SPO Examining Sites – Managing Folder Permissions' section.

How do I CREATE folders within examining sites?

You are free to add folders in whatever structure is appropriate for your department within an examining site.

For example, it is assumed that within an 'exam board' section of an examining site that you may want folders including the following (along with any others that are required):
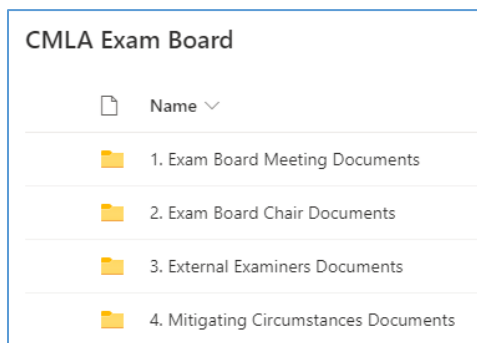
To create a folder within any section or existing folder within an examining site:

1. Navigate to the section or existing folder within which you want to create a folder

2. Click on the 'New' button in the top left hand side of the view and select 'Folder'
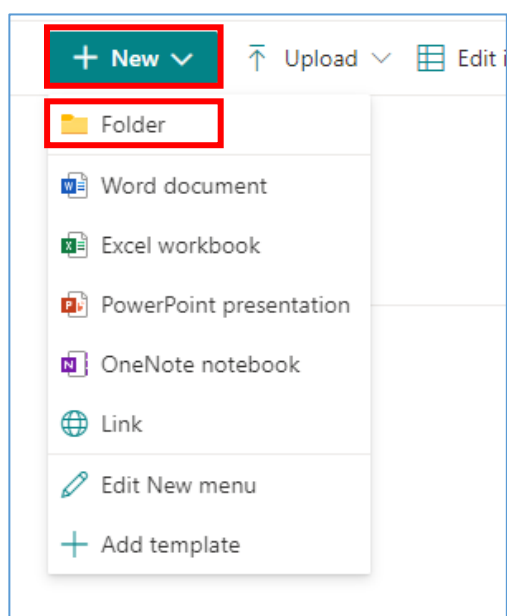
3. Enter a folder name in 'Create a folder' window and click 'Create'
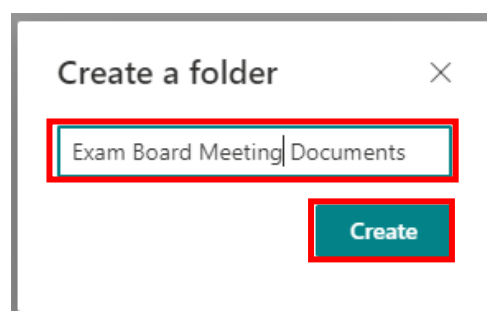
The folder will be visible in the view in which you've created it
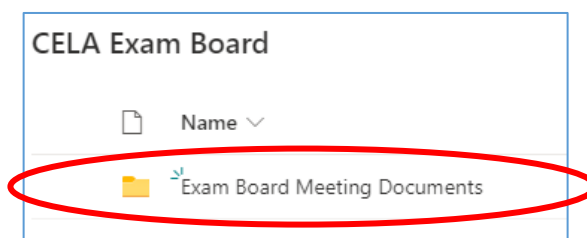
How do I RENAME a folder?

To rename a folder:

1. Select the folder you want to rename by ticking the tick box on the left hand side of the folder

2. Then click on the three-dot 'Show actions' menu for the folder
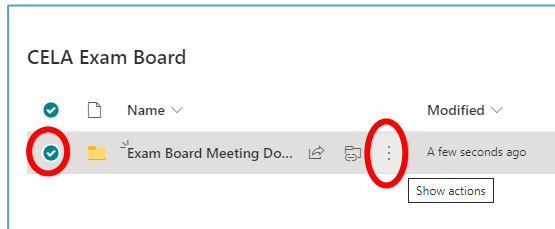
3. Select 'Rename' from the list of actions displayed
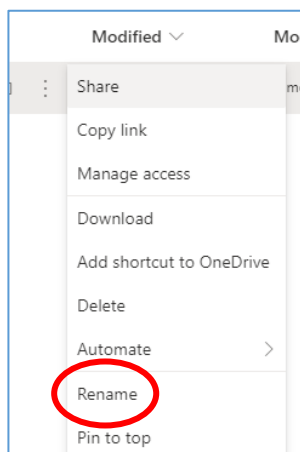
4. Rename the folder in the 'Rename' window and click 'Rename'
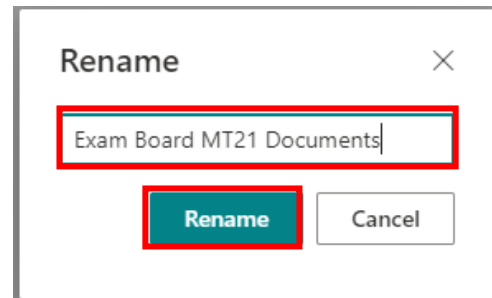
5. The folder name will now have been updated with the revised name
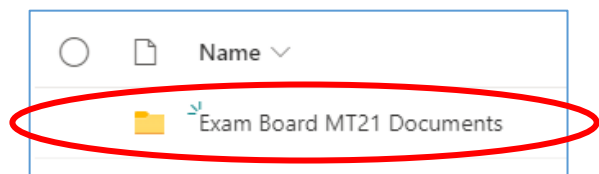
How do I COPY (duplicate) one or more folders?

Within SharePoint Online it is possible to copy (duplicate) one or more folders (and the documents within them) to another location either within the same site or to another site if appropriate.

Copying folders **duplicates** them so that the original folders stay in the original location and a copy of the folders is created in another location within the same or another site. Note that when you copy folders the **documents within them are copied also**.

This feature may be used to replicate the folder structure within the exam board sections of a site, for example.

To copy (duplicate) one or more folders (and any content within them):

1. Select the folder(s) that you want to copy by ticking the tick box on the left hand side of the folder(s) you wish to copy (see screenshot below)

2. Click on 'Copy to' option above the folders in the page of the site you are in
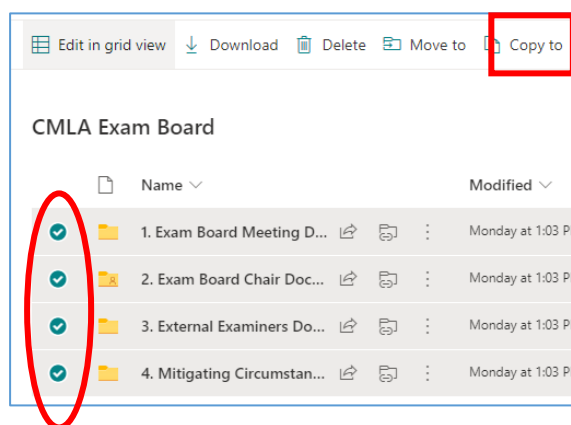
A list of sites will be provided in the 'Places' window that opens on the right hand side of the screen – with the site you are in at the top of the 'Nexus 365' list:
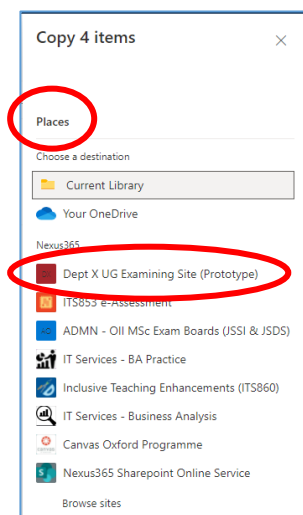
3. Navigate to the place where you want to copy the folders to – either another area within the site the folders are already in or another site altogether

