

Using SharePoint for Research Division Timesheets (VERSION 10/03/2015)

The Research Division is now using SharePoint to share and store monthly timesheets.

Why use SharePoint?

There are several reasons for using SharePoint for sharing and storing timesheets:

- The new Excel timesheet template is a large file that is cumbersome to email back and forth. Emailing multiple versions of the template would quickly use a significant amount of email storage space.
- The staff member, the staff member's line manager, the Principal Investigator, the department/centre manager, other project-related administrative staff, and the Research Division will all have shared access to the completed timesheets.
- The shared folder will help clarify what timesheets have been or remain to be completed.
- The shared folder will help ensure that only one timesheet is completed per staff member per month.
- Timesheets will be stored in a central location so that they are easily accessed in the event of staff turnover and/or of an audit.

How are the SharePoint folders organised?

The SharePoint folders are organised by department/centre and then by staff member. Where staff members have research projects in more than one department/centre, their folder will be located within the folder for their home department or for the department/center in which the majority of their projects reside. This ensures that there is only one folder per staff member.

SharePoint folders are not organised by project because it is common for staff members to work on multiple projects at the same time and over the life of their careers at LSE.

Who has access to the SharePoint folders?

Access to individual folders will be limited to the following individuals:

- the individual staff member,
- the staff member's line manager,
- the Principal Investigators for the projects against which the staff member is reporting his/her time,
- the relevant departmental/centre managers,
- other relevant project-specific or departmental/centre administrative staff that may be helping to manage the timesheet process, and
- the Research Division.

Please do not provide access to SharePoint folders to individuals who do not have a genuine work-related need to access the staff member's timesheets.

The Excel version of the timesheet template may contain salary information within the hidden worksheets that are for Research Division use only. If you have concerns about privacy when using SharePoint, please consult your Research Awards Manager (RAM) in the Research Division.

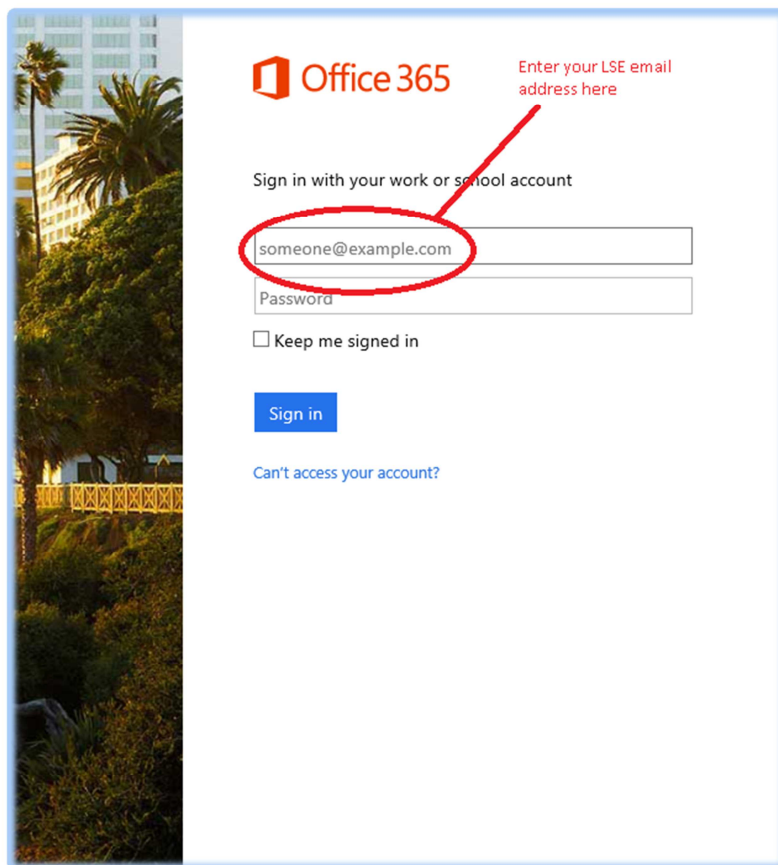
How do I access my SharePoint folder?

Your RAM will give you the web link to your SharePoint folder when the folder is set up. Please save this web link either as a bookmark in your web browser or where you will have easy access to it.

