The GW4 Portal: Standard Operating Procedures

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1   Background

The GW4 Alliance is comprised of the University of Bath, the University of Bristol, Cardiff University and the University of Exeter. Note that the universities are always listed in alphabetical order. The stated aims of the GW4 Alliance are to:

- develop new knowledge with the capacity to change lives and society;
- deliver research capability at a globally competitive scale;
- foster new talent for the world stage;
- forge new and stronger relationships with commercial, non-profit, academic, healthcare and government organisations;
- drive economic growth through creation of a vibrant and integrated innovation ecosystem.

1.1   GW4 Portal

The GW4 Portal is an internal platform, powered by Microsoft SharePoint, for collaboration and dissemination of internal events and announcements.

The GW4 Portal enables researchers to have live discussions and share information securely. The Portal will also act as a home for best practice exchange and detailed guidance on applying for GW4 grants/training, freeing up the public-facing website. The GW4 Portal is now technically ready to host users from across GW4.

1.2   Workstreams

The main activities of GW4 are contained within four workstreams, each led by one of the partner universities:

- Building Capacity, Developing People (Bristol): doctoral training and staff development;
- Building Communities (Exeter): awarding GW4 Initiator and Accelerator grants to new and existing research collaborations;
- Shared Infrastructure and Equipment (Bath): establishing shared access to scientific, IT and other (e.g. library) resources;
- Connectivity and Communication (Cardiff): Marketing, strategy, shared online platform.

1.3   Portal Aims

The core aims of the Portal are as follows:

- To recruit staff/postgraduate students onto the Portal in a phased manner, allowing for iterative feedback and ensuring consistent customer service.
- To promote the Portal as a 'one-stop shop' for GW4 staff and postgraduate students to access secure collaborative spaces, share internal news and events and find information on how to apply for grants/training and best practice guidance on collaboration.
- To create a network of early adopters for the Portal who will act as ambassadors and will encourage other colleagues to use it – enabling the Portal user network to grow organically.

1.4   Target audiences

The key target audience can be split into the following groups. It is common for people to fall into more than just one category.

1.4.1   GW4 core staff
- Directorate

- Work stream staff
- Board and Council (and supporting administrators)

1.4.2 Research
- Existing members of GW4 research communities
- Applicants for next Building Communities round
- Members of strategic research or infrastructure initiatives (e.g. cryo-EM, SIA, Isambard, Bridging the Gap)
- Members of working groups (as previously identified)
- Attendees of GW4 researcher development events
- Broader research staff beyond GW4 projects (focusing on Heads of Schools/Research Institute Directors/ECR recommendations)

1.4.3 Professional services
- Members of informal GW4 staff networks (e.g. Engagement, Careers, IT, Communications)
- Staff supporting GW4 initiatives across professional services / management / administration

1.4.4 Postgraduate students
- Managers/administrative staff working on doctoral training programmes associated with GW4
- Postgraduate research students in GW4-associated doctoral training programmes
- Doctoral College/Academy staff
- Attendees of GW4 doctoral events/training
- Non-cohort based doctoral students interested in professional development and collaboration

2 Getting Started

The GW4 Portal is designed to be easy to navigate via the tiled layout. Simply click on the relevant tile or links to navigate through the contents. On most pages there are also navigation elements, such as links to the GW4 Portal home, Building Communities, Doctoral Training, Developing Our Staff, Sharing Infrastructure and Help. Note that some of the links are to subsite for which you may not have permissions to view the content. Please contact the relevant owner of the site to request access.

2.1 Searching for content

Most pages include a search box on the top-right of the page. This can be used to quickly search for the document, page or items you have access to. The search looks for the terms wherever they occur in the item. When a search is made it is against an index of everything in the site; newly added items may not be immediately searchable.

2.1.1 Search Results

The search results will be shown on the new page, with the most relevant item displayed first, and the search terms highlighted. The left-hand side of the pages will give you options on further refine the result by type, author or date.

You can hover over the results to see a preview of the result and to see additional options associated with the result.

2.2   Opening documents

The portal can be used to store documents and files. These could be Word document, PDFs, Excel spreadsheets, PowerPoint presentations or more.

It is possible to edit Word documents, Excel spreadsheets and PowerPoint presentations directly in the browser itself without resorting to a desktop version of the program. Simply click on the document and it will open in Office Online. If you wish to make changes you can then click on the Edit Document button and then choose to Edit in the Browser, or if you have the application installed, Edit in application. If you edit in the browser other users can also view an edit the document simultaneously. You do not have to save the changes as they are automatically saved.

