

# Hosted SharePoint 2010 User Stories

Find out how you can connect your business



**Inspira**  
Technology Group

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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.

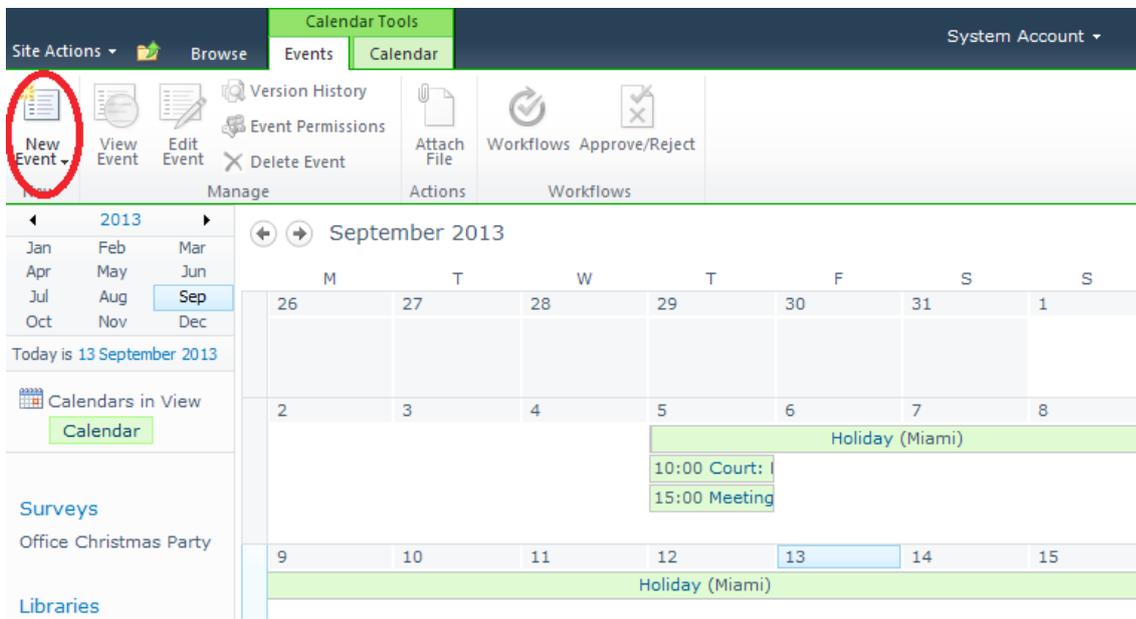
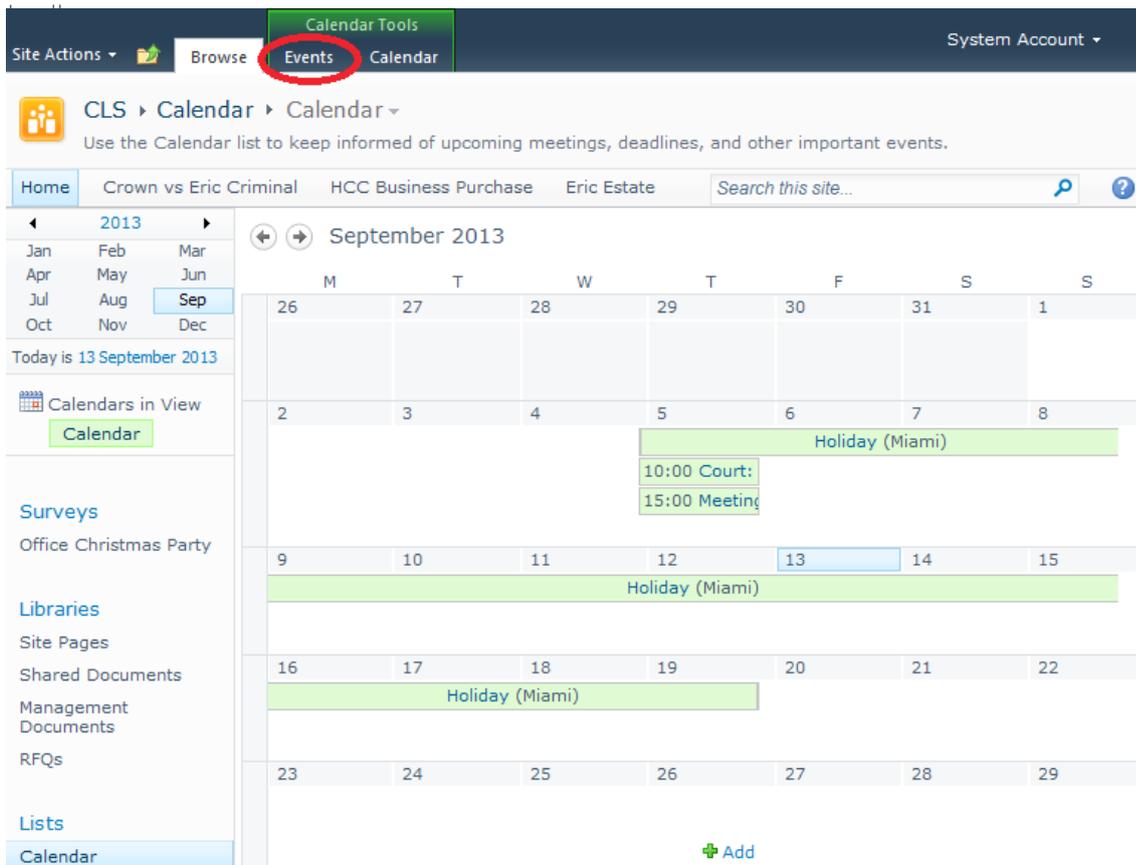
1. The SharePoint calendar is shown in Day View on the home page of the demo site. Click on the title ("Team Today") to view the full calendar

The screenshot shows a SharePoint site interface. At the top, there is a navigation bar with 'Site Actions', 'Browse', and 'Page' options, and a user account 'System Account'. Below this is a breadcrumb trail 'CLS > Home' and a search bar. The main content area is divided into three columns. The left column contains navigation links for 'Surveys', 'Libraries', 'Lists', and 'Discussions'. The middle column displays a calendar titled 'Team Today' for '10 October 2013' in 'Thursday' view. The right column features a section for 'Collaborative Legal Services' with an image of a scale of justice, a 'Client Directory' table, and a 'My Tasks' section.

<input type="checkbox"/>	Last Name	First Name	Business Phone	Mobile Number
<input type="checkbox"/>	Contract	Hermione	555-3333	555-4444
<input type="checkbox"/>	Criminal	Eric	555-1234	555-4321
<input type="checkbox"/>	Homebuyer	Fiona	555-1111	555-9999
<input type="checkbox"/>	Will	Eric	555-1212	555-2121