If the site you want to copy the folders to is not in the list click on 'Browse sites' at the bottom of the window and select the relevant site from the list that's displayed

4. Once you have selected the location where you want to copy the folders to, click 'Copy here'
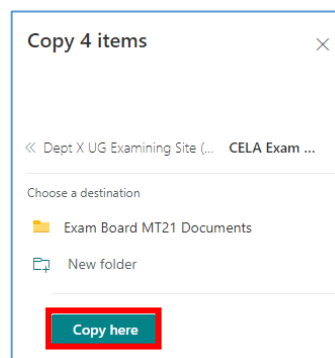
5. The folders and the documents within them will be copied to the selected location and a message will be displayed in the location from which the folders are being copied once that has been completed
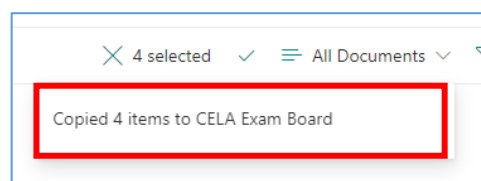
*To move one or more **documents** within a folder (instead of a folder) repeat the same steps but select the documents you wish to move in step 1 above.*

How do I MOVE (relocate) one or more folders?

Within SharePoint Online it is possible to move one or more folders to another location within the same examining site or another SharePoint site if appropriate.

Moving folders **relocates** the folders to another location so that they are no longer in their original location. If you want to create a duplicate copy of the folders (and documents within them) and leave the original folders in the original location – see 'How do I COPY one or more folders'.

To move (relocate) one or more folders (and any content within them):

1. Select the folder(s) that you want to move by ticking the tick box on the left hand side of the folder(s) you wish to move (see screenshot below)

2. Click on 'Move to' option above the folders in the page of the site you are in
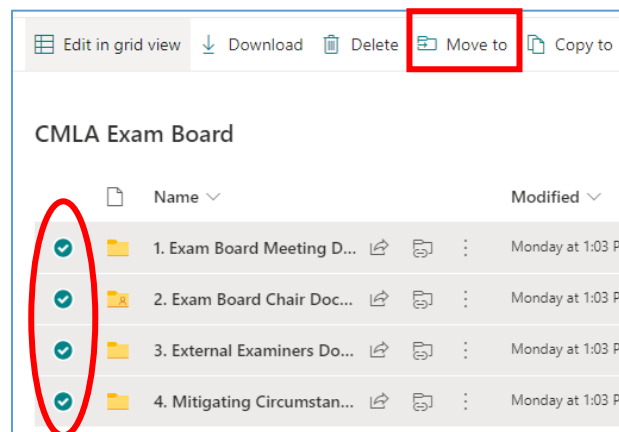
NOTE: if you move or copy folders that have unique (restricted) permissions, or that individuals have been given direct access to, double check whether the unique permissions and individuals who have been given direct access have been retained once the folder has been copied or moved.

For more information about managing folder permissions click see the 'SPO Examining Sites – Managing Folder Permissions' section.

How do I DELETE one or more folders?

To delete a folder:

1. Navigate to the folder you want to delete

2. Then click on the three-dot '**Show actions'** menu for the folder and select the '**Delete**' option
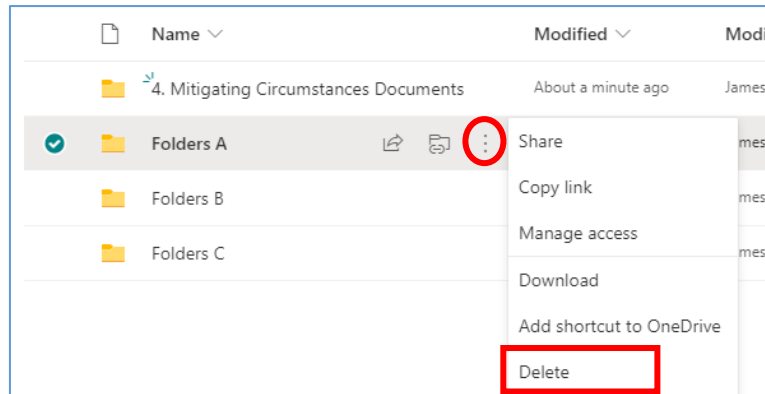
To delete multiple folders at once:

1. Select the folders that you want to delete by ticking the tick box on the left hand side of the folders

2. Click on the '**Delete**' option above the folders
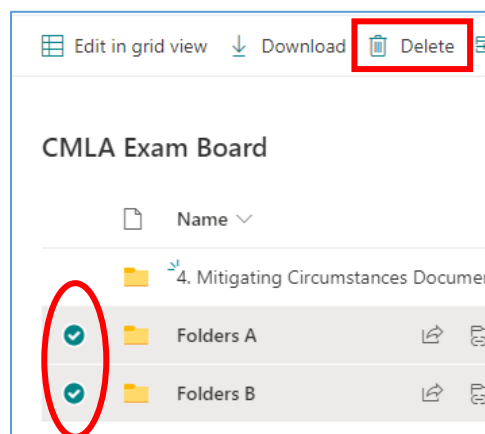
The Recycle Bin
Please note the following regarding folders / files that are deleted:

-   Items that are deleted are sent to the recycle bin
-   Items deleted from the recycle bin are sent to the second-stage recycle bin (which is accessible to department administrators)
-   Items are retained for 93 days from the time they are deleted
-   Items will stay in the recycle bin for the 93 days unless they are deleted and sent to the second-stage recycle bin
-   If something is deleted from the recycle bin it will be in the second-stage recycle bin for the remainder of the 93 days
-   Items deleted from the second-stage recycle bin can be restored by Microsoft Support if requested within 14 days

SPO Examining Sites – Managing Folder Permissions

Introduction to Managing Folder Permissions in SharePoint Online Sites

Whilst access **to** a SPO examining site and the relevant sections within it are managed via SharePoint groups, access **within** the different sections of the site can be managed using folder permissions.

By default, all users who are part of a SharePoint group can access all folders within the sections of the site they have access to.

For example:
a) Markers added to the 'Markers' group for the site can by default access all folders within the Markers Workspace unless access to relevant folders in that workspace is restricted
b) Exam board members added to an 'XXXX Exam Board' group will have access to all folders within the associated exam board workspace (including folders containing mitigating circumstances information) unless access to relevant folders in that workspace is restricted

'Inherited' and 'Unique' Permissions

The above is the case because SharePoint permissions work on the principle of 'inheritance'.

Inheritance works on the basis that the permissions applied to a workspace (e.g. that all markers can access the 'Markers Workspace') will apply to all of the folders within the workspace too unless the permissions are changed within one or more of the folders in the workspace.

The first step in managing the permissions within a folder is therefore to 'stop inheriting the permissions' from the workspace and to set up 'unique permissions' that apply to the folder.