The Office Online versions of Word, Excel and PowerPoint are not as fully featured as the desktop version, so it may be necessary to open the file in the desktop version of the application. If you wish to make changes to a document and prevent others from making changes at the same time you can check it out.

2.3   Sharing or restricting documents

Typically, uploading a document to the library is sufficient to allow people to access it. When you upload files into a document library they inherit the permissions from that library; anyone who has rights to the library will also gain those rights for the document. However, there may be times when you wish to share a file with a user who does not have access to the library, and it is possible to grant additional access to specific files and folders without granting access to the whole site.

2.3.1   Sharing and Linking

Sharing and linking are similar. If you click on Share the Portal will automatically send a message via email; if you click on Copy link, you can then send it via a different method (e.g. Skype) or include in documentation. Simply select the file or folder and then click on Share or Copying link in the menu.

2.3.1.1   Share

When you click Share, you can email a link to a person or group that they can use to access the folder or document. Just enter their name or email address, optionally type a message, and click Send and an automated message will be sent.

2.3.1.2   Copy link

Clicking Copy link creates a link that you can use to share a document or folder and copies it to your clipboard. You can then choose to share it in a method of your choosing.

2.3.1.3   Link settings

In Link Settings, you can choose who your sharing link gives access to. The options are as follows:

- **Anyone** creates an anonymous ink that anyone can use to access the document or folder without having to log in; currently this is disabled.
- **People in <organization>** creates a link that only people in your organization who are logged in can use to access the document or folder. However, this only applies to people who have a GW4 account; all other users (i.e. users who are logged in with their institutional account) are considered external users
- **People with existing access** create a link that can be used to access the document or folder but does not change the permissions
- **Specific people** creates a link that only the people that you specify can use to access the folder or document. If you click this option, you need to enter the names or email addresses of the people to whom you want to give access to.

Once you have selected who you want to give access to, select or clear the Allow editing check box depending on what type of access you want to allow, and then click Apply.

2.3.1.4 *Stop and amend sharing*

If you want to change who has access to the folder or document, or if you wish to remove the sharing permissions select the file or folder and open the details pane by clicking on the button in the menu.

On the right-hand side of the page the details panel will be displayed. In the Has Access section you file find the details of who have permissions for the file. You can hover over the icons to see further details.

Clicking on the Manage access link shows full details of all the permissions granted. Here you can add, update or remove permissions, including those automatically granted due to inheritance from the document library.

2.4 Upload or add a new file

2.4.1 Create a new file

You can quickly create new files directly within SharePoint. Simply click on the New button and select the appropriate file type. Due to limitations in Office Online, the default proofing language will be set as American English, although this can subsequently be changed.

Your file will be automatically saved in the document library, and you can rename it from with the online version of the application, or by browsing to the file in the library and right-clicking and selecting Rename.

2.4.2 Upload a file

You can easily add documents to an existing library by dragging and dropping them on the library in the browser. If you are using Edge browser you can upload files and folders. For other browsers you can only add files. Alternatively, you can click on the Upload button and browse to you file and upload it. Please note that there are several file types which are automatically blocked. You can only upload 100 files or fewer when using drag and drop to add files. Also, the maximum file size is 15GB.

When uploading files and folders, you need to be aware of path and file name length. SharePoint Online supports up to 400 characters for the total file and path length.

2.4.3 Open with Explorer

Another way to upload multiple files and folders it to use the 'Open with Explorer' option. This allows you to open your document library in File Explorer, as if you are working with files and folders on your computer. You can then easily drag and drop and navigate through structure.

To open in File Explorer click on the drop-down arrow in the tool bar and select 'View in File Explorer'. A new tab will be opened and after 5-10 seconds a File Explorer will open containing the document library. This method is very good for adding larger sets of documents and is an easy familiar interface. However, there can be issues with illegal characters in file name and it encourages the continuation of using folders and there are good reasons to not user folders. Once the files have been uploaded metadata should be added.

2.5 Portal Pages

Pages are one of the main types of content on the Portal. They are quick to add and edit, and can contain dynamic contents from other parts of the portal.

2.5.1 Adding Pages

To add a page click on New in the menu and select Page from the drop-down menu. A new page will be created and you can then give it a title, and this is used as the URL.

The page will be create using a standard grey header image. You can use the menu to remove the image, which will make the header smaller, or to change it to a different image. If you struggle to find suitable images there are useful links on the header images page.

