

# Catalyst PMO SharePoint Administrative User Guide

February 2009

# Topics

- **SharePoint Administration**
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  - Granting Permissions
  - Requesting a New SharePoint Site
  - Recycle Bin/Empty Trash
- **Catalyst Finance Website**
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- **SharePoint SME Team**

# Space Allocation

1. Click on the Site Actions box in the upper right hand corner of the SharePoint home page:

<http://globalconsumer.collaborationtools.consumer.citigroup.net/sites/ccc-catalyst-program/default.aspx>

2. Select "Site Settings" from the drop-down menu.

3. On the Site Settings page, select "Storage Space Allocation" from the Site Collection Administration menu on the right side of the page.

4. The green section of the Storage Allocation page indicates how much space is remaining.

When capacity reaches 18 GB, email Deborah or Dennis and request space and/or delete files. If approved, delete files in the recycle bin.

The system will send an automatic warning when SharePoint reaches 90% of full capacity. To request additional space, do ONE of the following:

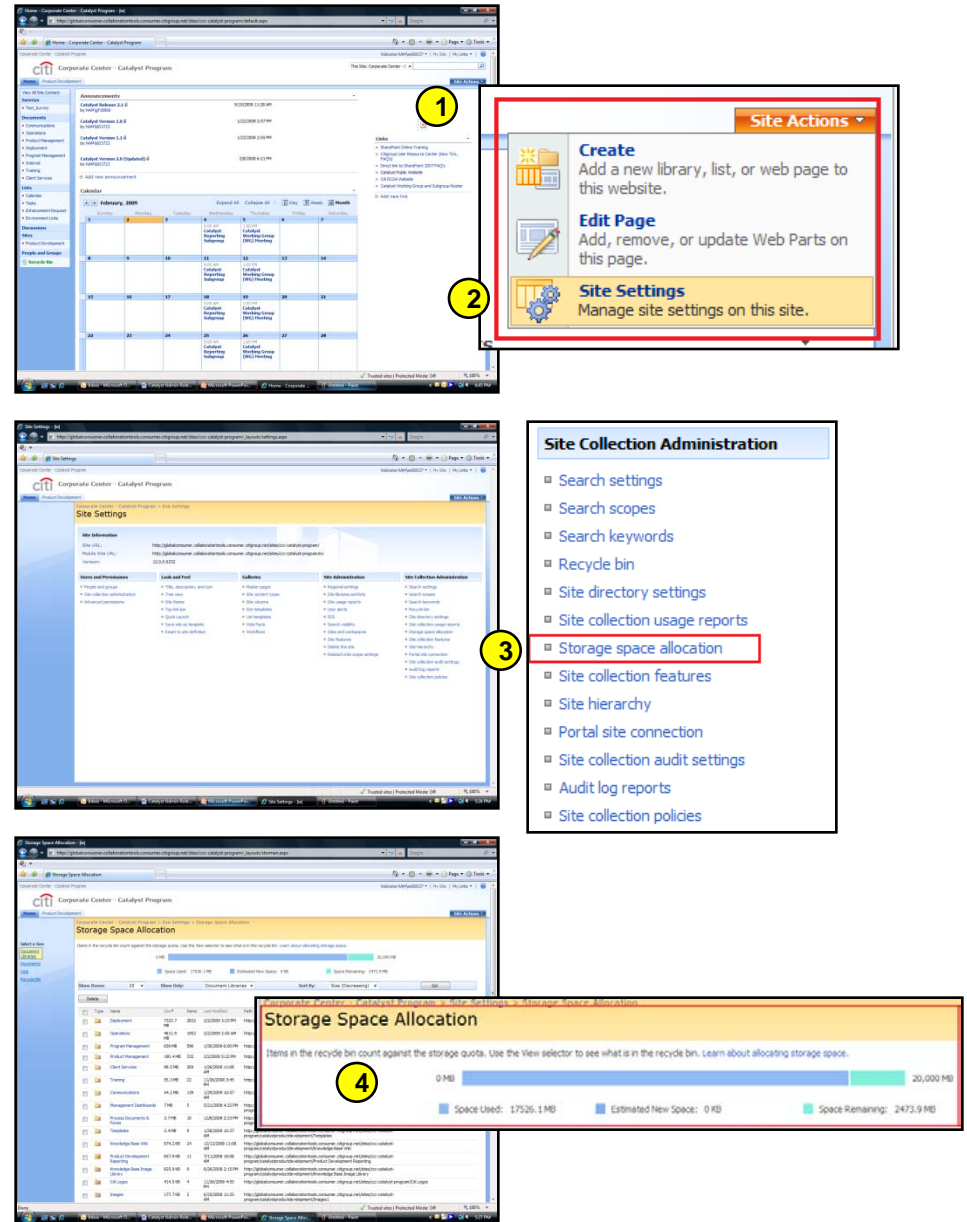
- Raise a VT ticket via the following URL (access required):

