Hosted SharePoint 2010 User Stories

Find out how you can connect your business



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Chapter 1. Introduction

SharePoint's capabilities are very diverse: document management, task scheduling, shared calendars, discussion forums, image galleries and many others all fall within the capability of our SharePoint offering. In fact, one of the major challenges is that with so many diverse and flexible functions, it can be difficult to visualise exactly how your clients could take advantage of SharePoint's facilities.

In this document, we set out a series of user stories. Rather than talking about features or technologies, we look at a number of challenges facing many small- to medium-sized businesses. Although the stories are set in the context of a small legal services practice, Collaborative Legal Services (CLS), they are widely-applicable. CLS is a practice with perhaps a half-dozen staff members; some are office workers, others are mobile. The challenges they face are typical of the problems faced by many businesses, and reflect the 21st century need to deploy the capabilities offered by advanced IT systems, but with very limited budget and IT staff on hand. We hope that by evaluating SharePoint through these user stories, you will be able to understand the value that SharePoint offers your clients – and how, as a reseller, you can add value to attract and retain clients.

Chapter 2. Sharing Calendars

For offices with more than one worker, it's always useful to know where everyone is at any given time. SharePoint provides a shared calendar accessible via the web, which can also be viewed alongside your personal calendar in Outlook. Appointments can be dragged between the shared calendar and your personal calendar – if everyone updates the shared calendar with their whereabouts, suddenly the whole office can effortlessly know where everybody is.

1. The SharePoint calendar is shown in Day View on the home page of the demo site. Click on the title ("Team Today") to view the full calendar

Site Actions 👻 📝	Browse Page		System Account -
CLS • Home			
Home Crown vs Eric C	criminal HCC Business Purchase Eric Estate	Search this site	۶ (
Surveys			
Office Christmas Party	Team Today	Collaborative Legal	
Christmas Party Survey	() 10 October 2013	Services	
Libraries	Thursday	This is the SharePoint site for our	
Site Pages	7	practice.	
Shared Documents			AAA
Management Documents	8		
RFQs	9		
Liete		Client Directory	
Calendar	10	Last Name First Name Business Phot	e Mobile Number
Tasks		Contract Hermione 555-3333	555-4444
FAQ	11	Criminal Eric 555-1234	555-4321
		Homebuyer Fiona 555-1111	555-9999
Discussions	12	Will Eric 555-1212	555-2121
Team Discussion		A and a second second	
	13	Add new item	
🗟 Recycle Bin			
All Site Content	14		
		My Lasks	
	15	Title Status Priority Due Dat	e % Complete
	10		

2. To add an event, click on the "Events" tab and then click "New Event" on the Ribbon

CLS + Calendar + Calendar - Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events. Home Crown vs Eric Criminal HCC Business Purchase Eric Estate Search this site P 2013 Jan Feb Mar Apr May Jul Aug September 2013 M T W T F S S N T F S S Oct Nov Dec Dec Z 28 29 30 31 1 Today is 13 September 2013 Image: Calendars in View Image: Calendar	ite Actions 👻 🔂 Browse (Calendar Tools Events Calendar				System A	Account +
Home Crown vs Eric Criminal HCC Business Purchase Eric Estate Search this site P 2013 → Jan Feb Mar Aug Jun Jul Aug Sep Oct Nov Dec Z6 27 28 29 30 31 1 Z6 27 28 29 30 31 1 Today is 13 September 2013 Marcolars in View Z0 3 4 5 6 7 7	CLS > Calendar Use the Calendar list	 Calendar → t to keep informed of a 	upcoming meetings, de	adlines, and ot	ner important e	vents.	
 ↓ 2013 ↓ ↓ Jan Feb Mar Apr May Jun ↓ Aug Sep Oct Nov Dec ▲ 26 ∠7 ∠8 ∠9 30 31 1 ▲ 26 ∠7 ∠8 ∠9 30 31 1 △ 27 ∠8 ∠9 30 31 △ △ △ △ △ △ △ △ △ △ △ △ △ △ △ △ △ △ △ △	Home Crown vs Eric Crin	minal HCC Busines	s Purchase Eric Esta	ate Search	h this site		P 🕜
Apr May Jun M T W T F S S Jul Aug Sep 26 27 28 29 30 31 1 Oct Nov Dec Image: September 2013 Image: September 201	↓ 2013 → Jan Feb Mar	🔄 🄄 September	2013				
Juing Aug Jep 26 27 28 29 30 31 1 Oct Nov Dec 2013 20 20 20 20 30 31 1 Calendars in View 2 3 4 5 6 7 8	Apr May Jun	М	T W	Т	F	S	S
Today is 13 September 2013	Oct Nov Dec	26 27	28	29	30	31	1
Calendars in View 2 3 4 5 6 7 8	oday is 13 September 2013						
	Calendars in View	2 3	4	5	6	7	8
Calendar Holiday (Miami)	Calendar				Holiday (M	1iami)	
10:00 Court:				10:00 Court:			
Surveys 15:00 Meeting	Surveys			15:00 Meeting			
Office Christmas Party	Office Christmas Party						
9 10 11 12 13 14 15		9 10	11	12	13	14	15
Libraries	Libraries		t .	ioliday (Miami)			
Site Pages	Site Pages						
Shared Documents 16 17 18 19 20 21 22	Shared Documents	16 17	18	19	20	21	22
Management Documents Holiday (Miami)	Management Documents		Holiday (Miami)				
RFQs 23 24 25 26 27 28 29	RFQs	23 24	25	26	27	28	29
		20 24	20	20	-/	20	23
Lists	Lists						
Calendar 🖶	Calendar			🕈 Add			

