SharePoint and Office 365 Suite Configuration and Implementation in Northern New Jersey AA Area 44

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Northern New Jersey Area 44

Presentation Objectives

- Provide Background and Timeline for SharePoint Implementation
- Discuss Configuration and Implementation Steps
- Review Admin Procedures
- Show SharePoint Webpage Examples
- Discuss Challenges

Why Implement System?

- Previous Situation
  - Document storage on personal storage devices
  - Files and information lost after rotation
  - Emails by use of personal email accounts, breaking anonymity
  - Documents distributed as email attachments or paper

Selected Solution

- **Office 365 Enterprise E1 Plan Includes:**
  - SharePoint for file storage
  - Office Suite (Online versions of Word, Excel, and PowerPoint) for creating documents
  - Outlook Web Access for email
  - Yammer and Teams for collaboration
  - OneDrive for file storage
  - OneNote for electronic notes
  - Apps/List/Forms/Surveys
  - Mobile Apps

Share44

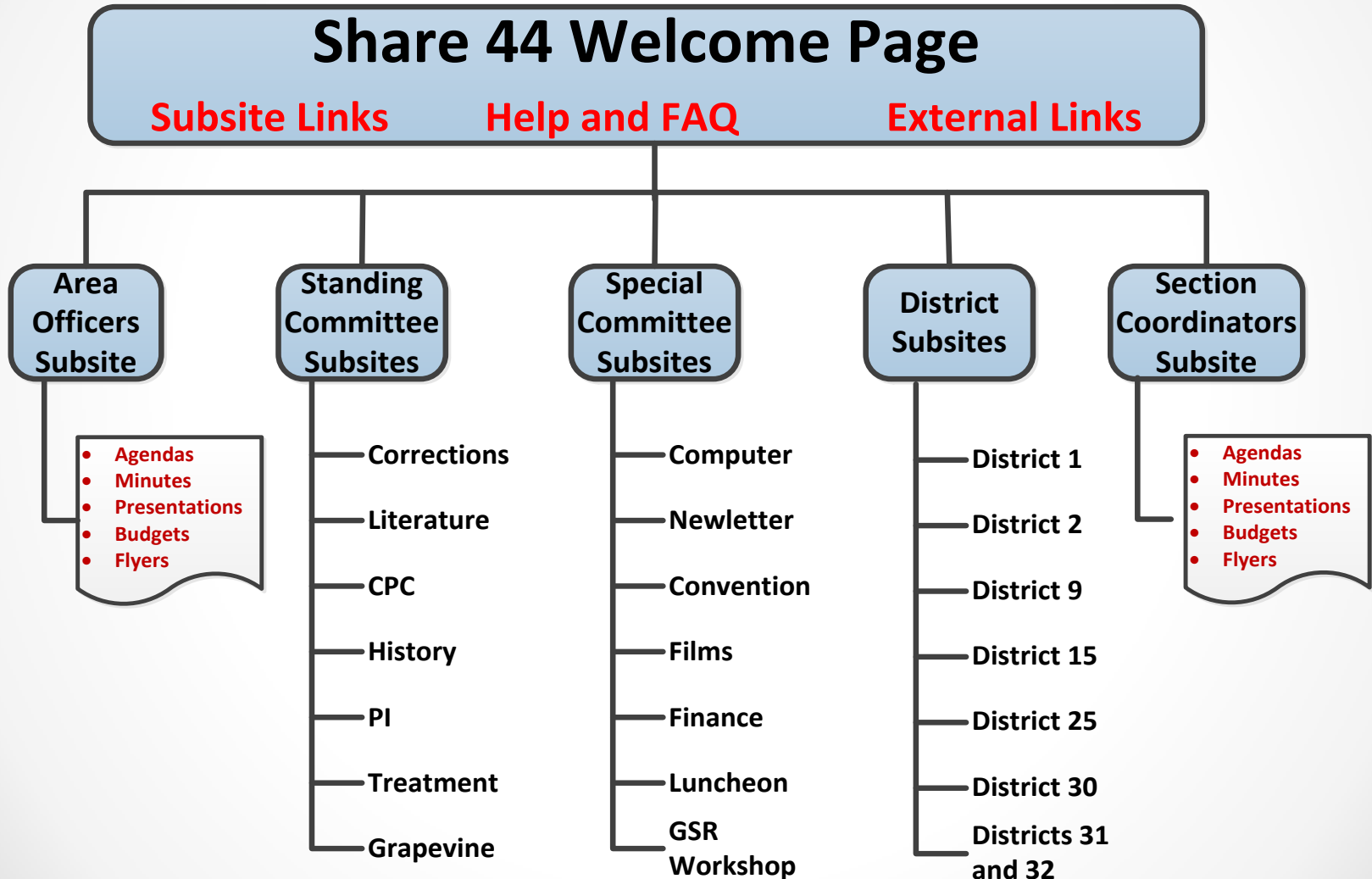**NOTE**: Free for non-profit 501(c)(3) organizations

