# Hosted SharePoint 2010 User Stories

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# Contents

# Chapter 1. Introduction

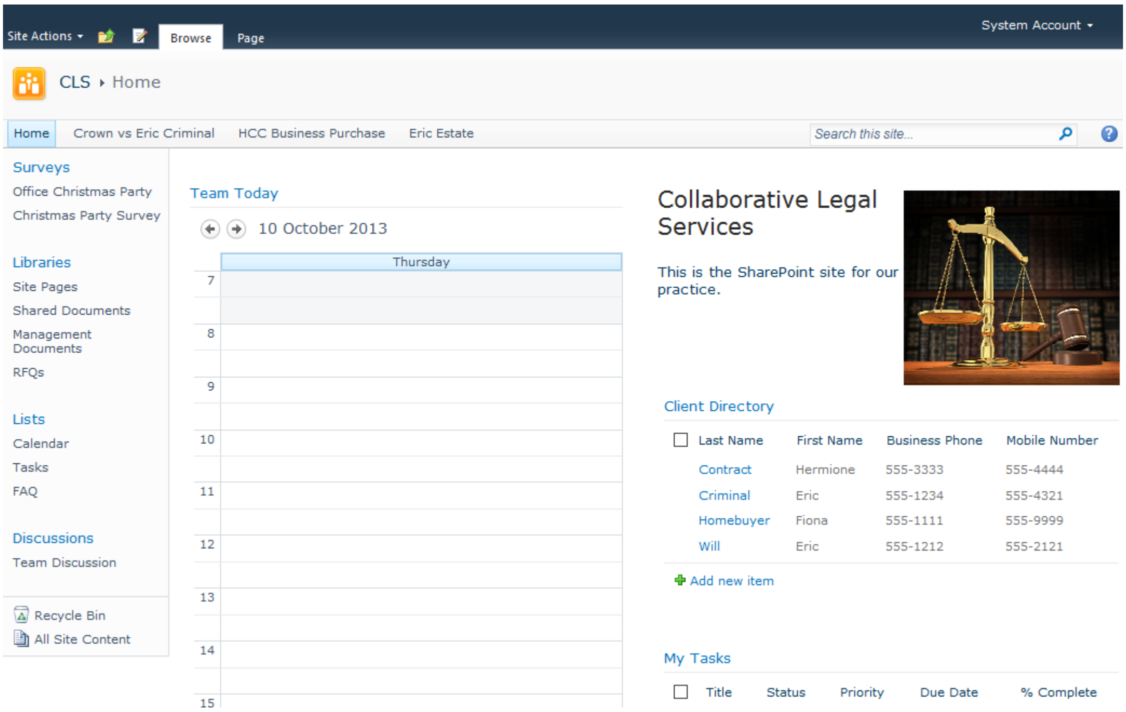
SharePoint's capabilities are very diverse: document management, task scheduling, shared calendars, discussion forums, image galleries and many others all fall within the capability of our SharePoint offering. In fact, one of the major challenges is that with so many diverse and flexible functions, it 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.

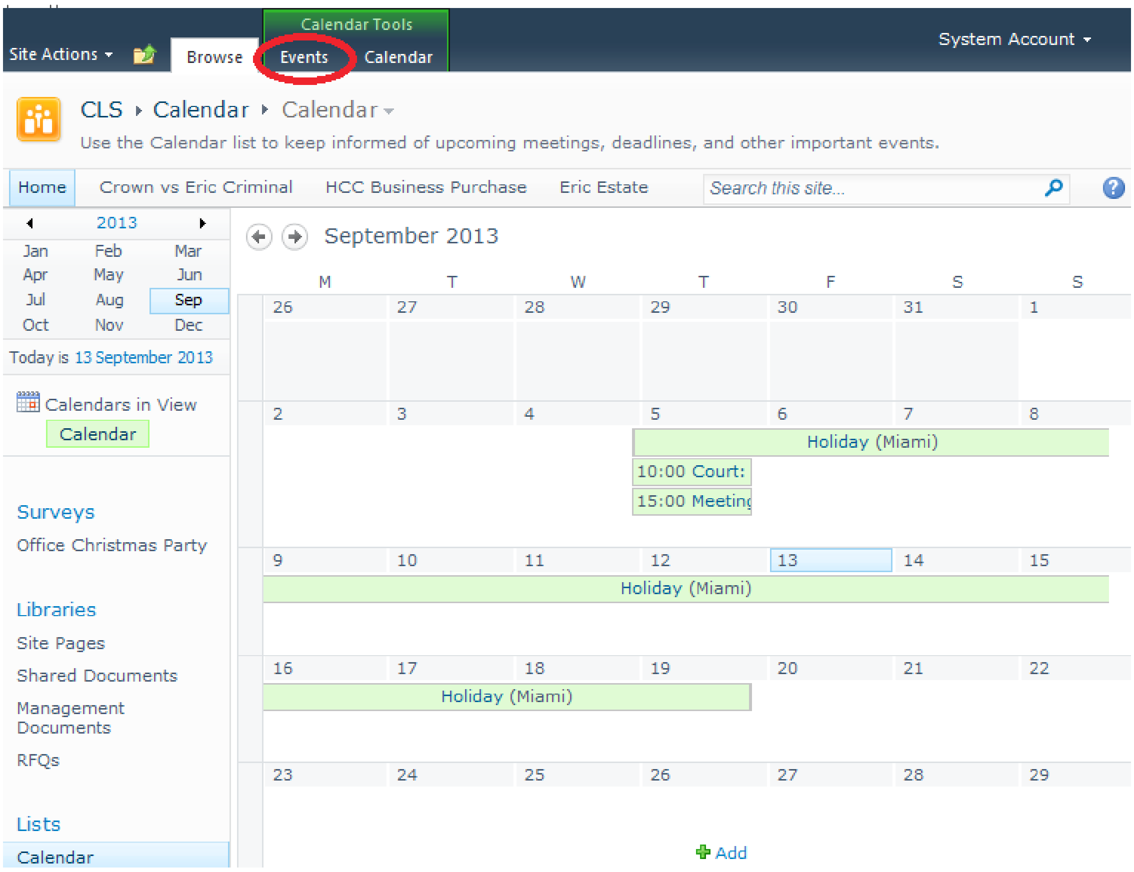
# Chapter 2. Sharing Calendars

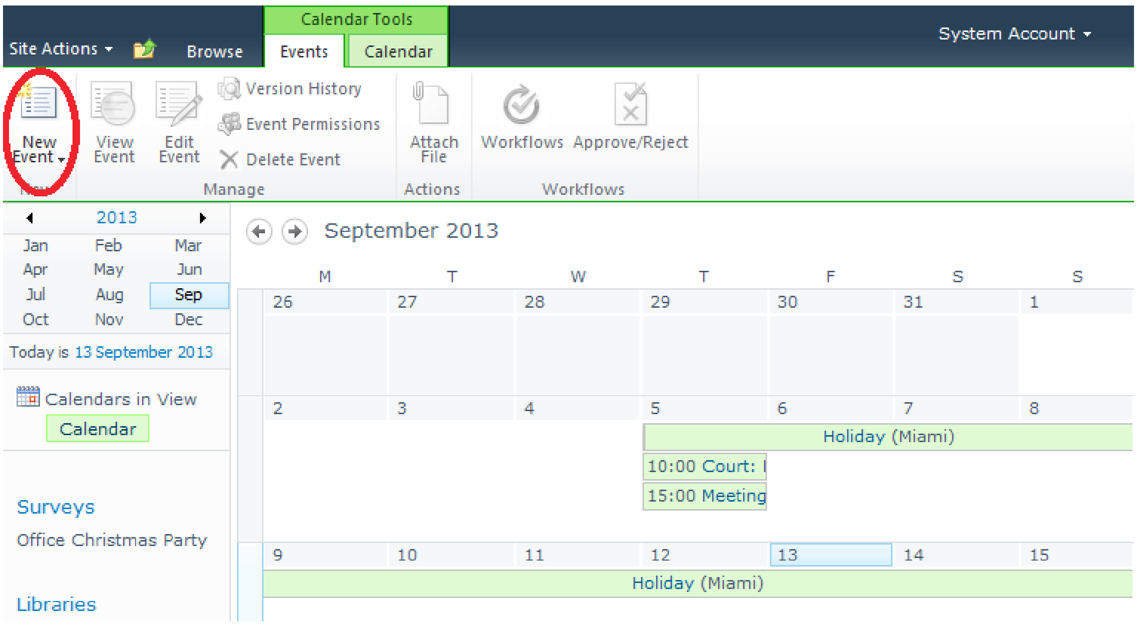
For offices with more than one worker, it's always useful to know where everyone is at any given time. SharePoint provides a shared calendar accessible via the web, which can also be viewed alongside your personal calendar in Outlook. Appointments can be dragged between the shared calendar and your personal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