In that way, **'unique' folder permissions** can be used to restrict access to folders within sections of the site where necessary. For example:
• To restrict access to folders for specific markers in the Markers Workspace
• To restrict access to Mitigating Circumstances folders in an Exam Board workspace

Managing Folder Permissions – Key Rules

Please note the following key points to be aware of when managing folder permissions:

1. All users (apart from a few exceptions) should be part of a SharePoint Group

For the best user experience and most straightforward permissions management, a user who needs access to a folder in a workspace should also be part of the SharePoint group that has access to that workspace.

For example, it is NOT recommended that you give markers access only to a specific folder within an examining site and that you don't also add them to the 'Markers' SharePoint group within your sites.

Adding the markers to the 'Markers' SharePoint group, for example, will:
• Give them access to the Markers Workspace and all folders that do not have restricted access
• Allow the markers to **navigate** to the folders that you have given them specific permissions to e.g. their own folder or a folder for an assessment that contains mark sheets etc.

There will be some exceptional cases where you will give users access to specific folders ONLY (and not also give them access to the site itself via a SharePoint group). This may be the case, for example, if you are giving users in another department access to a specific folder.

However, most users of an examining site should be granted access to a site by being added to a SharePoint group. This will give the user access to Home, Useful Resources and the relevant workspace. Access to folders within the workspaces can then be managed using folder permissions.

Giving SharePoint Groups access to Specific Folders

In the same way, if you only want a SharePoint group to have access to one or more folders within a workspace, you still need to give the SharePoint group access to the workspace as a whole so that users in the new group can navigate to any folders they've been given access to within the workspace.

2. Ensure that users can navigate to the folders they should have access to

If the folder you want to restrict access to is a **sub-folder within another folder** in a workspace, then make sure that the users that you want to be able to access the sub-folder also have **access to the folders above it** – so that they are **able to navigate to the sub-folder** within the workspace.

For example, if you want a marker to have access to their own folder a few levels down within the markers workspace – e.g. if their folder is located beneath a number of other folders such as **Markers Workspace > FHS > Dissertation > Joe Bloggs** – then the marker needs access to all of the folders above theirs to be able to navigate to their folder.

To enable users to navigate within workspaces (except into folders that are restricted to specific users only), restrict access only to the actual folders that should be accessible to specific individuals only (and not the folders above those folders also) – so that relevant users are able to successfully navigate down to folders that they should be able to access.

Other Useful Information

As well as giving specific individuals access to specific folders, you can also give SharePoint groups access to specific folders where that is the best way of managing access to a folder.

And in the same way that it is possible to restrict access to folders it is also possible to control who can see and access **specific documents / files** where that is needed too – see 'Managing Access to Documents / Files' for more information.

Managing Folder Permissions – Key Guidance Topics

- How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?
- How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?
- How do I give users from other departments access to a folder?
- How can I see who has access to a folder within a workspace?
- How do I reset a folder's permissions (if access to the folder has been restricted)?
- How do I remove an individual's access to a folder (if they have been given direct access to it)?
- How do I remove an individual's access to all folders that they have been given 'direct access' to within a workspace?

How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?

This help topic assumes:
  a) That the folder you want to restrict access to is already accessible to one or more SharePoint groups associated with the site e.g. the 'Markers' group or an 'XXXX Exam Board' group; and
  b) That you want to restrict the access to the folder to one or more specific individuals instead of all users in the SharePoint group that have access to the workspace that the folder is in

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**Other options to consider:**

If you want to give an individual access to a folder without changing who already has access to the folder, see '**How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing its permissions)?**'

If you have previously restricted access to the folder and you want to remove the access of one or more of the specific individuals that currently have access, see '**How do I remove an individual's access to a folder?**'.

Alternatively, you may even want to remove someone from a SharePoint group if you no longer want them to have access to any folders within a workspace or even the site itself. See '**How do I remove users from SharePoint groups?**', if this is the case.

To restrict access to a folder so that only one or a number of specific individuals (or SharePoint groups) can access it, complete the following steps:

1. Navigate to the location of the folder you wish to restrict access to and click on the **three-dot 'Show actions' menu** for the folder
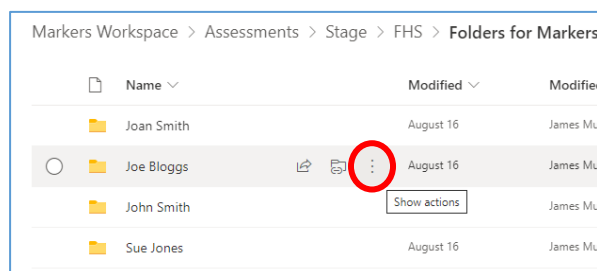
2. Select the '**Manage access**' option
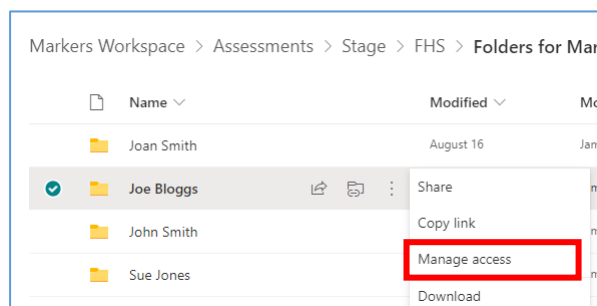
3. Click on the '**Advanced**' link at the bottom of the 'Manage Access' sidebar on the RH side of the screen

4. Within the folder permissions view click on '**Stop Inheriting Permissions**' and then click '**OK**'

5. To remove the SharePoint group(s) that you don't want to have access to the folder:
   a. Select the group(s) by **ticking the checkbox(es)** next to the name of the group(s)
   b. Click on '**Remove User Permissions**'
   c. Click '**OK**'

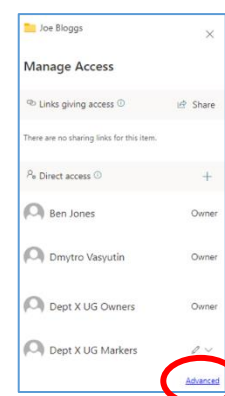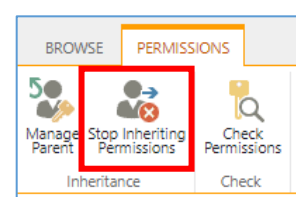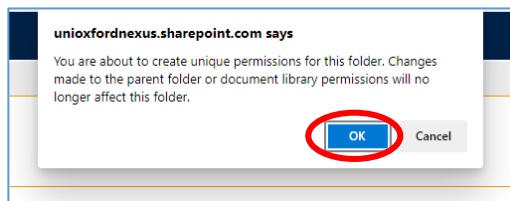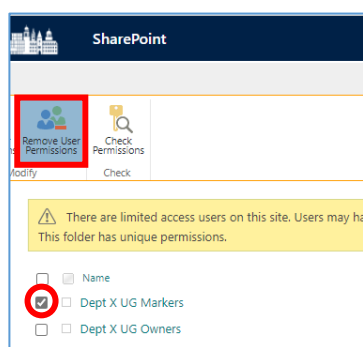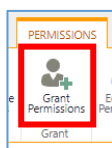*NB leave the 'Owners' group in the folder so that any administrators in the 'Owners' group can still access the folder.*

6. To add the individual or individuals that you would like to be able to access the folder:
   a. Click on '**Grant Permissions**'

   b. Search for and select the specific user(s) or SharePoint groups that you want to have access to the folder within the box that says 'Enter names or email addresses…'

NB to share the folder with an external (Non-SSO) user simply type in their email address.
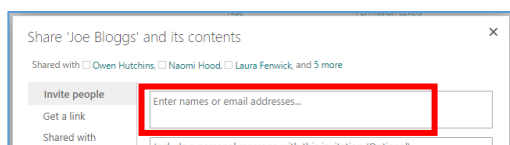
NB you can also search for and select a SharePoint group in the 'Enter names or email addresses…' box if you want to give a SharePoint group access to a folder.

   c. IF there are files or other folders **with unique permissions** *within* the folder, then:

If you untick 'Share everything in this folder, even items with unique permissions', the users (that you are giving access to the folder) will get access to everything within the folder apart from those things with unique permissions.