<https://virtualtech.eur.nsroot.net/virtualtech/default.asp>

- Contact the One Citi Help Desk at 1-888-435-7612 and open a ticket requesting additional space.

- SharePoint contacts:

- Marion Burns 904-954-8828
- Terry Watt (email only)



**1**

**2**

**3**

**4**

**Site Actions**

- Create**  
Add a new library, list, or web page to this website.
- Edit Page**  
Add, remove, or update Web Parts on this page.
- Site Settings**  
Manage site settings on this site.

**Site Collection Administration**

- Search settings
- Search scopes
- Search keywords
- Recycle bin
- Site directory settings
- Site collection usage reports
- Storage space allocation**
- Site collection features
- Site hierarchy
- Portal site connection
- Site collection audit settings
- Audit log reports
- Site collection policies

**Storage Space Allocation**

Items in the recycle bin count against the storage quota. Use the View selector to see what is in the recycle bin. Learn about allocating storage space.

0 MB

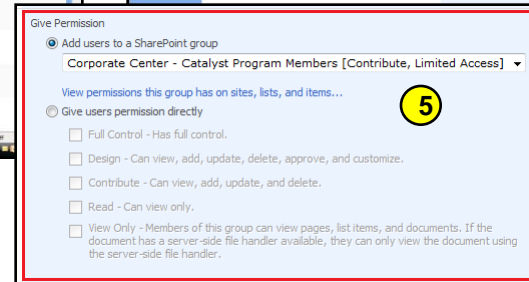
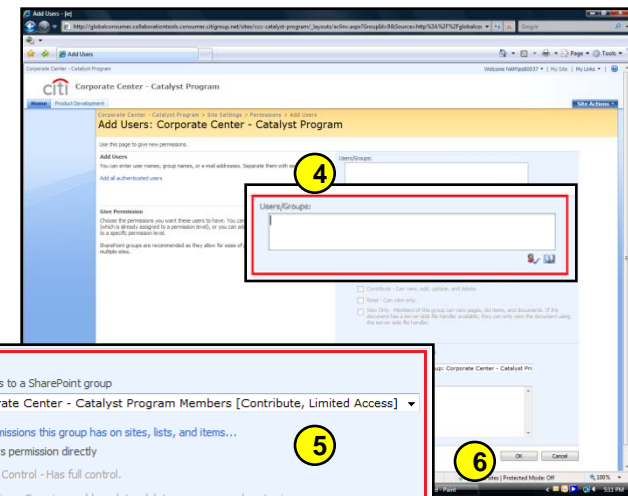
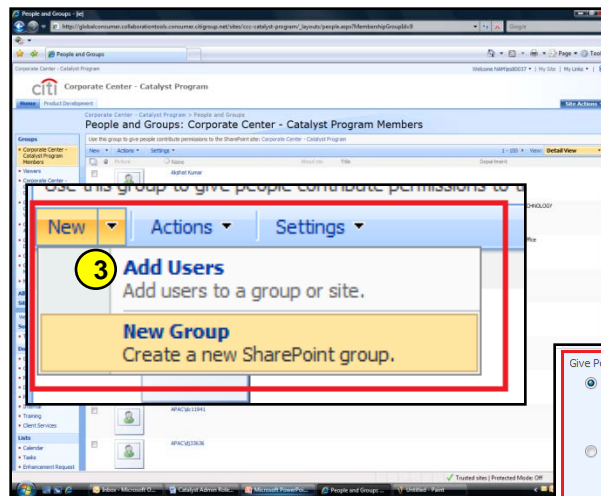
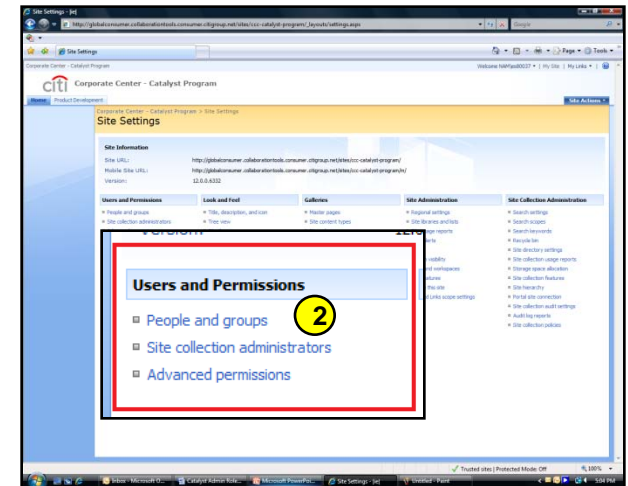
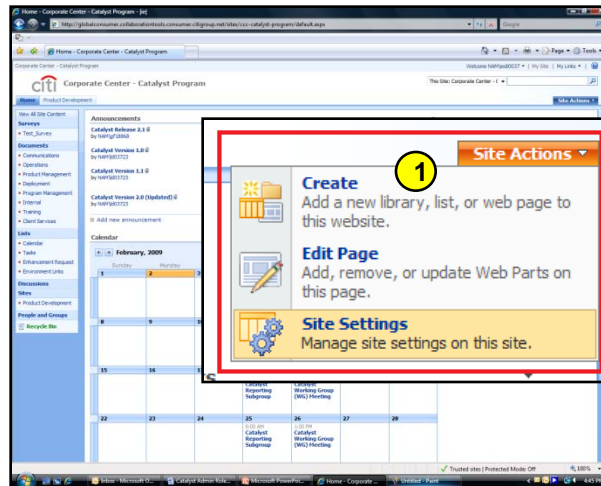
Space Used: 17526.1 MB    Estimated New Space: 0 KB    Space Remaining: 2473.9 MB