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

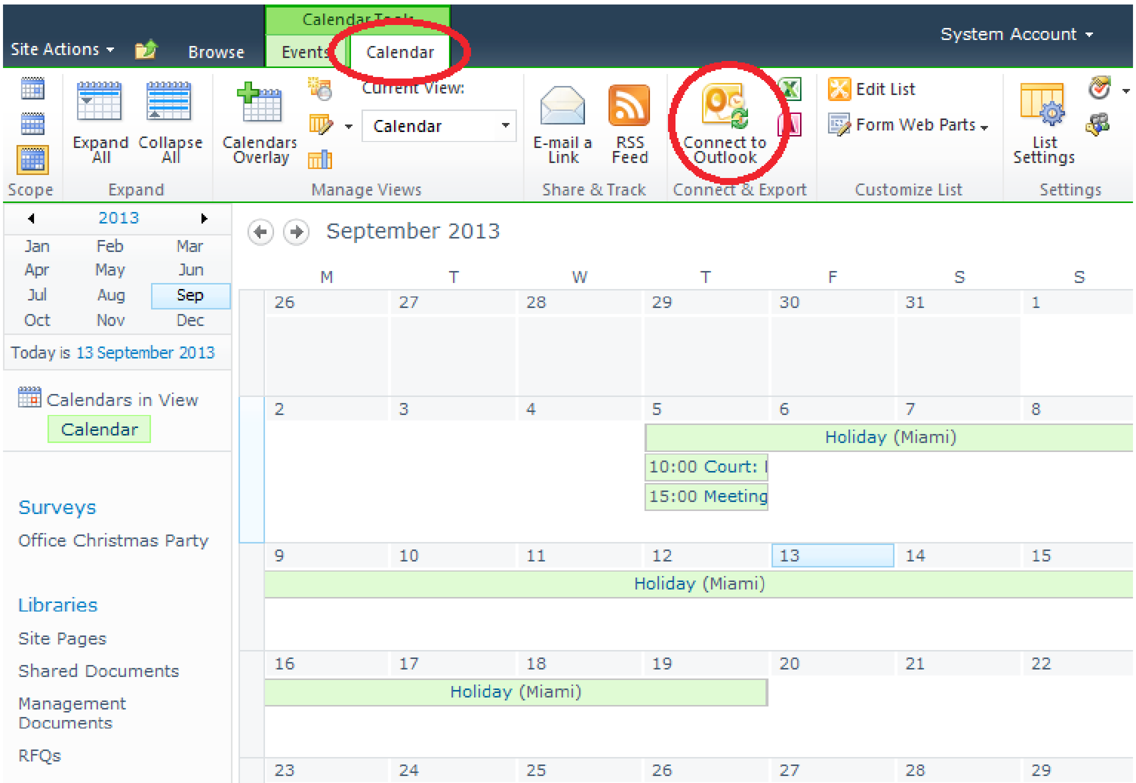


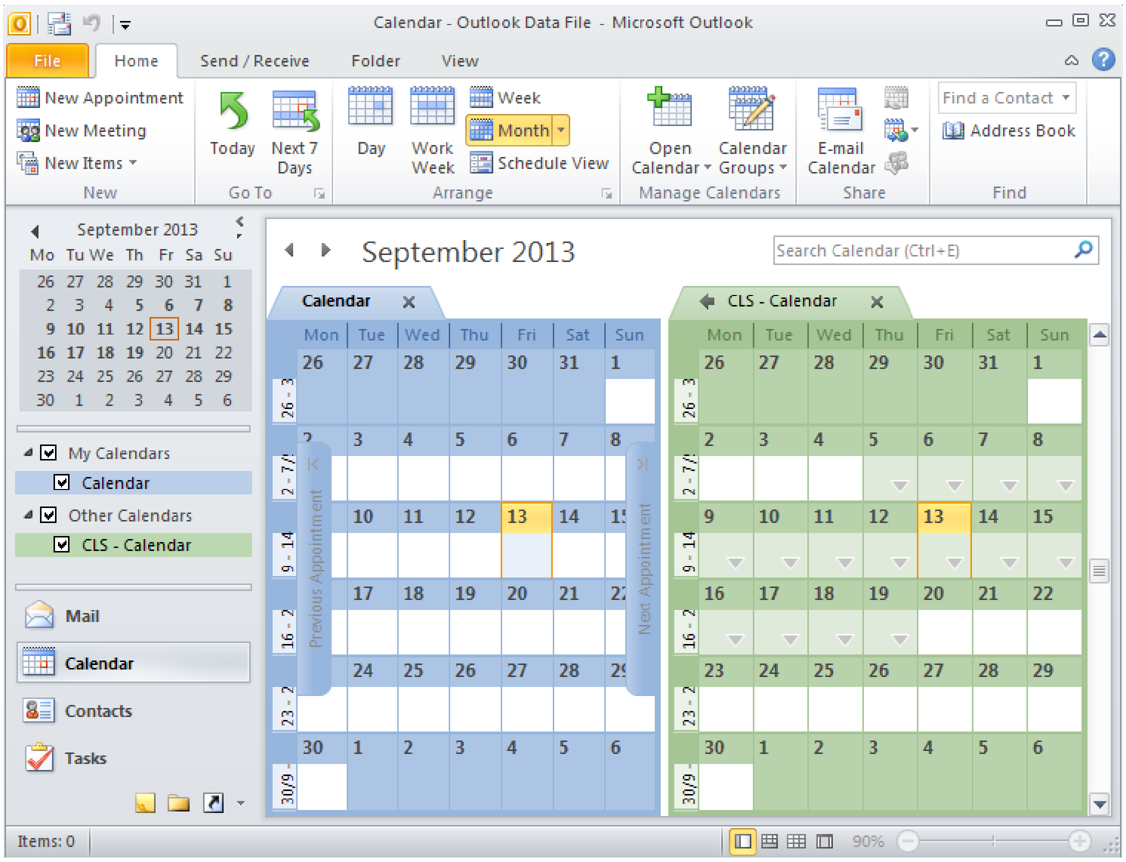
**3.** Provide the details of the New Event and then click "Save"

**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"



**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

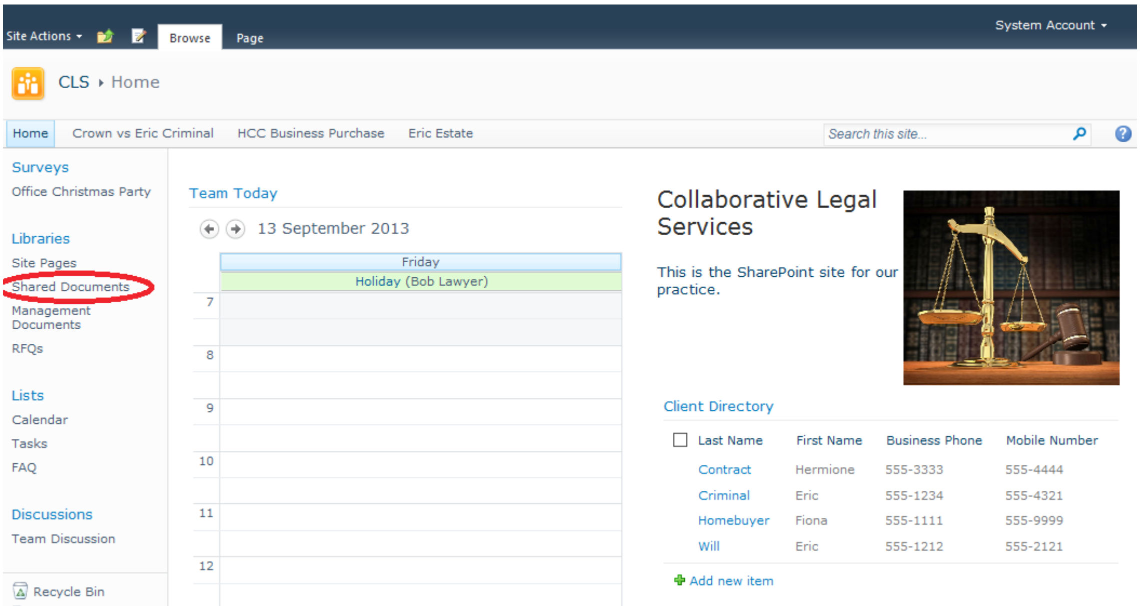


# Chapter 3. Working on the Road

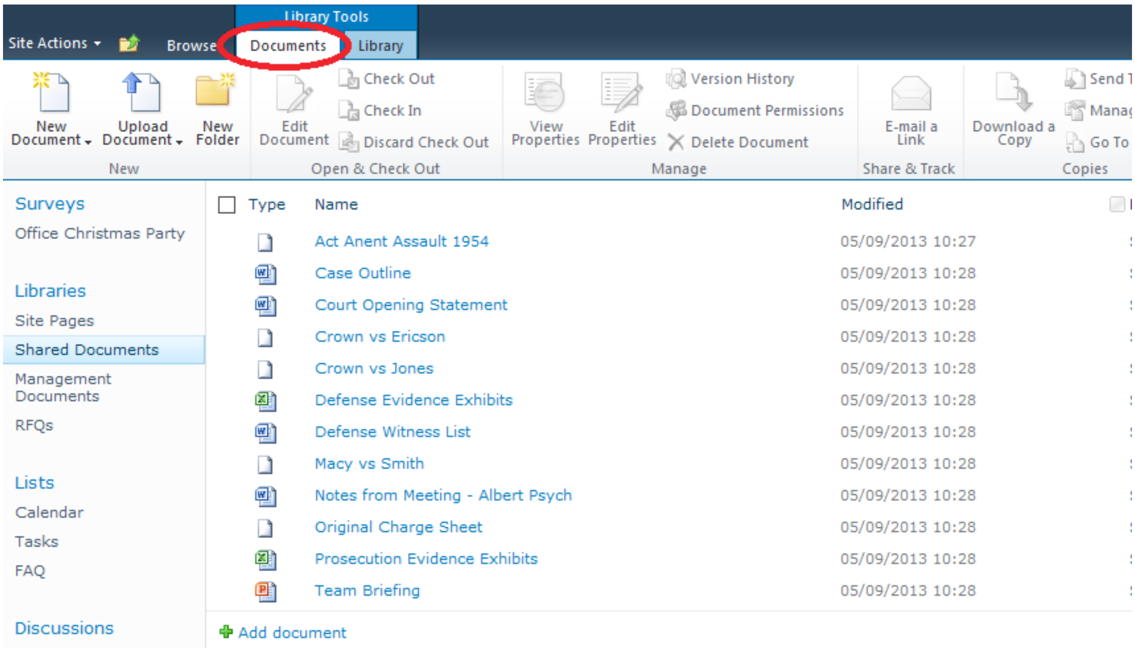
These days, many workers spend much of their time away from the office. Sometimes they will be working from home, usually with a good broadband connection – in which case, they can have full access to the SharePoint site without needing to worry about VPNs. SharePoint is a superb home-working solution. 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.

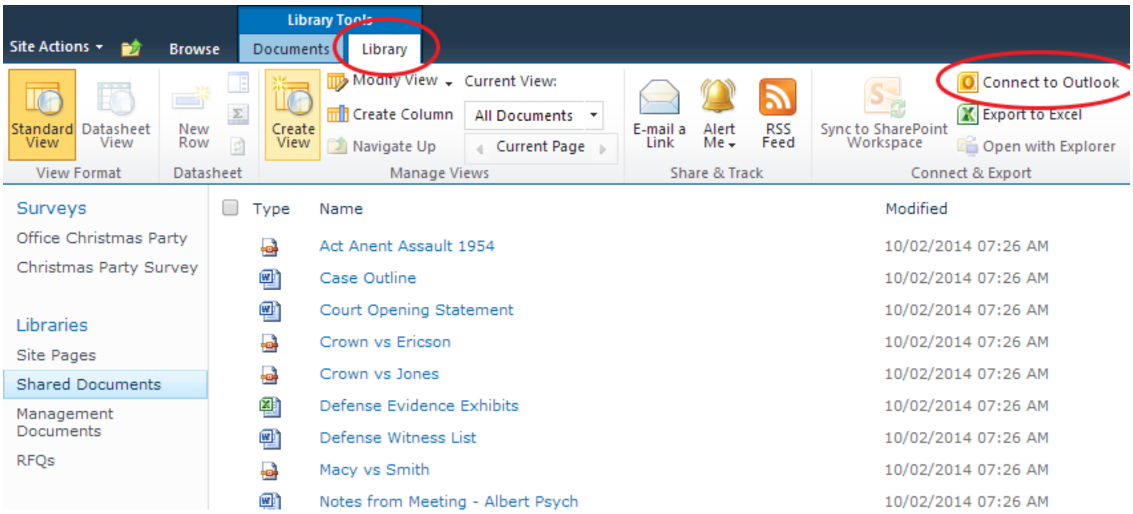
**1.** From the CLS site home page, access the "Shared Documents" document library. This is the place for storing documents in SharePoint



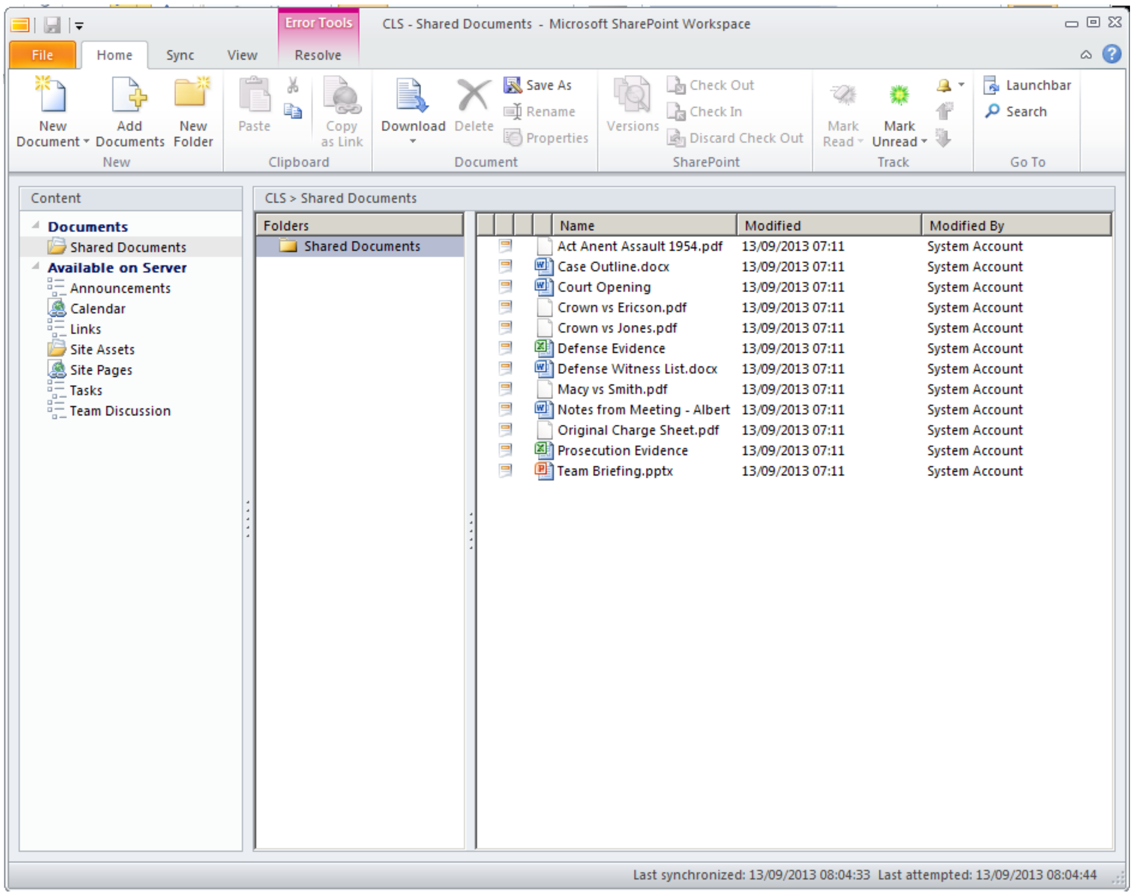
**2.** Click on the “Documents” tab. Here Amy has full functionality to create new documents, edit and delete documents, upload documents and so on. With our SharePoint service, this will work as well for Amy from her home broadband as it does from the office, without muddling with hard-to-configure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