<input type="checkbox"/>	Title	Status	Priority	Due Date	% Complete
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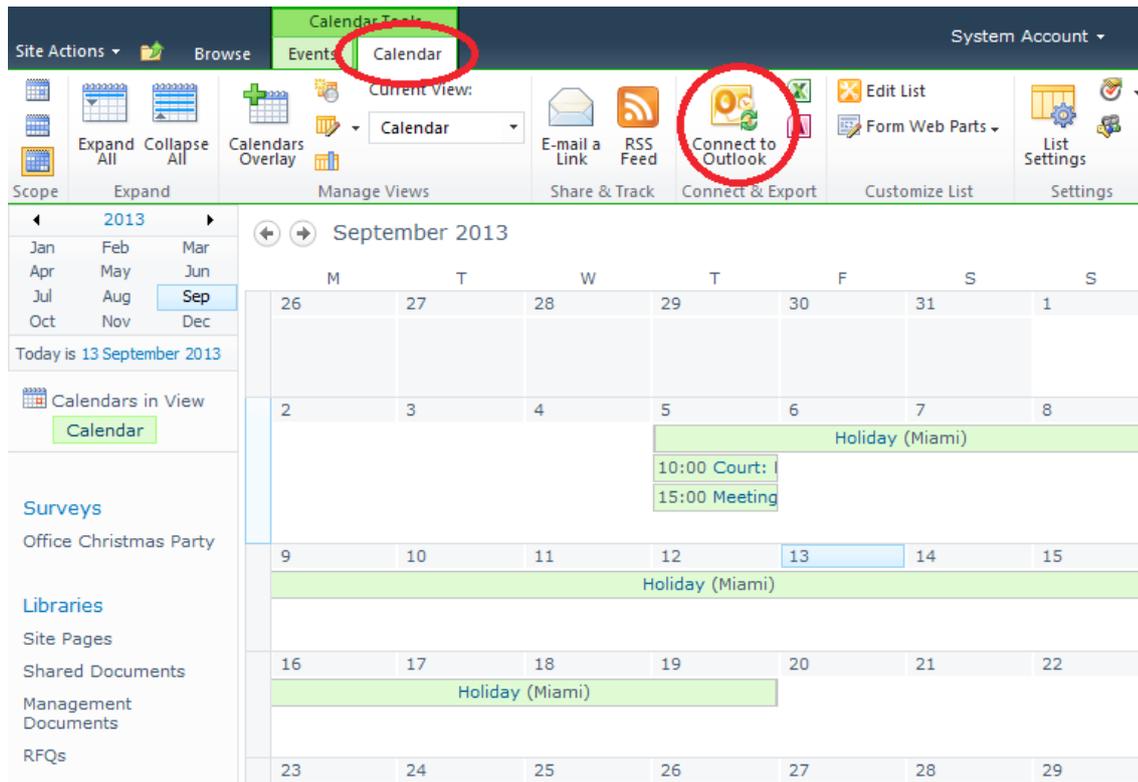
2. To add an event, click on the “Events” tab and then click “New Event” on the Ribbon



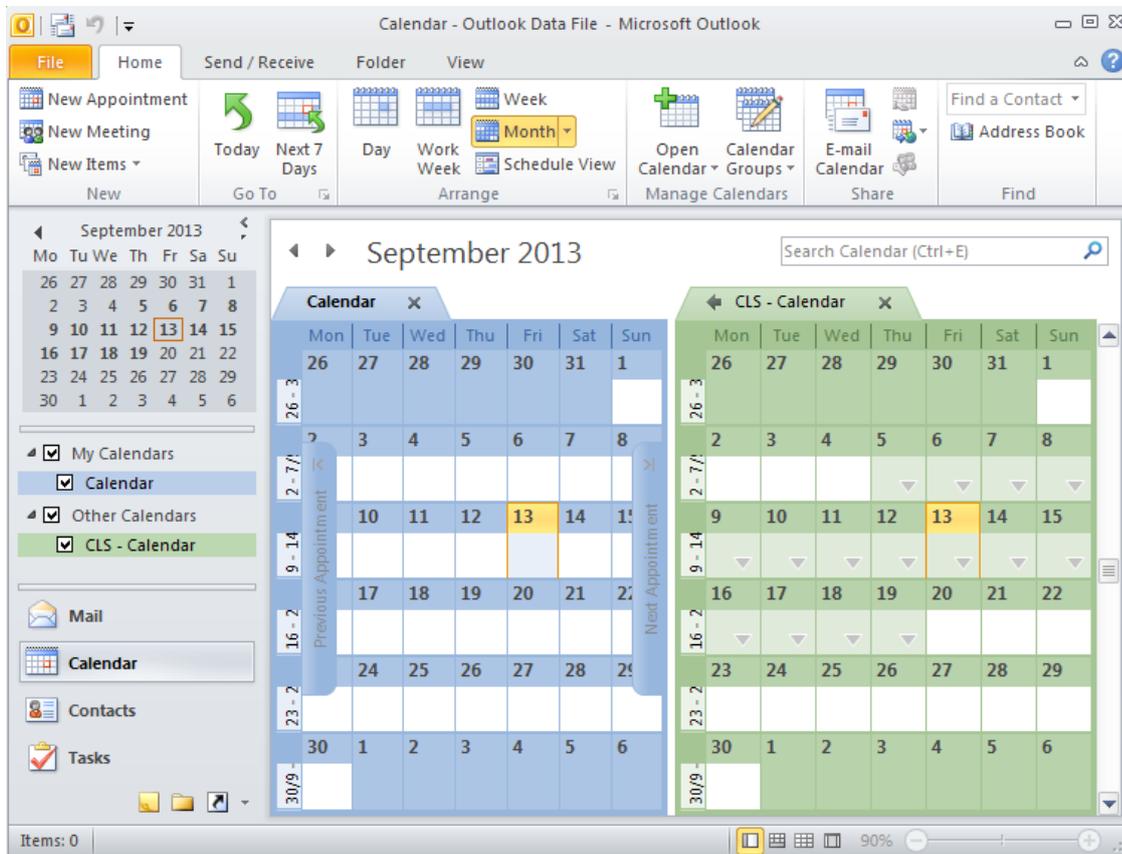
3. Provide the details of the New Event and then click “Save”