MS Office Solution Time Line

Date	Event
July 2016 to Nov 2017	Computer Committee evaluated cloud storage options (SharePoint vs Google Drive)
December 2017	Formally proposed usage of SharePoint/ Office 365 to Area Committee
December 2018	Announced rollout of **Office 365** Enterprise E1 Plan
Jan to Aug 2019	Low area-wide usage
Aug to Nov 2019	Conduct 15 training sessions at area and district sites
September 2019	Area Committee declared **Office 365** as system of record for document storage and emails staring in January 2020

Share44 Development Methodology

1. Create Logical Design
   o Build according to organizational structure of area, committees, and districts

2. Design Service Role-Based ID Format
   o Establish requirements for role-based IDs and security

3. Create Security Model and Groups
   o Security Groups
   o Office 365 Groups

4. Build Sites and Subsites with Unique Permissions
   o Use Templates
   o People and Groups for owners, members, and visitors

5. Create Admin Procedures
   o Creating Subsites
   o Adding Users

6. Rollout with Training
   o Conduct Area and on-site District training

Step 1: Share44 Logical Design

Share 44 Welcome Page

Subsite Links   **Help and FAQ**   **External Links**

Area Officers Subsite
- **Agendas**
- **Minutes**
- **Presentations**
- **Budgets**
- **Flyers**

Standing Committee Subsites
- Corrections
- Literature
- CPC
- History
- PI
- Treatment
- Grapevine

Special Committee Subsites
- Computer
- Newletter
- Convention
- Films
- Finance
- Luncheon
- GSR Workshop

District Subsites
- District 1
- District 2
- District 9
- District 15
- District 25
- District 30
- Districts 31 and 32

Section Coordinators Subsite
- **Agendas**
- **Minutes**
- **Presentations**
- **Budgets**
- **Flyers**

Step 2: Share44 User IDs

- **IDs assigned according to service role rather than personal names**
  - Provides continuity with service rotation
  - Ensures anonymity instead of using personal email address
- **User ID Format**
  - First Name = Committee name or District #
  - Last Name = Service Role (e.g. Chair)
  - Display Name = First Name + Last Name
  - Domain = @nnjaa.onmicrosoft.com

Share44 User Community

Share44 Is Intended for All Alcoholics Involved with NNJGS Area 44 Service
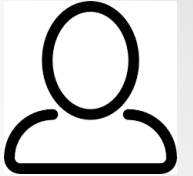
- Area Officers
- Standing, Special, and Ad Hoc Committee Chairs and Members
- District DCMs/Alt DCMs, Committee Members, and GSRs/Alt GSRs
- Section Coordinators
- Current and Past Delegates
- Intergroup Members in Joint Committees and Districts (Intergroup separate from Area 44)

