**How to Provision an Office 365 SharePoint Site**

**Accenture Federal Services**

**Operations Center**

Table of Contents

[1.0 Introduction 2](#_Toc509912657)

[2.0 Prerequisites 2](#_Toc509912658)

[2.1 Customer Requests SharePoint Site 2](#_Toc509912659)

[2.2 Gain Approval for Commercial/Defense 2](#_Toc509912660)

[2.3 Activate SharePoint Service Admin Role 2](#_Toc509912661)

[3.0 Standard Operation Procedure (SOP) 2](#_Toc509912662)

[3.1 SOP section 1 – Provisioning SharePoint 2](#_Toc509912663)

[3.2 SOP section 2 – Completing Form and Closing Task in ServiceNow 4](#_Toc509912664)

[3.3 SOP section 3 – Sending Notice to Primary and Secondary Owners 4](#_Toc509912665)

[4.0 Post Implementation Verification/Testing 4](#_Toc509912666)

[5.0 Document Revision History 5](#_Toc509912667)

# Introduction

A team needs a digital space to collaborate for various reasons and requests and SharePoint site. Our policy is to provision a SharePoint site in the Office 365 cloud if there contains no ITAR data. If ITAR, CUI, or Export Controlled data will be present, the site is provisioned in O365 Defense Tenant.

# Prerequisites

## Customer Requests SharePoint Site

The requestor for the SharePoint site will go to <https://portal.accenturefederal.com> and fill out the SharePoint site request.

## Gain Approval for Commercial/Defense

AFS IT Operations will need to get approval to create the requested SharePoint on Office 365 from Jessica Blum and/or Scott Andersen.

## Activate SharePoint Service Admin Role

The AFS IT Operation Center team member who will be provisioning the SharePoint site will need to activate his or her Azure role associated with SharePoint Administration

* SharePoint Service Administrator

# Standard Operation Procedure (SOP)

## Provisioning SharePoint

1. In one browser window, open the ServiceNow Request for O365 SharePoint site.
2. In another window, login to <https://afs365-admin.sharepoint.com> with your a- login and wait for the complete list to load.
3. In the “Site Collections” ribbon, click on *New*, and in the dropdown list, choose *Private Site Collection.*
4. In the “New Site Collection” popup window, Fill in the following fields from the SharePoint request in ServiceNow:

|  |  |
| --- | --- |
| O365 SharePoint Provision Field | ServiceNow Request Field |
| Title | Project Name |
| Web Site Address – 3rd box – leave the first two boxes as they are. | Site Name – remove any spaces and unnecessary letters, etc. to reduce characters |
| Administrator | Primary Owner |

1. Set the following fields in the form that don’t have a matching field in ServiceNow:

|  |  |
| --- | --- |
| Template Section | NONE – use default “Team Site” selection |
| Time Zone | NONE – set as Eastern Time |
| Storage Quota | NONE – set as 100GB |

1. Click OK and wait for the site to be provisioned. You will be able to search and click on the site in the site collections list by typing in the Site URL in the search box.
2. Once the site is provisioned, click on the checkbox next to the site name.
3. Click on *Owners* in the “Site Collections” ribbon.
4. Click on *Manage Administrators.*
5. In the popup window “Manage Administrators”, there are two boxes.
	1. In the first box, the Primary Owner should be the same as what was filled into the Administrator box when the site was provisioned.
	2. In the second box, add the Secondary Owner name from the ServiceNow form, as well as “SharePoint Service Administrator”.
	3. Click OK
6. Click on *Storage Quota*.
7. In the popup window, place a checkmark in the check box stating “Send e-mails to site collection administrators….”.
8. In the box below, enter 95.
9. Click Save.
10. Browse to the URL of the newly provisioned SharePoint site.
11. Login with your a- credential.
12. Click on the gear in the top right corner of the SharePoint site, and choose *Site Settings* from the dropdown.
13. In the Site Settings menu, under the “Site Collection Administration” section, click on *Site collection audit settings*.
14. Ensure that the *Specify the number of days...* box has 90 pre-populated. If it doesn’t, then enter 90 and notify the Products team that this is no longer auto-populating.
15. The box *If you’d like to keep…* should be left blank.
16. Check all the boxes on this page.
17. Click OK.
18. Close the browser.

## Completing Form and Closing Task in ServiceNow

1. Open the corresponding Task in ServiceNow.
2. In the *Site URL* field, enter the URL of the SharePoint site that was provisioned.
3. In the *ITAR Data?* box, choose No. If there is ITAR data, refer to the document on provisioning an ITAR SharePoint site.
4. Click *Close Task* button in the top right corner.
5. An error message will popup making sure Close Notes is filled in. Close this box and fill in “Site provisioned in O365 Commercial” or a similar note in this box.
6. Click *Close Task* button again to close the task.

## Sending Notice to Primary and Secondary Owners

1. Once the site is provisioned, open the attached Email template.

2. Enter the primary owner’s Enterprise ID in the *To:* box
3. Enter the secondary owner’s Enterprise ID in the *CC:* box.
4. In the *Subject:* box, add the URL to the end of the line.
5. In the body of the email, after “Your new SharePoint Site” enter the URL and hit space so that it becomes a hyperlink. Also, after “in O365 with” add the Enterprise ID of the primary owner, and after “and” add the Enterprise ID of the secondary owner.
6. Send the e-mail so that the owners are then notified the site has been created.

# Post Implementation Verification/Testing

Browse to the URL and validate that the owners are listed in the SharePoint Site Collection Administrators list under Site Settings.

# Document Revision History

| **Version** | **Date** | **Prepared By** | **Comment** |
| --- | --- | --- | --- |
| 0.1 | 11/14/17 | Matthew Kostak | Initial Draft |
| 0.2 | 11/15/17 | Matthew Kostak | Tested Steps and updated after finding errors |
| 0.3 | 11/21/17 | Matthew Kostak | Made some edits after feedback from Graham Monteleone and Steve Strigle |
| 0.4 | 3/27/18 | Matthew Kostak | Made some final edits including Defense wording |
| 1.0 | 04/02/18 | Matthew Kostak | Approved for Operation |