



SharePoint Online 'Examining' Sites Getting Started Guide

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SharePoint Online (SPO) 'Examining' Sites

Getting Started Guide

This 'Getting Started Guide' provides an overview of the new SharePoint Online 'examining' sites as well as the steps you need to complete to get the site(s) ready for use in your department.

The guide covers the following topics:

- Key information about the design, structure and capacity of the examining sites
- Details of the different sections / workspaces within the sites
- An overview of how to manage access to the sites
- The key steps you need to complete to get your sites set up ready for use
- Information about how to manage and maintain your site(s)
- How to give other Administrators in your departments access to the sites

If you prefer to see all guidance in one document, see the '**SPO Examining Sites Administrator Guide**' which contains full details of how to set-up, manage and maintain all of the aspects of your SPO examining site(s) including the details in this Getting Started Guide.

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.

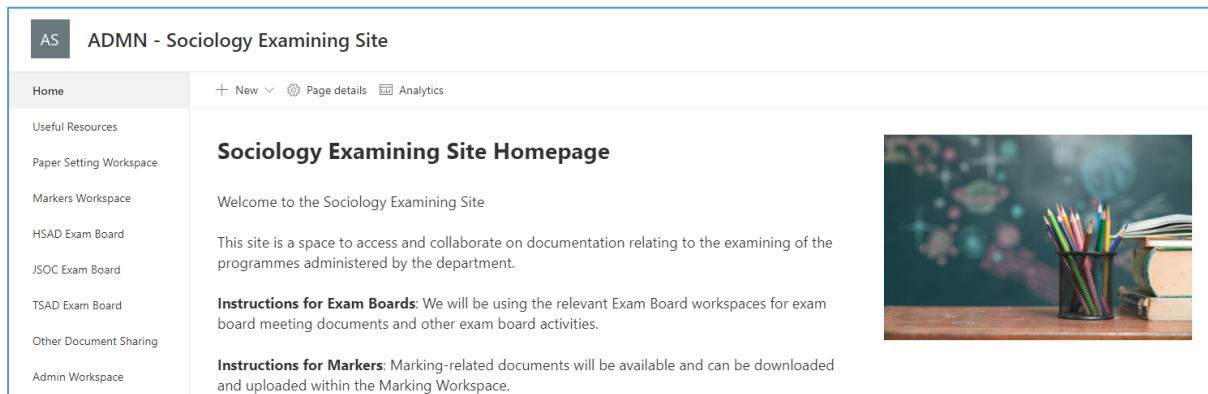
The project team will be providing 'early life support' during MT21 after which ongoing support arrangements will be confirmed and communicated.

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.

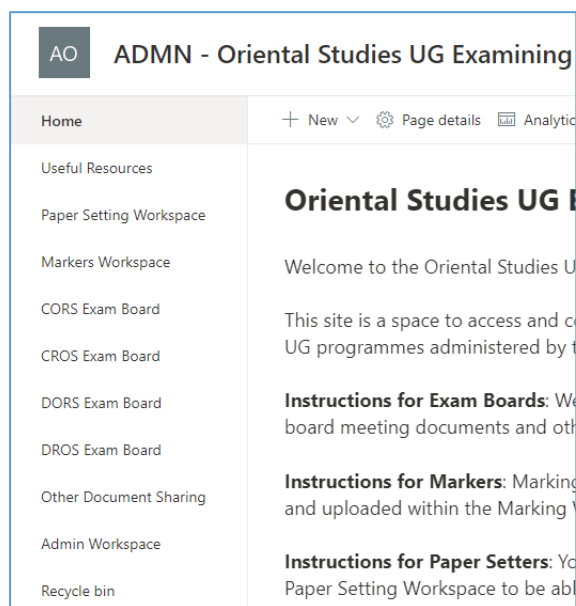
Whilst the SPO ‘examining’ sites have been ‘pre-built’ ready for use, departments will need to complete a number of steps to set up the site for use in their department e.g. add users and create folders as appropriate – see the steps outlined in the ‘Getting Started’ section of this guide.

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. See the ‘Managing Folders in a SPO Site’ and ‘Managing the Sections of a Site’ quick reference guides.

