SharePoint for Nonprofits

Learning Objectives

- Learn what SharePoint is and how it is used for file sharing

- Know more about choosing SharePoint as a file storage/sharing solution

- Understand concepts in creating file sharing architecture for your nonprofit

Presenter

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About Build Consulting

Passionately Independent

Agenda

SharePoint
for File Sharing

- We are brand new to 365 and need help! How does SharePoint work?

- Who should "own" SharePoint at an organization?

- How to choose SharePoint to share files?

- How long should we expect it to take to move our files to SharePoint? How much does it cost?

- Can I combine SharePoint and Google Drives? How do I share files between them? How do I share files externally/internally?

- Please delineate SharePoint vs. Teams vs. OneDrive vs. Shared libraries.

- What are recommendations for structure and storage, file architecture?

- How "open" should an organization make SharePoint and Teams? Are there ways to limit where staff share/store files?

- We store documents in systems like Salesforce or Intacct, how does this work if we also want to use SharePoint?

- Can you discuss advanced topics: work-flow features, security, and integrations?

Poll #1: Are you using SharePoint now?

1. Yes! And I have questions!

2. Yes, my organization has a **hybrid system** part SharePoint part something else

3. No, but we are thinking about it

4. N/A

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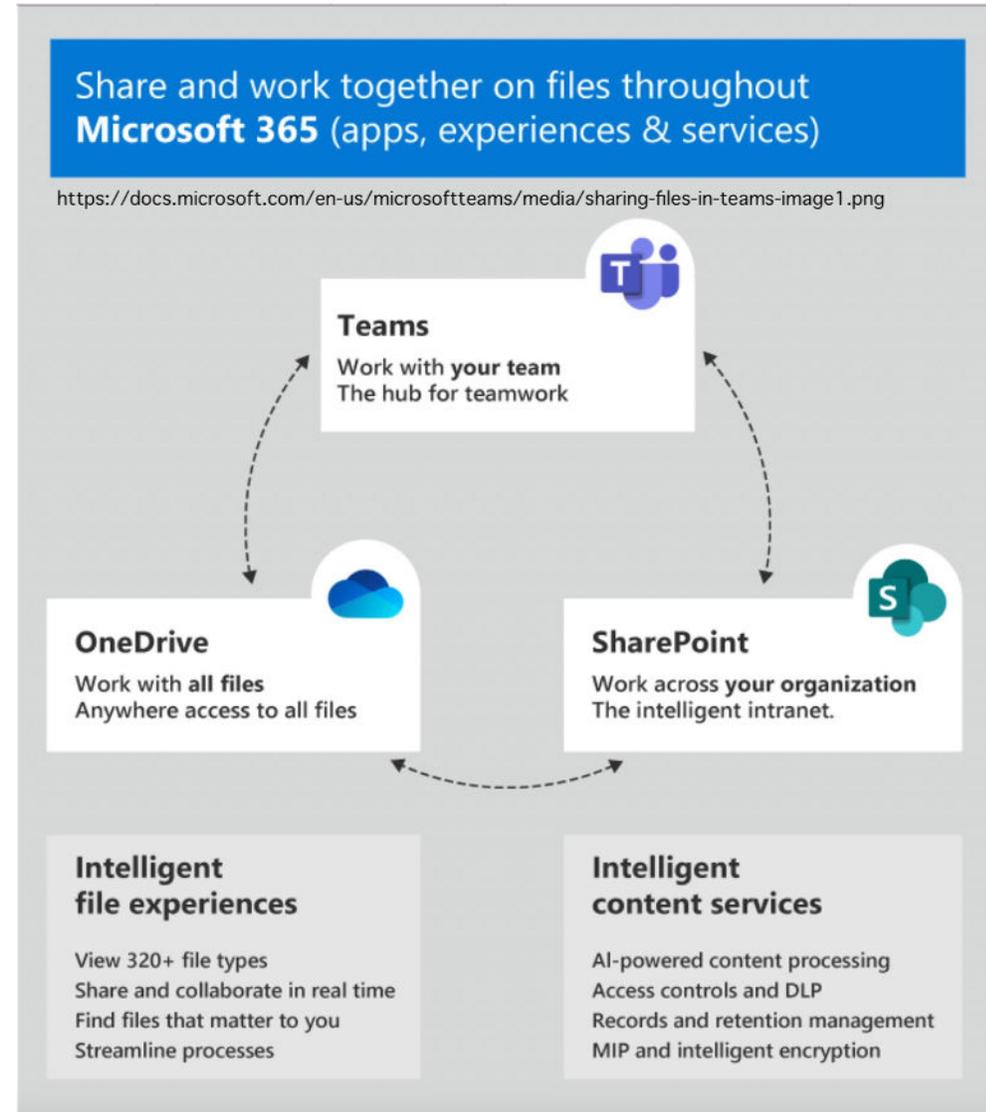
Why use Microsoft 365 cloud file storage?