NOTE: Presently, no external users are allowed to access Share44

Share44 User ID Examples

Display Name	Share44 ID
Area Chair	area-chair @nnjaa.onmicrosoft.com
Area Delegate	area-delegate @nnjaa.onmicrosoft.com
District 09 Alternate DCM	d09-alt-dcm @nnjaa.onmicrosoft.com
District 24 Alternate GSR Keyport Keeping It Real	d24-alt-gsr04 @nnjaa.onmicrosoft.com
Corrections Chair	cfc-chair @nnjaa.onmicrosoft.com
Literature Member Districts 1 and 2	literature-d01_02 @nnjaa.onmicrosoft.com
Section 3 Coordinator	Section3-coordinator @nnjaa.onmicrosoft.com

Share44 User ID Complexities

- Personal names are not stored or displayed in Share44, so emails and chats are identified only with service role name

- GSR names are too complicated to include group name in ID

- Users with multiple service roles given only one ID and are assigned access to multiple sites

- Some Districts numbers are combined, which complicates ID (e.g. Districts 5 and 7 = d05_07)

- User IDs are imported by use of an Excel spreadsheet to achieve ID consistency

Step 3: Create Share44 Groups

- **Security Groups**: Controls access to SharePoint subsites and OneDrive
  - Security group created for each committee and district
  - Security access for site assigned to group
  - Members added to each respective group
  - Members can belong to multiple security groups

- **Office 365 Groups**: Provides a group email address for sharing, chatting, and creating calendar events
  - 365 group created for each committee, district, and other common groups (e.g. Share44 Members)
  - Members added based on collaboration need and can belong to multiple groups
  - Displays as Groups in Outlook

Step 4: Build Sites and Subsites

- Create New Subsite from Parent or Subsite

- Use templates for consistent layout as other subsites

- Apply unique permissions to control access

- Select to have site URL display on:
  - Quick Launch of parent site
  - Link Bar
  - Top Link Bar from parent site (Main, Committee, and District links are always available)

- Assign site group membership:
  - Select DCM/Alternate DCM or Committee Chairs as Owners
  - Select subsite Security Group as Members
  - Allow visitors to request access from subsite Owner
  - Include Area Officers with visitor rights for all subsites

Step 5: Create Admin Procedures

- Creating Subsites
  - Assign unique permissions
  - Use templates for consistency
  - Include subsite owners, members, and visitors

- Adding New Users
  - Use Excel spreadsheet for importing user IDs, first and last names, which ensures ID format consistency
  - Assign users to security and office 365 groups, according to roles

- Modifying User IDs
  - Update subsite access for multiple roles

Step 6: Rollout/Support/Training

- **Rollout**
  - Rollout announced at annual Area 44 Workweek End in December 2018
  - Approximately 400 assigned user IDs
  - Most members still use personal email accounts
  - Area Committee has declared **Share44** as system of record for email by January 2020
- **Support**
  - Share44 Help mailbox available
  - FAQ document link on main page
- **Training**
  - Fifteen training sessions completed or planned for area office and district meetings
  - Surveys to follow training

Share44 Welcome Page

Share44 District Page

Share44 Library Page

Share44 Outlook

Share44 Challenges

- ## Time, Effort, and Expertise
    - ~500 hours over 12 months has been needed for design and configuration (~5 days/month)
    - SharePoint administration knowledge and sustainability
    - Routine support approximately 8 hours/week

- ## Area 44 User Skills
    - Resistance to something new (want to keep Gmail)
    - Minimal computer skills affect log in and usage

- ## Training
    - Requires training demonstrations at District meetings

- ## Multiple Service Roles by Individuals
    - Requires adding unique access rights

