Below are strategies to help departments and colleges develop SharePoint sites (or other software) to securely archive assessment data and materials, while also allowing them to be accessible to faculty and staff. See also ATL’s Assessment Data Stewardship: Tips for Academic Programs.

Key Elements

1. SharePoint Administrator
   a. a faculty or staff member who will manage the site and maintain the site structure
   b. also need one person who is cross-trained in site administration
2. IT Support
   a. someone from IT who will configure the initial site and provide occasional technical support and advice as the site grows
3. User Groups/Group Permissions
   a. allows for easier site administration/management of user access to files, views, navigation links, and SharePoint pages on site
   b. may require frequent updates depending on user groups/staff turnover
4. Document Libraries
   a. are more flexible and more powerful than using a file and folder/desktop structure (although this approach has applications, too)
   b. create a separate “upload” document library where users can contribute files; from there the site administrator intakes files -- processes/renames/adds metadata and moves the files to the core document libraries for the site. (End users should not have to manage the site.)
5. Metadata
   a. initial cost of adding metadata to files in the document library is high but creates downstream possibilities for organizing and sharing files
   b. use metadata to attach information to files, enable filtered views, and sort and move documents around the SharePoint site
   c. use minimum amount of metadata for site administration
6. Views
   a. use views to filter large document libraries on SharePoint pages and in web parts

Considerations

1. Integration with Active Directory is Useful
   a. this is an essential and important feature for managing user groups and permissions
2. Working with Data Is Difficult
   a. SharePoint can be an efficient and effective tool for file management, collaboration, and information sharing within and between organizational units but there are limits, too
   b. start with document libraries, metadata, user groups, views, lists, and web parts
   c. more advanced data features such as InfoPath forms, SharePoint apps, data charts, KPIs, BI dashboards, PowerPivot, and Reporting Services require additional investments in time, knowledge, infrastructure, and training
3. Design Is Important
   a. who is the target audience, what are the needs of the end user, what are the likely user scenarios that the site should support -> the site should be useful and easy to use
   b. think ahead and consider how the site will function with more files, more users, more metadata, changes in organizational structure, new projects and workflows, etc.
   c. learn how SharePoint works/wants to work and design to its strengths (see Consideration 2a.)