To add contents to your page click + and then select the web part you wish to use. You can also adjust the layout. For further information please see the web parts page.

When you are happy with the page click on Publish and your changes will be visible to others.

2.5.2 Editing a page

To edit a page, navigate to it and click on Edit in the menu bar. You can then update the content and republish the page to make is visible to others

2.5.3 Deleting a page

To delete a page, navigate to the page library and click on the vertical ellipsis by the page you wish to remove. Then click on Delete from the menu.

2.5.4 Other page types

From the page library when you click on New there are four options:

- Wiki Page: This is a classic SharePoint page. It uses the older style interface but allows for more options, such as tables and JavaScript.
- Web Part Page: This is another classic page, usually used to display content from lists and libraries
- Site Page: A Modern page. This is the recommended option and displays well across devices.
- Link: This allows you to store links to websites and documents within the library.

3 Document creation and collaboration

The Portal can support document creation and collaboration. Your site has been created with a document library, and this can be used to store files, documents and images.

3.1 Access the library

The library should be accessible from any page within your site. Simply navigate to the site and then look at the left-hand menu. Within it there should be listed 'Documents'. Click on this and then you will be able to access the document library.

When viewing the library the right-hand side of the menu bar provides options to change the view (e.g. List, Tiles, View in File Explorer), or filter the view (e.g. Modified, Modified By, Type). You can also select a file and click on the Info icon to discover more details about the item selected.

3.2 Upload files to a site

To upload to files to the document library there are two ways: upload and drag and drop.

When uploading files and folders, you need to be aware of path and file name length. SharePoint Online support up to 400 characters for the total file and path length. In most cases this should not be an issue.

3.2.1 Upload

To upload documents, open document library and click on Upload in the menu bar. When the Add a document dialog box is displayed, click Browse to upload an individual file. You can upload multiple files by holding down either the CTRL or Shift key, and selecting more than one file.

When you've selected the file or files to upload, click OK.

3.2.2 Drag and Drop

Another way to add files is to drag and drop them. Open the document library and on your computer open the folder containing the files in Explorer.

Then simply select the files you wish to add and drag them onto the library in browser. The files will be then uploaded and should appear in the library when complete. Note there is a limit of 100 or fewer files when using drag and drop.

3.3 Share documents

Rather than emailing files around, upload them to your site and then share them from there. This removes the issues with multiple versions of the same file, and then having to subsequent merge multiple versions of the same file back into a single consistent file.

3.4 Create online

It is possible to create new documents directly in the site without first creating them on your device. Simply click on the New in the menu in the appropriate location and click on the corresponding application for the desired file.

A new file will be created with a standardised name. You can either use the 'Save As' option with the application's menu or close the tab containing the file and return to the document library and rename it there. There is no Save button in the application as the file is constantly saved.

When editing in the browser like this multiple users can simultaneous edit the file.

Note that when files are created this way the proofing language is set to American English. This default language cannot be change but the proofing language can be subsequently changed.

3.5 Real-time co-authoring

In SharePoint, multiple people can work together on a Word document, Excel spreadsheet, or PowerPoint presentation simultaneously. When you open the file you will be able to see who else is editing it. As changes are made all users will be able to see them in real time.

In addition comments can be added and then these can be incorporated or excluded.

3.6 Organising the files

3.6.1 Folders

It is possible to create folders in the library to organise content. If too many folders are used issues can arise. For example, if many nested folders are used then the contents becomes hard to find. Also one person's organisation of the document may not suit another.

To create a new folder navigate to the appropriate location and click on New in the menu. You can then select Folder and complete the dialogue; the folder is then created.

It is possible to upload a folder and the files within in if using Edge or Chrome browsers.

3.6.2 Metadata

Another method of organising content is to use metadata. This is more powerful that folders, and it also overcomes the differing structural approaches.

3.7 Protecting content

3.7.1 Version control

When versioning is enabled in your document library is protected; version control is turned on by default for the library. This means that changes can be undone if required. Also if the file is deleted it can be retrieved from the Recycle Bin.

It also means that you no longer have to work out which is the correct version; you will always have access to the latest version. Furthermore it removes the need to include versions in the file name.

3.7.2 Require check out

The site owner can configure the library to require the end user to check out files prior to being able to make changes, and to check them back in after the changes have been made. This means the file is locked to an individual and others cannot edit it until the file has been check back in or the changes are discarded.

3.7.3 Content approval

The site owner can configure the library to require approval of the content before it becomes visible to others who use the library. As the author, you can see the file listed and work with it, but nobody else can.

