EDUgroepen – creating and configuring a project teamsite

0. Introduction

All VU employees and students can use EDUgroepen, a digital environment in which partners can collaborate on a research project. EDUgroepen is based on Microsoft SharePoint 2010. Users collaborate in a team site, which is a secure page accessible to invitees only. The default total amount of space that is available for each employee is 5 GB. Within that space it is possible to set up a maximum of 20 team sites of 250 MB each. Individual team sites can have a different amount of space allocated than 250 MB. Changing the limit of 250 MB of a team site requires contacting SURF. The combined free space, however, of all the team sites cannot exceed the default overall limit of 5 GB. It is also possible to extend the default storage space beyond 5 GB. Contact SURF to request more storage space (https://www.surf.nl/diensten-en-producten/clouddiensten/overzicht-clouddiensten/index.html). It is 300 euros for each additional 100 GB. You can request a quote through: offerte@2at.nl. General information email address: info@edugroepen.nl.

1. Start / Registration

i. Go to http://www.edugroepen.nl. Click the button `registreer jezelf` (green button)
ii. Use the institutional email address and Register with your VU-Net-ID and password
iii. Accept the terms (sharing information from your institution so that you can use those credentials to log in; single sign-on > SURFConext)
iv. Activate your account through the confirmation email (link and code are available for 3 days).
   Important: you may need to check your spam folder for this email!

2. Invite project members

Site administrators: send out an invitation to ask partners to register at EDUgroepen. Upon registration, they have two options:

i. Sign in and create a personal account > set your own password
ii. Sign in through your educational institution > use the institutional login and password

We recommend the second option. If this is not possible or practical you can choose the first option: you then need to agree with data sharing.
3. Setting up the main team site
   i. Log in at http://www.edugroepen.nl
   ii. Click the green button `Nieuwe site aanmaken`
   iii. Fill out the details: 
       a. Title (= `Titel`)
       b. Project description (= `Beschrijving`)
       c. Create a specific URL for the project (= `Naam van de URL`). You provide a name for the part of the URL after 'https://www.edugroepen.nl/sites/'. No capitals or spaces are allowed.
       Example research project URL: https://www.ed.../sites/nsaproject
       d. Select the team site language (= `Selecteer een taal`). The most likely options are > Dutch (= ‘Nederlands’) or English (= ‘Engels’)
   iv. Select a prefabricated template for the structure (= `Selecteer een sjabloon`):
       a. Collaboration (= `Samenwerking`)
       b. Enterprise (= `Onderneming`)
       c. EDUgroepen (the `default template`)
       d. Publishing (= `Publiceren`)
       e. Custom (= `Aangepast`)

For collaboration in a research project, the template `Collaboration' probably contains the most useful tools: Team site, Blog, Developer site (= `Ontwikkelaarssite`) and Project site.
For the example NSA-project we have chosen the template `Project site`. The relevant features for this project include: time line & calendar.
You can find more information about the various templates by clicking on them. You should choose the `Custom` (`Aangepast`) option if you wish to fully design the project site yourself. In that case you are free to select any tools & templates, as needed.
After selecting the appropriate template, the menu on the right shows the option `Site contents'. Through this option all the assets for a page can be selected: add any tools for a page as needed.
If you want to change the look of the team site, go to: **What's your style?** (site settings) > click on a look. You can try out different looks through the preview page option. Finalize and choose a look by clicking: 'Yes, keep it'.

4. Creating team subsites

When you're at the main (research project) site you can create the subsites as follows:

i. Go to **Site contents' > click on `new subsite'**
ii. Fill out the same information as for the main site (see: 3. Setting up the main team site)
iii. Select a **subsite template** (there are fewer templates to choose from for subsites)
iv. Select **user permissions**: choose between 
   `use same permissions as parent site' or `use unique permissions'. If you select unique permissions, you will go to a page to set up groups once you’ve created the subsite
v. Set **navigation properties** ('navigation' and 'navigation inheritance'). For the example **NSA-project** we set all values to 'yes'. If the option `use the top link bar from the parent site' is set to `no' there will be no link at the top to the parent site. This means that you cannot navigate to the parent project site directly. If you created subsites and set **navigation for top link bar** to 'yes' the top level site will show links to both parent site and subsites

NB: always make sure that you’re at the right level when creating a subsite!

5. Share the site with project members

All project members that need access first need to register at [http://www.edugroepen.nl](http://www.edugroepen.nl) with a personal email address. Through the Share option at the top right corner of any EDUgroepen site you can do two things:

i. **'Invite people'** > people that have registered at EDUgroepen can be invited
ii. **'Shared with'** > this shows the people who are already a member of the site
When you select 'Invite people' you can select a group or permission level (= role). The following predefined roles are available: Excel services-viewers [View only], Members [Contribute], Owners [Full control], and Visitors [Read].

Invitation remarks:

- The invitation that invitees get is in the Dutch language!
- A project member may need different rights on different sites. If this is needed it requires specific separate invites: e.g. reading rights for one team (sub)site and writing rights for the other team (sub)site
- If you develop a research project site for a large team, it is a good idea to create a spreadsheet beforehand with an overview of the people involved and the associated rights.

Rights levels that can be assigned are:

i. **Full control**: add other subsites, change look and structure
ii. **Design**: can view, add, update, delete, approve, and customize
iii. **Edit**: can add, edit and delete lists; can view, add, update and delete list items and documents
iv. **Contribute**: can view, add, update, and delete list items (e.g. tasks, calendar) and documents
v. **Read**: can view pages and list items and download documents
vi. **View Only**: can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser but not downloaded.

Rights remarks:

- It is possible to change or remove people's rights. Using the option Share at the top right corner you can select 'Shared with' > Advanced > Actions > Remove users from this group (make sure you're at the right level!)
- You can create new groups (owners, members) to define their rights (permission level): Share > Shared with > Advanced > Create Group > Give a name & fill out the fields
- What happens if a project site member used to be registered with a VU university account and he/she no longer works at VU: this person will no longer be able to access the project site.
6. General remarks & recommendations

- Before adding documents to a team site it is a good idea to set up a clear folder structure.
- You can't upload entire folders or empty files, but it is possible to simultaneously upload multiple files.
- SURF offers a more extensive manual at their website.

7. Contact / Support details

Research Data Services, UB VU
De Boelelaan 1103
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Netherlands
Tel.: (020) 59 85166
Email: ResearchDataServices.ub@vu.nl

W: http://libguides.vu.nl/researchdata

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