# Granting Permissions

## For SharePoint Sites:

SharePoint permissions requests are generally received via email indicating the user name and access type (most often this is for read-only).

1. From the SharePoint home page, click on "Site Settings" under **Site Actions** tab.
2. Select "People and Groups".
3. Click on the down-facing arrow next to the **New** tab and choose "Add Users".
4. Enter the user's SOE ID (if multiple users, separate with a semicolon).
5. Select the permission level.
6. Click OK.

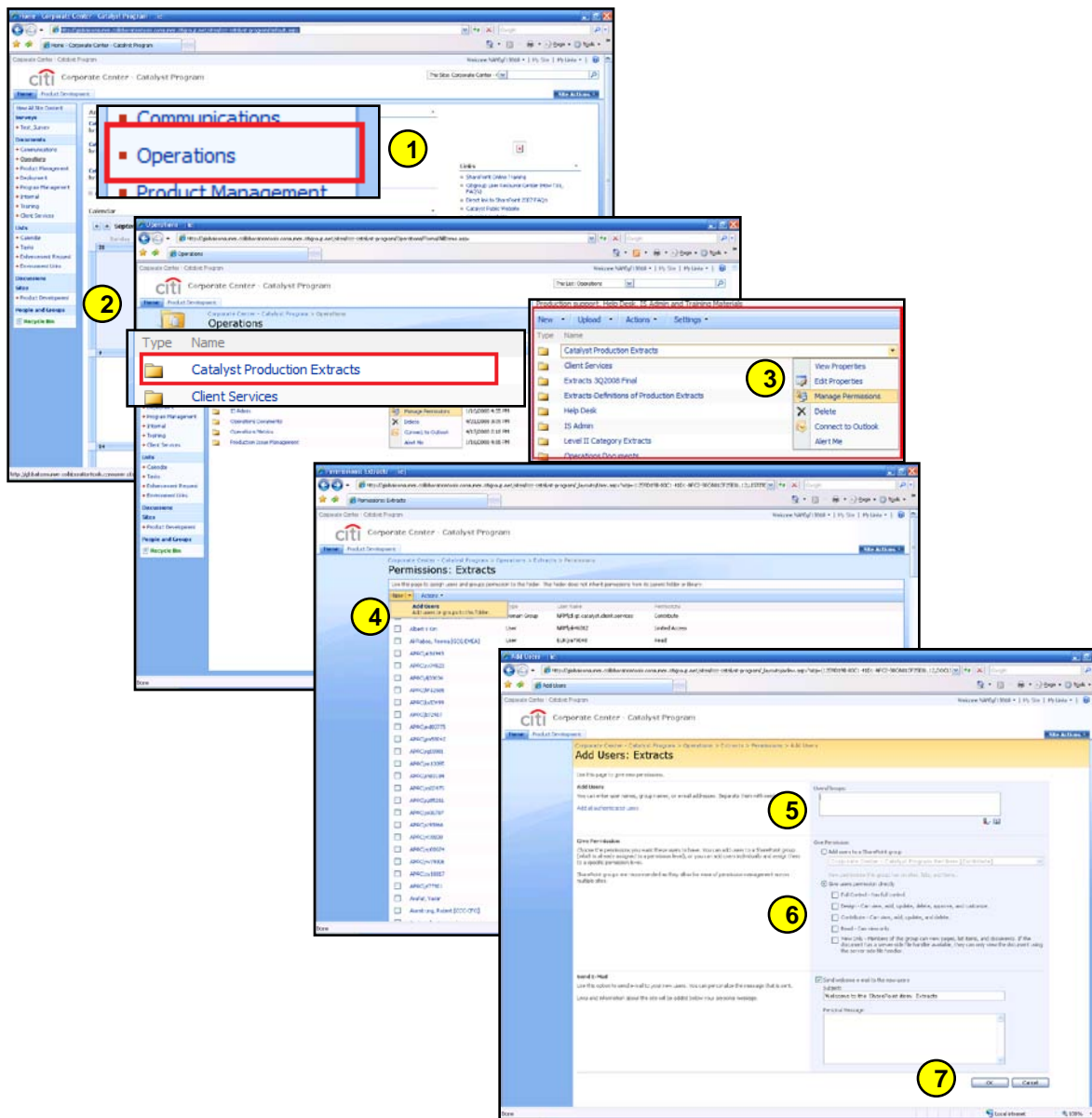


# Granting Permissions Con't.

## For Folders & Files:

SharePoint permissions requests are generally received via email indicating the user name, access type (most often this is for read-only) and a link to the file or folder to where access should be granted.

1. For example, many users need access to the Catalyst Production Extracts folder in Operations. From the SharePoint home page, click on the Operations link on the left hand side of the page.
2. Move the mouse to the selected folder, e.g. Extracts, and click on the down-facing arrow.
3. Select "Manage Permissions" from the drop-down menu.
4. Click on the down-facing arrow next to the **New** tab and choose "Add Users".
5. Enter the user's SOE ID (if multiple users, separate with a semicolon).
6. Select the permission level.
7. Click OK.



The screenshots illustrate the following steps:

1. Navigating to the 'Operations' link in the left sidebar.
2. Clicking the down arrow next to the 'Catalyst Production Extracts' folder.
3. Selecting 'Manage Permissions' from the dropdown menu.
4. Clicking the down arrow next to the 'New' tab and selecting 'Add Users'.
5. Entering user names in the 'Add Users' field.
6. Selecting a permission level from the 'Give Permissions' dropdown.
7. Clicking the 'OK' button to confirm the permissions.