4 First steps for Site Owners

When a site is first set up for you it is empty. Below are listed some steps to help you get started.

4.1 What is the purpose of your site?

Your site can support different types of activity; below are listed some typical ones. Your site is not limited to a single type of activity, and you do not have to enable them all at the start, but instead can progressively build over time.

- Discussion and Exchange
- Document creation and collaboration
- File centralisation and storage
- Publishing news and updates

4.2 Who is going to participate?

Your audience is going to be made up of different groups of users. They are likely to have differing needs and access requirements, and their participation can change over the lifespan of the community. Please see the permissions section below for more details around managing permissions.

4.3 Boosting engagement

The home page is the first impression you get to make on the users. It should be relevant to new and existing users without being overloaded with information.

Keep it brief and instead signpost to the most common uses for your community. It should explain to new users the purpose of your site and it provide updates for the existing users.

The Classic SharePoint homepage can be considered dated and cluttered, and so the site has been created using the Modern UI. This has the advantage of then also working on mobile phones, tablets, etc. A Hero web part has been added to the homepage with suggested links. These need to be adjusted to work with your site, or changed to suit your purposes. Images can be very helpful. If you do not have appropriate ones there are links to free copyright-free images on the Portal.

5   Permissions overview

To access the Portal a user must have an account. This is provided by using the Microsoft accounts as provided by the home institution. Hence, within the GW4 tenant the users have guest accounts, and this limits the functionality available.

There are two ways to grant access to the Portal for new users: invitation and self-serve:

- **Invitation:** the user can be added by inviting them to the Portal Members permissions group in SharePoint. This must be done via the UPN, and user then must accept the invitation by clicking on a link in an automated email from Microsoft.
- **Self-serve**: for new users from Bath, Bristol and Cardiff, an app has been created; Exeter are yet to authorise access to the app. By following the link, the user's credentials are checked. If they already have an account, they are redirected to the Portal. If no account exists then a guest account for them is automatically created, and they are added to a security group associated with their institution.

The preferred method of providing access to the Portal is via the self-serve app. Not only does it remove the requirement for the user to be invited, it also adds the user to a security group associated with their institution. These security groups are stored in Azure Active Directory (AAD), and there is no direct way to add users to the account from Microsoft. By going via the app, the user is added to the correct security group, and this is also the case for existing users.

5.1   GW4 Portal Access App

The Portal Access App is the primary method used to grant access to the GW4 Portal for a user from Bath, Bristol and Cardiff; hopefully Exeter will authorise it in due course. A user can access the app via the details below and gain access to the Portal. Should they not have an account then one will be created for them. They will also be placed into the security group corresponding to their home institution.

Access URL: https://gw4portal.azurewebsites.net/api/access

Using the link above will result in the user being redirected to the GW4 Portal root; it can also be created to target a specific page or document as below; note that this does not grant any permissions to the resource beyond general access to the Portal:
https://gw4portal.azurewebsites.net/api/access?target=sites/portal/Help/SitePages/Troubleshooting%20access.aspx

5.2   Permission Groups

Permissions should not be granted to users directly. Instead they should be added to a permission group. By default three permission groups are automatically generated when a site is created.

These are as follows *(XXX is the name of the site)*:

- ***XXX* Visitors:** Used to grant read access to the site. People in this group will only be able to consume information.
- ***XXX* Members:** Used to grant read/write access to the site. People in this group have all the rights of the visitors, but can also contribute, so can edit, add and delete items.
- ***XXX* Owners:** Used to grant read administrator rights to site. People in this group have all the rights of the members, but can also make global changes to the site.

5.3 Public and Private sites

Within the portal there are several sites, each one focused on a single topic. Public sites are accessible by anyone with general access to the portal; for private sites the owner must grant explicit permissions.

The mechanism for granting permissions is the same in either case.

5.3.1 Public sites

If a site is public and if the user already has access to the portal, then they should be able to access the site. If they cannot access either the portal or the site then user then needs to be added to the "Portal Members" group. If the user can access the portal but not the site, the site owner should check that the 'Everyone' user is in the site members permission group.

5.3.2 Private sites

If the site is public access needs to be granted. For the private sites only the owners can add new users. They should add the users to the group corresponding to the permissions they wish to grant (Visitor, Member or Owner). By adding users to the permissions group they will automatically also be able to access the GW4 portal, and all the public shared information within it.