By taking full advantage of SharePoint-powered file storage in Microsoft 365, you can avoid purchasing cloud storage from other providers and enjoy:

Anywhere access to files

Enterprise-grade security

Secure sharing outside the organization

Real-time collaboration and file versioning

Intelligence that helps users discover files

How does SharePoint work?

SharePoint vs. Teams vs. OneDrive vs. Shared libraries

Share and work together on files throughout
Microsoft 365 (apps, experiences & services)

https://docs.microsoft.com/en-us/microsoftteams/media/sharing-files-in-teams-image1.png

Teams
Work with **your team**
The hub for teamwork

OneDrive
Work with **all files**
Anywhere access to all files

SharePoint
Work across **your organization**
The intelligent intranet.

Intelligent file experiences

View 320+ file types
Share and collaborate in real time
Find files that matter to you
Streamline processes

Intelligent content services

AI-powered content processing
Access controls and DLP
Records and retention management
MIP and intelligent encryption

In general, if you are already in the water, keep paddling with the current, not against it. Staying within a platform makes everything easier.

When should you combine platforms?

Poll #2: Why are you using or thinking about using SharePoint?

1. We are retiring a file server and going to the cloud.

2. We are already using SharePoint but want to get better

3. We want to migrate from a different file storage solution in the cloud to SharePoint

4. N/A

What are recommendations for structure and storage architecture?

https://www.microsoft.com/en-us/microsoft-365/business-insights-ideas/resources/11-ideas-for-how-to-organize-digital-files

All projects
↳ **Department** Marketing
↳ **Category** Paid advertising
↳ **Subcategory** Online ads
↳ Files

#5. Choose a file naming convention

After you've decided how to organize digital files, decide how to name them. Avoid vague file names like "draft1.doc"—the more specific you are, the easier searching will be. Ideally, your file names should be detailed enough that you know exactly what they are at a glance.

Start with the broadest category at the beginning of the file name, like the year or department, and then get more specific.

- If you're organizing by **date**, your file name structure might be YYYY-MM-DD (year month day), followed by any other details you might search for (for example, *2021-06-26_Contoso-Suites_social-media-ads*).

- If you're organizing by **name, project,** or **department**, start with that, again followed by anything you might type in to search for it (for example, *Contoso-Suites_social-media-ads_2021*).

Those file name examples use underscores (_) and hyphens (-), but you don't have to. It's OK to use spaces in file names, but some organizations don't, because you can't have a space in a URL—you'll get an error message. If you're naming files that will go on your organization's website, such as your logo, avoid spaces and special characters. Whatever you decide, just be consistent.

What are folder permission best practices?

Collaboration governance in Microsoft 365

IT needs governance so they can:	Users need to collaborate, and will use:	Microsoft 365 provides governance over:
Manage user access	Chat and posts	Chat and posts in Microsoft Teams and Yammer
Manage compliance needs	Email	Email in Exchange and Outlook
Ensure security	Documents	Documents stored in SharePoint, OneDrive, and Teams
	Many applications, including 3rd party tools	

https://docs.microsoft.com/en-us/microsoft-365/solutions/collaboration-governance-overview

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Webinar: Security Training for Nonprofit Grantees

Upcoming Webinar

Security Training for Nonprofit Grantees

- Wednesday, October 12, 2022

- 3pm Eastern, 12 Noon Pacific

Questions?

- buildconsulting.com/learning/

- communityit.com/webinars
- Youtube.com/CommunityIT
- communityit.com/podcast/

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transforming nonprofits

Contact us!

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