				Calenc	dar Tools					System A	ccount -
Site Actio	ons 👻 过	Brow	se	Events	Calendar					oyatem A	
New Event	View Event	Edit Event	🔍 Ver 🖗 Eve 🗙 De inage	rsion Histor ent Permissi lete Event	ry U ions Atta Fil Actic	ch Workf	lows Approve/ Workflows	Reject			
•	2013	•	() 🔿 Se	ptember	2013					
Jan Apr	Feb May	Mar Jun		м		т	w	т	F	s	s
Jul	Aug	Sep		26	27	2	28	29	30	31	1
Today is 1	13 Septem	ber 2013									
III Cale	endars in	View		2	3	4	4	5	6	7	8
Ca	alendar								Holiday	(Miami)	
								10:00 Court: I			
Survey	ys							15:00 Meeting			
Office (Christma	s Partv									
		-		9	10	1	11	12	13	14	15
Librario	00						Н	loliday (Miami)			
Libran	65										

3. Provide the details of the New Event and then click "Save"

4. This shared calendar is accessible to all site users. Additional calendars can be created, and can be limited to specific users – this will be dealt with in other User Stories

5. To get the shared calendar into Outlook, click on the "Calendar" tab and then "Connect to Outlook"

				Ca	lendar	Teele								System	1 Accou	nt -
Site Act	tions 👻 🗎	😰 Bro	wse	Event		alendar										
	Expand C	Collapse All	Caler Ove	ndars erlay	5 C > - [1	urrent Viev Calendar	w: ▼	E-mail a Link	RSS Feed	Con	nect to itlook	X	🔀 Edit L 🕎 Form	.ist Web Parts ↓	List Settin	
Scope	Expa	nd		N	lanage	Views		Share 8	t Track	Conn	ect & Exp	ort	Custo	omize List	Se	ttings
↓ Jan	2013 Feb	Mar	•	• •	Sept	ember :	2013									
Apr	May	Jun			М		Т	W		Т			F	S		S
Oct	Nov	Dec		26		27		28		29	3	30		31	1	
Today is	n 12 Conton															
Touay	s 15 Septen	IDEI 2013														
Ca	alendars ir	n View		2		3		4		5	6			7	8	
0	Calendar			2		5		4		5		,	Holiday	(Miami)	0	
			_							10.00 0	ourt: 1		nonday	(mann)		
										15:00 M	leating					
Surv	eys									10.00 1	recting					
Office	e Christma	as Party		0		10				10	4	2		14	15	
				9		10		11		12 alidau (I	1 Ain mil			14	15	
Libra	ries								п	oliday (i	marni)					
Site P	2000															
Oher	dyca			16		17		18		19	2	20		21	22	
Share	ed Docum	ents					Holiday ((Miami)			-					
Manag Docur	gement ments							(
RFQs				23		24		25		26	2	27		28	29	

6. In Outlook, your Personal Calendar is visible side-by-side with the Shared Calendar. Try dragging and dropping appointments between them. If you update the calendar in Outlook, SharePoint is updated automatically and vice versa



Chapter 3. Working on the Road

These days, many workers spend much of their time away from the office. Sometimes they will be working from home, usually with a good broadband connection – in which case, they can have full access to the SharePoint site without needing to worry about VPNs. SharePoint is a superb home-working solution. But sometimes, a worker would like to have access to all their content while they're on the road.