- ## Including Spanish-speaking Community

Digital World of Area 44 Service Members

OneDrive
- Personal
- Shared

Area 44 Service Member

OneNote
- Personal
- Shared

Outlook
- Email
- Calendar
- Groups
- Skype

Sharing/Yammer
- Area Officers
- DCMs/GSRs
- Committees

SharePoint Storage
- Agenda
- Meeting Minutes
- Conference Reports
- Budget
- Registry
- Presentations
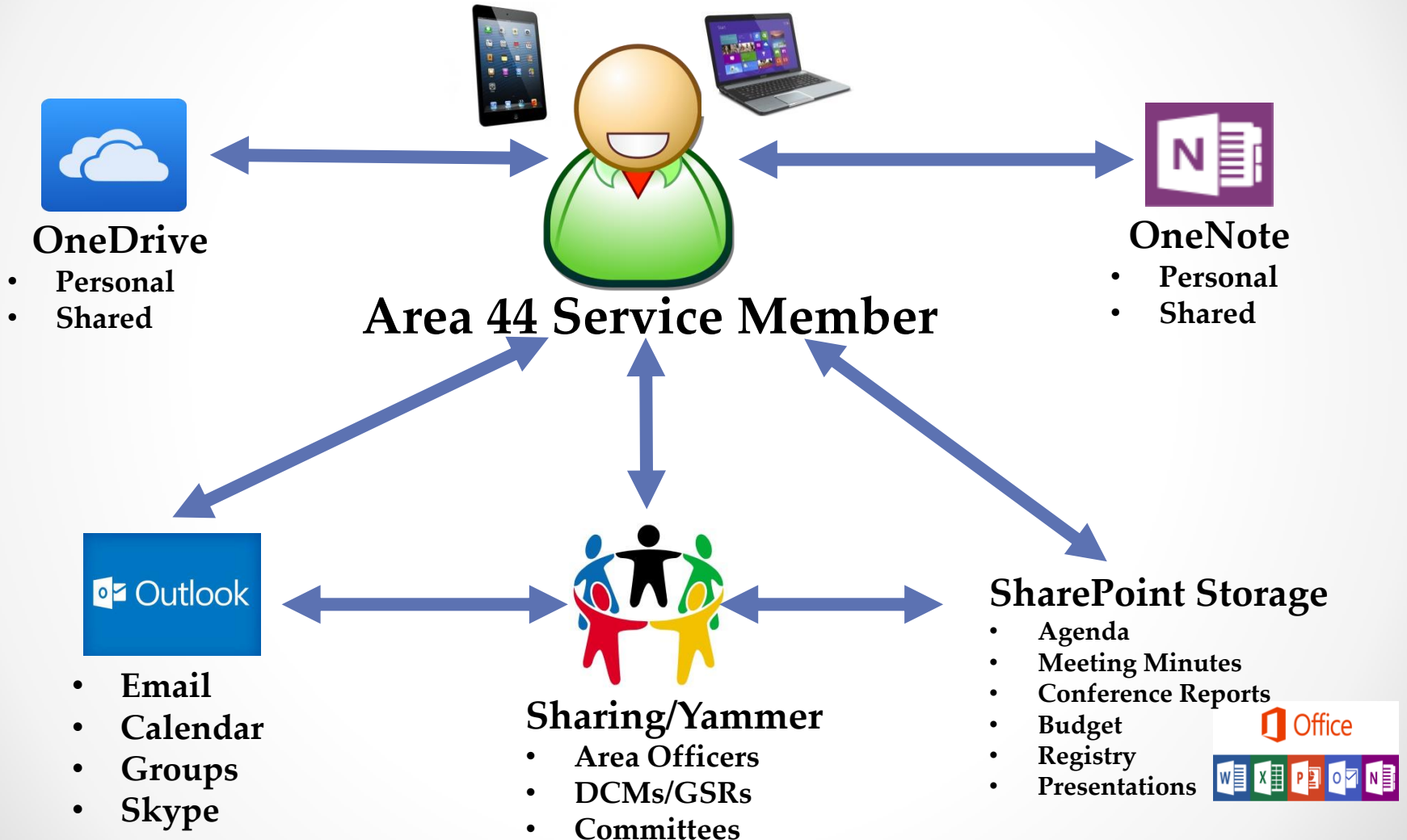
Thank You for Listening

Questions?

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