If you leave the 'Share everything in this folder, even items with unique permissions' option ticked the users (that you are giving access to the folder) will get access to everything within the folder.
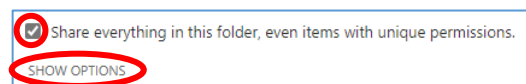
   d. Click on **SHOW OPTIONS**
   e. Only untick 'Notify people' (so that the user doesn't receive an email with a link to the folder) if they have access to the workspace the folder is in (through being part of a SharePoint group) and/or if you don't' want them to be notified

NB if you are giving an external user access (who has not yet logged into an Oxford SharePoint Online site) then it will not be possible to untick the 'Send an email invitation' box

   f. **Select the relevant permission level:** *Contribute: view, download, upload, and edit documents OR Read: view and download documents*
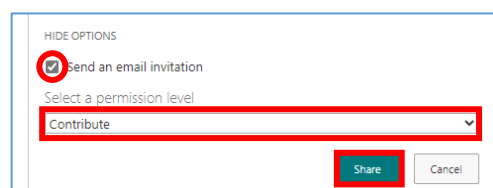
   g. Click '**Share**'

Navigating to Restricted Folders – Key Points to Note

1. All users (apart from a few exceptions) should be part of a SharePoint Group

For the best user experience and most straightforward permissions management, a user who needs access to a folder in a workspace should also be part of the SharePoint group that has access to that workspace.

For example, it is not recommended that you give markers access only to a specific folder within an examining site and that you don't also add them to the 'Markers' SharePoint group within your sites.

Adding the markers to the 'Markers' SharePoint group, for example, will:
- Give them access to the Markers Workspace and all folders that do not have restricted access
- Allow the markers to navigate to the folders that you have given them specific permissions to e.g. their own folder or a folder for an assessment that contains mark sheets etc.

There will be some exceptional cases where you will give users access to specific folders ONLY (and not also give them access to the site itself via a SharePoint group). This may be the case, for example, if you are giving users in another department access to a specific folder.

However, most users of an examining site should be granted access to a site by being added to a SharePoint group. This will give the user access to Home, Useful Resources and the relevant workspace. Access to folders within the workspaces can then be managed using folder permissions.

Giving SharePoint Groups access to Specific Folders

In the same way, if you only want a SharePoint group to have access to one or more folders within a workspace, you still need to give the SharePoint group access to the workspace as a whole so that users in the new group can navigate to any folders they've been given access to within the workspace.

2. Ensure that users can navigate to the folders they should have access to

If the folder you want to restrict access to is a **sub-folder within another folder** in a workspace, then make sure that the users that you want to be able to access the sub-folder also have **access to the folders above it** – so that they are **able to navigate to the sub-folder** within the workspace.

For example, if you want a marker to have access to their own folder a few levels down within the markers workspace – e.g. if their folder is located beneath a number of other folders such as **Markers Workspace > FHS > Dissertation > Joe Bloggs** – then the marker needs access to all of the folders above theirs to be able to navigate to their folder.

To enable users to navigate within workspaces (except into folders that are restricted to specific users only), restrict access only to the actual folders that should be accessible to specific individuals only (and not the folders above those folders also) – so that relevant users are able to successfully navigate down to folders that they should be able to access.

How do I give one or more specific individuals (or SharePoint groups) access to a folder (without changing who already has access to it)?

This help topic outlines how to give an individual (or SharePoint group) 'direct access' to a folder without changing who already has access to the folder.

Other options to consider:

If you want to restrict access to a folder (i.e. change its permissions) so that only one or more specific individuals can access the folder, see the following topic: '**How do I restrict access to a folder to just a one or a number of specific individuals (or SharePoint groups)?**'

If you want to give a user from another department access to an individual folder only (and not to the wider site) see '**How do I give users from other departments access to a folder?**'

If you want to give an individual access to a folder that is 'unrestricted' (i.e. to a folder that anyone with access to the workspace can access) then you may want to add the individual to the SharePoint group that has access to the workspace rather than giving them access to just the one folder. If this is the appropriate course of action, see '**How do I add users to SharePoint groups?**'
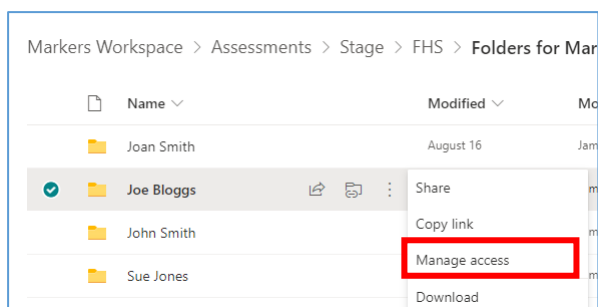

To give an individual or SharePoint group 'direct access' to a folder without changing who already has access to the folder, complete the steps outlined below.

NB if there are files or folders in the folder that are restricted to specific individuals and you don't want to give this user access to those files or folders (within the folder) follow the steps outlined in the following help topic instead: How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?
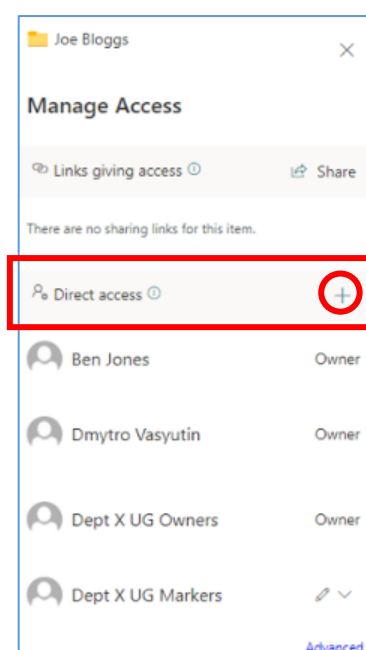
1. Navigate to the location of the folder you wish to give direct access to and click on the **three-dot 'Show actions' menu** for the folder
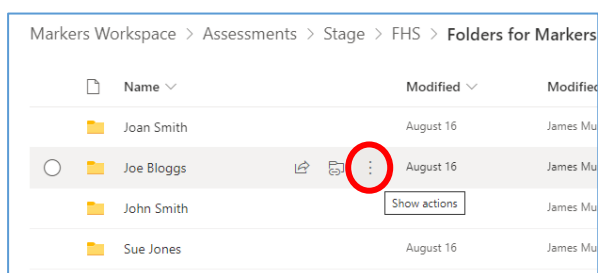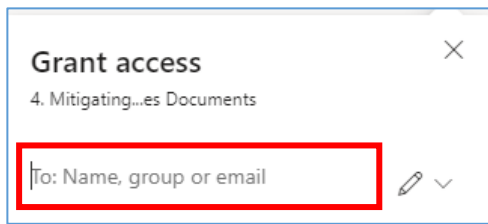

2. Select the '**Manage access**' option

3. Click on the **'Grant access' icon ('+')** within the '**Direct access**' section of the 'Manage Access' sidebar on the RH side of the screen

4. Within the '**Grant access**' pop-up window:
    a. Search for and select the individual(s) or SharePoint groups (one at a time) who you wish to give direct access to

NB to share the folder with an external (Non-SSO) user simply type in their email address.