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

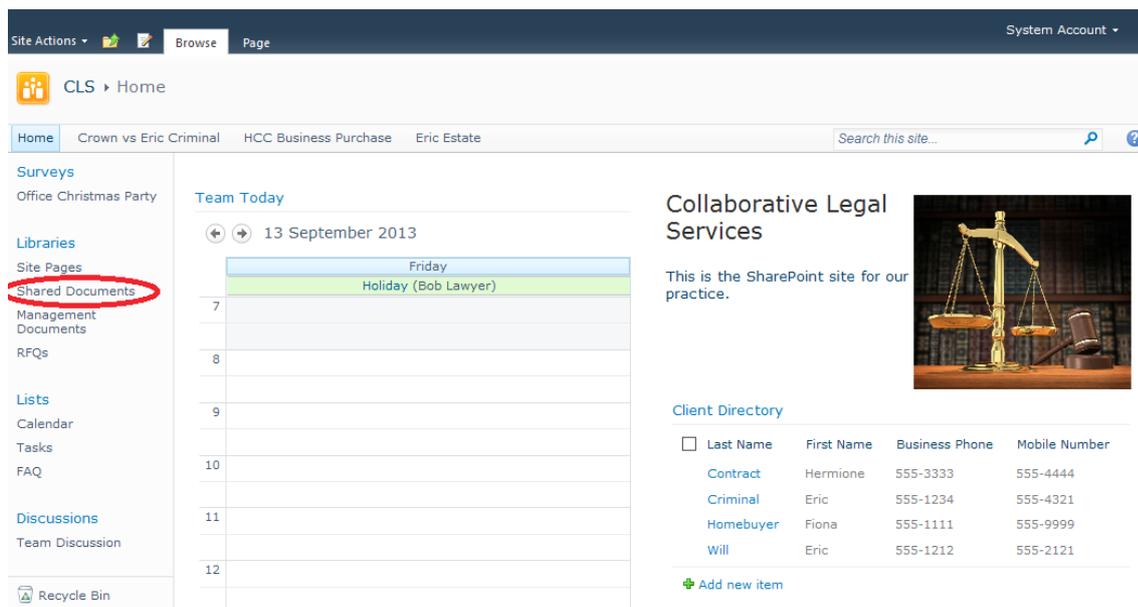


# Chapter 3. Working on the Road

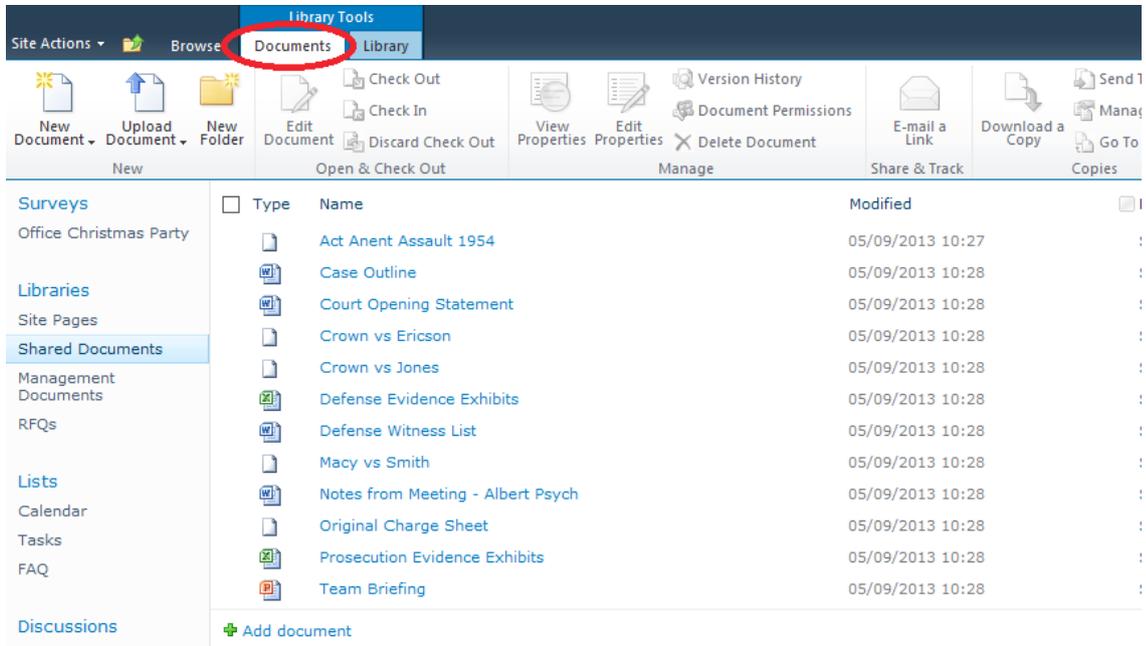
These days, many workers spend much of their time away from the office. Sometimes they will be working from home, usually with a good broadband connection – in which case, they can have full access to the SharePoint site without needing to worry about VPNs. SharePoint is a superb home-working solution.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

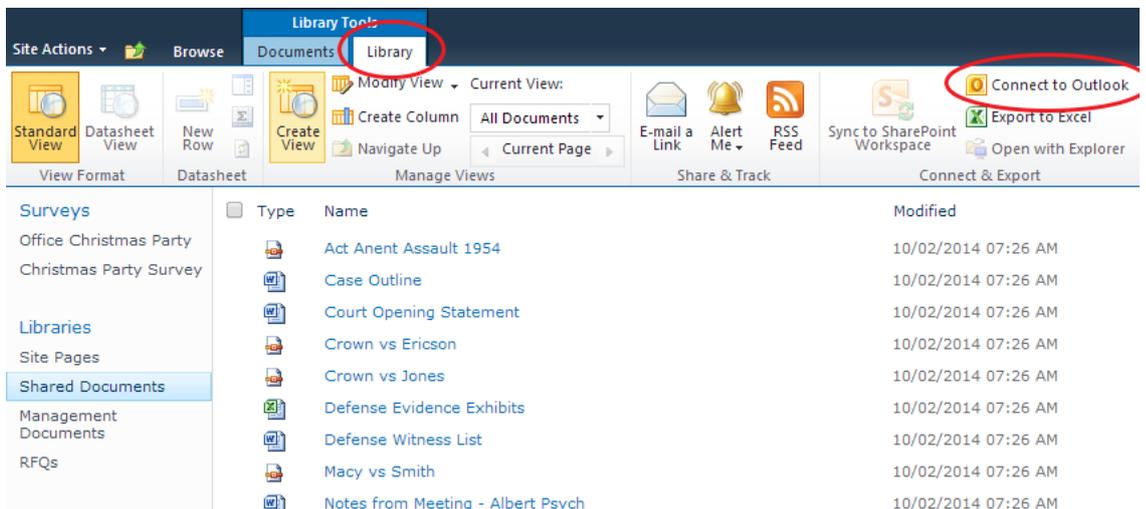
1. From the CLS site home page, access the "Shared Documents" document library. This is the place for storing documents in SharePoint



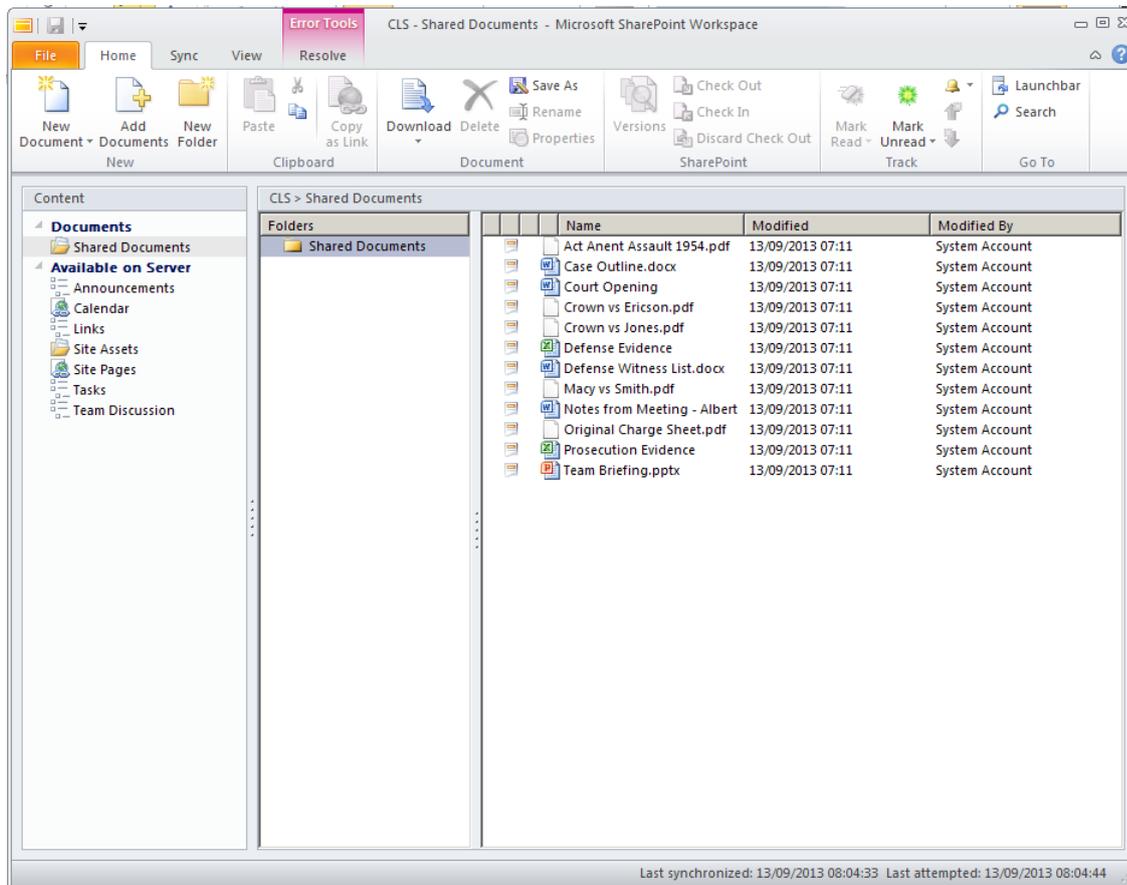
2. Click on the “Documents” tab. Here Amy has full functionality to create new documents, edit and delete documents, upload documents and so on. With our SharePoint service, this will work as well for Amy from her home broadband as it does from the office, without muddling with hard-to-configure or unreliable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