If your RAM hasn't given you a web link, please contact him/her to request one.

Alternatively, the following web link should also work:

https://lseccloud.sharepoint.com/sites/research_grant_timesheets/Shared%20Documents/



When using the web link, you may first encounter a webpage asking you to sign-in to Office 365. Enter your LSE email address in the first box. If you are on your LSE computer or using the LSE remote desktop, you should be automatically redirected to SharePoint without needing to enter a password.

Otherwise, you may need to provide your LSE password and pass through one or more additional pop-up windows. This is the same password that you regularly use to log on to the LSE network.

How do I upload, edit, and share documents in my SharePoint folder?

SharePoint provides multiple ways of doing the same thing, which can be nicely flexible but also sometimes confusing.

Using the red icons:

Once you have been redirected to SharePoint, you should see the folders to which you have been given access. Click on the folder that you want to access.



You should then see the options: new, upload, edit, share.

'New': It is unlikely that you will ever use the option 'new' which allows you to create a new document from scratch within SharePoint using Office360. In most cases, you will be uploading documents that you have already created or will be editing documents that are already uploaded to SharePoint.

'Upload': Click 'upload' to upload an existing document to your folder. You will most often be using the 'upload' feature to store the PDF scans of the fully signed monthly timesheets in your SharePoint folder.

- A window will come up asking you to choose the document that you want to upload. Click 'browse' to find the document on your computer. A new window will pop-up. Once you find the document, click 'Open'.
- The upload window will also ask you to confirm the SharePoint folder in which you want the document saved. Note, you will only have the option to save a document in SharePoint folders to which you have been given access.
- The upload window also provides the option to add 'version comments' if you want to include a note about the document that you are uploading.

'Edit': Click 'edit' to open and edit a document that has already been uploaded to your folder. You will most often be using the 'edit' feature to edit and save the Excel timesheet template. The 'edit' option will only change from grey to red once you have placed a check next to the document that you would like to edit.

- Once you click 'edit', the document will open in a new window. A window may first pop-up asking you to sign-in to Office360 again. Just enter your LSE email address, and you should be automatically redirected to the document.
- When you are finished editing the document, click the save icon at the top of the document or (Ctrl + S). You can then close the document. Note, this saves the document in SharePoint. It does not save the document on your computer.

'Share': Click 'Share' to add or delete people who should have access to the folder or document. If you want to share the folder, make sure that none of the documents are checked and click 'share'. If you just want to share a document, select the document by placing a check next to it and then click 'share'. A document will automatically be accessible

Clicking on the document name itself:

Clicking on the document name itself should open the document in the online version of Microsoft Office. Most people are not familiar with the online version, and it has diminished capability. If you want to edit the document, we recommend that you choose 'Edit Document' and then the option to edit in the standard version of Microsoft Office. At that point, you are editing the document same as if you had chosen 'Edit' as described above.

Using the three dots next to the document name:

You may notice that there are three dots next to each document name. If you click on the three dots, a new window will pop-up. The window gives you the option to 'edit' and 'share' which works the same as described above. However, the window also gives you the option to **'Follow'**. If you click 'Follow' then you will receive notices when the document has been edited by other users. The pop-up window also contains another three dots. Clicking on these gives you a variety of options that you may find useful.

What documents should I store in SharePoint?

Your SharePoint folder should contain:

1. The Excel version of the timesheet template, one for each 18-month period.
2. A scanned PDF of the completed and fully signed timesheet, one for each month.

I still need help, where can I get more information?

- The SharePoint website has a 'Help' function that can be accessed by clicking the question mark at the top right-hand corner of the screen.
- Additional guidance about using SharePoint is available on the IMT website at: <http://www.lse.ac.uk/intranet/LSEServices/IMT/facilities/sharepoint/home.aspx>.
- Additional guidance about completing timesheets will be saved on SharePoint at: https://lsecloud.sharepoint.com/sites/research_grant_timesheets/Shared%20Documents/
- Additional guidance about completing timesheets will also be saved on the Research Division's website at: <http://www.lse.ac.uk/intranet/researchAndDevelopment/researchDivision/managingYourAward/monthlyTimesheets.aspx>.
- Ask your RAM for help. He/she can sit down with you and walk you through the use of SharePoint and answer any questions you may have about timesheets.