You can also search for and select a SharePoint group in the 'Enter names or email addresses…' box if you want to give a SharePoint group access to a folder.

b. Select whether the individual(s) should have '**Can view**' (view and download documents) or '**Can edit**' (view, download, upload, edit documents)
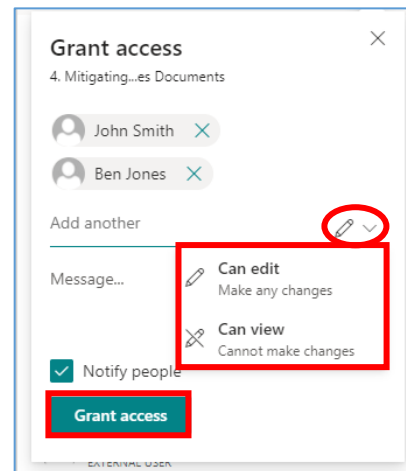
c. Click '**Grant access**'

Note that if the user(s), who you have given access to the folder to, does not already have access to the workspace that the folder is in, then you may want to add them to the relevant SharePoint group so that they can <u>navigate</u> to the folder within the workspace.

NB they will also get access to all 'unrestricted' folders within the workspace once they are added to the SharePoint group.

If this is the appropriate course of action, see '**How do I add users to SharePoint groups?**'

This also applies to SharePoint groups that you may have given access to the folder to – if that group does not already have access to the workspace that the folder is in, then you may want to give the group access to the workspace so that the users in the group can navigate within the workspace to the folder(s) they have been given access to.

See '**How do I give SharePoint groups access to workspaces within an examining site?**'

How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?

If there are any files or folders, **within the folder** that you want to give an individual 'direct access' to, that are restricted to a specific set of individuals only AND you don't want the user to have access to those restricted files or folders then grant the user access to the folder as follows:

1. Navigate to the location of the folder you wish to give direct access to and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option
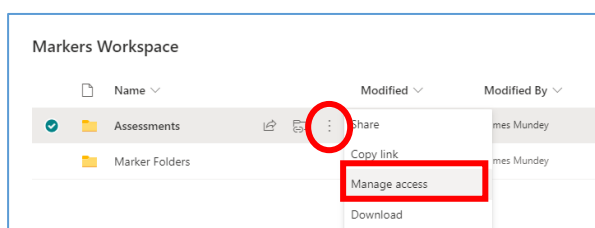
3. Click on the 'Advanced' link at the bottom of the 'Manage Access' sidebar on the RH side of the screen
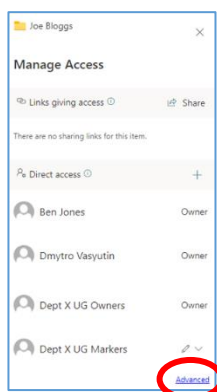
4. IF the folder inherits its permissions (i.e. the 'Stop Inheriting Permissions' button is visible within the folder permissions view), then click on 'Stop Inheriting Permissions' and then click 'OK'
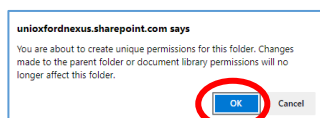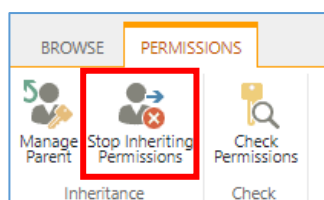

5. To **add the individual or individuals** that you would like to be able to access the folder:

   a. Click on '**Grant Permissions**'
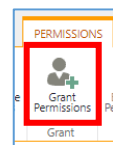
   b. Search for and select the specific user(s) or Sharepoint groups that you want to have access to the folder within the box that says 'Enter names or email addresses…'

   NB to share the folder with an external (Non-SSO) user simply type in their email address.
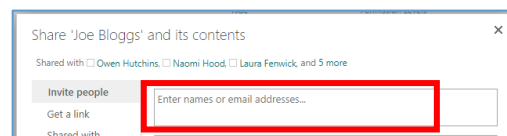
   c. Untick '**Share everything in this folder, even items with unique permissions**' (so that the users being added don't get access to the files / folders within the folder that have unique permissions)
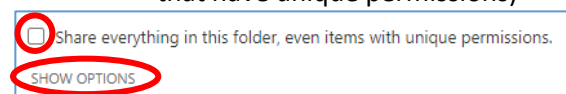
   d. Click on **SHOW OPTIONS**

   e. Select the **relevant permission level**: '**Read**' (view/download documents) OR '**Contribute**' (view/download, upload/edit document)

   f. Finally, click '**Share**'

How do I give users from other departments access to a folder?

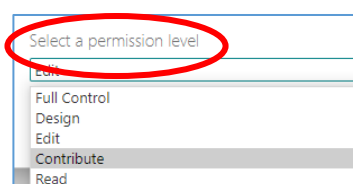Whilst exam board members, markers, and paper setters have access to the site and folders within workspaces via SharePoint groups, there are times when it is appropriate to give individual users (e.g. those from other departments who don't otherwise have access to the site) access to a specific folder e.g. when sharing a series of documents relating to a student with Information Compliance within the 'Other Document Sharing' workspace.

NB if there are files or folders in the folder (that you want to give a user from another department access to) that are restricted to specific individuals and you don't want to give this user access to those files or folders (within the folder) follow the steps outlined in the following help topic instead: 'How do I give one or more specific individuals (or SharePoint groups) access to a folder (that has restricted folders within it)?'

To give a user from another department access just to a specific folder:

1. Navigate to the location of the folder you wish to give direct access to and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option
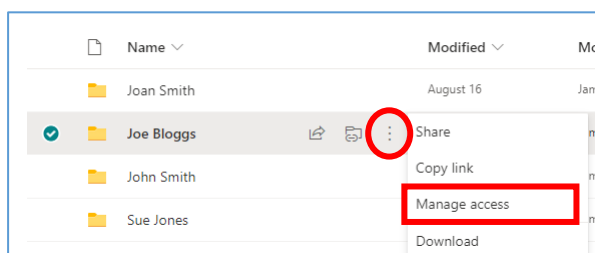
3. Click on the **'Grant access' icon ('+')** within the '**Direct access**' section of the 'Manage Access' sidebar on the RH side of the screen
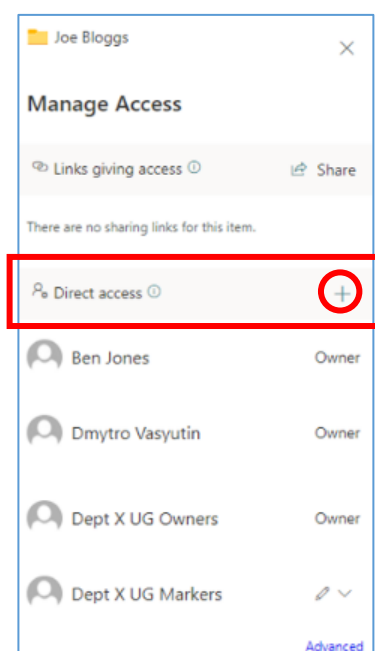
4. Within the '**Grant access**' pop-up window:
   a. Search for and select the individual(s) (one at a time) who you wish to give direct access to