5.3.3 Research Communities

Permissions for the Research Communities work in the same way as the private sites. Users have to be granted permissions to be able to see or contribute to the community. However, users are not automatically granted access to the GW4 portal. If these users do not already have access to the portal they will have to be granted permissions there as well.

This means that you can grant external access to your research community (e.g. other HEIs or funding bodies) without also sharing GW4 specific information.

5.4 Granting Permissions

If you are a site owner, or have administrative rights to for a site you can change the access by granting permissions. To grant permissions navigate to the permission group and add them; this is done as follows:

5.4.1 Navigate to the permission group

Click on the cog on the right-hand side of the menu bar and select Site settings. Within the site settings click on People and groups in the Users and Permissions section. On the left-hand side select the group you wish to add them to (Members, Visitor or Owners).

5.4.2 Adding all Portal users

To make your site accessible to all GW4 Alliance members you should add the security group to permission group. To add the security group click on New -> Add Users. A dialogue box as shown below will then be displayed.

You can then add the security groups by typing the names as follows:

- Bath University
- Bristol University
- Cardiff University
- Exeter University
- GW4 Accounts

Click on Share, and then access will be granted for the existing users and all new ones.

5.4.3   Add an existing user

Instead of granting access to all users you can grant access to a single user or users. To do this, open the dialogue box as above and then start to type the user's name (note some are stored with their surname first e.g. Smith, Bob). The user should be automatically suggested, so double check the email address is correct and click on the name to select it. If the user does not appear try searching with the surname first, or try the steps below.

5.4.4   Adding a new user

If the user has not created an account on the Portal you can ask them to create an account first, and then use the method above, or you can invite them.

To invite them, open the dialogue box as above, and instead of searching for them by name, add them by entering their unique identifier into the first section. You can include a personalised message should you wish. When you click Share the user will be emailed an invitation. They can then use the link in the email to access the site or portal. You may see a warning telling you that the user is external to the organisation; this is because most users do not have a GW4 email address and it is OK to ignore.

You need to be careful with the form of the email address used to grant access. This is especially true with University of Bristol users as their usual email address is usually an alias and not the actual account. Have a look at the troubleshooting section for more details.

It is possible to add multiple users by separating the email address with a semi-colons e.g. Mishun.Sugworth@bath.ac.uk;   Cattlegrid.Coleman@bristol.ac.uk;   Harrison.Rabbit@cardiff.ac.uk; Oonagh.Herwick@exeter.ac.uk;

5.5   Granting access to the general GW4 Alliance audience

Your site is restricted to the owners, members and visitors groups, and cannot be seen by the rest of the GW4 Alliance. If you wish to increase the participation in your community you need to ensure that people can access it.

5.5.1   Everyone

Rather than having to add every user of the GW4 Alliance individually there is a handy shortcut, the 'Everyone'. This is a special user that includes anyone who has access to portal. By adding the Everyone user to the right group you will then be allowing your site to then be able to navigate to the site if they have the right link or URL.

Note that the 'Everyone except external users' special user is not appropriate. As access to the Portal is made by a user's home institution email address and not a GW4.ac.uk they are considered to be external users.

To grant access, consider if you wish to grant visitor (read) or member (read/write) access, and then add Everyone to the appropriate group

5.5.2 Everyone means everyone

Be aware that the Everyone group includes all users, which may include people outside the GW4 Institutions. If you wish to restrict access to just the GW4 members then there are some groups which can be used:

- Bath University: all users with a @bath.ac.uk address
- Bristol University: all users with a @bristol.ac.uk address
- Cardiff University: all users with a @cardiff.ac.uk address
- Exeter University: all users with a @exeter.ac.uk address
- GW4 Accounts: all users with a @gw4.ac.uk address

All of these should be granted permissions. If you do not wish to grant access to all of your site you have some other options.

5.5.2.1 *List or Library*

You can add permission for a list or library and make this the public areas of your site. Note that the users will see the navigation elements of the page and clicking on these will lead to an access restriction message.

5.5.2.2 *Sub-site*

Another approach is to create a separate sub-site for public access (or alternatively, make your existing site public, and create a private sub-site). You can then set the permissions to suit your audience.

5.6 External audiences

Access to the Portal is made by a user's home institution email address. From a technical point of view, as the email domains are not GW4.ac.uk ones then the user associated with that address is considered external. However, on this page external refers to anyone who is not a member the University of Bath, University of Bristol, Cardiff University or University of Exeter.