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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> A separate space for each 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	<ul style="list-style-type: none"> 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 Inspira)
6	Other Document Sharing	<ul style="list-style-type: none"> A space to share documents with other departments e.g. joint schools departments; Education Policy Support; Information Compliance etc. ➤ <i>Please note:</i> completed results templates should continue to be shared with ARO via the separate ARO-managed site ➤ <i>Please note:</i> appeals-related documentation should continue to be shared with the Proctors via links they share with you
7	Admin Workspace	<ul style="list-style-type: none"> 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?’ in: the ‘Managing Folders in SPO Sites’ quick reference guide or the full ‘Administrator Guide’.

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?’** in the ‘Managing User Access to Folders’ quick reference guide.

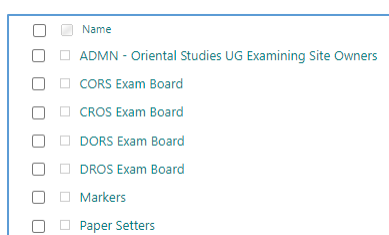
Pre-Built ‘Examining Site’ SharePoint Groups

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 this 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.



A screenshot of a SharePoint interface showing a list of pre-built groups. Each group has a checkbox and a name. The groups listed are: ADMN - Oriental Studies UG Examining Site Owners, CORS Exam Board, CROS Exam Board, DORS Exam Board, DROS Exam Board, Markers, and Paper Setters. The 'Markers' group is currently selected.

<input type="checkbox"/>	Name
<input type="checkbox"/>	ADMN - Oriental Studies UG Examining Site Owners
<input type="checkbox"/>	CORS Exam Board
<input type="checkbox"/>	CROS Exam Board
<input type="checkbox"/>	DORS Exam Board
<input type="checkbox"/>	DROS Exam Board
<input checked="" type="checkbox"/>	Markers
<input type="checkbox"/>	Paper Setters

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	<ul style="list-style-type: none"> XXXX Exam Board groups Markers group Paper Setting group Owners group (Department Admins) 	<ul style="list-style-type: none"> Read-only Read-only Read-only Full Control
2	Useful Resources	<ul style="list-style-type: none"> XXXX Exam Board groups Markers group Paper Setting group Owners group (Department Admins) 	<ul style="list-style-type: none"> Read-only Read-only Read-only Full Control
3	Paper Setting Workspace	<ul style="list-style-type: none"> Paper Setting group Owners group (Department Admins) 	<ul style="list-style-type: none"> Contribute Full Control
4	XXXX Exam Board (one for each exam board)	<ul style="list-style-type: none"> XXXX Exam board group (each Exam Board group has access to the corresponding Exam Board workspace) Owners group (Department Admins) 	<ul style="list-style-type: none"> Contribute Full Control
5	Markers Workspace	<ul style="list-style-type: none"> Markers group Owners group (Department Admins) 	<ul style="list-style-type: none"> Contribute Full Control
6	Other Document Sharing	<ul style="list-style-type: none"> Owners group (Department Admins) 	<ul style="list-style-type: none"> Full Control
7	Admin Workspace	<ul style="list-style-type: none"> Owners group (Department Admins) 	<ul style="list-style-type: none"> 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).

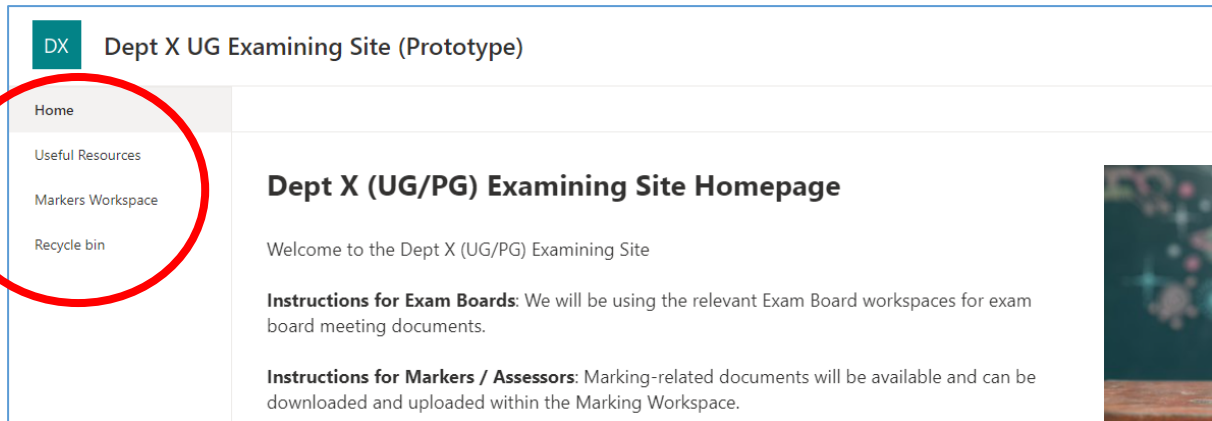
You are able to change which groups can access which parts of the site, if appropriate, and you can also create additional SharePoint groups within a site (and give the groups access to relevant areas within the site) as needed for your department. See the details in the 'Getting Started' section of this guide for more details about how to do these things if appropriate in your department context.