NB to share the folder with an external (Non-SSO) user simply type in their email address.

   b. Select whether the individual(s) should have '**Can view**' (view and download documents) or '**Can edit**' (view, download, upload, edit documents)

   c. Ensure that '**Notify people**' is ticked as that will send a link to the folder to the user
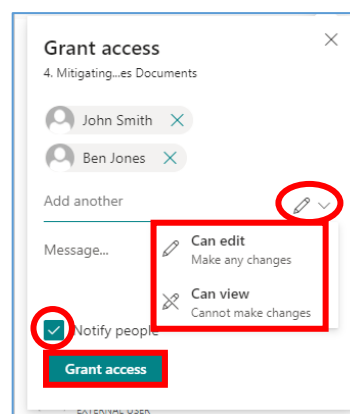
   d. Click '**Grant access**'

How can I see who has access to a folder within a workspace?

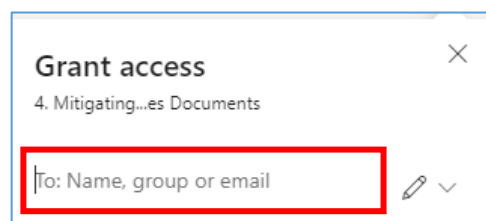To see who has access to a folder within a workspace:

1. Navigate to the location of the folder you wish to confirm who has access to and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option

3. The '**Manage Access**' sidebar shows:

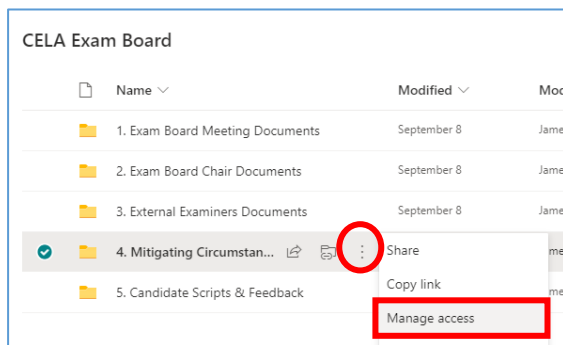   a) The 'site collection administrators' who have access to the folder – they are the individuals listed as 'Owner'
    b) The SharePoint groups that have access to the folder (NB to see which users are part of the SharePoint group, see 'How can I see which users have been added to a SharePoint group?')
    c) Any individuals (including external users) that have been given direct access to the folder (who are not part of a SharePoint group that has access to the folder)
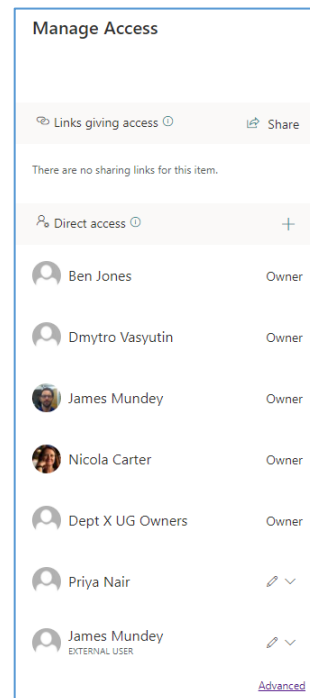
4. You can also click on the '**Advanced**' link at the bottom of the 'Manage Access' sidebar to see a different view of who has access (the site collection administrators won't be visible in this view):

How do I reset a folder's permissions (if access to the folder has been restricted)?

To 'reset' a folder's permissions if access to the folder has been restricted, complete the following steps:
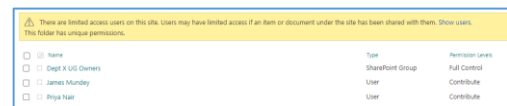
1. Navigate to the location of the folder you wish to reset the permissions for and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option
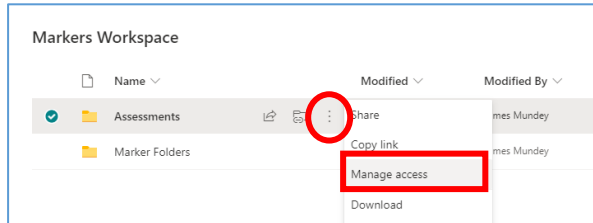
3. Click on the '**Advanced**' link at the bottom of the '**Manage Access**' sidebar on the RH side of the screen
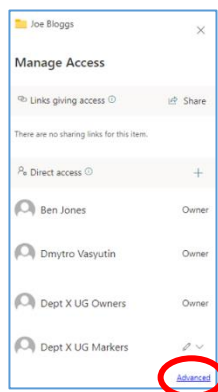
4. Within the folder permissions view, click on '**Delete Unique Permissions**' and click '**OK**'
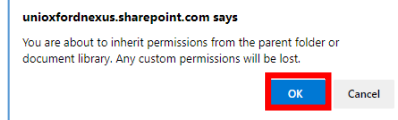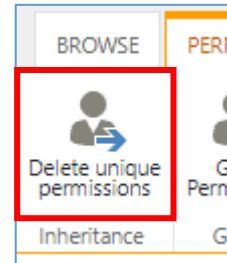
Note that deleting a folder's unique permissions will remove the access of any users who have been given direct access to the folder.

How do I remove an individual's access to a folder (if they have been given direct access to it)?

This help topic outlines how to remove an individual's (or SharePoint group's) access to the folder if they have been given **direct access** to the folder i.e. the individual is not part of a SharePoint group that has access to it.

The scenarios in which this help topic is relevant are as follows:
a) The folder has unique permissions i.e. its access is restricted to only one or more specific individuals who have been given direct access to it (including the individual whose access you now want to remove)
b) You have given an individual from another department direct access to a folder and you want to remove the individual's access to the folder

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Other options to consider:

If you want to remove an individual's access to a folder and they have access to the folder as a result of being part of a SharePoint group (that has access to the folder) then your options are:

1. Restrict access to a folder so that only one or more specific individuals can access the folder – and in that way the individual (whose access to the folder you want to remove) will no longer have access to the folder: see: '**How do I restrict access to a folder to just a one or a number of specific individuals?**'

2. Remove the user from the SharePoint group that has access to the folder if you no longer want them to have access to some or all of the folders within a workspace (depending on which folders the SharePoint group they are in has access to). See '**How do I remove users from SharePoint groups?**'

3. Remove a SharePoint group's access to the folder if all of the users in the SharePoint group should not have access to the folder anymore – follow the steps below to do that but rather than removing an individual user remove the group instead