## Requesting a New SharePoint Site

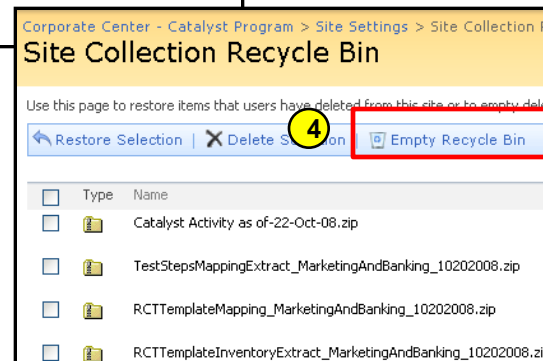
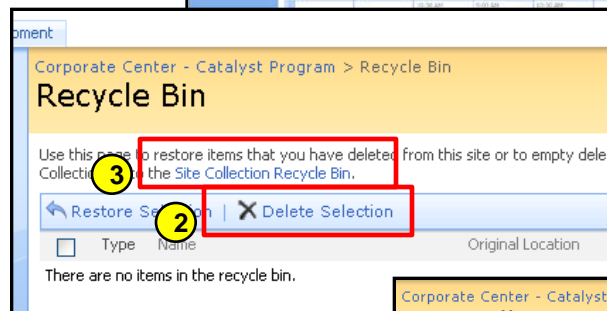
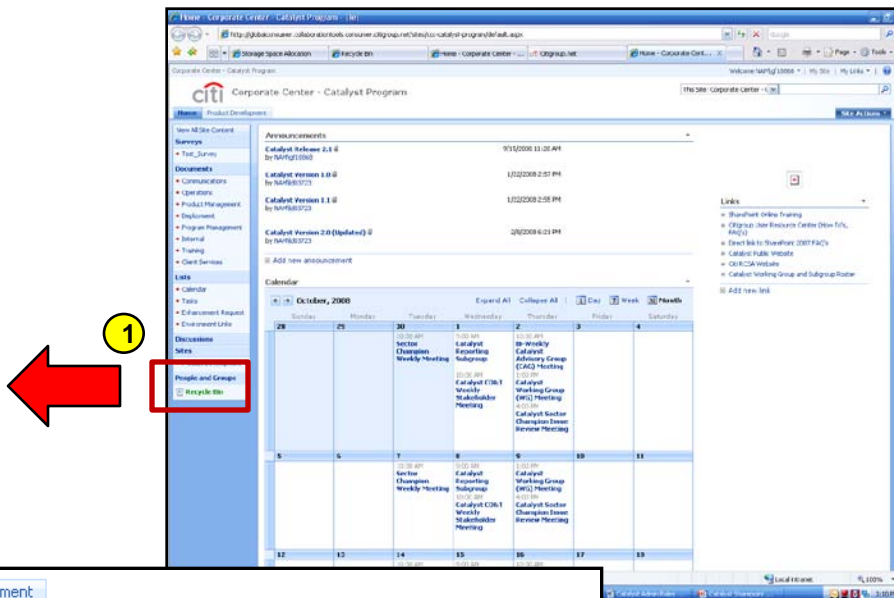
- Submit a VT ticket for to create a new SharePoint site along with:
  - Site Name
  - Primary Owner Name and SOEID
  - Secondary Owner Name and SOEID
  - Line of Business
    - All SharePoint issues must be sent to the attention of Global Collaboration Support
    - Note: Must have VT access in order to submit VT ticket
  - VT tickets are submitted at:
    - <https://virtualtech.eur.nsroot.net/virtualtech/defaultNT.asp?message=Domain%2C+Username+or+password+not+correct>

# Recycle Bin/Empty Trash

The Recycle Bin houses documents which have been deleted and are waiting to be emptied with the trash.