User Story: At CLS Solicitors, for example, Amy Lawyer likes to have access to all the documents relating to a case while she's seeing clients or at court. Ideally, she wants to be able to update things while she's on the road and not on a secure network. Copying files back and forth between desktop and USB drive, and USB drive and laptop or tablet is a pain, and there's always the risk of making a mistake. SharePoint provides a much neater solution.

1. From the CLS site home page, access the "Shared Documents" document library. This is the place for storing documents in SharePoint

Site Actions 👻 📝	Browse Page		System Account 🗸
CLS + Home			
Home Crown vs Eric C	Criminal HCC Business Purchase Eric Estate	Search this si	te 🔎 😮
Surveys Office Christmas Party Libraries Site Pages Shared Documents Management Documents RFQs	Team Today	Collaborative Legal Services This is the SharePoint site for our practice.	
Lists	9	Client Directory	
Tasks FAQ	10	Last Name First Name Bus Contract Hermione 555 Criminal Fric 555	-3333 555-4444
Discussions Team Discussion	11	Homebuyer Fiona 555 Will Eric 555	-1111 555-9999 -1212 555-2121
A Recycle Bin		🖶 Add new item	

2. Click on the "Documents" tab. Here Amy has full functionality to create new documents, edit and delete documents, upload documents and so on. With our SharePoint service, this will work as well for Amy from her home broadband as it does from the office, without muddling with hard-to-configure or unreliable VPNs

Site Actions 🕶 🐋 Brows	se D	Libr ocumer	ary Tools nts Library					
New Upload Document - Document - F	New older	Edit Docum	La Check Out La Check In ent La Discard Check Out Open & Check Out	View Edit Properties Propertie	(값 Version History 종 Document Permission: S X Delete Document Manage	E-mail a Link Share & Track	Download a Copy	Send 1 Manag Go To Copies
Surveys	П	уре	Name			Modified		
Office Christmas Party	(Act Anent Assault 1954			05/09/2013 10:	27	4
1 there also	Ģ		Case Outline			05/09/2013 10:	28	4
Libraries	6		Court Opening Statemen	t		05/09/2013 10:	28	4
Site Pages	[Crown vs Ericson			05/09/2013 10:	28	4
Shared Documents			Crown vs Jones			05/09/2013 10:	28	1
Documents	Ć		Defense Evidence Exhibit	ts		05/09/2013 10:	28	1
RFQs	ĺ.		Defense Witness List			05/09/2013 10:	28	1
			Macy vs Smith			05/09/2013 10:	28	1
Lists	6	- 	Notes from Meeting - Alb	ert Psych		05/09/2013 10:	28	1
Calendar			Original Charge Sheet			05/09/2013 10:	28	:
Tasks	Ó	2	Prosecution Evidence Ext	hibits		05/09/2013 10:	28	1
FAQ	0	P	Team Briefing			05/09/2013 10:	28	
Discussions	🕈 Ad	d docu	ment					

3. To be able to take her documents on the road with her, Amy fires up her laptop, clicks on the "Library" tab, then "Connect to Outlook"



4. Now, all the documents are available locally in her SharePoint Lists. She can work on them while she's offline, and next time she's online, her changes are automatically synched back to SharePoint

	Error Tools	CLS - Shared Doc	uments - Microsof	t SharePoint Workspa	се			_ 0 %
File Home Sync	View Resolve							۵ 🕜
New Add New Document - Documents Folder	Paste Copy as Link Clipboard	Download Delet	Save As TRename Properties ment	Versions Check C Discard SharePoint	Dut n Check Out t	 Mark Mark Read → Unread Track		Go To
Content	CLS > Shared Doct	uments		,				
4 Documents	Folders		Name		Modified		Modified	d By
Available on Server	Shared Doc	uments	Act Ane Case O Court C Court C Crown Crown Defens Macy vs Mary vs Prosecc P Team B	nt Assault 1954.pdf utline.docx Dpening vs Sencson.pdf e Evidence e Witness List.docx : Smith.pdf rom Meeting - Albert Il Charge Sheet.pdf ution Evidence riefing.pptx	13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013 13,09/2013	07:11 07:11 07:11 07:11 07:11 07:11 07:11 07:11 07:11 07:11 07:11	System A System A System A System A System A System A System A System A System A System A	ccount ccount ccount ccount ccount ccount ccount ccount ccount ccount ccount ccount
				Last synchronized	d: 13/09/2013	3 08:04:33 Last at	tempted: 1	3/09/2013 08:04:44

Chapter 4. Sharing with Clients

Often, it's useful to share documents with a client – for information, for review, or even working together on a document. Emailing versions back and forth is possible, but often creates a lot of manual work keeping versions in sync – and the risk that someone may be relying on the wrong version of a document. With our SharePoint solution, you can create subsites for particular clients or cases, and allow your clients to have access to the subsite – without getting access to your SharePoint documents.

