



Ohio Department of Transportation

Division of Construction Management

Appendix Q

LPA SharePoint Creation Guide

Standardized SharePoint Site

LPA Construction Project Documentation

How to create a LPA Construction Project

SharePoint Site

How to Create a Construction Web Site

This document provides detailed steps on how to create an ODOT SharePoint Construction Web Site.

SharePoint Site Creation General Overview:

- 1) Create the Site
- 2) Set the Site Settings
- 3) Set the Site Permissions

The latest version of this document can be found at:

<http://construction.dot.state.oh.us/lpaconstruction/SitePages/Home.aspx>

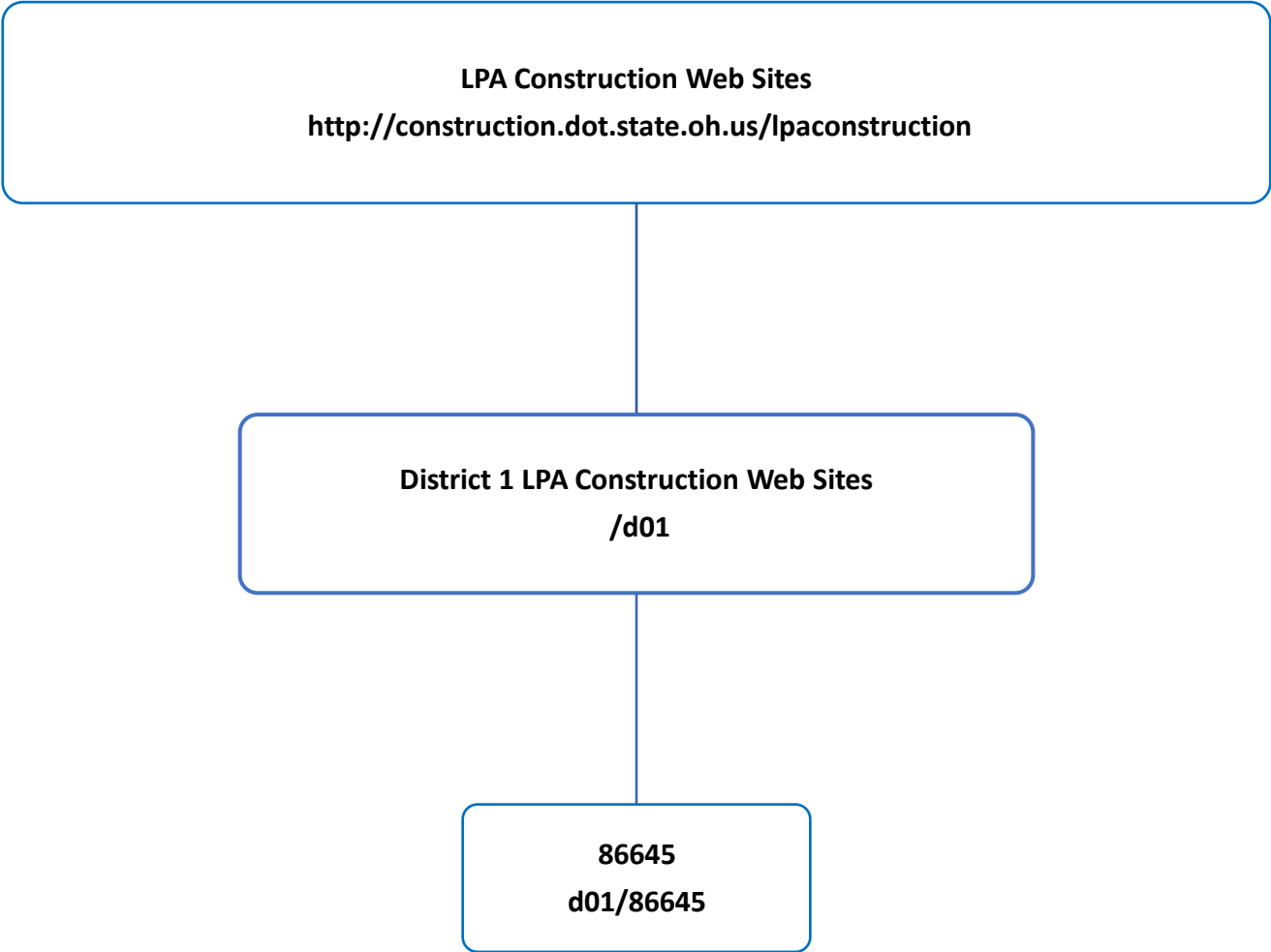
Site Hierarchy

<http://construction.dot.state.oh.us/lpaconstruction/SitePages/Home.aspx> contains twelve separate site collections, one for each district:

- <http://construction.dot.state.oh.us/lpa/d01>
- <http://construction.dot.state.oh.us/lpa/d02>
- <http://construction.dot.state.oh.us/lpa/d03>
- <http://construction.dot.state.oh.us/lpa/d04>
- <http://construction.dot.state.oh.us/lpa/d05>
- <http://construction.dot.state.oh.us/lpa/d06>
- <http://construction.dot.state.oh.us/lpa/d07>
- <http://construction.dot.state.oh.us/lpa/d08>
- <http://construction.dot.state.oh.us/lpa/d09>
- <http://construction.dot.state.oh.us/lpa/d10>
- <http://construction.dot.state.oh.us/lpa/d11>
- <http://construction.dot.state.oh.us/lpa/d12>

LPA Project SharePoint sites will be created within each district's site collection using the ELLIS PID (e.g. "86645") by the LPA Construction Monitor(s).

Here is a sample hierarchy using District 1 as an example:





1. Creating the SharePoint Site

Navigate to the desired LPA district's site collection:

(e.g. <http://construction.dot.state.oh.us/lpa/d01>)

Next, follow the steps below to create a new LPA Project SharePoint site. Utilize the LPA district's parent site to start the process.

- 1) In the upper right corner, click “Settings” 
- 2) Select “Site Contents”
- 3) Scroll down to the Subsites section.
 - a. Click the  button to create a “New Subsite”
- 4) In the **Title and Description section**
 - a. Enter the **Title** (i.e. “86645”) (This is important because the security groups you create later will use this site name.)
 - i. **NOTE: If you would like to provide more information for the project description, that also be put here ex:**
“86645_FRA_40_10.55_Broad/Central”
 - b. In the **Website Address Section**, add the URL name.
 - i. Enter the same PID for the **URL Name**
 1. **NOTE: Only the PID should go into this field.**
 - c. Select the template to use from the **Template section**
 - i. Click **Custom**
 1. Select **New Project Site**
 - d. Click **Create**.

Examples are shown in the screenshot below.

Site Contents · New SharePoint Site

Title and Description

Title:



Description:

Web Site Address

URL name:

http://construction.dot.state.oh.us/lpa/d01/



Template Selection

Select a template:

Collaboration Enterprise Publishing Custom



New Project Template - 5-28-20

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.

Note: If you select Use same permissions as parent site, one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

User Permissions:

- Use same permissions as parent site
- Use unique permissions

Navigation Inheritance



Use the top link bar from the parent site?

- Yes
- No



2. Set Site Permissions

The method of creating a site that inherits permissions, breaking inheritance, and then creating the new site groups with permsetup.aspx allows the permissions to easily be inherited from the parent site and create the site groups for the sub site. Another option is to create the site while also specifying that the site has unique permissions, and then add all the parent site's groups, but this method requires less steps.

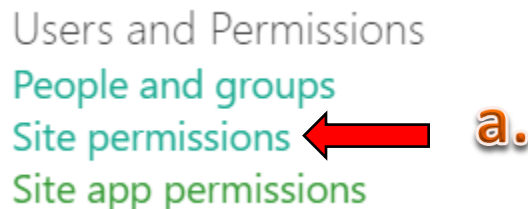
The steps listed below outline how to stop inheriting permissions from the parent site.

NOTE: Breaking permissions from the parent site is important in the process of the site creation. This process is important because it allows access permissions to be granted to a user to access the site directly. If permissions are not broken, then users may experience issues trying to access the site as the permissions would then be granted from the parent site which they may not have access to.