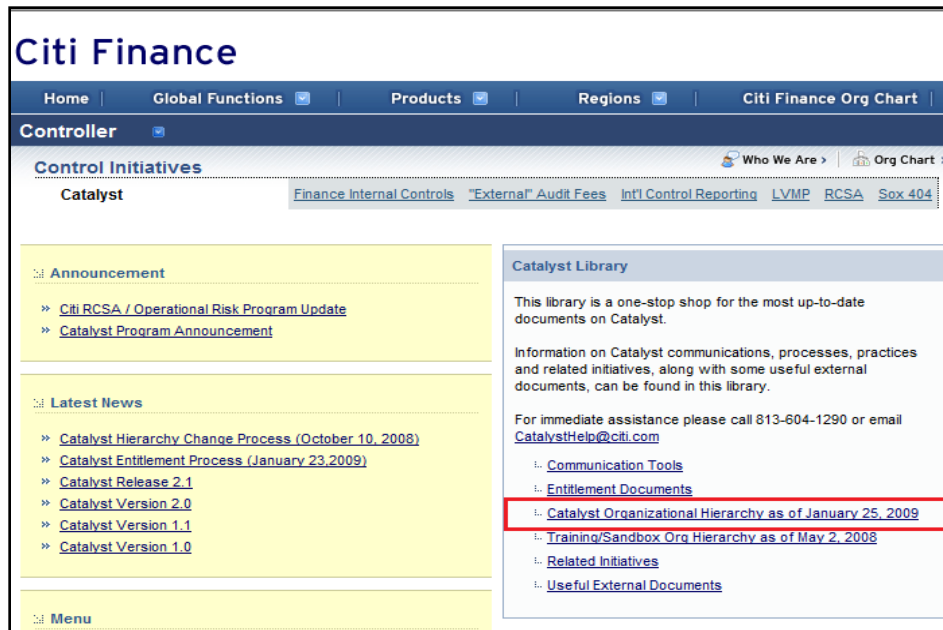
1. Click on the Recycle Bin to see documents you have deleted and to remove these from the system.
2. From the Recycle Bin, click on the “Delete Selection” to remove the documents you have placed in the Recycle Bin.
3. Click on “Site Collection Recycle Bin” to see a cumulative list of all documents in the bin, and to empty the trash.
4. From here, click on “Empty Recycle Bin” to remove ALL documents which have been placed in the Recycle Bin by anyone.

Note: The Catalyst PMO team will do this when we are close to running out of space, however each SharePoint admin team should decide the best way to remove documents.



# Hierarchy Extracts

- Hierarchy extracts should be posted to the Catalyst Finance Website every Monday.
  - The Hierarchy extracts sit in the Catalyst Library section of the Catalyst Finance Website.



- Note: If a US-based holiday falls on Monday, Hierarchy extracts will be posted on Tuesday.
- Pull the latest versions (usually date is Sunday before) from the Corporate Center – Catalyst Program - Operations-Catalyst Production Extracts or this URL:  
<http://globalconsumer.collaborationtools.consumer.citigroup.net/sites/ccc-catalyst-program/Operations/Forms/AllItems.aspx?RootFolder=%2fsites%2fcc%2dcatalyst%2dprogram%2fOperations%2fCatalyst%20Production%20Extracts&FolderCTID=&View=%7b654E137B%2d3DC9%2d481D%2d9A03%2d8CD9EC758B66%7d>
- Open each folder for Grand Central Extracts for the latest Hierarchy Extract.
- Save all recent extracts onto your hard drive, zip the files, and save as “Catalyst Organizational Hierarchy as of *insert current date*”. The date should be the Sunday prior.
- Forward to Michelle Zapata with a request to replace the current version with latest version, and rename the link as “Catalyst Organizational Hierarchy as of *insert current date*”.



## Updates to Catalyst Website

- Occasionally you will receive requests to update the Catalyst Finance website or to change the Catalyst Key Contacts on the Catalyst Finance website.
- Ensure that the instructions make sense and forward these emails to Michelle Zapata, cc'ing the owner.
  - Michelle will let you know when this is complete.
- Have the owner conduct final QA on any changes in staging at this URL:
  - <http://citiweb1.citicorp.com/finance/ccf/controller/controlinitiatives/catalyst.htm>
- Forward feedback to Michelle Zapata as needed.
- Note: Catalyst PMO owns any name changes so be sure to QA these changes as needed.

# Other SharePoint in Catalyst

SharePoint Site	Owner
Catalyst SharePoint	Catalyst PMO
Product Development	Meghna Singh
Catalyst Document Management	Meghna Singh
ICON	Gary Sheehan
CCSA ORCA Archive	Gary Sheehan
COGNOS RSCA Archive	Gary Sheehan
ORCA RSCA Archive	Gary Sheehan
SAS RSCA Archive	Gary Sheehan

# SharePoint SME Team

- Marion Burns
  - Tel: 904-954-8828
  - Burns, Marion [CCC-OT\_IT]
- Terry Watt
  - Terry [GCG-NAOT]