User Story: Bob Lawyer is representing Eric Criminal in his case. He wants to have a subsite where he can share documents, calendars, discussions – all the goodness of SharePoint – with Eric, but without allowing Eric access to the main SharePoint site.

1. Bob creates a subsite using the "Matter Template" – a SharePoint template preconfigured for dealing with CLS cases. To do this, Bob opens up "Site Actions" and selects "New Site"



2. Bob completes the "New Site" form, selecting the custom "Matter Site" template created.He clicks the "Create" button



3. Now Bob has a complete SharePoint site, devoted to Eric's case



Now to give Eric access. First of all, Bob uses the control panel to create a login for Eric. Bob may do this himself, or ask his IT service provider to do so on his behalf. However, this does not give Eric access to the CLS SharePoint site – first Bob must specify what content Eric can view.

4. In the "Crown vs Eric Criminal" site, Bob clicks on "Site Actions" and then selects "Site Permissions"



5. Bob notes that the new site inherits permissions from the main CLS site – which means they have the same permissions. But Bob wants this new site to have different permissions – so he clicks "Stop Inheriting Permissions" and confirms the action so that this site can have its own unique access control

	Permission Tools		
Site Actions 👻 対 Brow	vse Edit		
Manage Stop Inheriting Parent Permissions P	Grant Create Check Permissions		
This Web site inherits pe	ermissions from its parent. (CLS)		
Libraries		Туре	Permission Levels
Site Pages	CLS Management	SharePoint Group	Limited Access
Shared Documents	SharePoint Members	SharePoint Group	Contribute
Lists	SharePoint Owners	SharePoint Group	Full Control
Tasks	SharePoint Visitors	SharePoint Group	Read
Discussions			
Team Discussion			
All Site Content			

6. Now Bob can click "Grant Permissions", select the new user he created for Eric Criminal, and add him to the "SharePoint Members" group – allowing him to work on the documents in this site, but keeping the main CLS site secure

	Per	mission Tools					
Site Actions 👻 📄 Brows	se	Edit					
8 8 3	68	Grant	Permissions				×
Inherit Permissions Grant Permissions Grant Grant Inheritance Grant This web site has unique Libraries	permissio	Edit L ermis: Select You can group n address with ser	Users enter user names, ames, or e-mail es. Separate them nicolons.	Users/Groups: Eric Criminal		\$ ₇ 1	Province
Site Pages Shared Documents Lists Calendar Tasks Discussions Team Discussion		CLS Shai	Permissions he permissions you ese users to have. add users to a init group that has been granted the iate permission levels, ang grant the users permission levels, users to a SharePoint recommended, as ese managing ions easier across sites.	Grant Permissions Add users to SharePoint I View permiss O Grant users	a SharePoint group (recor Members [Contribute] sions this group has on site permission directly	nmended) es, lists, and items	I
All Site Content					OK	Cancel	

Chapter 5. Tracking Work

Often, even in a small office, a piece of work will require tasks to be coordinated between various members of staff. When some of the staff are often out of the office, it can become difficult to track the status of the various tasks – especially on a complex piece of work. SharePoint provides a shared task tracker to take the effort out.

Site Actions 👻 📝	Browse	Page				
CLS + Home						
Home Crown vs Eric (Criminal	HCC Business Purchase Eric Estate			Search	this site
Surveys Office Christmas Party	Tear	n Today	C	llaborati		
Libraries	4	● 13 September 2013	Se	rvices	ive Lega	7
Site Pages		Friday	This	s is the Share	Point site for	our
Shared Documents	7	Holiday (Bob Lawyer)	pra	ctice.		$// \setminus$
Management Documents						
RFQs	8					
Lists			Cli			
Calendar	9			ent Directory		
Tasks				Last Name	First Name	Business Phone
FAQ	10			Contract	Hermione	555-3333
				Criminal	Eric	555-1234
Discussions	11			Homebuyer	Fiona	555-1111
Team Discussion				will	Eric	555-1212