Stop Inheriting Permissions

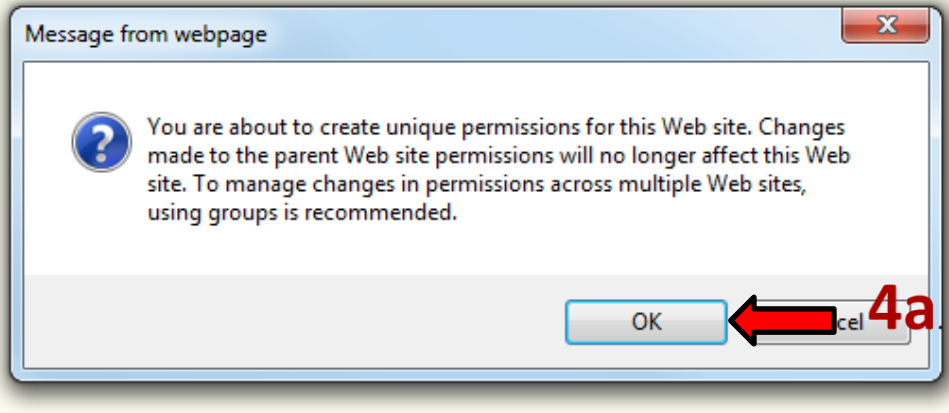
Since there will be a need to set unique permissions for the site, the following steps should be followed:

- 1) In the upper right corner, click “Settings”
 - a. Select **Site Settings**
- 2) In the **Users and Permissions** section
 - a. Select **Site Permissions**






- 3) Click the icon to **Stop Inheriting Permissions**.
- 4) Upon making the selection to Stop Inheriting Permissions, a message will appear.
 - a. Select “OK” in the Message from webpage dialog box.



- 5) After selecting OK, the screen shown below will display
 - a. On this screen:
 - i. Visitors to this Site
 - i. Select - Create a new group
 - ii. Members of this Site
 - i. Select - Create a new group
 - iii. Owners of this Site
 - i. Select - Create a new group



TODAYISDIFFERENT [EDIT LINKS](#)

<ul style="list-style-type: none"> libraries Change Orders Contract Docs Correspondence DWR EEO DBE Estimates Finalization Issues Claims Proposal Line Numbers Materials Media Meetings Misc General Documents to be Reviewed 	<p>Visitors to this Site Visitors can read content in the Web site. Create a group of visitors or re-use an existing SharePoint group.</p> <p>Members of this Site Members can contribute content to the Web site. Create a group of site members or re-use an existing SharePoint group.</p> <p>Owners of this Site Owners have full control over the Web site. Create a group of owners or re-use an existing SharePoint group.</p>	<p><input type="radio"/> Create a new group <input checked="" type="radio"/> Existing group</p> <p>207003_BEL108187 Visitors ▼</p> <p><input type="radio"/> Create a new group <input checked="" type="radio"/> Existing group</p> <p>207003_BEL108187 Members ▼</p> <p><input type="radio"/> Create a new group <input checked="" type="radio"/> Existing group</p> <p>207003_BEL108187 Owners ▼</p>
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The appearance of the page will change to the screen shot on the next page. Now, the new “Visitors”, “Members” and “Owners” group names can be entered. Visitors will be granted Read access. All ODOT employees will already have read access, but this group can also be used to grant external users with read access. Members will be granted Contribute access, while Owners will be granted Full Control access. If the name of this site is a unique name, the names of the groups will be filled in for you. Otherwise, try to keep the names relatively short and descriptive.

- Verify the Visitors Group Name
- Verify the Members Group Name
- Verify the Owners Group Name

Users can be added to their intended groups at this time, or they can be added later.

The screenshot shows the SharePoint group creation interface for a site named 'TODAYISDIFFERENT'. The interface is divided into three sections: 'Visitors to this Site', 'Members of this Site', and 'Owners of this Site'. Each section has a radio button to 'Create a new group' (which is selected) and a radio button to 'Use an existing group'. Below each section is a text input field for the group name and a larger text area for adding members. Red arrows point to the group name input fields in each section, and a red arrow points to the 'OK' button at the bottom right. A large red number '6' is also present next to the 'OK' button.