**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

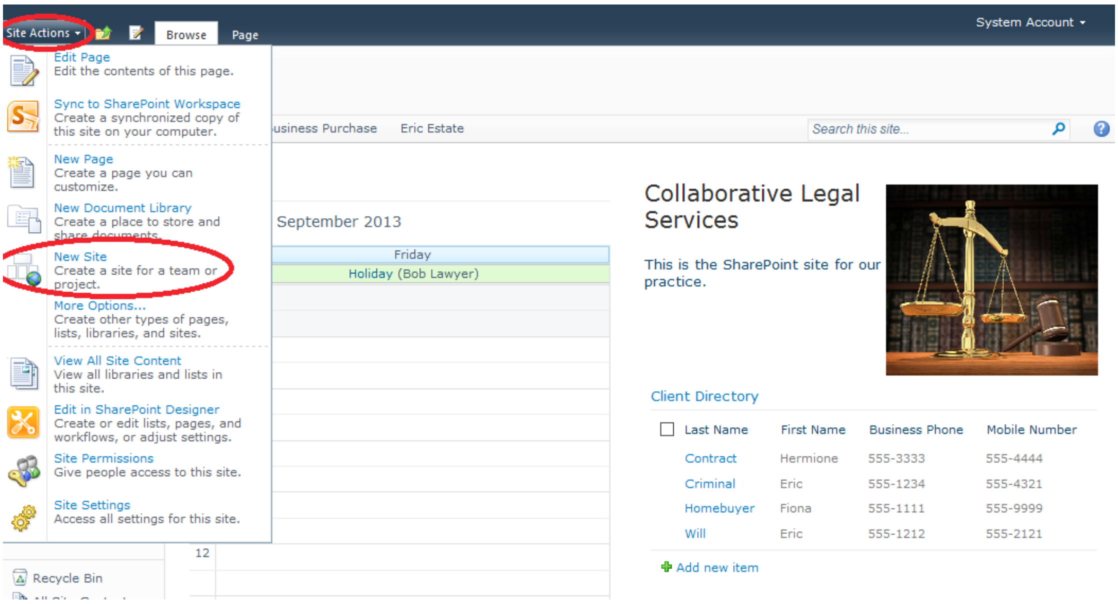


# Chapter 4. Sharing with Clients

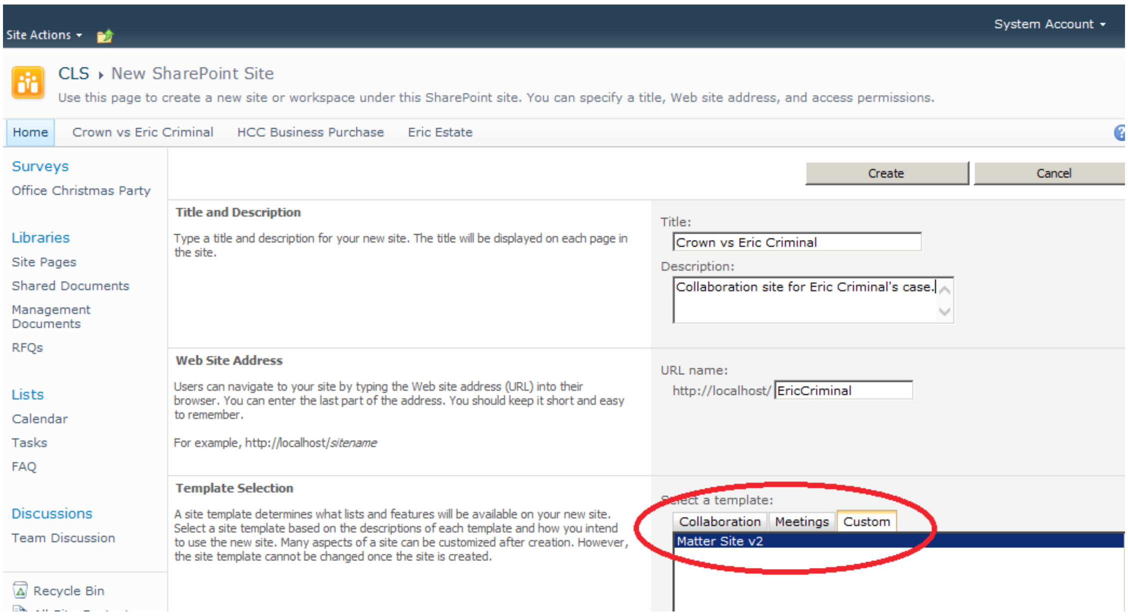
Often, it's useful to share documents with a client – for information, for review, or even working together on a document. Emailing versions back and forth is possible, but often creates a lot of manual work keeping versions in sync – and the risk that someone may be relying on the wrong version of a 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

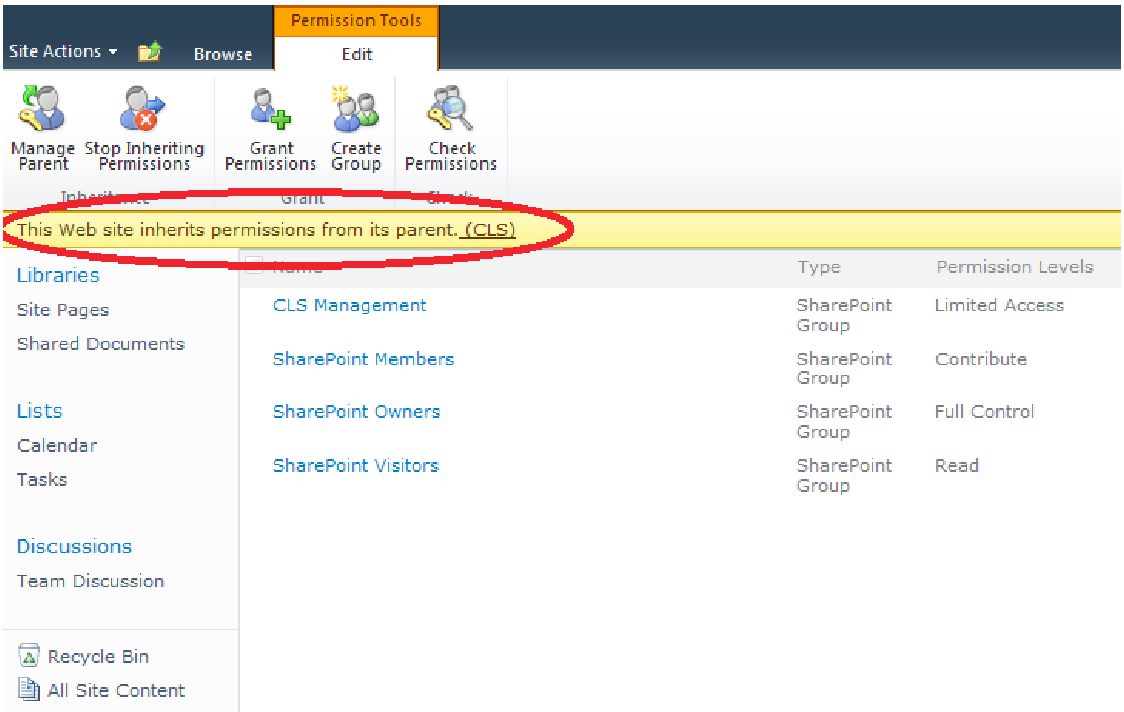



**3.** Now Bob has a complete SharePoint site, devoted to Eric's case

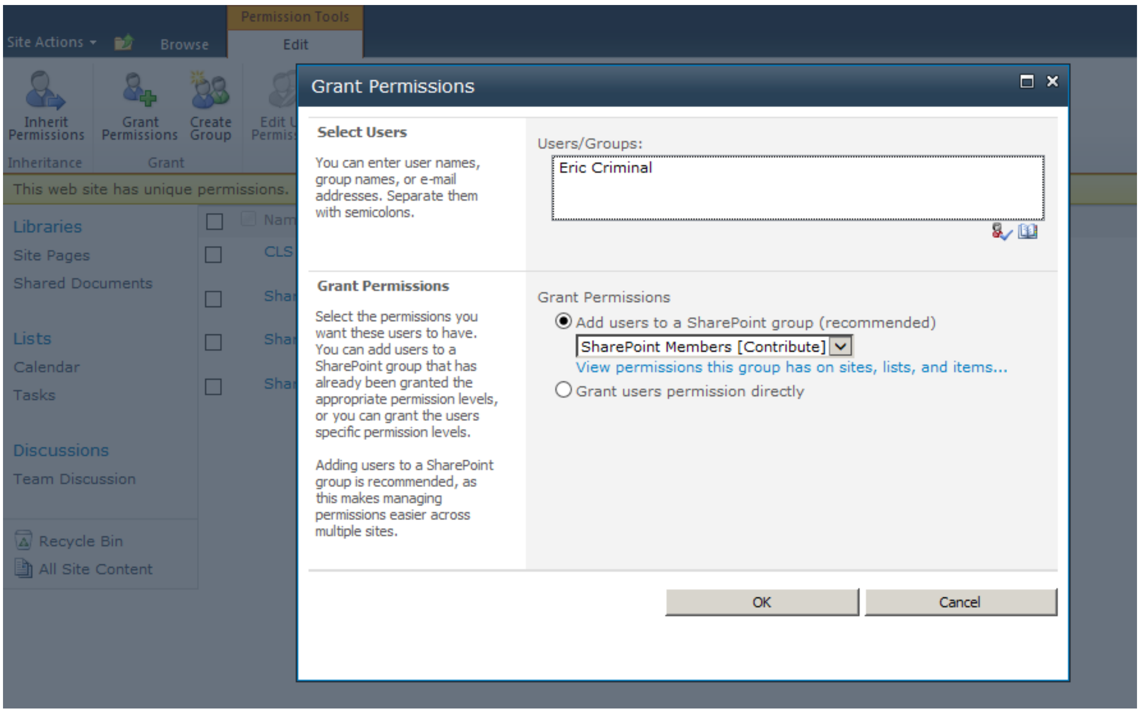
Now to give Eric access. First of all, Bob uses the control panel to create a login for Eric. Bob may do this himself, or ask his IT service provider to do so on his behalf. However, this does not give Eric access to the CLS SharePoint site – first Bob must specify what content Eric can view.