1. On the SharePoint Quick Launch bar, click on the "Tasks" list

2. Click "Add New Item" to create a new task

Site Actions 👻 🔡 Brow	se Items	Tasks - New It	tem		□ ×		System Account
CLS > Tasks Use the Tasks list	 All Task to keep trac 	Edit	a Vet				
Home Crown vs Eric C	Criminal H	Save Cancel F	Copy Attach			?	٩
Surveys Office Christmas Party	There are r	Commit	Clipboard Actions			Complete	Predecessors
Libraries	🕈 Add nev	Title *	[[^]	
Site Pages Shared Documents		Predecessors		< bba			
Management Documents				< Remove			
RFQs							
Lists		Priority	(2) Normal 🗸				
Tasks		Status	Not Started	~			
FAQ		% Complete	%		8,2 (1)		
Discussions		Description					
Team Discussion				≡≡ 目目律律 ▲	🌆 ৮বা বাব		
Recycle Bin					^		
All Site Content							

3. Fill in the form to create a new task. Note especially how the task can be related to other tasks ("Predecessors"), how Priority and Status are tracked, and how you can assign the task to a specific user. Everything about the task is tracked in one place – you can even attach files with further details if needed.

4. As with the Calendar, you can also synchronise the SharePoint task register with Outlook – on the "Lists" tab, click "Connect to Outlook"

Site Actions 🕶 📸 🛛 Bro	wse	List Tools Items List	>							
Standard View NR	ew bw	Create View	Modify View 🚽 Treate Column Navigate Up	Current View: All Tasks Qurrent Page	E-mail a Link	Alert Me +	RSS Feed	Sync to SharePo Connect to Out	int Workspace	 Create Visio Diagram Open with Access Open Schedule
View Format Da	tasheet		Manage V	iews	Sha	are & Tra	ck		Connect & Ex	port
Surveys		🛛 Туре	Title	Assigned To		St	tatus	Priority	Due Date	e % Cc
Office Christmas Party Christmas Party Surve	y Ther	e are no items	to show in th	is view of the "Tasks'	list. To a	idd a ne	w item,	click "New".		
	+ 4	Add new item								
Libraries										
Site Pages										
Shared Documents										
Management Documents										
RFQs										
Lists										
Calendar										
Tasks										
FAQ										
Discussions										
Team Discussion										

Chapter 6. Document FAQ

SharePoint's main mechanism for organising information is the "list". SharePoint provides preconfigured "lists" for managing documents, calendars, images, tasks, discussions – and many others. But what if you need to organise another type of information? SharePoint's answer is the "Custom List", a mini-database which allows you to manage any type of tabular information.

User Story: For example, at CLS, prospective clients often fire legal questions – sometimes quite complex – at the receptionists. If the receptionists were able to answer more of these questions without referring them to Amy or Bob (the solicitors), then Amy and Bob would have more billable time and the practice could be more profitable. Carol Administrator decides to set up an FAQ area in SharePoint – every time a receptionist fields a new question, it can be captured here – and Amy or Bob can add an answer which the receptionists will always have access to in future.

Site Actions 👻 📝	Browse Page	System Account +
CLS • Home		
Home Crown vs Eric C	Criminal HCC Business Purchase Eric Estate	Search this site 👂 👔
Surveys		
Office Christmas Party	Team Today	Collaborative Legal
Libraries	() 3 September 2013	Services
Site Pages	Friday	This is the SharePoint site for our
Shared Documents	Holiday (Bob Lawyer)	practice.
Management Documents	,	
RFQs	8	
Liete		
Calendar	9	Client Directory
Tasks		Last Name First Name Business Phone Mobile Number
FAQ	10	Contract Hermione 555-3333 555-4444
		Criminal Eric 555-1234 555-4321
Discussions	11	Homebuyer Fiona 555-1111 555-9999
Team Discussion		Will Eric 555-1212 555-2121
	12	Add new item
Recycle Bin		♣ Add

1. On the site home page, click on the "Lists" heading

2. Now click "Create" to start setting up a new list

Site Actions 👻 🐋				System Account +
CLS → All Site Displays all sites,	Content lists, and libraries in this site.			
Home Crown vs Eric C	Criminal HCC Business Purchase	Eric Estate	Search this site	۶ (
Surveys Office Christmas Party	Create Site Workflows			View: Lists •
			Items Last Modified	
Libraries	Lists			
Site Pages Shared Documents	Announcements	Use this list to track upcoming events, status updates or other team news.	1 2 months ago	
Management Documents	Calendar	Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.	3 8 days ago	
RFQs	S Clients		4 3 weeks ago	
	Dates		0 9 days ago	
Lists	FAQ FAQ	Frequently Asked Questions	1 8 days ago	
Calendar	Links	Use the Links list for links to Web pages that your team members will find interesting or useful.	0 2 months ago	
Tasks FAQ	Tasks	Use the Tasks list to keep track of work that you or your team needs to complete.	0 2 months ago	
	Upcoming Dates		0 9 days ago	
Discussions Team Discussion				
Recycle Bin				