The Portal is intended to be public for the GW4 members. By adding someone to a permission group for a sub-site the portal, they will also have access to the public areas of the portal. Hence, external access should not be granted to sub-sites of the portal. The sub-sites are anywhere the URL starts with 'https://gw4.sharepoint.com/sites/portal/'.

The research communities are set up in a separate site collection to the portal. Hence they can add external users without accidently granting access to the portal. The external users can then be added the same way as any other users.

Once access is granted the external should be able to follow a link to the site. If they are experiencing issues it is likely to be that the wrong email address has been added, or that they are signed in with a different account.

5.6.1 Monitoring access requests and invitations

There are two ways a user can gain access to your site: requesting access and being invited.

5.6.1.1 *Access requests*

The Portal provides an easy to use navigation to allow users to find the right resources. These could be in a sub-site for which the user does not have permissions. A message will be displayed to the user

and they will have the option to request access. As an owner, you should be automatically emailed when someone requests access. Alternatively, you can view the pending request via the site settings.

5.6.1.2 Approve or decline access requests for a site

To navigate to the Access requests and invitations click on the Office 365 Settings cog and click on Site Settings. From there, within the Users and Permissions section, click on Access requests and invitations. You will then see the access requests and invitations.

Under Pending Requests, you will see the requests that have be made. To accept or reject a request, locate the appropriate request and then click on the ellipsis . . . to open the menu. There, under Permissions, select the permission group you would like to assign the user if you plan to approve the request. You can also optionally type a message to the person requesting access; this can be a useful way to document your decision. You can then click on Approve or Decline.

To view past requests, click Show History.

5.6.1.3 Invitations

When a user is added to a permissions group, if they already have access to the Portal they will appear in the group, and will automatically receive an email. However, if they have not previously been added then they will be invited to join. An email will automatically be sent to the email address used and they will have to use this to sign into the Portal. Until they do this they will be listed in pending invitations list, and they will not appear in the permissions group.

To see the pending requests navigate to it the same way as above. Note that requests are valid for 90 days. If the user has not accepted it within that period then a new invitation will have to be made. It is possible to withdraw or resend an invitation by click on the ellipses . . . by the appropriate one and selecting the option from the menu.

6   What can be put on the Portal?

The GW4 Portal is the name given to the SharePoint Online, and to a lesser extent the Yammer network. It is a collaboration and communication space for use by all the GW4, and as such is available to all members of the GW4 institutions. The Portal is made up of several private and public spaces, and no information in the public spaces is sensitive. Hence access to the Portal can be granted without further actions to anyone using a Bath, Bristol, Cardiff or Exeter email account.

The GW4 Share Point Portal will be used to process some sensitive data, such as fee status, or criminal convictions. The portal is designed to be secure enough to be able to handle this data. Data is processed only as strictly necessary, in private spaces and for legitimate reasons (eg registering students at other GW4 HEIs) only.

The Portal is not intended to be a repository for raw research data. This should be stored in the appropriate systems available within the home institutions. It is acceptable for news, reports and communication material derived from the research data, but these must comply with the governance and legal requirements, and these are all set at the individual institutional level. If you are not sure if the information can be shared then do no upload it to the Portal until you have checked.

6.1   Removing information

If information has been added to the Portal which should not be shared, then it must be removed as soon as possible. This can be done by deleting the file both from the original location as well as the

recycle bin. A request should also be made to the site administrator to ensure that the file is also removed from the site collection recycle bin.

For edit made to pages or files which have version control switched on, ensure that the content is replaced and then remove the historical version. Again, this needs to be removed from the recycle bin for the site and the site collection.

7 GW4 Portal Interface

7.1.1 Interface and CLAF
The Portal makes use of the Modern UI in most places. The main exception to this is discussion lists and calendars where only the Classic UI is available.

The common look and feel (CLAF) is implemented with the Portal site and subsites, and in newly create site collections, but site owners are free to amend this as desired. The CLAF consist of a background image, site icon and colour scheme (theme).

7.2 Discussions and exchange
There are three primary ways of end users being able to discuss and exchange with each other: Discussion Board, Yammer and Skype. As most users are external, there are some extra considerations and these are as follows:

7.2.1 Discussions
The classic SharePoint discussion board. Similar to a forum, messages can be posted, and questions asked; other users can then search, read and reply to the post. Images, documents and links can all be included on the posts.