**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



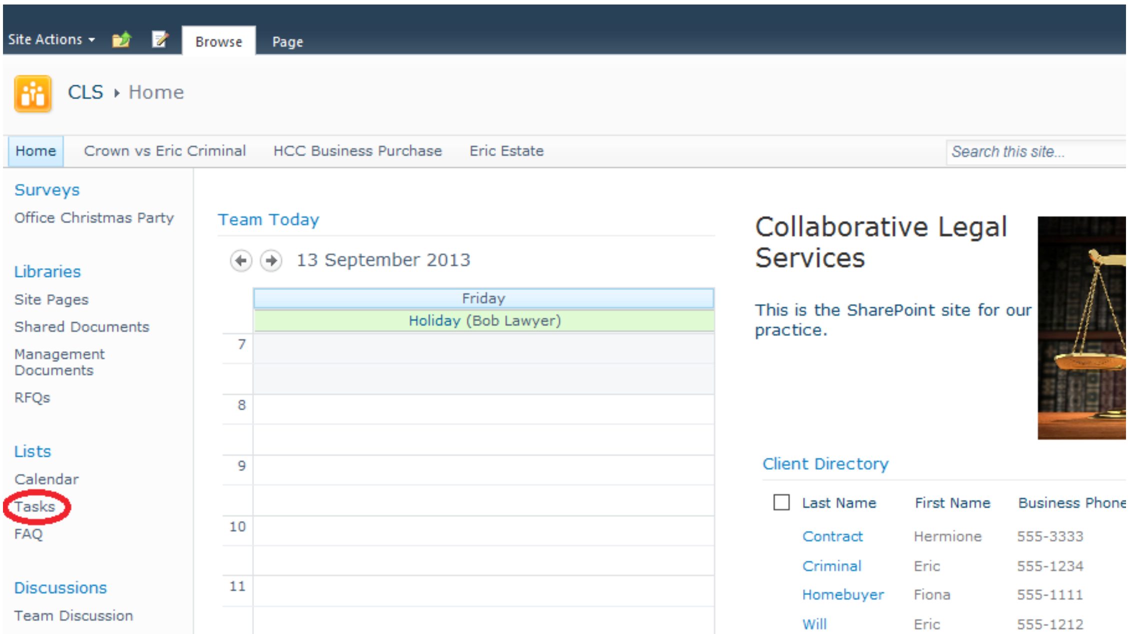

**6.** Now Bob can click “Grant Permissions”, select the new user he created for Eric Criminal, and add him to the “SharePoint Members” group – allowing him to work on the documents in this site, but keeping the main CLS site secure



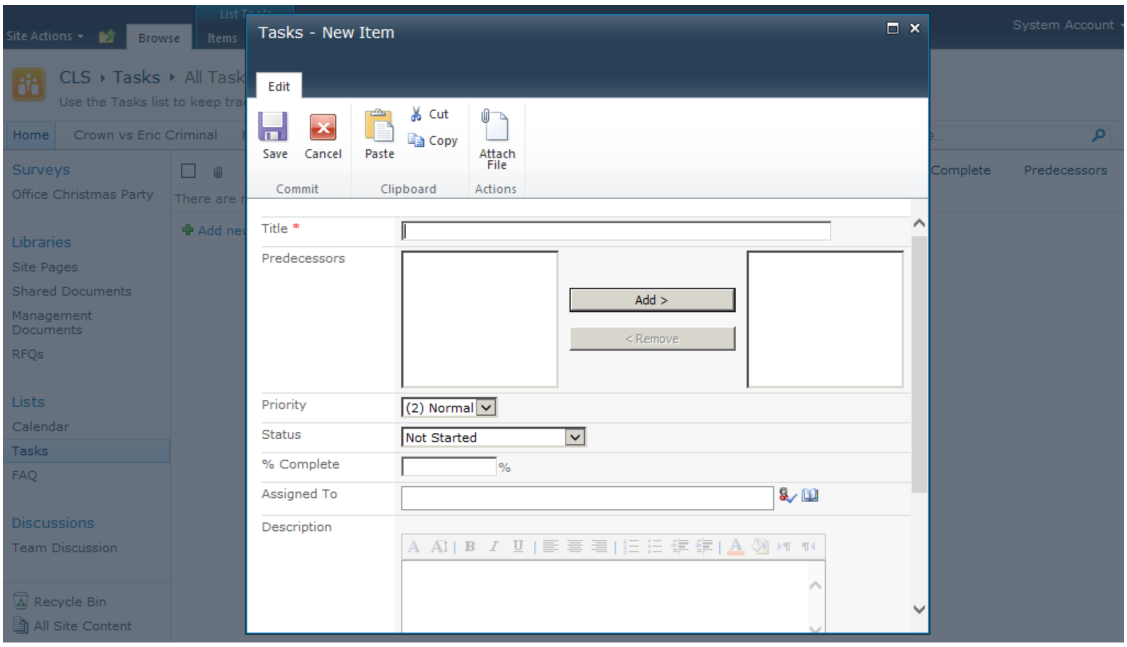
# Chapter 5. Tracking Work

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.

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

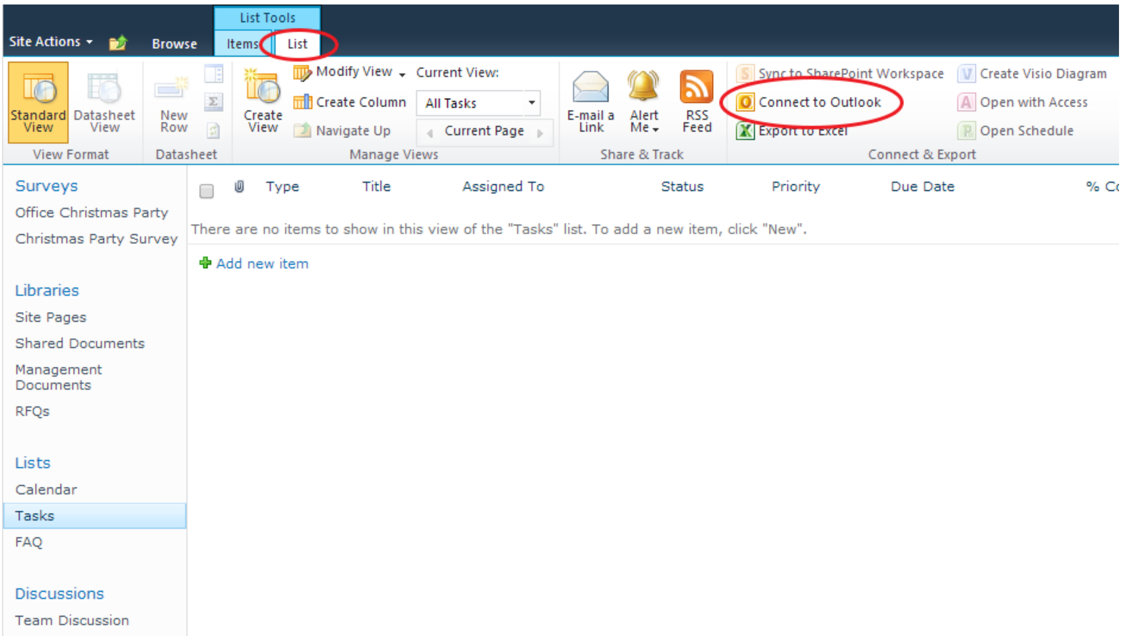



**2.** Click "Add New Item" to create a new task



**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"

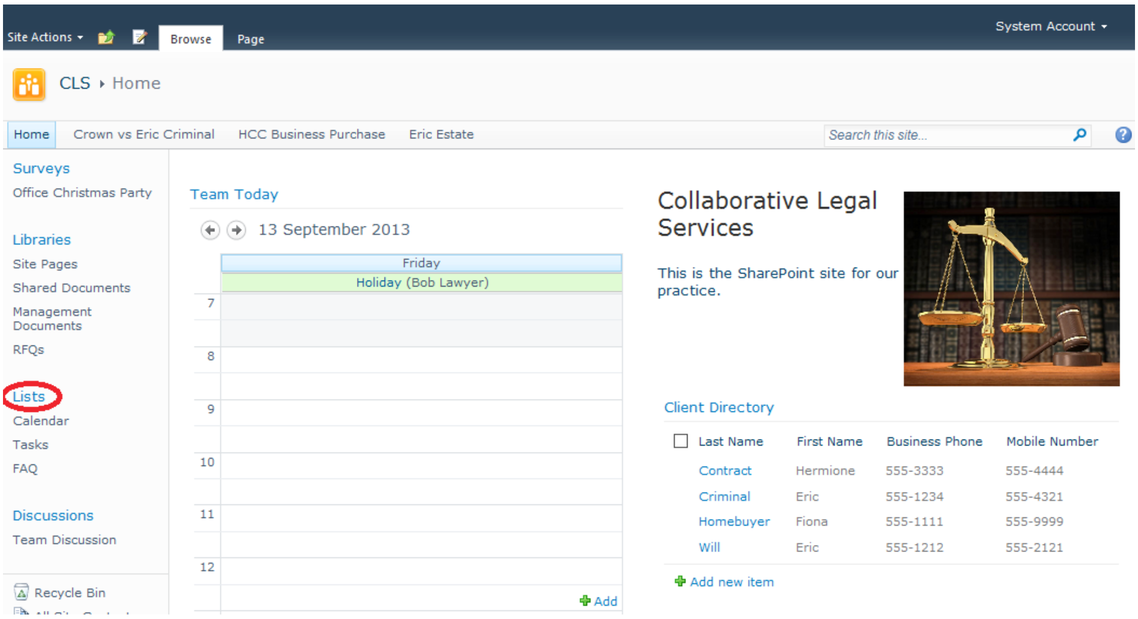


# Chapter 6. Document FAQ

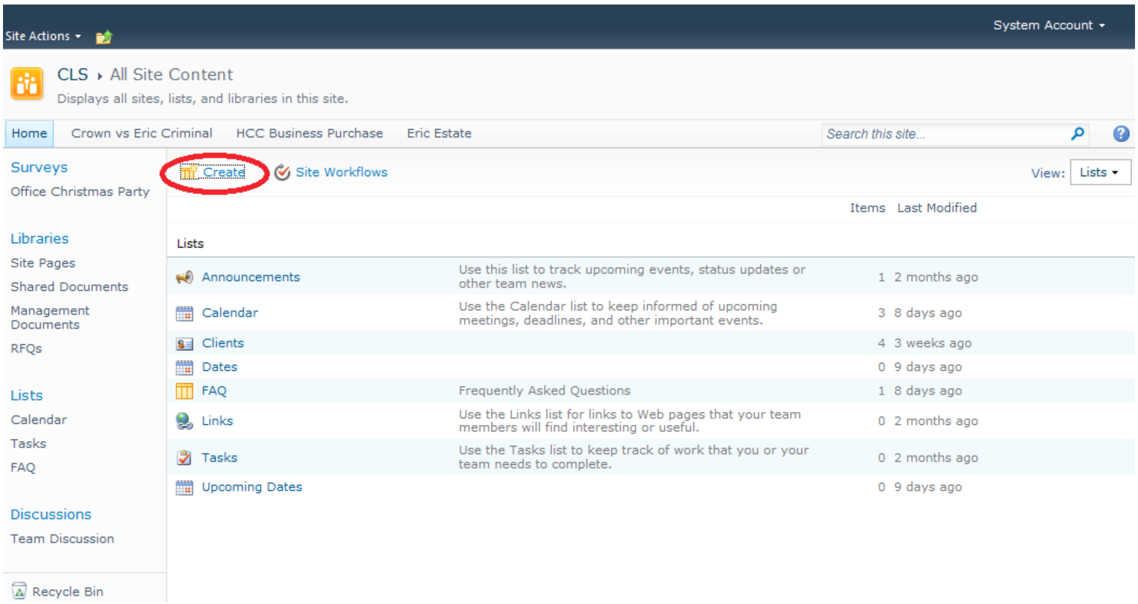
SharePoint's main mechanism for organising information is the "list". SharePoint provides preconfigured "lists" for managing documents, calendars, images, tasks, discussions – and many others. But what if you need to organise another type of information? SharePoint's answer is the "Custom List", a mini-database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

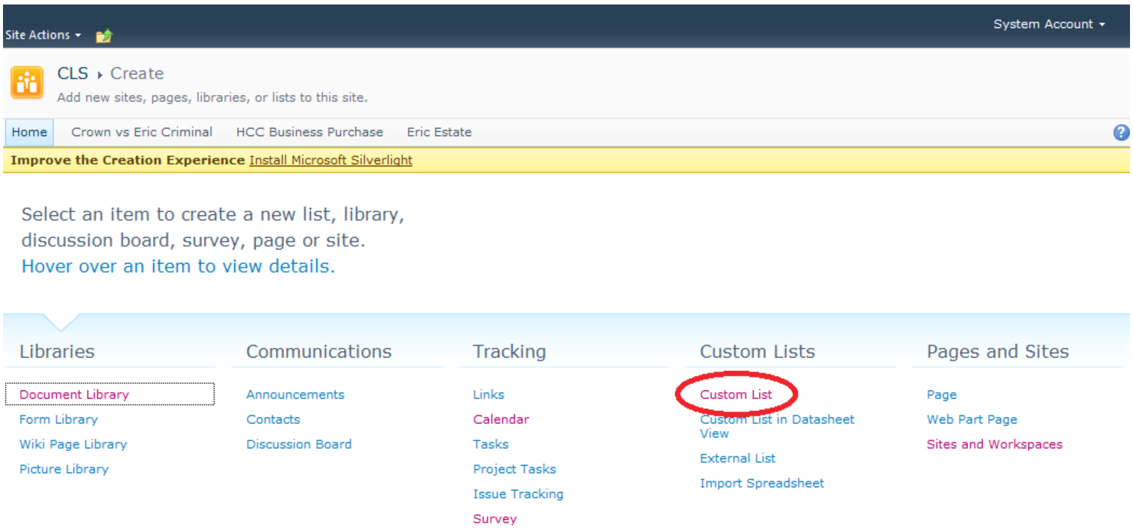
**1.** On the site home page, click on the "Lists" heading