TODAYISDIFFERENT EDIT LINKS

Visitors to this Site
Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.

Create a new group Use an existing group

TODAYISDIFFERENT Visitors

Members of this Site
Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.

Create a new group Use an existing group

TODAYISDIFFERENT Members

Tia Williams-Hayes

Owners of this Site
Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.

Create a new group Use an existing group

TODAYISDIFFERENT Owners

Tia Williams-Hayes

OK

6) Select OK.

After selecting OK to complete the process, the site will then again navigate to the home page. Now the check to see if the correct permissions were applied for the groups recently created can be checked.

- 1) In the upper right corner, click “Settings”
 - a. Select **Site Settings**
- 2) In the Users and Permissions section
 - a. Select **Site Permissions**



The Site Permissions page will now appear like the page below. *Note the additional options such as “Grant Permissions”.*

Please notice:

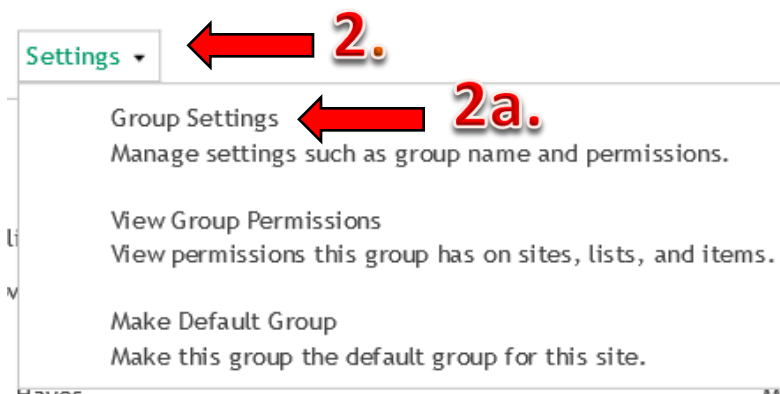
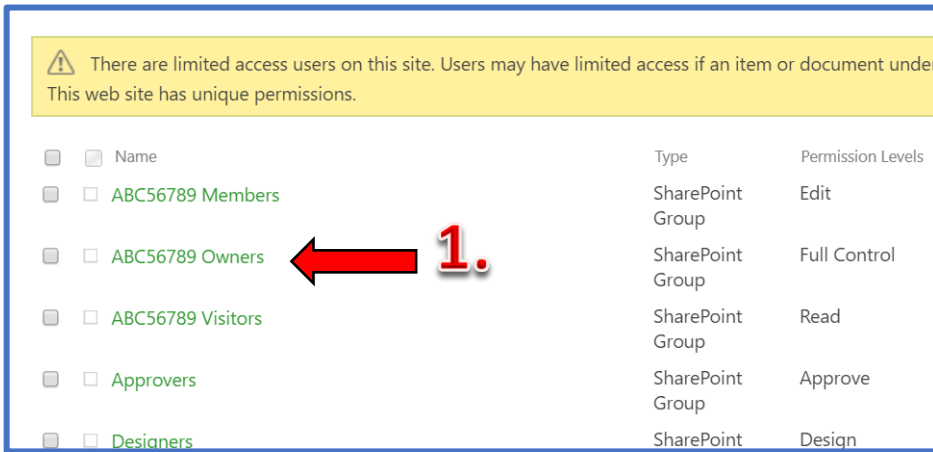
- 1) Notice that the “Members” group we created has “**Edit**” access.
- 2) Notice that the “Owners” group has “**Full Control**” access.
- 3) Notice that the “Visitors” group has “**Read**” access.

New users can now be added to each of the different groups. Users that only need to Edit documents can be added to the **Members** group. Any new Administrators can be added to the **Owners** group. External users that only need read access should be added to the **Visitors** group. (ODOT employees will already have read access.) **NOTE: User Permissions should always be managed on the site using these groups. Do not apply user’s permissions directly to the site!**

Name	Type	Permission Levels
<input type="checkbox"/> ABC56789 Members	SharePoint Group	Edit
<input type="checkbox"/> ABC56789 Owners	SharePoint Group	Full Control
<input type="checkbox"/> ABC56789 Visitors	SharePoint Group	Read
<input type="checkbox"/> Approvers	SharePoint Group	Approve
<input type="checkbox"/> Designers	SharePoint	Design