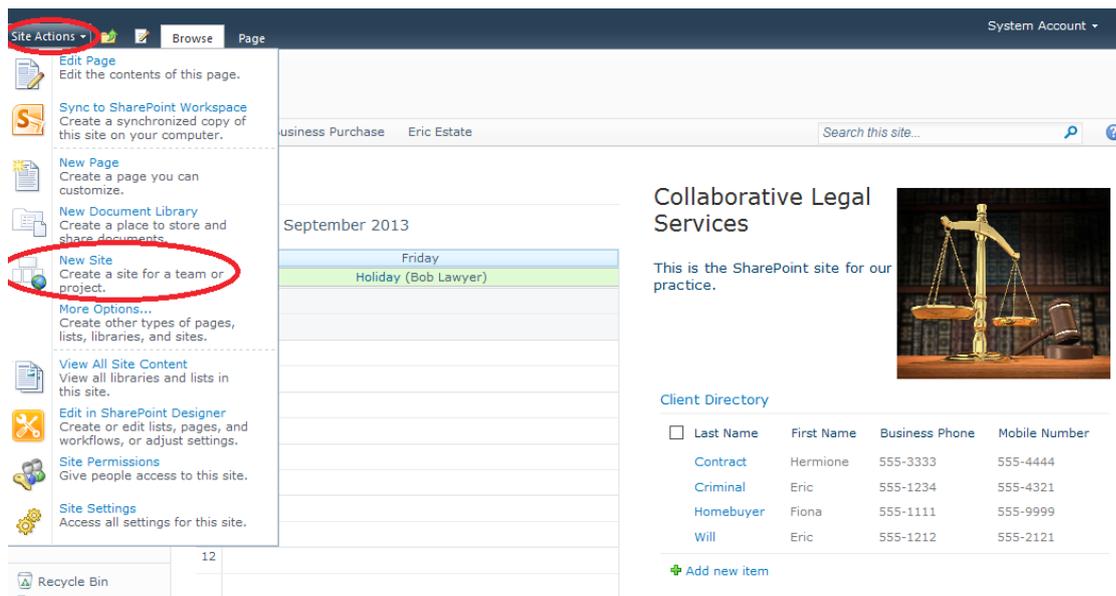


# Chapter 4. Sharing with Clients

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

Site Actions System Account

CLS > New SharePoint Site  
Use this page to create a new site or workspace under this SharePoint site. You can specify a title, Web site address, and access permissions.

Home Crown vs Eric Criminal HCC Business Purchase Eric Estate

Surveys Office Christmas Party

Libraries Site Pages Shared Documents Management Documents RFQs

Lists Calendar Tasks FAQ

Discussions Team Discussion

Recycle Bin All Site Content

**Title and Description**  
Type a title and description for your new site. The title will be displayed on each page in the site.  
Title: Crown vs Eric Criminal  
Description: Collaboration site for Eric Criminal's case.

**Web Site Address**  
Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.  
For example, http://localhost/sitename  
URL name: http://localhost/EricCriminal

**Template Selection**  
A site template determines what lists and features will be available on your new site. Select a site template based on the descriptions of each template and how you intend to use the new site. Many aspects of a site can be customized after creation. However, the site template cannot be changed once the site is created.  
Select a template:  
Collaboration Meetings Custom  
**Matter Site v2**

Create Cancel

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

Site Actions Browse Page System Account

Crown vs Eric Criminal > Home

Home Search this site...

Libraries Site Pages Shared Documents

Lists Calendar Tasks

Discussions Team Discussion

Recycle Bin All Site Content

**Crown vs Eric Criminal**

This secure site provides facilities for collaboration between Eric and CLS representatives.

**Upcoming Dates**

<input type="checkbox"/>	Title	Location	Start Time	End Time
There are no items to show in this view of the "Calendar" list. To add a new item, click "New".				

[Add new event](#)

**Case Documents**

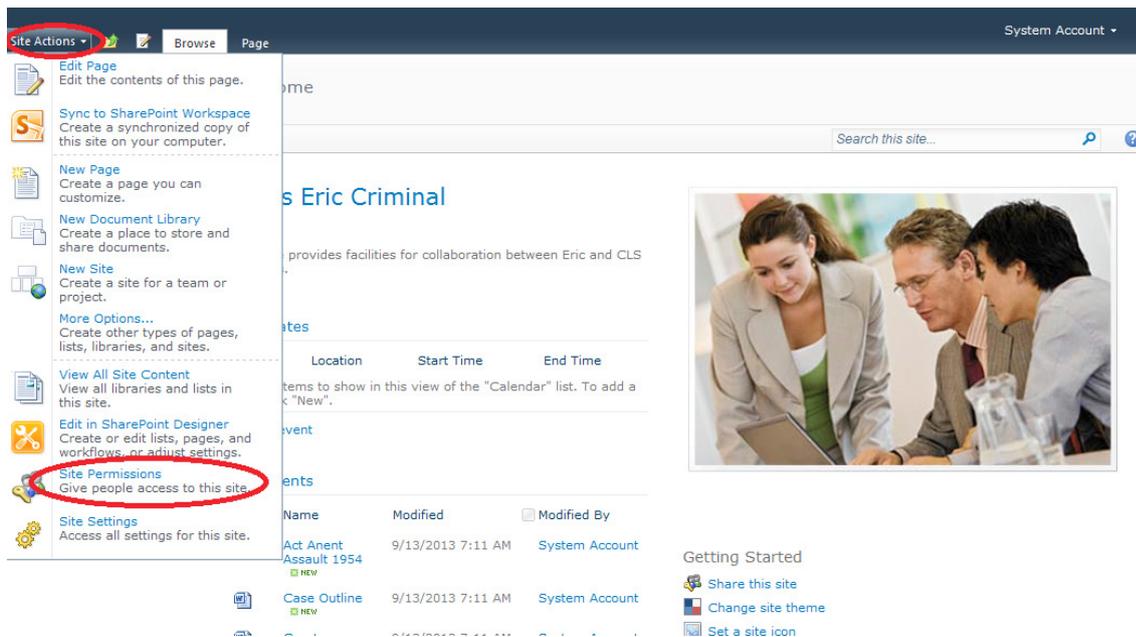
<input type="checkbox"/>	Type	Name	Modified	Modified By
<input type="checkbox"/>	Document	Act Anent Assault 1954	9/13/2013 7:11 AM	System Account
<input type="checkbox"/>	Document	Case Outline	9/13/2013 7:11 AM	System Account