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

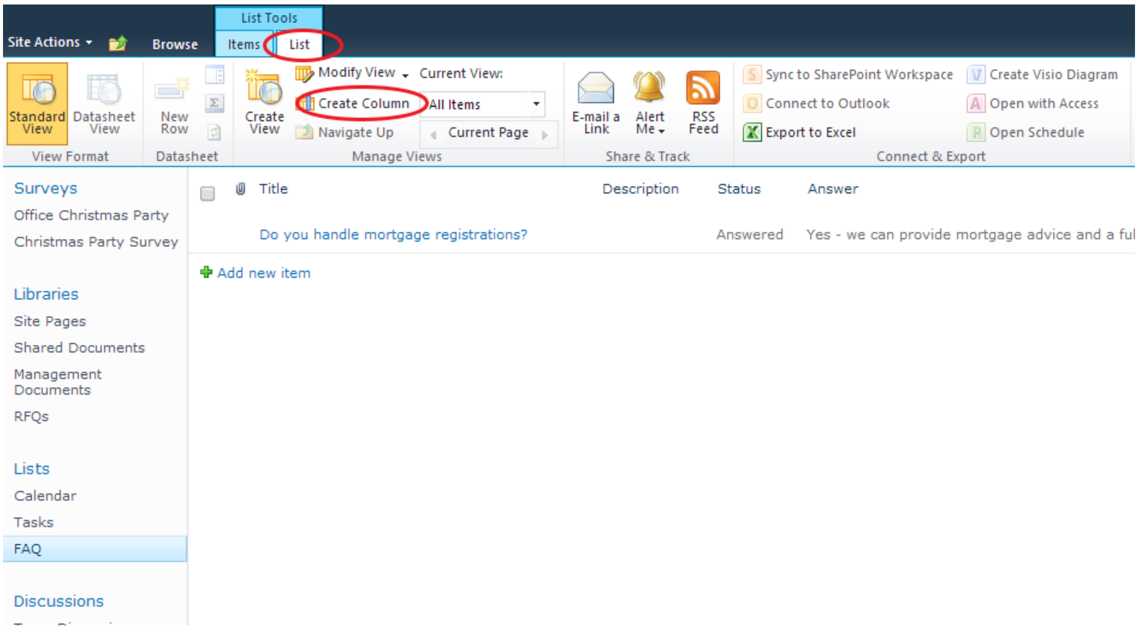



3. Note all the preconfigured list types SharePoint offers – we are going to select “Custom List”

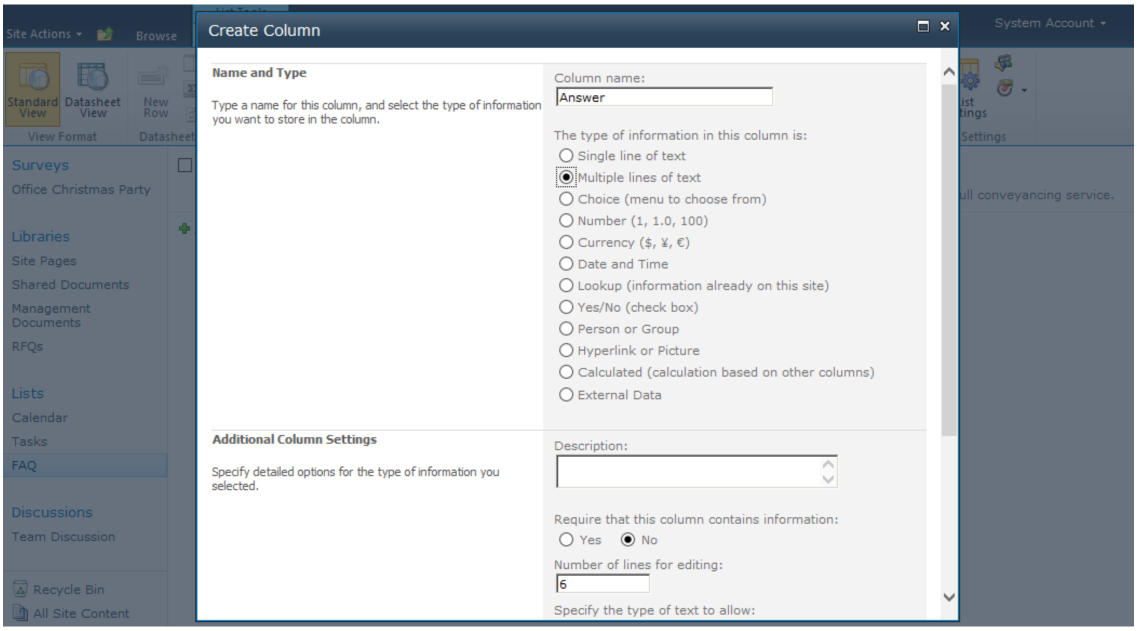



4. Give the list a name, description, and select “Yes” to have it displayed on the Quick Launch bar at the left of the site. Now click the “Create” button

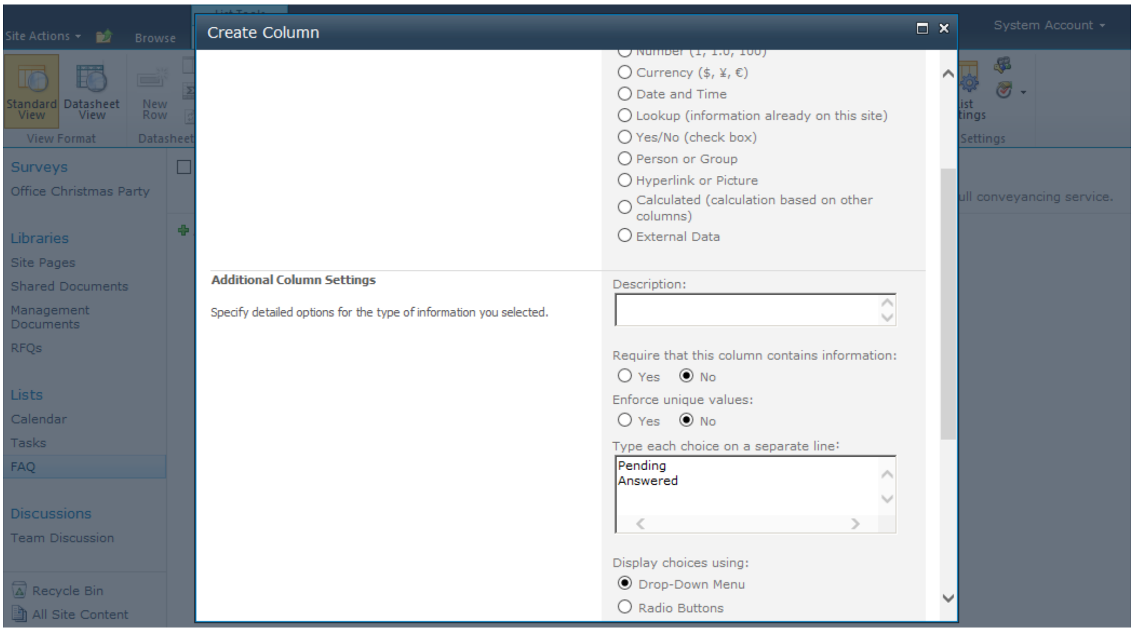
**5.** A blank list is created, with just one column – “Title”. We can use that for the questions, but what about everything else? On the”List” tab, click “Create Column”



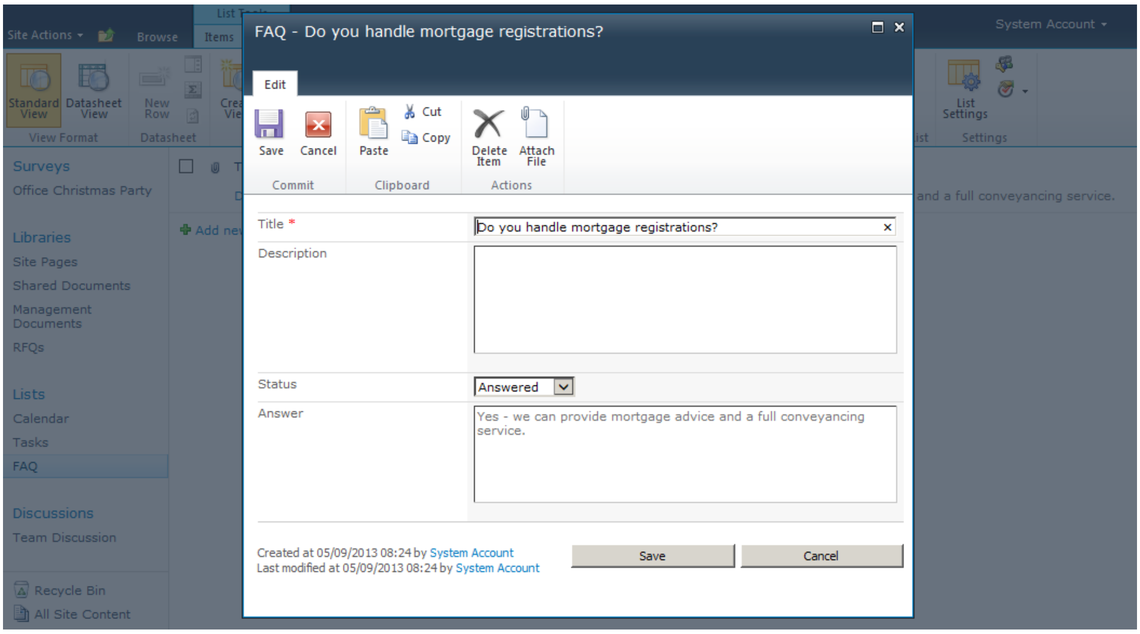

**6.** Note the various different column types. We start by creating a “Description” field of type “Multiple Lines of Text”. Scroll down and click “OK” when finished



**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



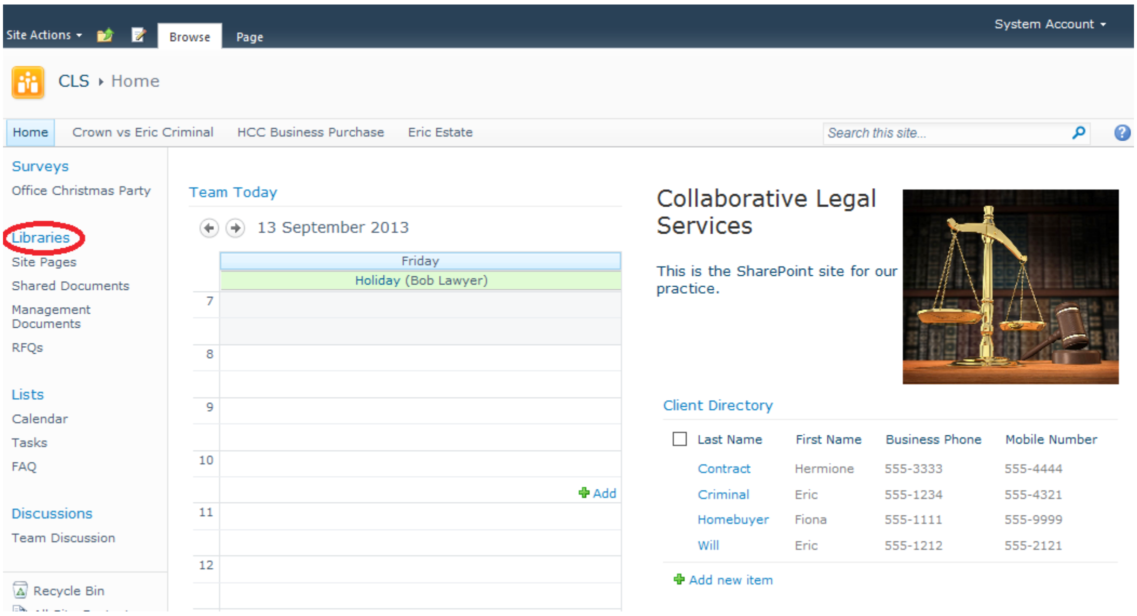

**8.** Once all the columns have been created, click "Add New Item". Note how SharePoint has automatically created an FAQ form to enter data into this list