3. Note all the preconfigured list types SharePoint offers – we are going to select "Custom List"

Site Actions 👻 🐋				System Account +
CLS > Create Add new sites, pages, libi Home Crown vs Eric Criminal Improve the Creation Experi	raries, or lists to this site. HCC Business Purchase Eric <mark>ence Install Microsoft Silverlight</mark>	Estate		<u> </u>
Select an item to crea discussion board, sun Hover over an item to	ate a new list, library, vey, page or site. o view details.			
Libraries Document Library Form Library Wiki Page Library Picture Library	Communications Announcements Contacts Discussion Board	Tracking Links Calendar Tasks Project Tasks Issue Tracking Survey	Custom Lists Custom List Custom List in Datasheet View External List Import Spreadsheet	Pages and Sites Page Web Part Page Sites and Workspaces

4. Give the list a name, description, and select "Yes" to have it displayed on the Quick Launch bar at the left of the site. Now click the "Create" button

5. A blank list is created, with just one column – "Title". We can use that for the questions, but what about everything else? On the "List" tab, click "Create Column"

Site Actions 👻 📂 Brows	e Items List
Standard View Format	Image: Solution of the second seco
Office Christmas Party Christmas Party Survey	Image views Share what Connect we point Image views Share what Connect we point Image views Description Status Answered Yes - we can provide mortgage advice and a full
Libraries Site Pages Shared Documents Management Documents RFQs	🗣 Add new item
Lists Calendar Tasks FAQ	
Discussions	

6. Note the various different column types. We start by creating a "Description" field of type "Multiple Lines of Text". Scroll down and click "OK" when finished



7. Complete the FAQ list by adding more columns – for Answer (Multiple Lines of Text) and Status (Choice). Note how when you specify a "Choice" column, under "Additional Column Settings" you can specify the values – these go into a drop-down list when someone is entering this value



8. Once all the columns have been created, click "Add New Item". Note how SharePoint has automatically created an FAQ form to enter data into this list

Site Actions 👻 📷 Browse	List T Items	FAQ - Do you handle mortg	age registrations?	□ ×	
		Edit			
View Format Datash	eet Crea	Save Cancel Paste	Delete Attach		ist Settings
Surveys Office Christmas Party	о т (0) П	Commit Clipboard	Item File Actions		
Libraries	🕈 Add nev	Title *	Do you handle mortgage registrations?	×	
Site Pages		Description			
Shared Documents					
Management Documents					
RFQs					
Lists		Status	Answered		
Calendar		Answer	Yes - we can provide mortgage advice and a full conveyancing		
Tasks			service.		
FAQ					
Discussions					
Team Discussion		Created at 05/09/2013 08:24 by System Last modified at 05/09/2013 08:24 by S	n Account Save Cancel		
Recycle Bin					
All Site Content					

Chapter 7. Management-Only Documents

Sometimes it's important to have an area for restricted documents – such as documents which are only to be accessed by management. In the old fileserver world, you'd need to create a new file share, set up and maintain the appropriate ACLs, and map the new drive on the PCs of the authorised users. SharePoint makes things easier – just create a new document library, and specify who has permissions. Below demonstrates how to set up Management-Only Documents – but the same approach can be used for restricted calendars, tasks, discussions – any kind of SharePoint list.

1. On the site home page, click on the "Libraries" heading on the Quick Launch bar, then click "Create" and select "Document Library"



2. Complete the New Document Library form, then scroll down and click Create

Site Actions 👻 🐋		System Account +
CLS > New		
Home Crown vs Eric C	Criminal HCC Business Purchase Eric Estate	0
Surveys	Name and Description	
Office Christmas Party	Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this document library.	Name: Management Only Docs
Site Pages		Description:
Shared Documents		Documents restricted to
Management Documents		management access.
RFQs		
<mark>Lists</mark> Calendar Tasks FAQ	Navigation Specify whether a link to this document library appears in the Quick Launch.	 Display this document library on the Quick Launch? Yes No
Discussions Team Discussion	Document Version History Specify whether a version is created each time you edit a file in this document library. Learn about versions.	Create a version each time you edit a file in this document library? O Yes O No
Recycle Bin	Document Template Select a document template to determine the default for all new files created in this document library.	Document Template: Microsoft Word document
		Create Cancel

3. By default, your new document library has the same permissions as the site. To change this, access the "Library" tab and click the "Library Permissions" icon