**Getting Started**

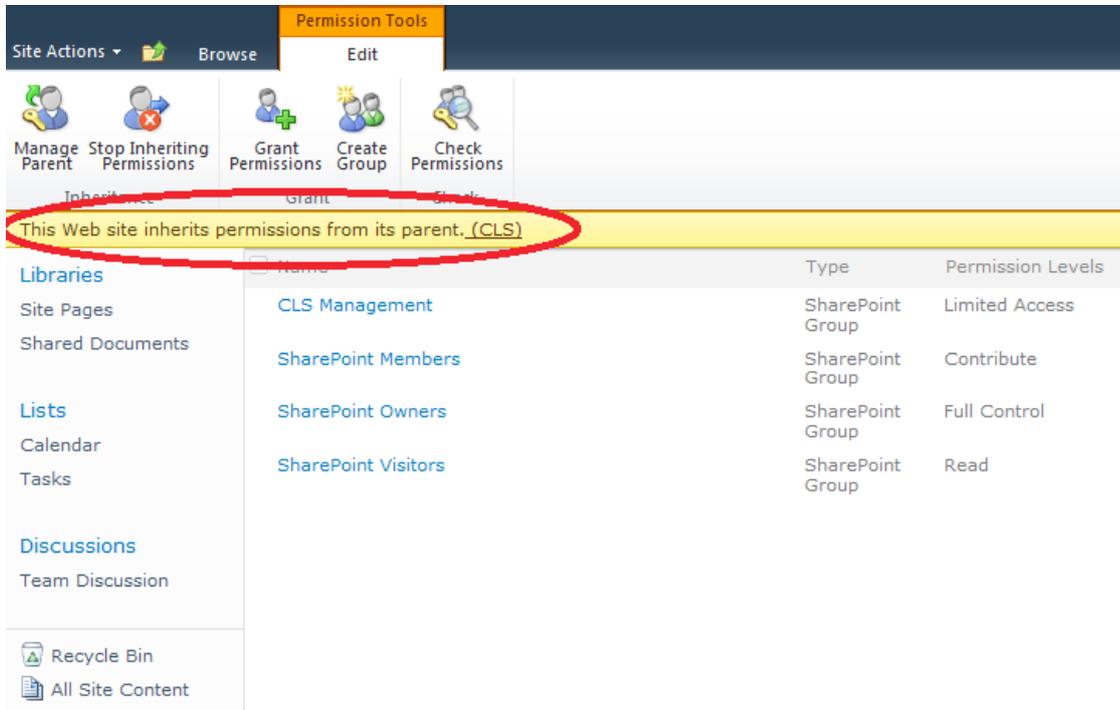
- [Share this site](#)
- [Change site theme](#)
- [Set a site icon](#)

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.

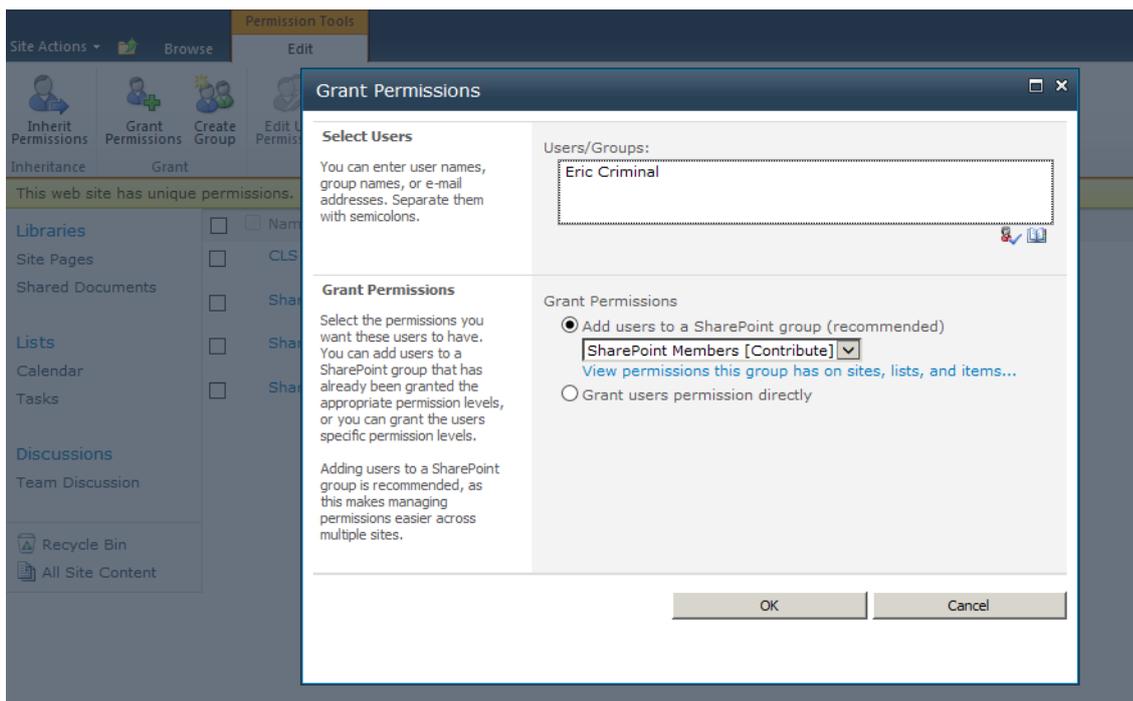
4. In the “Crown vs Eric Criminal” site, Bob clicks on “Site Actions” and then selects “Site Permissions”



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



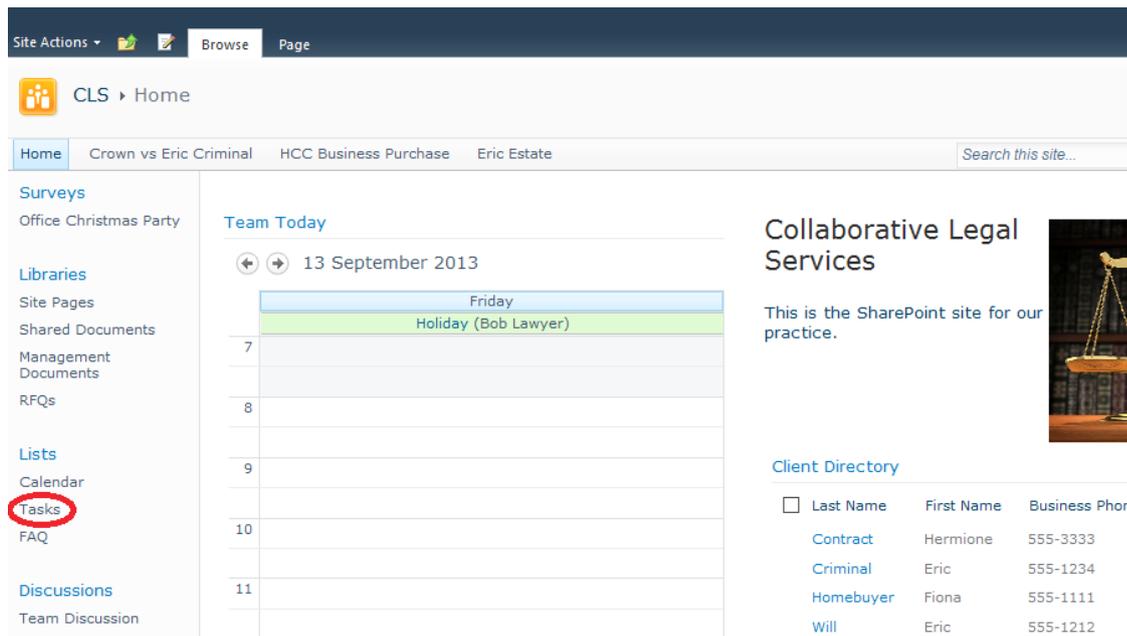
6. Now Bob can click “Grant Permissions”, select the new user he created for Eric Criminal, and add him to the “SharePoint Members” group - allowing him to work on the documents in this site, but keeping the main CLS site secure