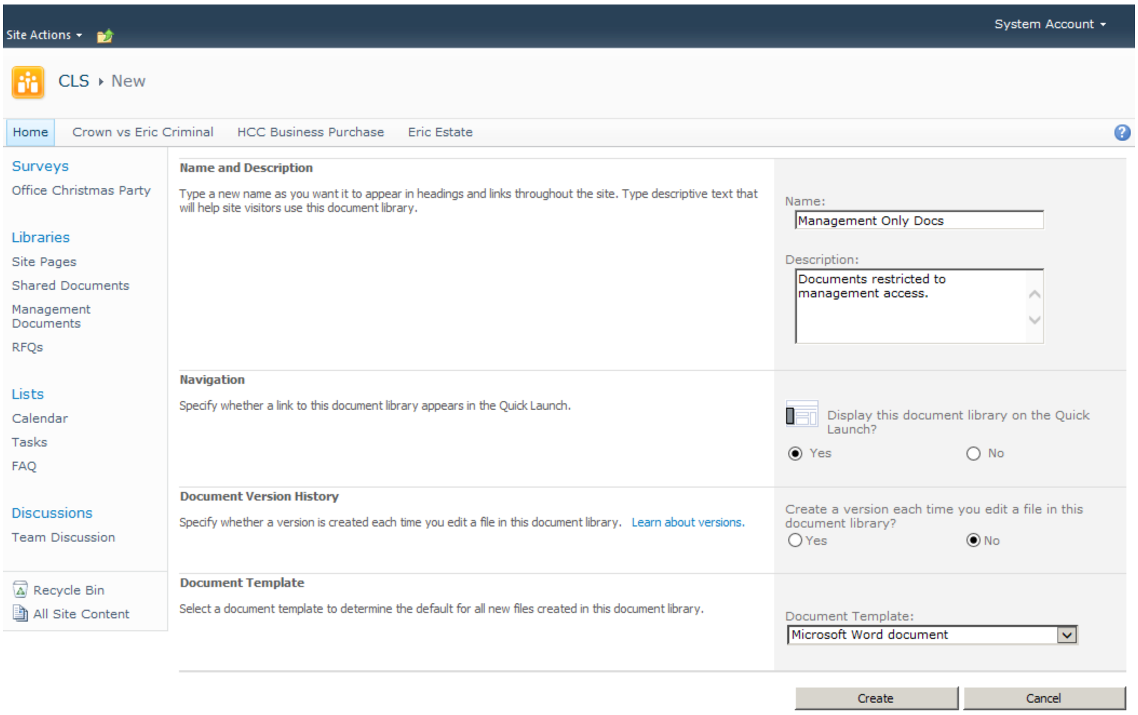
# Chapter 7. Management-Only Documents

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.

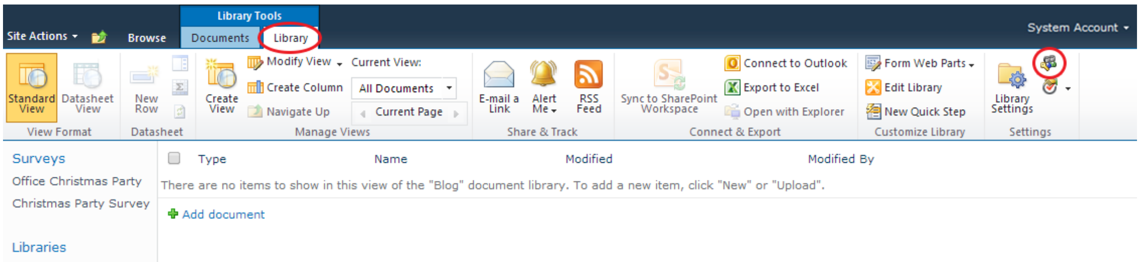
**1.** On the site home page, click on the "Libraries" heading on the Quick Launch bar, then click "Create" and select "Document Library"



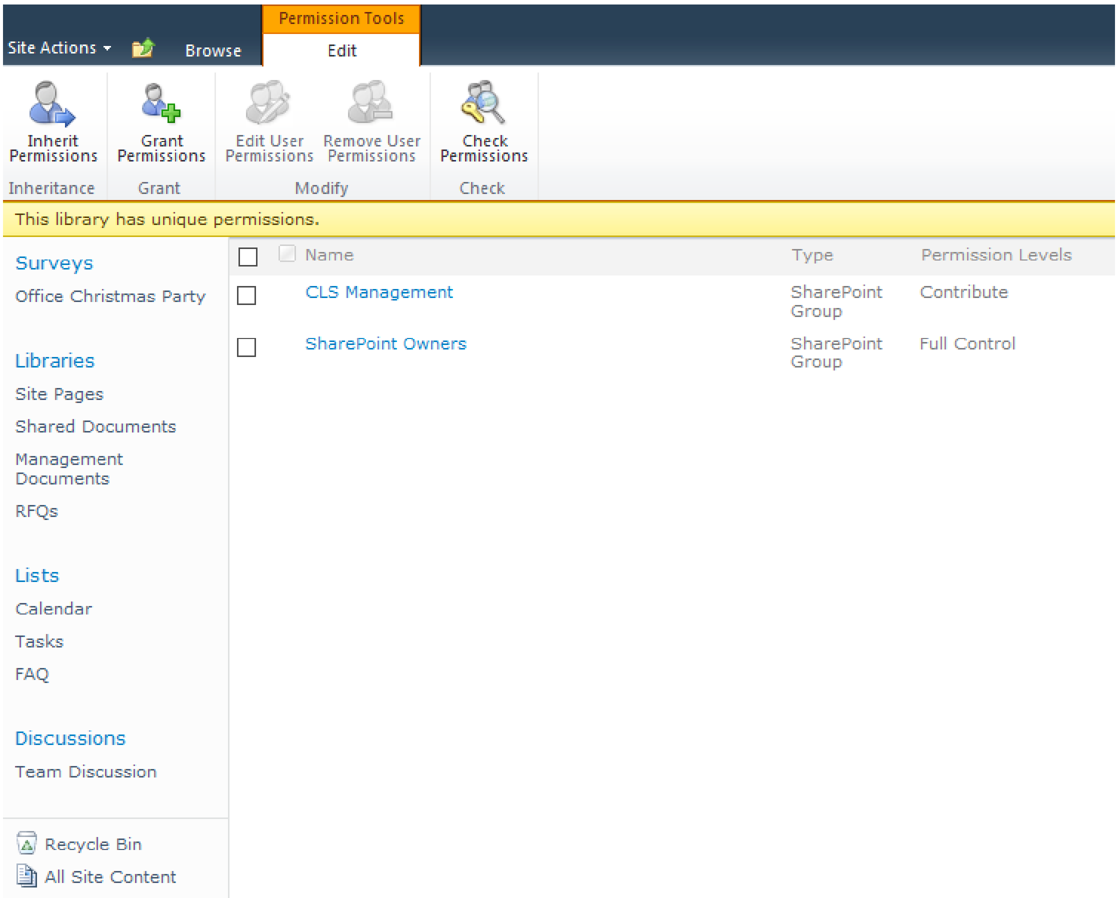
**2.** Complete the New Document Library form, then scroll down and click Create




**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



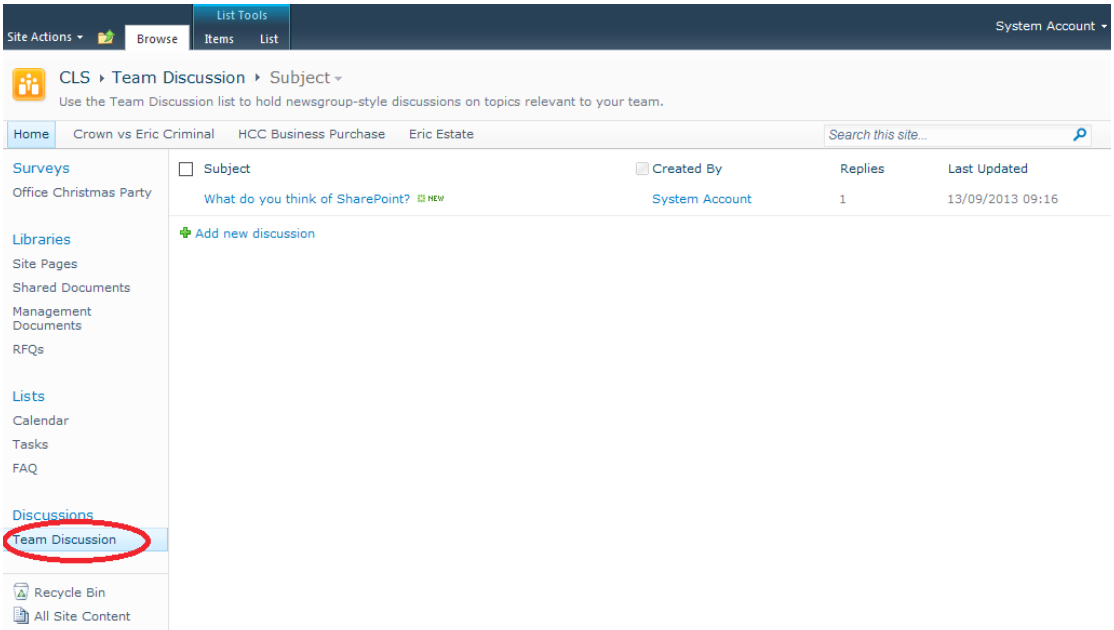
**4.** Use the "Stop Inheriting Permissions" button (the same as with the subsite for Eric Criminal) and you can now add the precise users you want to have access to this new library by clicking the "Grant Permissions" button



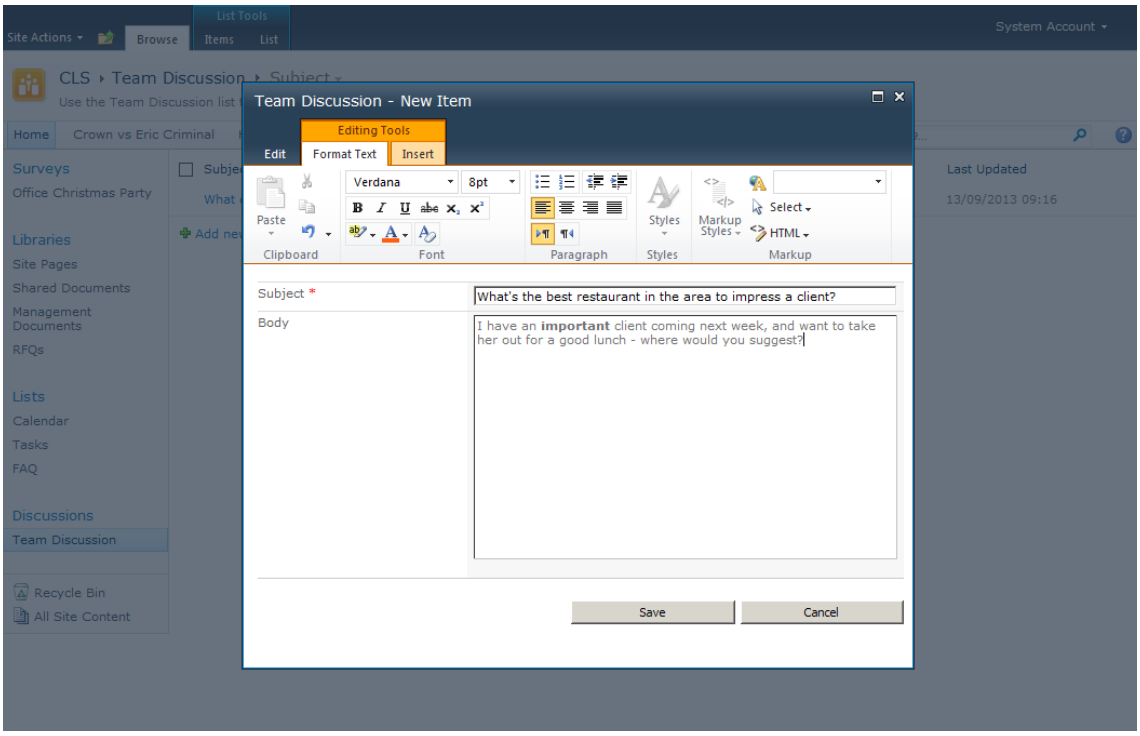
# Chapter 8. Team Discussions

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.