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To remove an individual's access to a folder they have been given direct access to:
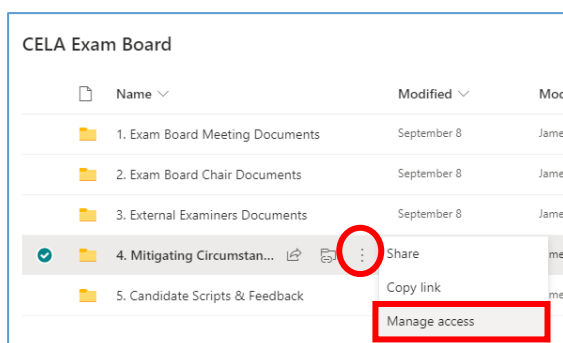
1. Navigate to the location of the folder you wish to remove the individual's direct access to and click on the **three-dot 'Show actions' menu** for the folder

2. Select the '**Manage access**' option

3. Within the 'Manage Access' sidebar identify the user whose access you want to remove, click on the dropdown icon (containing a pencil) to the right of their name and select '**Stop sharing**'
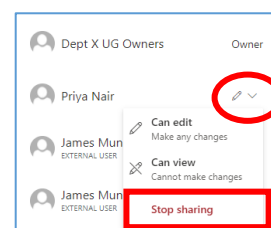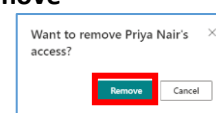
4. Click '**Remove**'

How do I remove an individual's access to all folders that they have been given 'direct access' to within a workspace?

This help topic outlines how to remove an individual's access to all folders – that they have been given 'direct access' to – within a workspace (outside of their membership of any SharePoint groups).

Other options to consider:

If you only want to remove an individual's access to a specific folder within a workspace, see '**How do I remove an individual's access to a folder (if they have been given direct access to it)?**'

To identify the specific files and folders a user has been given direct access to (outside of their membership of any SharePoint groups) see '**How can I see who has access to a folder within a workspace?**'

For how to remove individuals from SharePoint groups see '**How do I remove users from SharePoint group**s?'


To remove a user's access from all files or folders that they've been given direct access to within a workspace (NB you can't see 'at a glance' specifically which files and folders those are), complete the following steps:

1. **Click on name of the section of the site in the LH site menu** within which you want to remove a user's access to all of the files and folders they've been given direct access to AND then click on the **Settings 'cog' icon** in the top right hand corner of the site

2. Select '**Library settings**' from the list
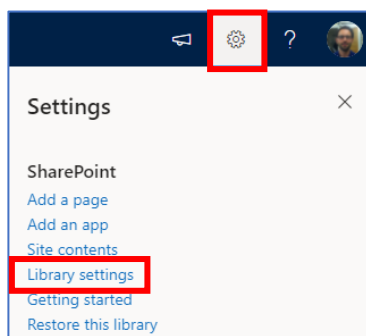
3. Within the workspace '**Settings**' window, click on '**Permissions for this document library**'
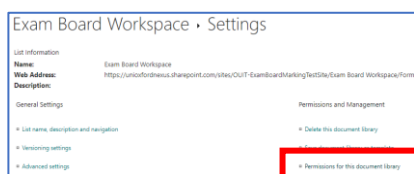
4. In the workspace permissions view, click on 'Show users'
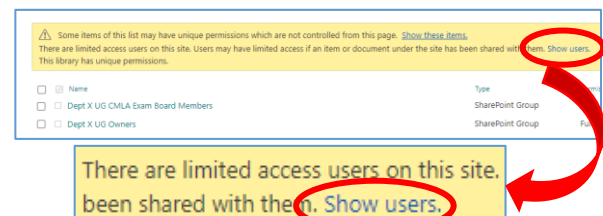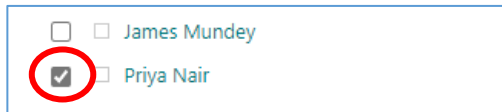
Users who have been given direct access to some of the folders or files within the workspace (outside of SharePoint groups) are then displayed along with the SharePoint groups that have access to the workspace:
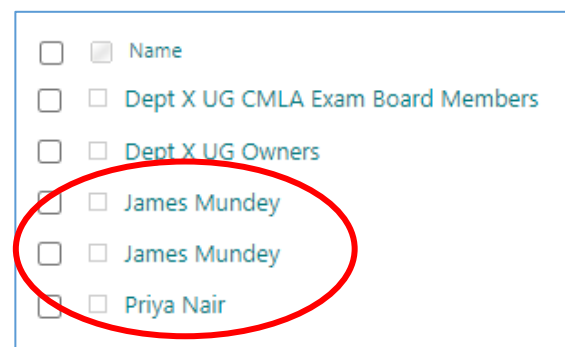
5. To remove a user's access to any folders or files they have been given direct access to in the workspace (outside their membership of a SharePoint group):

a. Tick the checkbox next to their name

b. Click 'Remove User Permissions'
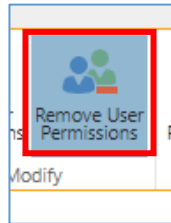
c. Click '**OK**'

The user will no longer have access to any folders or files they have been given direct access to in the workspace (outside their membership of any SharePoint groups).

6. *Repeat these steps for any other workspaces within which the user may have been given direct access to folders or files outside of their membership of any SharePoint groups*

Managing Access to Documents / Files

Access to documents is managed in largely the same way as access to folders is managed, except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How do I restrict access to a document within a site?

See '*How do I restrict access to a folder to just one or a number of specific individuals?*'

Largely the same steps apply to restricting access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

NB for obvious reasons the steps in relation to '*Share everything in this folder, even items with unique permissions*' don't apply to the sharing of an individual document.

How do I give an individual access to a document within a site (without changing who already has access to it)?

See '*How do I give one or more specific individuals access to a folder (without changing who already has access to it)?*'

The same steps apply to giving someone access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How can I see who has access to a document within a folder?

See '*How can I see who has access to a folder within a workspace?*'

The same steps apply to seeing who has access to a document except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

How do I remove an individual's access to a document (if they have been given direct access to it)?

See '*How do I remove an individual's access to a folder (if they have been given direct access to it)?*'

The same steps apply to removing someone's access to a document (if they have been given direct access to it) except that rather than navigating to the required folder to manage access you need to navigate to the relevant document or file to manage access to it.

Managing External Users

Giving external ('non-SSO') users access to SPO examining sites – by adding them to SharePoint groups and giving them direct access to folders (where applicable) – is no different from giving internal 'Oxford' users access to SPO examining sites.

To give external users access to sites follow the details outlined in topics such as:
- How do I ADD users to SharePoint groups within SPO examining sites?
- How do I restrict access to a folder to just one or a number of specific individuals (or SharePoint groups)?

What Steps Does An External User Need to Complete to Login to an Oxford SPO Site?

The following section is also in the '***How to Access Oxford Examining Sites (Non-Oxford User)***' guide; that guide can be shared with external users to provide guidance to them about how to access SPO examining sites.

What Steps do I Need to Complete to Login to an Oxford SharePoint Online Site?

When you are given access to an Oxford SharePoint Online (SPO) examining site, a SharePoint email is automatically sent to the email account of the email address with which you have been given access to the site, notifying you that you have been given access to the site.

Note that the email is very likely to be in your <u>spam</u> or <u>junk</u> folder so check there for the notification email.