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. See the 'Managing User Access to Folders' quick reference guide for more details.

Examples of what Different Users See and have Access To

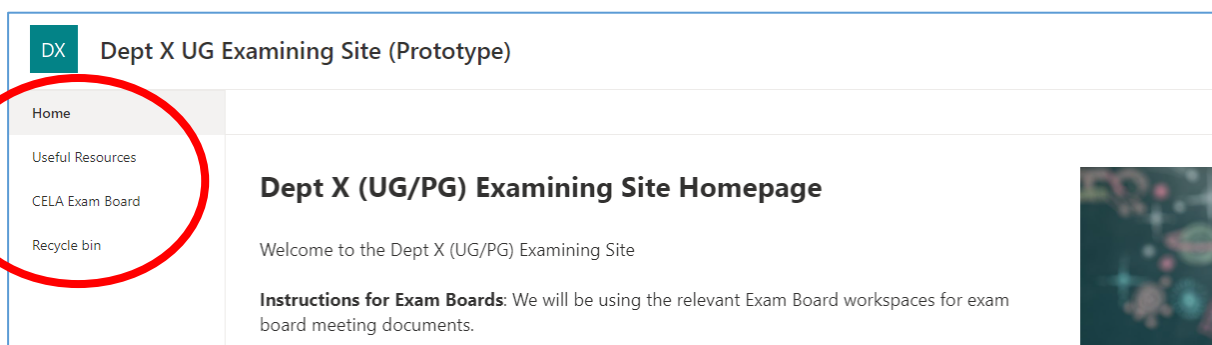
Depending on the SharePoint groups that users have been added to, they will see different workspaces when they access the examining site – see the following examples:

An individual added to the **Markers group**, for example, will see the following ‘sections’ of the examining site:



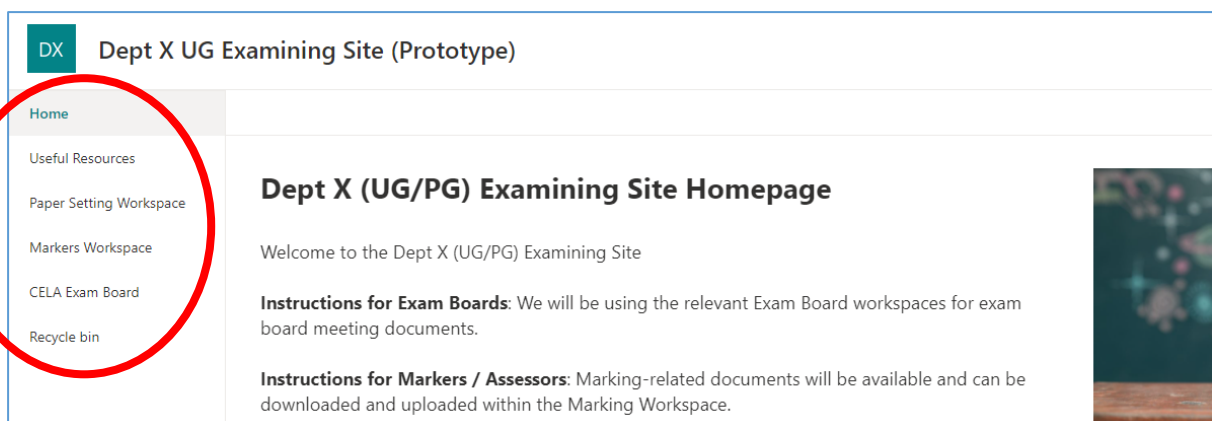
Example of a user's view if added to the Markers group