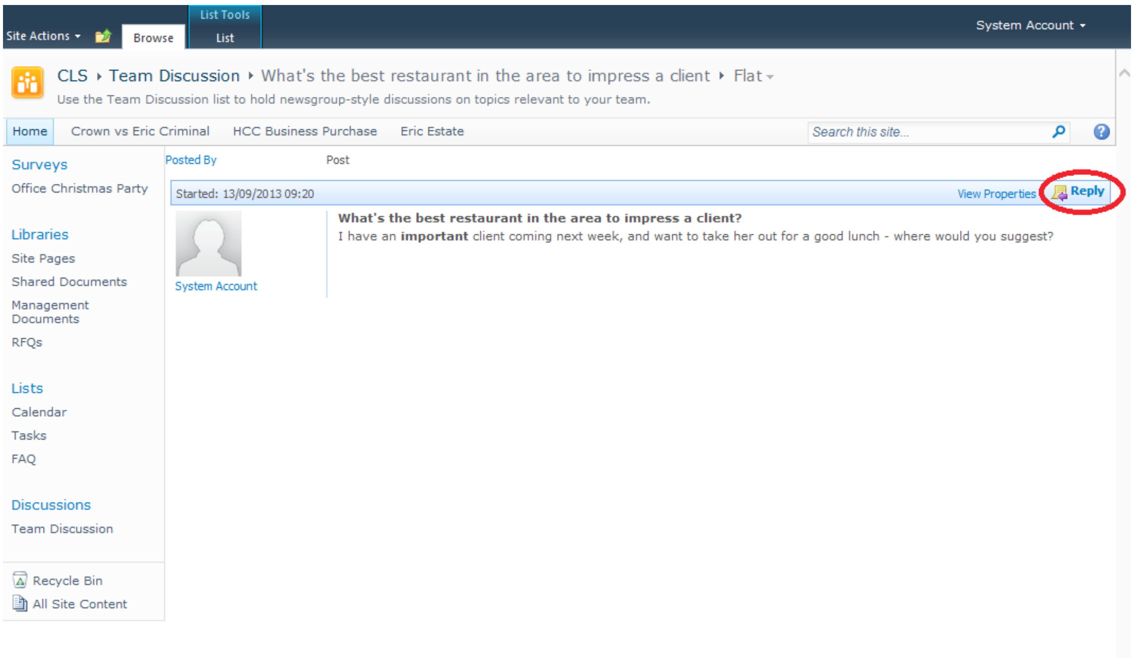
**1.** Click on the "Team Discussion" link on the Quick Launch bar



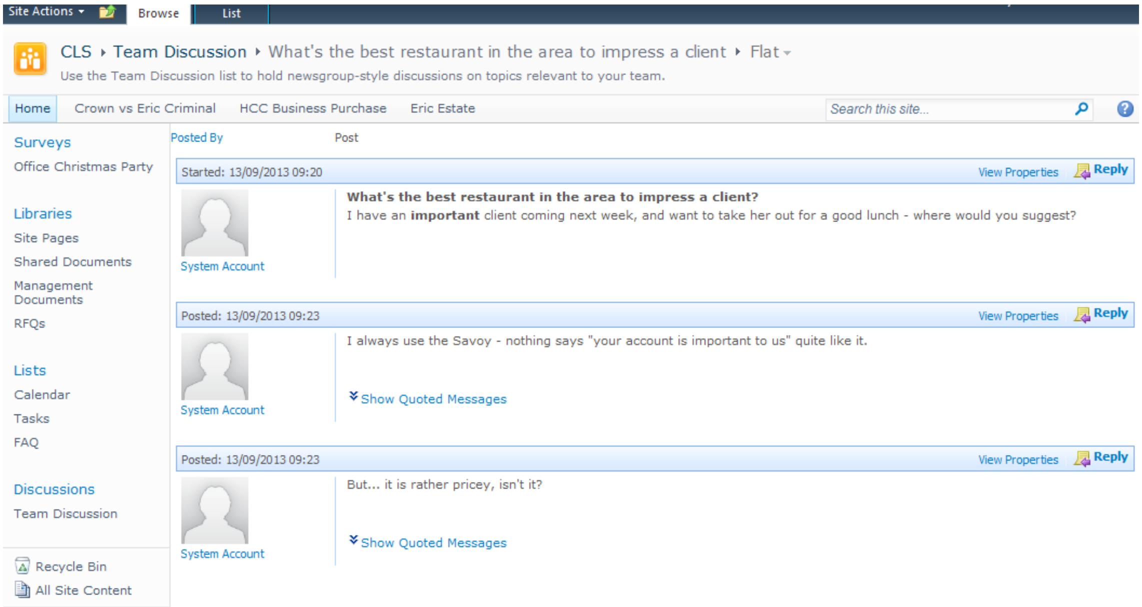
**2.** To start a new discussion, simply click on Add New Discussion, complete the form and click "Save"



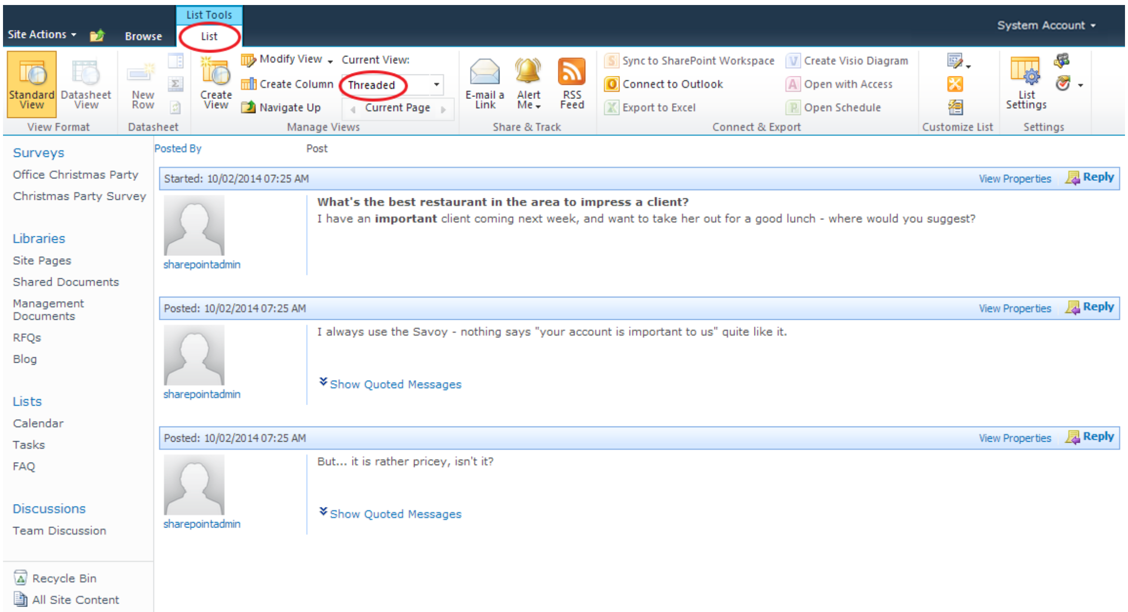

**3.** To reply to an existing discussion, click on it and then click the "Reply" button. Enter your reply and click "Save"



**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

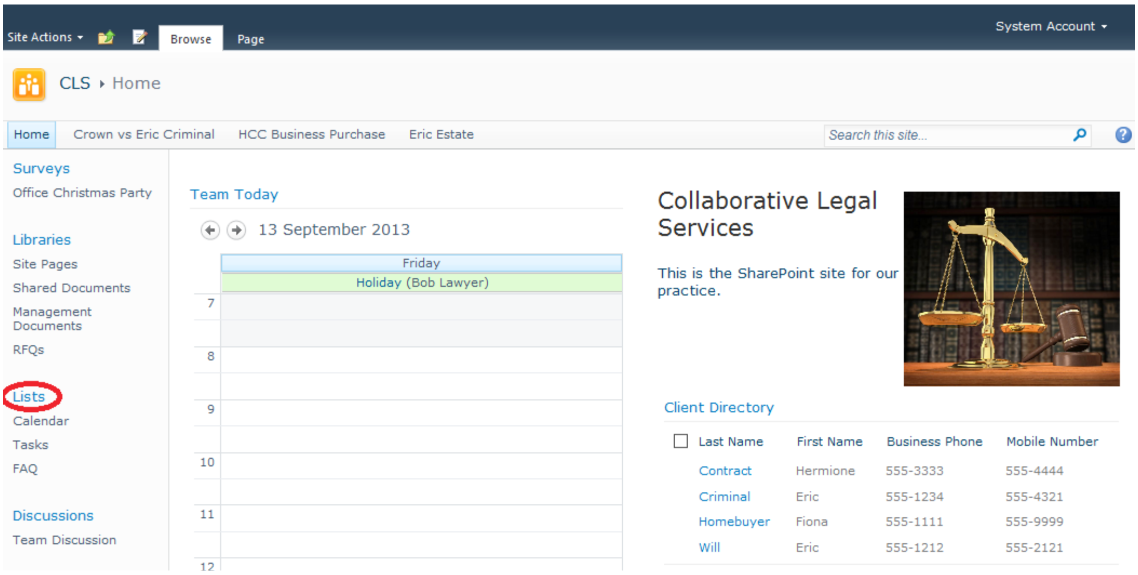


# Chapter 9. Gathering Feedback

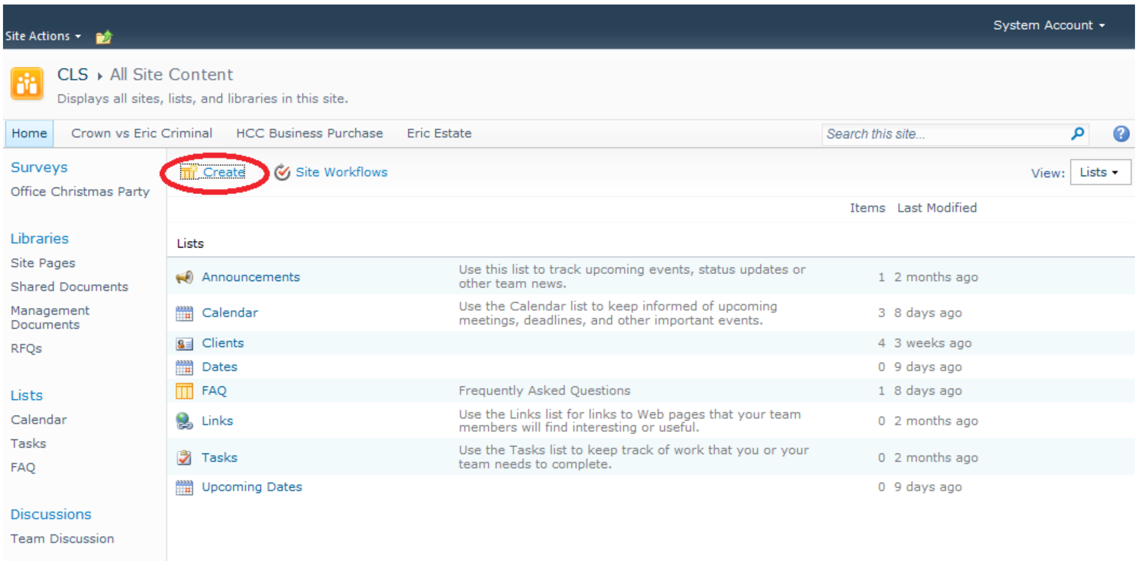
Quite often, something arises in an office which requires gathering feedback. Usually, the question is emailed out, and voting buttons may be used, or responses manually collated. SharePoint provides a powerful survey mechanism which makes it easy to ask questions and analyse the responses. For example,