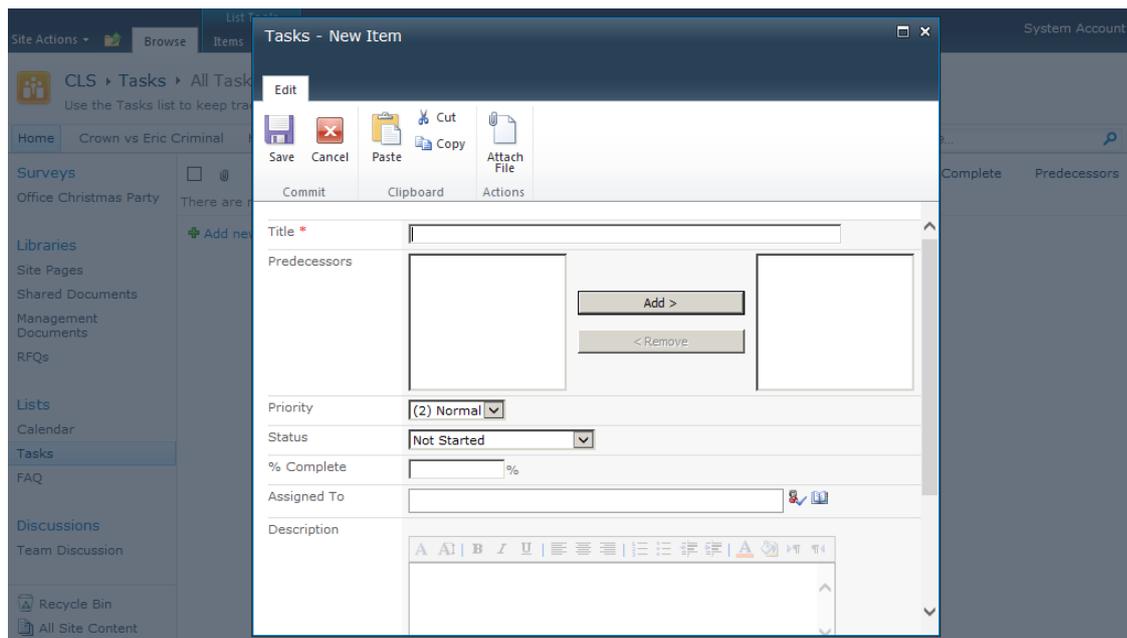
# Chapter 5. Tracking Work

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

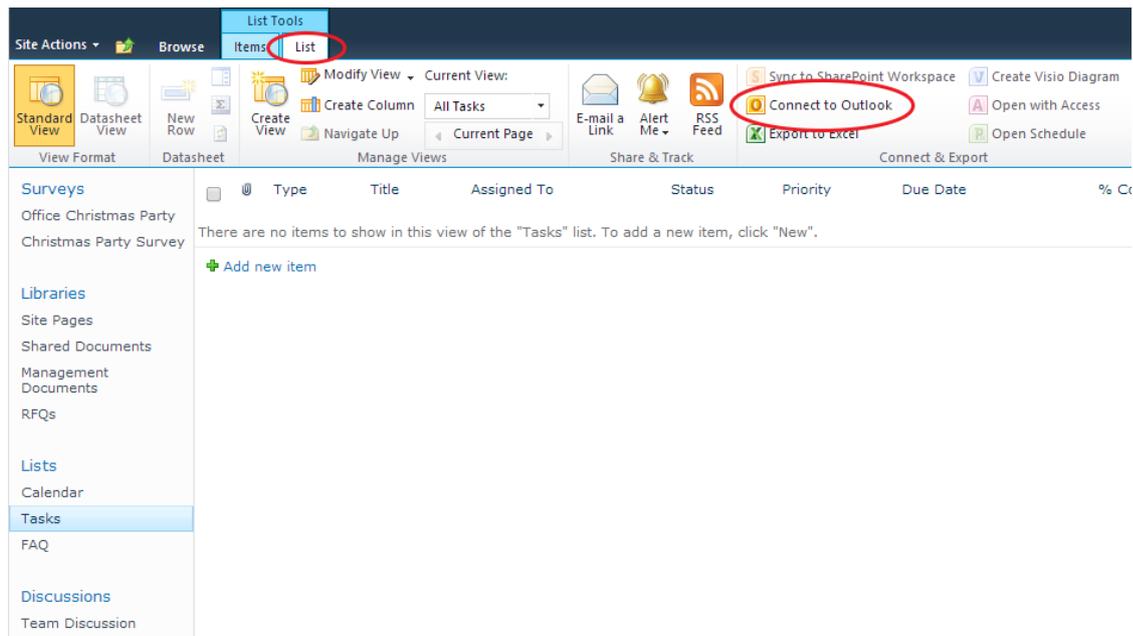


2. Click “Add New Item” to create a new task



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.

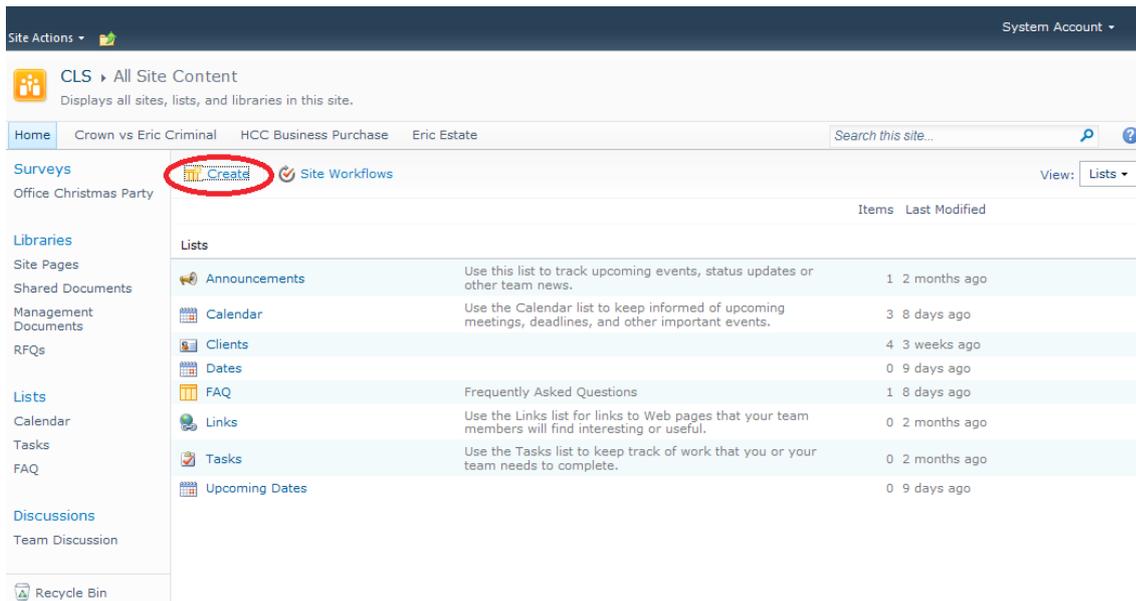
User Story: For example, at CLS, prospective clients often fire legal questions – sometimes quite complex – at the receptionists. If the receptionists were able to answer more of these questions without referring them to Amy or Bob (the solicitors), then Amy and Bob would have more billable time and 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

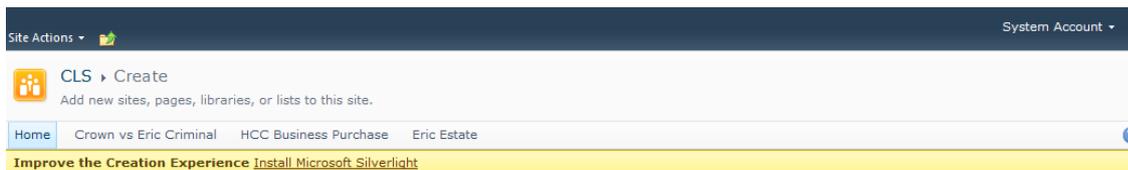
The screenshot shows a SharePoint site home page for 'CLS'. The left navigation pane includes sections for Surveys, Libraries, Discussions, and Recycle Bin. The 'Lists' link is circled in red. The main content area features a 'Team Today' calendar for 13 September 2013, showing a holiday for Bob Lawyer. To the right, there is a 'Collaborative Legal Services' section with a 'Client Directory' table.