Site Actions 👻 📷 B	Browse	Libra Document	ry Tools							System A	Account +
		, 6	Modify View	Current View:		🔊 🕑	S	Connect to Outlook	Form Web Parts -		
Standard Datasheet View	New Row	Create View	Navigate Up	Current Page	E-mail a Link	Alert RSS Me → Feed	Sync to SharePoir Workspace	nt	New Quick Step	Library Settings	
Surveys	Datashe	Type	Manage Vi	Name	Shar	e & Irack Modifie	L Con	nnect & Export Modified	By	Settings	
Office Christmas Part	ty Th	ere are no i	tems to show in thi	is view of the "Blog"	document l	ibrary. To ad	d a new item, click	k "New" or "Upload".			
Christmas Party Surv	/ey	Add docum	nent								
Libraries											

4. Use the "Stop Inheriting Permissions" button (the same as with the subsite for Eric Criminal) and you can now add the precise users you want to have access to this new library by clicking the "Grant Permissions" button

Site Actions	- 📬 Broy	Pern	nission Tools	
Q		, Ch		æ
Inherit	Grant	Edit User	Remove User	Check
Permissions	Permissions	Permission	s Permissions	Chack
This library	has unique	permissions	s.	CHECK
Surveys			Name	
Office Chris	stmas Party		CLS Managem	ent
			SharePoint Ow	ners
Libraries				
Site Pages	oursents			
Manageme	nt			
Documents	5			
RFQs				
Lists				
Calendar				
Tasks				
FAQ				
Diseussia				
Team Discu	ns			
radin Disci	0001011			
A Recycle	Bin			
All Site	Content			

Chapter 8. Team Discussions

Often groups of staff members discuss an issue via email. As the discussion grows, it can be hard to track the threads of the discussion – who is replying to whom? – and for those joining the discussion halfway through, it can be difficult to figure out what's going on. SharePoint provides a simple way of engaging in topical discussions – with the discussion structured and recorded properly as it proceeds.

Site Actions + 😰 Browse Items List							
CLS > Team Discussion > Subject ~ Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team.							
Home Crown vs Eric C	Criminal HCC Business Purchase Eric Estate		Search this site		۶		
Surveys	Subject	Created By	Replies	Last Updated			
Office Christmas Party	What do you think of SharePoint?	System Account	1	13/09/2013 09:16			
Libraries	+ Add new discussion						
Site Pages							
Shared Documents							
Management Documents							
RFQs							
Lists							
Calendar							
Tasks							
FAQ							
Discussions							
Team Discussion							
Recycle Bin							
🗎 All Site Content							

 $\ensuremath{\textbf{1}}.$ Click on the "Team Discussion" link on the Quick Launch bar

2. To start a new discussion, simply click on Add New Discussion, complete the form and click "Save"



3. To reply to an existing discussion, click on it and then click the "Reply" button. Enter your reply and click "Save"



Site Actions 👻 🔂 Browse List CLS → Team Discussion → What's the best restaurant in the area to impress a client → Flat -Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team. Home Crown vs Eric Criminal HCC Business Purchase Eric Estate Search this site. ۵ م Posted By Post Survevs Office Christmas Party Started: 13/09/2013 09:20 View Properties 🛛 🗸 Reply What's the best restaurant in the area to impress a client? Libraries I have an **important** client coming next week, and want to take her out for a good lunch - where would you suggest? Site Pages Shared Documents System Account Management Documents Posted: 13/09/2013 09:23 View Properties 🛛 🗸 Reply RFQs I always use the Savoy - nothing says "your account is important to us" quite like it. Lists Calendar Show Quoted Messages System Acco unt Tasks FAQ Posted: 13/09/2013 09:23 View Properties 🛛 🗸 Reply But... it is rather pricey, isn't it? Discussions Team Discussion Show Quoted Messages Recycle Bin All Site Content

4. By default, the discussion is shown linearly in date order

5. If you click on the "List" tab and change the current view to "Threaded", you see a threaded view of the discussion making it clear which messages were replies to which others. If you prefer, you can make the Threaded view the default



Chapter 9. Gathering Feedback

Quite often, something arises in an office which requires gathering feedback. Usually, the question is emailed out, and voting buttons may be used, or responses manually collated. SharePoint provides a powerful survey mechanism which makes it easy to ask questions and analyse the responses. For example,

User Story: Carol Administrator is trying to answer that all-important question – "what should we do for the office Christmas party?"