Pros:

- No additional permission configuration required, existing and new users will be able to use it

Cons:

- Dated interface; reliant on the Classic UI, and only available on SharePoint created sites
- No real-time update of posts

7.2.2 Yammer
Yammer is an enterprise social networking tool, built around groups dedicated to topics where people can converse in real-time, and updates are immediately displayed. Like the discussion board, images, documents and links can all be included on the posts. Automatic notifications can be created and private messages can be sent. Yammer is not fully integrated with SharePoint. Hence if a user is granted access to the portal they must also be added to Yammer. There is an external network for the GW4 Alliance and users can see and join all of the public groups and they can create new groups.

Pros:

- Modern interface with real-time conversations
- Good integration if the users already use Yammer
- Yammer feed can be incorporated into a Modern page

Cons:

- Users have to switch between their home network and the GW4 one

- Not fully integrated with Office 365

7.2.3 Skype for Business

Skype is an instant messaging app that provides online text message and video chat services. Users may transmit both text and video messages, and may exchange digital documents such as images, text, and video. Skype allows video conference calls. Skype can show you presence (free, away, busy) if federated.

Pros:

- Modern interface
- Presence can be seen
- Audio and video calls supported
- Conversation history kept

Cons:

- Conversation history not shared (stored in personal area)

7.3 End user support

The method for support is the Help subsite (https://gw4.sharepoint.com/sites/portal/Help/), and this has an associated email address (help@gw4.ac.uk) which tends to receive infrequent emails. Support is provided in the form of pages and documents, and the site can be edited by anyone in the GW4 Alliance.

SharePoint training should be provided by the users' home institution rather than by GW4, although there can be some areas where guidance can be appreciated by the GW4 team. This is given on an ad-hoc basis.

8 Administrative activities

8.1 Administer GW4 accounts

Global administration rights are required to add, remove and update user accounts. To make changes raise a support request via the University of Bristol TOPdesk system and ensure GW4 is in the title to ensure that it is routed correctly.

8.2 Distributions Lists

Similar to user accounts, global administration rights are required to add, remove and update distribution lists. To make changes raised support request via TOPdesk and ensure GW4 is in the title to ensure that it is routed correctly. For new lists it may make sense to create a site which comes with an email address. Users can then add and remove themselves as required without administrative support.

8.3 Support Request

For all other technical support request, if you do not know the answer raise a support request via TOPdesk and ensure GW4 is in the title to ensure that it is routed correctly.

8.4 Adding new sites

New sites can be created in two places. If a full SharePoint collection is required then one can be created via the SharePoint Administration center (https://gw4-admin.sharepoint.com/). Create a new site collection and once it is set up select it, and click on Sharing and enable 'Allow external users who

accept sharing invitations and sign in as authenticated users'. This will allow external users to access the site, and given that the majority of user are external this is by intent.

Another approach is to use an Office 365 Group. By creating a group an email inbox and calendar is also created which can be used as a distribution list. You can create a new group via Outlook or SharePoint.

SharePoint: Navigate to the [SharePoint Home](#) by selecting SharePoint from within the Office waffle. On the home page click on 'Create Site' and then select 'Team site. Give the site a name, and this form the basis of the email address. Select the privacy, and then create the site by clicking on 'Next'; here you can select any additional members and then you will be redirected to the site homepage. After a minute or two the page can be refreshed and the GW4 colour scheme and page layout will be applied. If the Hero web part fails to appear, wait a minute or two and then refresh the page.

Similarly, Groups can be created in Outlook. If you hover the mouse next to 'Groups' on the left-hand side, a + sign will appear and you will be able to create a new group form there with similar options as above. There are differences between creating a group in Outlook or SharePoint.

Sites associated with Groups do not appear in the classic SharePoint Administration center, but do in the Modern interface, which is currently in beta release.

8.5 Yammer

Yammer is not fully integrated with Office 365, and whilst an external network has been created for GW4, these are being deprecated by Microsoft. Also users must be manually invited to Yammer (in additional to gaining access to the Portal, and this cannot be automated). In general, Yammer has hardly been used, and it appears that Microsoft are going to terminate it at some future point when adoption of Teams has taken off. I would suggest that little effort is made to promote or use Yammer.

8.6 Microsoft Teams

Microsoft Teams (https://teams.microsoft.com/) looks like the future. It appears to be a front-end for Office Groups, but in addition external users can see the 'conversation' part of it, which is similar to Yammer. Users can switch between their home network and the GW4 one. This would an area to explore, and could be of great benefit for GW4. It is worth noting that a GW4 account is needed to create, own and administer a team so support would still be required.