<input type="checkbox"/>	Last Name	First Name	Business Phone	Mobile Number
<input type="checkbox"/>	Contract	Hermione	555-3333	555-4444
<input type="checkbox"/>	Criminal	Eric	555-1234	555-4321
<input type="checkbox"/>	Homebuyer	Fiona	555-1111	555-9999
<input type="checkbox"/>	Will	Eric	555-1212	555-2121

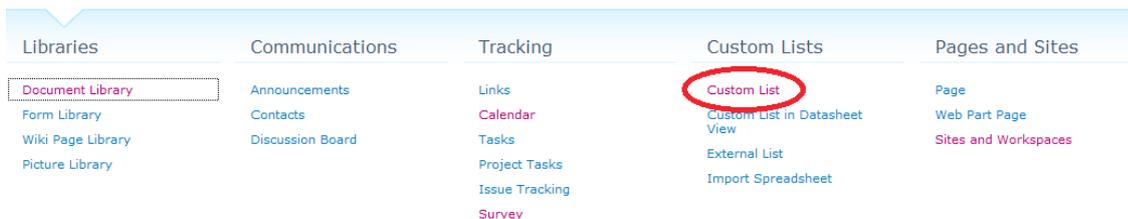
2. Now click “Create” to start setting up a new list



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

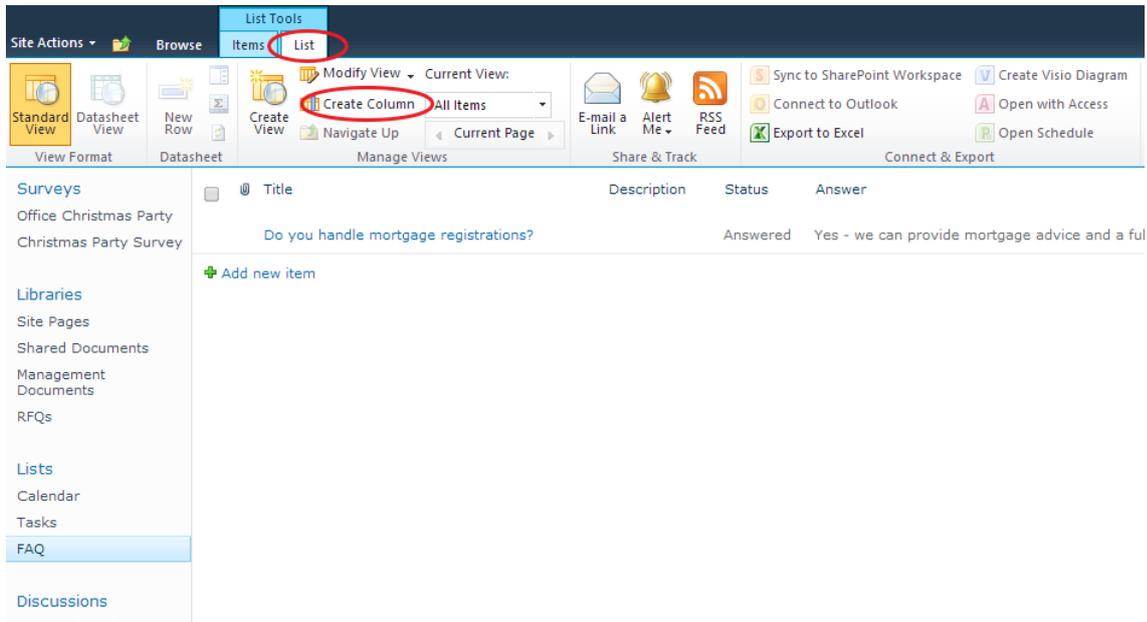


Select an item to create a new list, library, discussion board, survey, page or site.  
Hover over an item to view details.

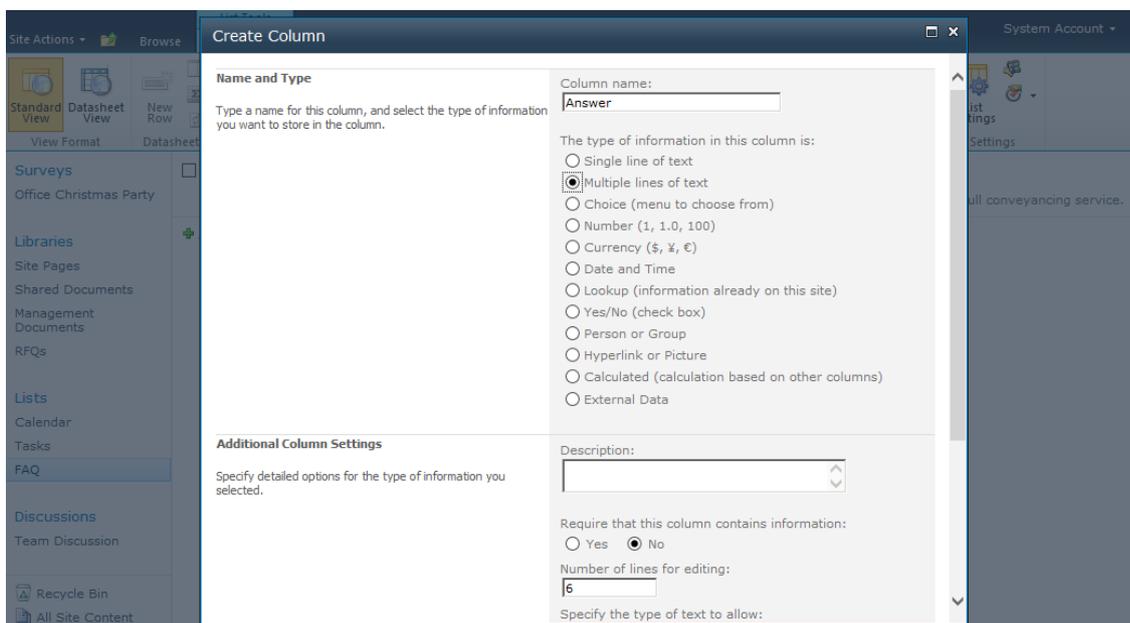


4. Give the list a name, description, and select “Yes” to have it displayed on the Quick Launch bar at the left of the site. Now click the “Create” button