The email, once you have opened it, will look something like this:
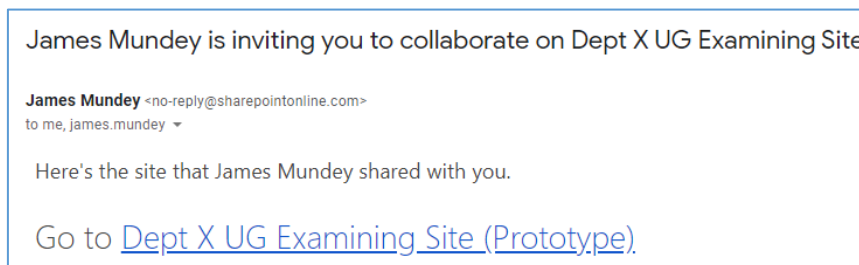
Once you have found and opened the email, you need to complete the following steps to login to the SPO site:

1. Click on the link to the site in the SharePoint notification email (see screenshot above)
2. You will be presented with the following 'Welcome to SharePoint Online' screen
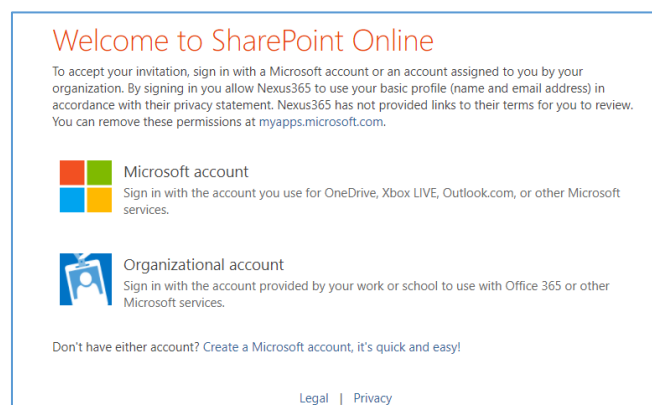
Select the relevant option (only one of a, b, or c):

a) If you have a personal Microsoft account (associated with the email with which you have been given access to the SPO site), sign-in to the Oxford SPO site using that personal Microsoft account by clicking on the '**Microsoft account**' option and following the standard login steps

b) If you have a Microsoft work account (associated with the email with which you have been given access to the SPO site), sign-in to the Oxford SPO site using that Microsoft work account by clicking on the '**Organizational account**' option and following the steps to login

Note that the only details that Oxford has access to in relation to your organisational account are your name and email address. (The same applies for personal Microsoft accounts too).

c) If you do not already have a Microsoft account (associated with the email with which you have been given access to the SPO site) you can create one in a few simple steps by clicking on '**Create a Microsoft account, it's quick and easy!**' and following the steps to create an account and login

3. Once you have logged into your Microsoft account, the Oxford 'examining' site Homepage will be displayed and you will be able to navigate around the parts of the site that you have been given access to

4. Save the URL of the site as a favourite so that you can easily access the site again when you need to log back into the site in future OR save the original SharePoint notification email somewhere where you can easily access it again in future (so that you have the link for logging in again)
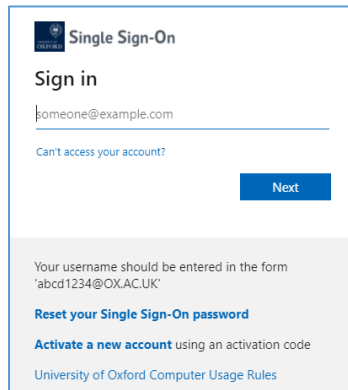
How do I log back into an Oxford SharePoint Online Site?

When you want to login to the SPO site again:

5. Click on the link to the site in the original SharePoint notification email or that you have saved as a favourite

6. You will be presented with one of the following screens:

a) The 'Welcome to SharePoint Online' screen again (in which case follow steps 2a or b):
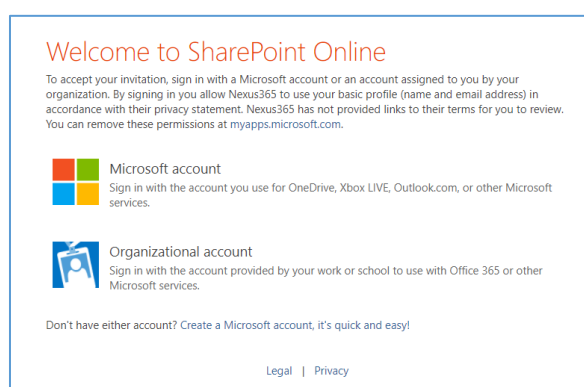
b) Or the following Oxford login screen:

In both cases you should login using:
- The email address with which you have been given access to the SPO site
- The password of your Microsoft account (which you used to login to the SPO site)

Notes for Administrators

Note that when you add an external user who has not authenticated with the University before to a SharePoint group you won't see a record for the user in the list of users associated with the SharePoint group **until** the user has successfully logged into the site (and authenticated with the University for the first time).

This is because the first time the user logs into any Oxford SPO site they effectively become 'known' to Oxford i.e. Oxford then treats them as an authenticated user (and at that point the University has access to their name and email address).

Going forward, the user will then appear in the same way an internal user will appear when you search for users when adding them to groups and folders in SPO sites.

Login Guide for External Users

As mentioned above, a short login guide has been created for external users to share details of how they login to Oxford SPO sites – see the 'How to Access Oxford Examining Sites (Non-Oxford User)' guide for sharing with external users as applicable.

Deleting & Restoring Items and Using the Recycle Bin

Within a SPO site it is possible to delete:
- Sections of a site including all of their contents
- Folders including all of their contents
- Individual files and documents

For more information about how to delete items within SPO examining sites see the following topics in the 'SPO Examining Sites Administrator Guide':
- How do I delete workspace / section of a site that I don't need?
- How do I delete one or more folders?

The Recycle Bin

Please note the following details regarding items in SPO sites that are deleted:

- Items that are deleted are sent to the recycle bin
- Items are retained for 93 days from the time they are deleted and can be restored in that time
- Any SPO user can delete items that they have deleted that are in the recycle bin
- Items deleted from the recycle bin are sent to the 'Second-stage recycle bin' (which is accessible to department administrators)
- If something is deleted from the recycle bin it will be in the second-stage recycle bin for the remainder of the 93 days (from the point of its original deletion) and it can be restored by department administrators in that time
- After 93 days deleted items can no longer be restored by any Oxford users but they can be restored by Microsoft Support if requested within 14 days (contact Oxford's SPO support team if that is required)
- If items, such as folders, that are deleted have unique permissions (e.g. they have been restricted to specific users) the unique permissions are restored when the folders are restored (but you should check this once the item has been restored)
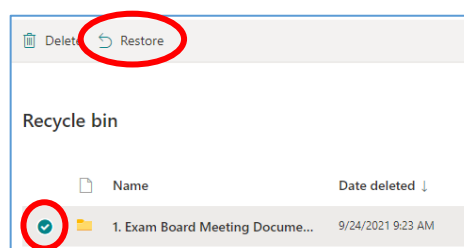
How do I restore a deleted item?

To restore a deleted item:

1. Navigate to the Recycle bin (see the link at the bottom of the LH site menu)
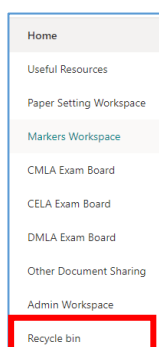
2. Select the item to restore and click 'Restore'

Note that if items, such as folders, that are deleted have unique permissions (e.g. they have been restricted to specific users) the unique permissions are restored when the folders are restored (but you should check this once the item has been restored).