System Account -Site Actions 👻 📝 🛛 Browse Page CLS + Home Home Crown vs Eric Criminal HCC Business Purchase Eric Estate Search this site. ۵ م Surveys Office Christmas Party Team Today Collaborative Legal Services () 13 September 2013 Libraries Friday Site Pages This is the SharePoint site for our Holiday (Bob Lawyer) Shared Documents practice Management Documents REOs 8 Lists Client Directory 9 Calendar Last Name First Name Business Phone Mobile Numbe Tasks 10 555-4444 FAO Contract Hermione 555-3333 Criminal 555-1234 555-4321 Eric Discussions Homebuver Fiona 555-1111 555-9999 Team Discussion Will Eric 555-1212 555-2121

1. On the site home page, click on the "Lists" heading

2. Now click "Create" to start setting up a new list



3. Note all the preconfigured list types SharePoint offers – select the "Survey" template

Site Actions 👻 🐋				System Account +
CLS > Create Add new sites, pages, librari Home Crown vs Eric Criminal Improve the Creation Experience	ies, or lists to this site. HCC Business Purchase Eric ce <u>Install Microsoft Silverlight</u>	Estate		0
Select an item to create discussion board, surve Hover over an item to v	e a new list, library, y, page or site. iew details.			
Libraries Document Library Form Library Wiki Page Library Picture Library	Communications Announcements Contacts Discussion Board	Tracking Links Calendar Tasks Project Tasks Issue Tracking Survey	Custom Lists Custom List Custom List in Datasheet View External List Import Spreadsheet	Pages and Sites Page Web Part Page Sites and Workspaces

4. Fill out the "New Survey" form and click "Next"

Site Actions 👻 🐋			System Account 🗸
CLS + New			
Home Crown vs Eric 0	Criminal HCC Business Purchase Eric Estate		()
Surveys	Name and Description		
Office Christmas Party	Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this survey.	Name:	v Survey
Libraries		,	,,
Site Pages		Description:	
Shared Documents		What shall we d	to this Christmas?
Management Documents			\sim
RFQs		1	
Lists Calendar Tasks FAQ	Navigation Specify whether a link to this survey appears in the Quick Launch.	 Display thi Launch? Yes 	s survey on the Quick
Discussions Team Discussion	Survey Options Specify whether users' names will appear in survey results and whether users can respond to the same survey multiple times.	Show user names Yes Allow multiple res Yes	s in survey results? No sponses? No
An Site Content			
		Next	Cancel

5. Adding questions to the survey is exactly like adding columns to a list – SharePoint is very consistent. Use "Next Question" to keep adding more questions, and "Finish" when you're done

Site Actions 👻 🐋			System Account 🗸
Surveys	Question and Type	Ouestion:	
Office Christmas Party Christmas Party Survey	Type your question and select the type of answer.	Should we do something in the office or use another venue?	$\hat{}$
Libraries		1	
Site Pages		The type of answer to this question is:	
Shared Documents		○ Single line of text	
Management		O Multiple lines of text	
Documents		 Choice (menu to choose from) 	
RFQs		O Rating Scale (a matrix of choices or a Likert scale)	
		O Number (1, 1.0, 100)	
Lists		O Currency (\$, ¥, €)	
Calendar		O Lookup (information already on this site)	
Tasks		Ves/No (check box)	
FAQ		O Person or Group	
		O Page Separator (inserts a page break into your survey)	
Discussions		O External Data	
Team Discussion			
	Additional Question Settings	Require a response to this question:	
Recycle Bin	Specify detailed entires for the type of proyuer you selected	O Yes No	
All Site Content	specify detailed options for the type of answer you selected.	Enforce unique values:	
		O Yes O No	
		Type each choice on a separate line:	
		In the office	
		External venue	
		×	
		× 2	
		Display choices using:	
		O Drop-Down Menu	
		Radio Buttons	

6. SharePoint automatically generates an easy-to-complete survey questionnaire

Site Actions 👻 📷			
CLS > Office C	Christmas	Party ► Overview -	
Home Crown vs Eric C	Criminal H	Office Christmas Party - New Item	و م
Surveys		Finish Cancel	
Office Christmas Party	Er Kespo	Should we have the party in the office or at an external venue?	View: Overview •
Christmas Party Survey	Survey N		
	Survey D	External	
Libraries	Time Cre		
Site Pages	Number	Who should be invited?	
Shared Documents		○ Staff Only	
Management Documents		Staff and Partners	
RFQs	Show a	O Staff, Partners and Children	
		What activities would you enjoy?	
Lists		√ Food	
Calendar		Games	
Tasks		Fancy Dress	
FAQ		Comedy	
		✓ Team-building challenges	
Discussions			
Team Discussion		Finish Cancel	

7. The survey provides a number of ways of accessing the response data – including an automatically-generated visual summary.



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