NOTE: By default, after breaking the site permissions from the 'parent' site, the Owner of the project group will need to be changed. This will allow the owners in the project site to manage users properly.*** At this point in the process, this step is only able to be completed by whomever created the site initially.***

1. Click on the project owners group
2. Select **Settings**
 - a. Select **Group Settings**
3. In the **Group Owner** section, remove creators name.
 - a. Type in the district LPA Owners group.
 - i. Ex: *District 12 LPA Owners*
4. Select **OK** to confirm



Name and About Me Description
Type a name and description for the group.

Name:

About Me:

Use this group to grant people full control permissions to the SharePoint site: [89258](#)

Owner
The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner: ← **3a.**

Group Settings
Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group?
 Group Members Everyone

Who can edit the membership of the group?
 Group Members Group Owner

Membership Requests
Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.

Allow requests to join/leave this group?
 Yes No

Auto-accept requests?
 Yes No

Send membership requests to the following e-mail address:

Caution: If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.

Buttons: Delete, OK, Cancel

↓ **4.**

Adding users to a specific group

1. While on the same screen, Select **New**
2. Once the **Share** menu appears, add users name in th first box.
 - a. A personal message can also be included to provide more detail for the users access.
3. Select **Share**

People and Groups · 90211 Me



Share '90211'

Add people to the 90211 Members group

Enter names, email addresses, or 'Everyone'. **2.**

Include a personal message with this invitation (Optional).

HIDE OPTIONS

Send an email invitation

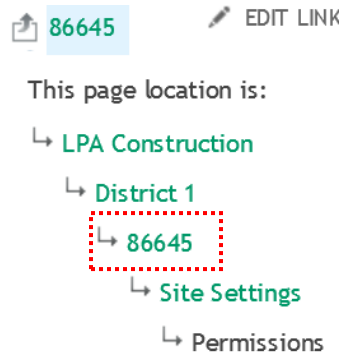
2a.

3.

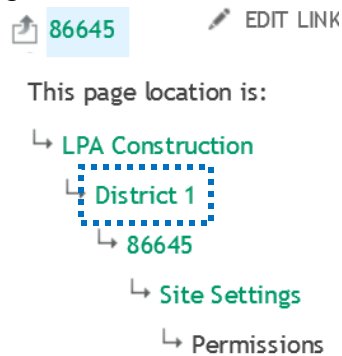
5. Adding link for new site to District Home page


The addition of the link to the Home page allows organization for multiple projects within the district to be maintained.

- 1) Navigate to the Home page by selecting the navigation icon, and then selecting the PID for the project.



- a.
- 2) Copy the URL of that current site page.
 - i. Ex: <http://construction.dot.state.oh.us/lpa/d01/86645/layouts/15/user.aspx>
- 3) Navigate to the District Home page by selecting the navigation icon, and then selecting the District.



- a.
- 4) In the **Project Links** section, select the icon  **new link** to add a new link.

5) Paste the project URL in the designated box.

NOTE: Erase contents in the box prior to pasting.

a. The link can also be tested for accuracy after being applied.

6) In the description box, enter in the PID for the project.

7) Project notes can also be added if desired.

The screenshot shows a web form with the following elements and callouts:

- Project URL ***: A text input field containing the URL `http://construction.dot.state.oh.us/lpa/d01/86645/_layouts/15/...`. A blue arrow labeled **5a.** points to the text "(Click here to test)" in the placeholder text. A red arrow labeled **5** points to the right side of the input field.
- Type the description:**: A text input field containing the number `86645`. A red arrow labeled **6** points to the right side of the input field.
- Project Notes**: A large text area containing the text "The notes placed in this section can be added to provide more detail for the project. This part is optional." A red arrow labeled **7** points to the right side of the text area.
- Save**: A button at the bottom right of the form. A red arrow labeled **8** points to the right side of the button.

8) Click Save.

Contact Information:

All questions and concerns regarding SharePoint can be directed to the Admin Owners below:

Tia Williams-Hayes: 614-644-6463

Janet Treadway: 614-466-7514