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? ’ below
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 the ‘ Managing the Home page ’ quick reference guide
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 the ‘ Managing Folders in a SPO Site ’ quick reference guide
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 the ‘ Managing User Access to Folders ’ quick reference guide
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 the ‘ Managing Users within SharePoint Groups ’ quick reference guide

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	See the ' Managing SharePoint Groups ' quick reference guide. AND for seeing how to give a (new) SharePoint group access to specific folders see the ' Managing User Access to Folders ' quick reference guide.
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	For how to create new site sections, see the following quick reference guide: ' Managing the Sections of a Site '. AND for managing which groups can access the new site section(s) see the ' Managing SharePoint Groups ' quick reference guide.
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	See the ' Managing the Sections of a Site ' quick reference guide.
3	Rename / remove existing workspaces	If you want to amend or remove any workspaces for any reason	See the ' Managing the Sections of a Site ' quick reference guide.

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 Inspira) that have been shared on examining sites, once marking is complete.

If the retention timelines on Inspira are not sufficient (scripts and submissions are retained on Inspira 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

As outlined above, 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 – Managing Department Administrator Access

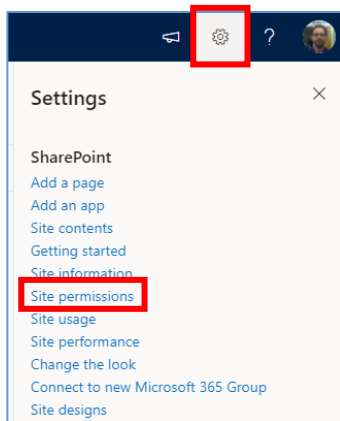
How do I give access to SPO examining sites to other Administrators in my Department?

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.

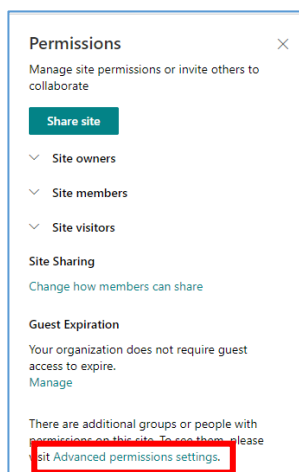
To give other administrators in your department – who should have full access to all parts of the examining site – access to a site, you should make them 'Site Collection Administrators':

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

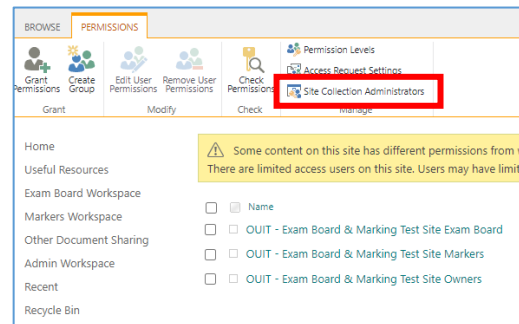
2. Select **'Site Permissions'** from the list



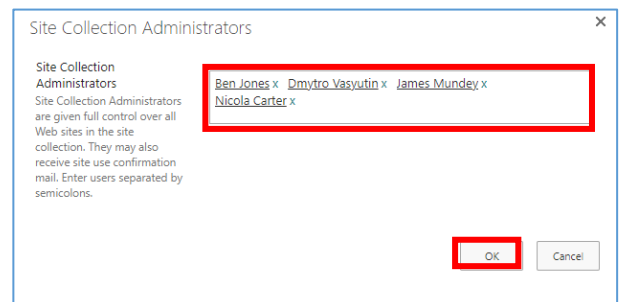
3. Click on **'Advanced permissions settings'** in the 'Permissions' sidebar



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?' in the 'Managing Users in SharePoint Groups' quick reference guide. This will mean that they are notified of any access or sharing requests along with yourself.