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

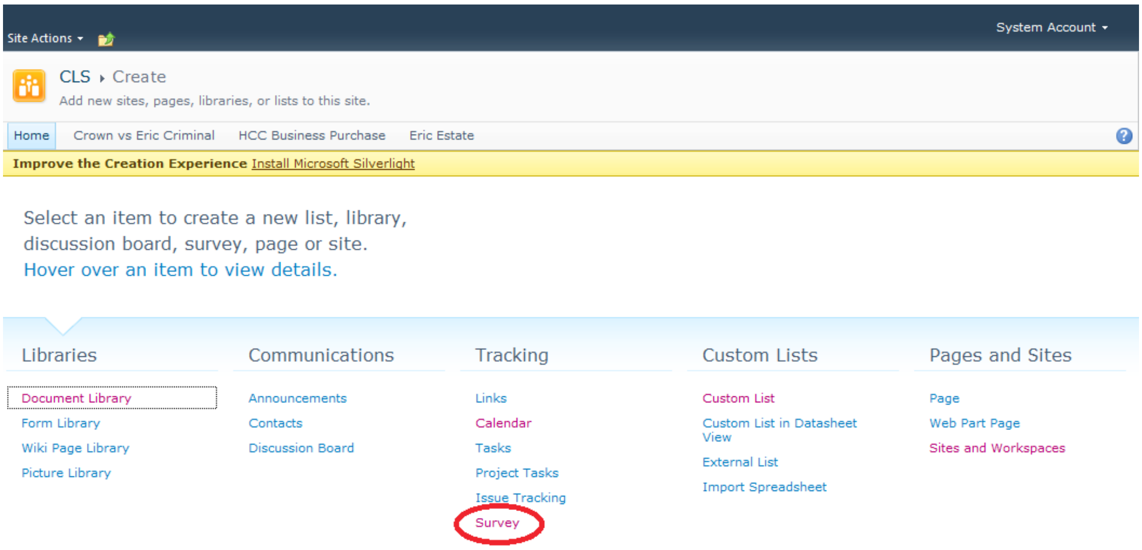
**1.** On the site home page, click on the "Lists" heading



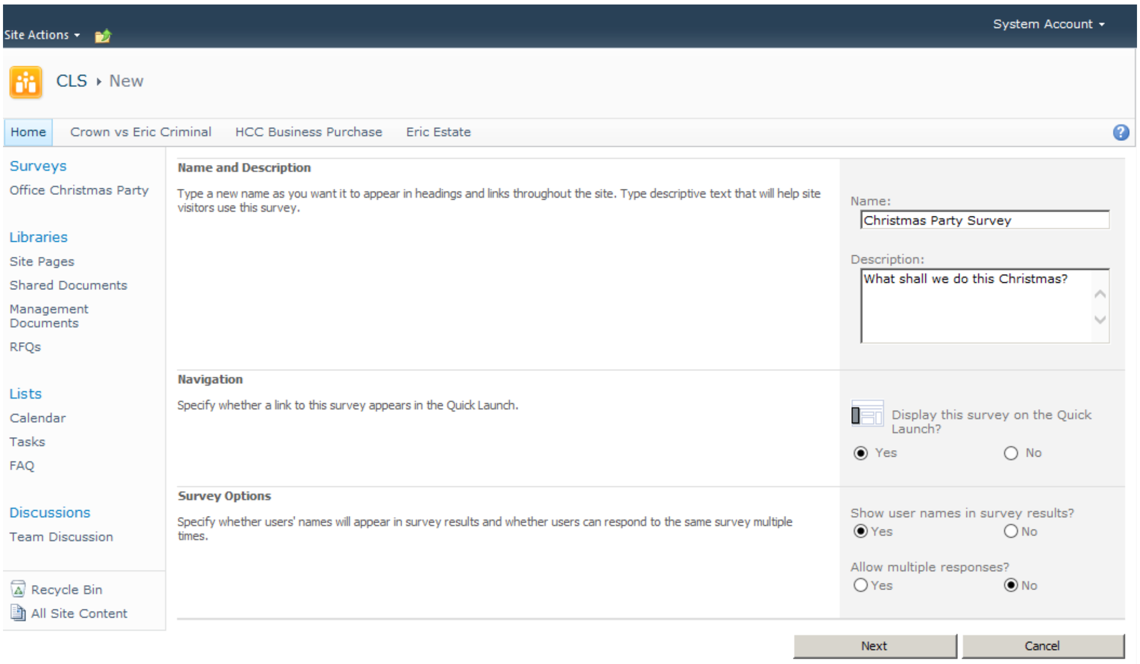

**2.** Now click "Create" to start setting up a new list



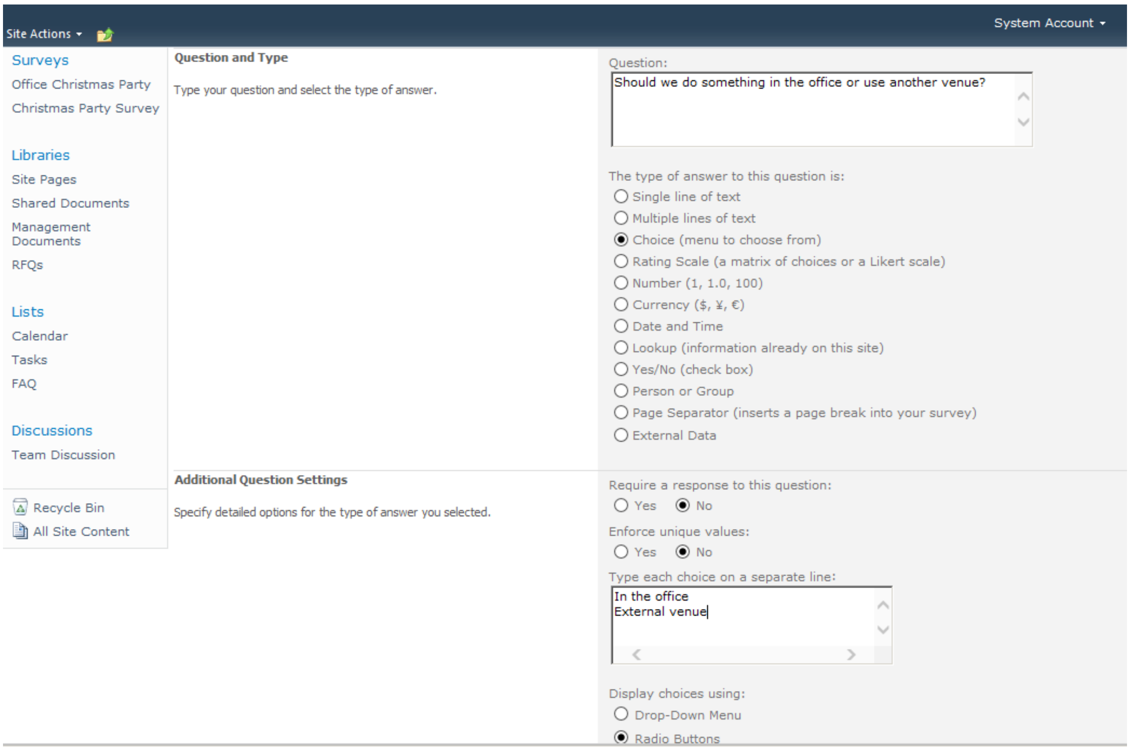
**3.** Note all the preconfigured list types SharePoint offers – select the "Survey" template



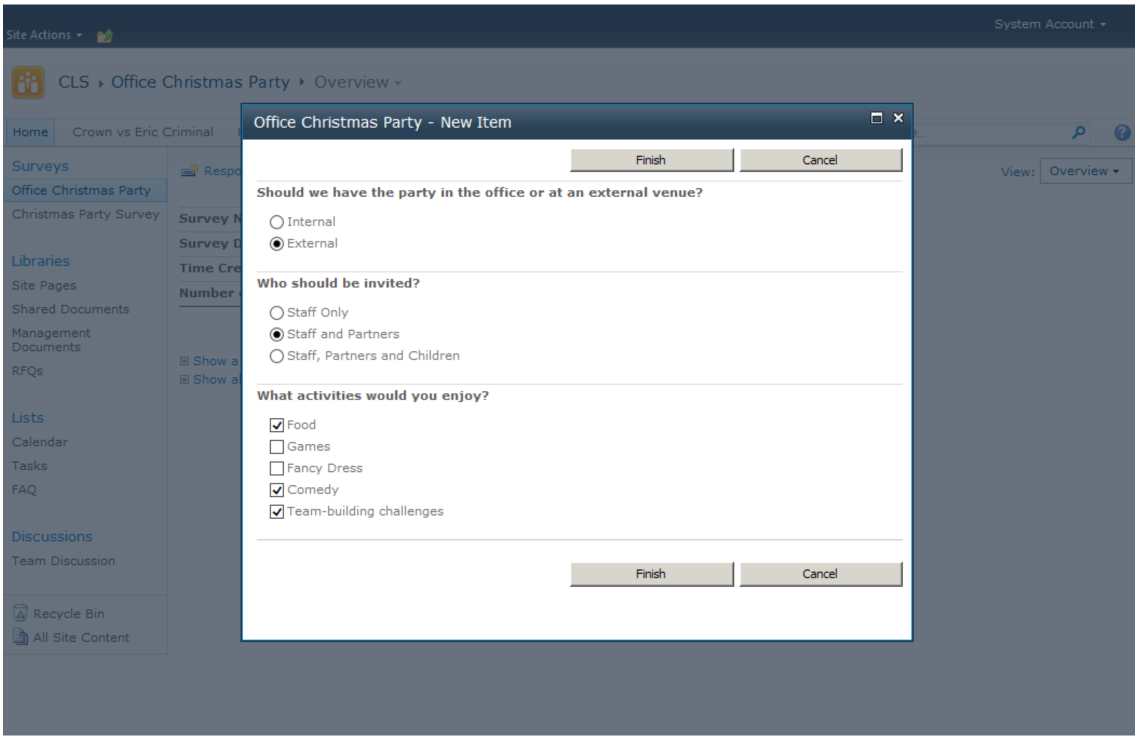

**4.** Fill out the "New Survey" form and click "Next"



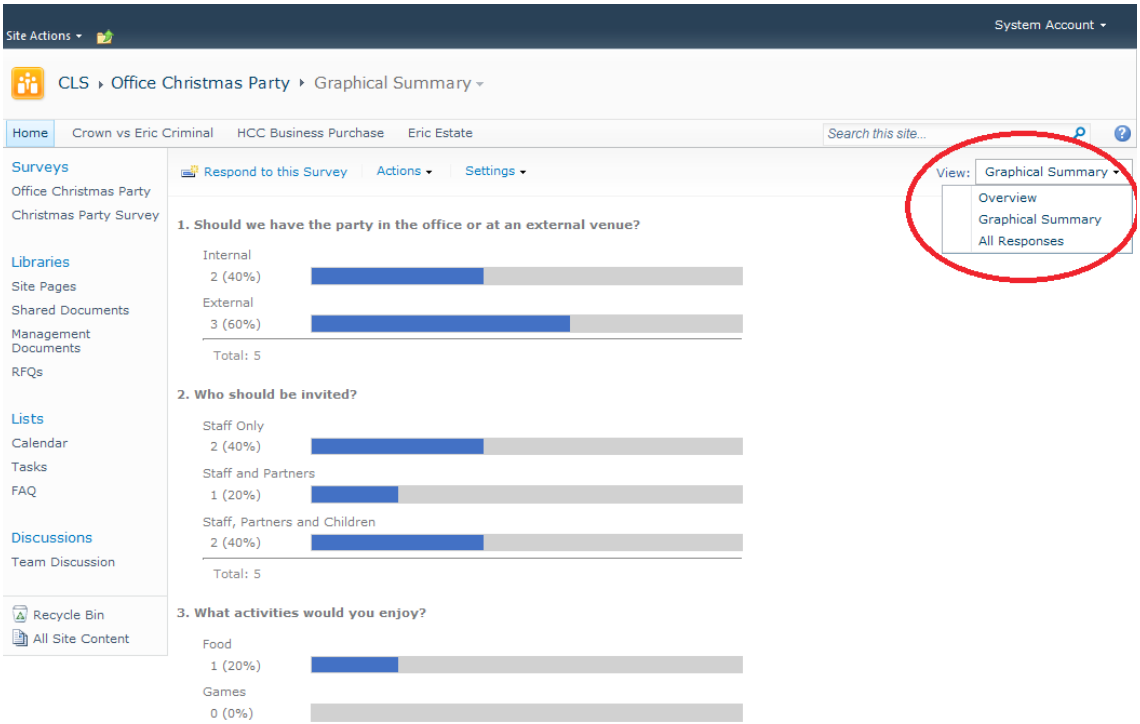
**5.** Adding questions to the survey is exactly like adding columns to a list – SharePoint is very consistent. Use "Next Question" to keep adding more questions, and "Finish" when you're done




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



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



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