9 Specific Portal Uses

9.1 Research Management Triage Tool

The Research Data Service team have created a research data management triage tool. This has been created using Squiffy (http://docs.textadventures.co.uk/squiffy/) and has been adapted to work in the Portal. It is hosted in a Classic page as it makes use of JavaScript. If an update is required then they can use Squiffy to generate a new story.js file and if this use used to overwrite the file in the Research Data Management Triage Tool_files folder then the options should update. If this is not the case then further support would be required.

The contact for this tool is Stephen Gray (Stephen.Gray@bristol.ac.uk).

9.2 DTE & Epigeum

An investigation was made to see if SharePoint was a suitable as a Virtual Learning Environment (VLE), utilising packages as provided by Epigeum, using the demonstration packages from the Epigeum

website. A number of formats are available, notably the SCORM format. SharePoint does not natively support SCORM files; however, ELEARNINGFORCE have a LMS365 app which supports SCORM packages which can be deployed within SharePoint. A trial version of the app was installed on a test tenant and examined. In reality the Learning Management System (LMS) is not held within the GW4 SharePoint environment but instead hosted remotely but accessible via the GW4 portal. There is therefore potential for student information to be exposed to third party without a formal agreement in place

The other formats were also examined, and the only real alternative were the html version, which can be viewed in a browser. These have to be converted to aspx format, and then an error message was displayed, caused by a script within the page. Following discussion with Epigeum, the reference to the script was removed but this meant that progress was no longer recorded, and this therefore removes the underlying reason for the using the VLE. Epigeum did propose a hosted solution which would reinstate the recording but would be external to GW4 SharePoint environment.

9.3   DTP

There are two site collections related to Doctoral Training Partnerships (DTPs).

- NERC GW4+ DTP (https://gw4.sharepoint.com/sites/NERCGW4plusDTP) *Calk Palk (carl.palk@bristol.ac.uk)*
- SWBio DTP Hub (https://gw4.sharepoint.com/sites/swbio-dtp) *Samantha Southern (Samantha.Southern@bristol.ac.uk)*

Neither is particularly active, although the SWBio DTP Hub is better utilised. They are supported and championed by the DTP and support is provided as needed.

9.4   Science and Innovation Audit

The Science and Innovation Audit made use of a site on the original GW4 tenant, and the contents were migrated across when the new tenant was created. [The site](#) and its contents are not really used at all, and it is stored for historical purposes. Sue Sundstrom (Sue.Sundstrom@bristol.ac.uk) is the contact for this site.

10.0   Risks and Problems

10.1   Risk Mitigation

The University of Bristol is signed up the latest Office 365 JANET Education Solutions Agreement and the data is held within the EEA.

A Periodic review of Microsoft Statistics and JANET's advice regarding the latest developments will be undertaken by Assistant Director, Digital Workspace Programme, current post holder: Nick Skelton, University of Bristol, Digital Workspace Assistant Director. The first review will take place 1st August 2019 and every 12 months thereafter.

10.2   Reporting Problems

Any problems or data breaches should be immediately reported to The University of Bristol IT Services and the IT Security/Compliance/Governance professional at each of the GW4 HEIs. These individuals will be responsible for disseminating or escalating within their own organisations, as appropriate.

- University of Exeter

- o Please email information-security@exeter.ac.uk and copy in the following individuals:
  - Information Governance Manager and Data Protection Officer, current post holder – Rhiannon Platt, r.platt@exeter.ac.uk 01392 726842
  - Operations and Security Manager, current post holder - Mike Maling, m.maling@exeter.ac.uk 01392 722788
  - Head of IT Security and Compliance, current post holder - Ali Mitchell, ali.mitchell@exeter.ac.uk 01392 722227
- University of Bristol - Information Security Manager, current post holder - Matt Osborn
  - o Information Security Manager, IT Services,
    31 Great George St
    Bristol
    BS1 5QD
    matt.osborn@bristol.ac.uk (0117) 39 41151

- Cardiff University
  - o Please email It-servicedesk@cardiff.ac.uk and copy in the following:
    - Senior Assurance Advisor and Data Protection Officer, current post holder – Matt Cooper, cooperm1@cardiff.ac.uk 02920 875466
    - IT Security Manager, current post holder – Huw Gulliver, Gulliver@cardiff.ac.uk 02920 874510

- University of Bath -
  - o Please email it-security@bath.ac.uk and copy in the following individuals
    - Data Protection Officer – Current post holder David Jolly - dataprotection-queries@lists.bath.ac.uk 01225 385024
    - IT Security Manager – Current Post Holder - Mark Acres M.S.acres@bath.ac.uk 01225 383831

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