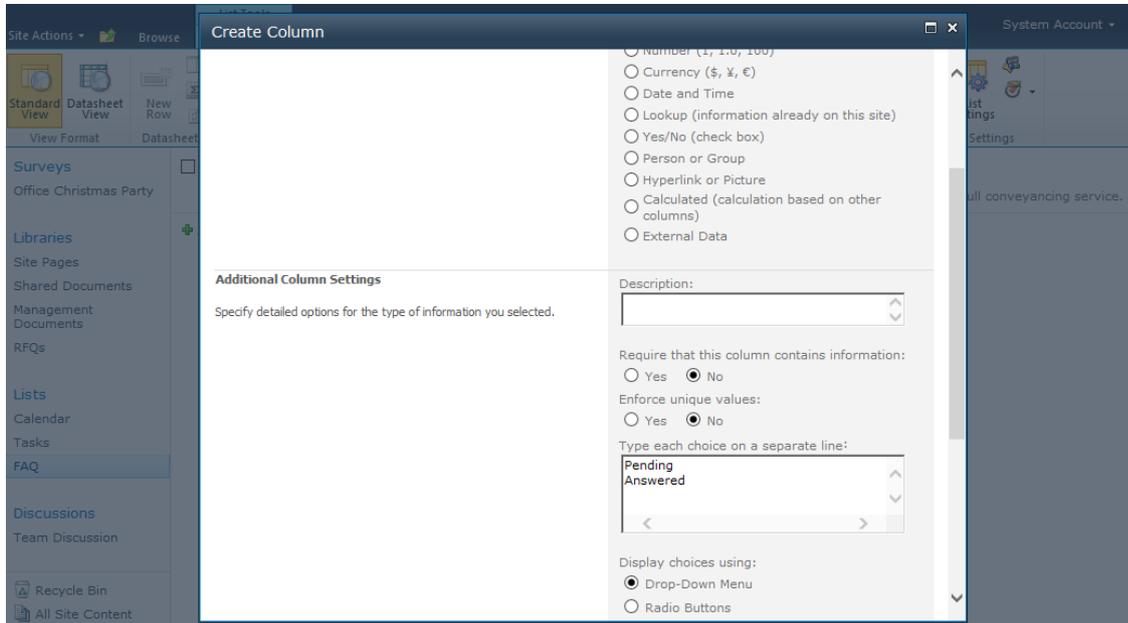
5. A blank list is created, with just one column - "Title". We can use that for the questions, but what about everything else? On the "List" tab, click "Create Column"



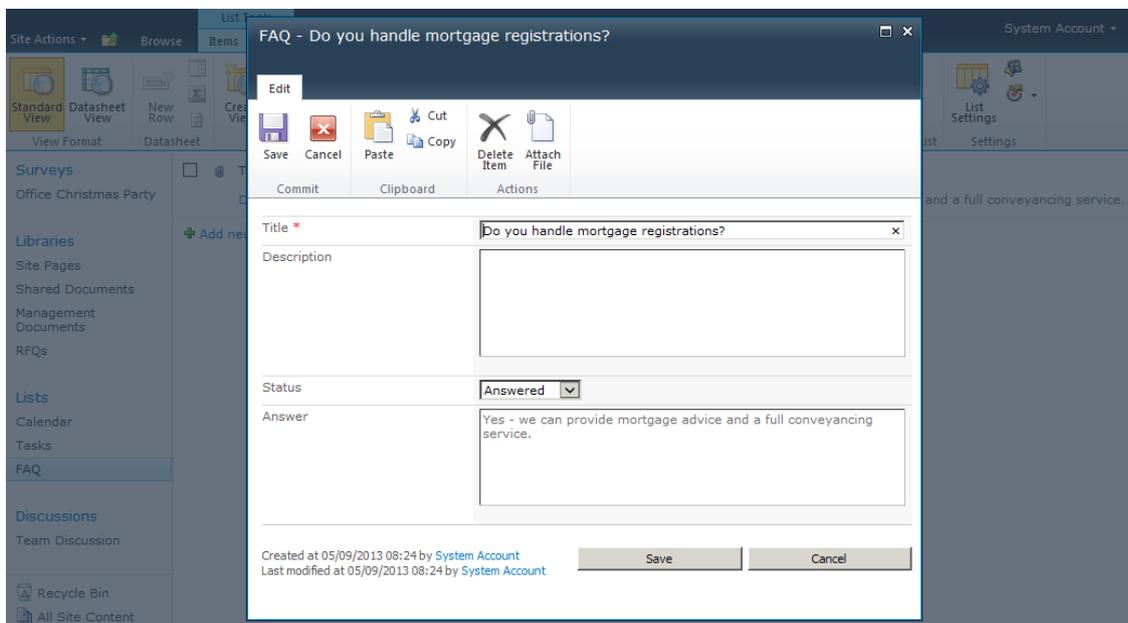
6. Note the various different column types. We start by creating a "Description" field of type "Multiple Lines of Text". Scroll down and click "OK" when finished



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”

The screenshot shows a SharePoint site interface. At the top, there is a navigation bar with 'Site Actions', 'Browse', and 'Page' tabs, and a user profile for 'System Account'. Below this is a breadcrumb trail: 'CLS > Home'. A search bar is present with the text 'Search this site...'. On the left side, there is a 'Quick Launch' menu with several categories: 'Surveys', 'Lists', 'Discussions', and 'Recycle Bin'. The 'Libraries' category is circled in red. Under 'Libraries', there are sub-items: 'Site Pages', 'Shared Documents', 'Management Documents', and 'RFQs'. The main content area is titled 'Team Today' and shows a calendar for '13 September 2013'. The calendar has a header for 'Friday' and a row for 'Holiday (Bob Lawyer)'. To the right of the calendar, there is a section titled 'Collaborative Legal Services' with a sub-heading 'This is the SharePoint site for our practice.' and an image of a scale of justice. Below this is a 'Client Directory' table with columns for 'Last Name', 'First Name', 'Business Phone', and 'Mobile Number'. The table contains four rows of data: 'Contract' (Hermione, 555-3333, 555-4444), 'Criminal' (Eric, 555-1234, 555-4321), 'Homebuyer' (Fiona, 555-1111, 555-9999), and 'Will' (Eric, 555-1212, 555-2121). There is an 'Add new item' link below the table.

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

Site Actions System Account

CLS > New

Home Crown vs Eric Criminal HCC Business Purchase Eric Estate

**Surveys**  
Office Christmas Party

**Libraries**  
Site Pages  
Shared Documents  
Management Documents  
RFQs

**Lists**  
Calendar  
Tasks  
FAQ

**Discussions**  
Team Discussion

Recycle Bin  
All Site Content

**Name and Description**  
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

Description: Documents restricted to management access.

**Navigation**  
Specify whether a link to this document library appears in the Quick Launch.

Display this document library on the Quick Launch?  
 Yes  No

**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?  
 Yes  No

**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 System Account

Library Tools

Documents Library

Standard View Datasheet View New Row Create View Create Column All Documents Current Page E-mail a Link Alert Me RSS Feed Sync to SharePoint Workspace Connect to Outlook Export to Excel Open with Explorer Form Web Parts Edit Library New Quick Step Library Settings

View Format Datasheet Manage Views Share & Track Connect & Export Customize Library Settings

**Surveys**  
Office Christmas Party  
Christmas Party Survey

**Libraries**

Type Name Modified Modified By

There are no items to show in this view of the "Blog" document library. To add a new item, click "New" or "Upload".

Add document

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

The screenshot shows the SharePoint interface for managing permissions. At the top, there is a navigation bar with 'Site Actions' and 'Browse'. Below this is the 'Permission Tools' section, which includes buttons for 'Inherit Permissions', 'Grant Permissions', 'Edit User Permissions', 'Remove User Permissions', and 'Check Permissions'. The 'Grant Permissions' button is highlighted. Below the tools, a yellow banner states 'This library has unique permissions.' Below this is a table listing the permissions for the library.

	Name	Type	Permission Levels
<input type="checkbox"/>	CLS Management	SharePoint Group	Contribute
<input type="checkbox"/>	SharePoint Owners	SharePoint Group	Full Control

On the left side of the interface, there is a navigation pane with the following sections:

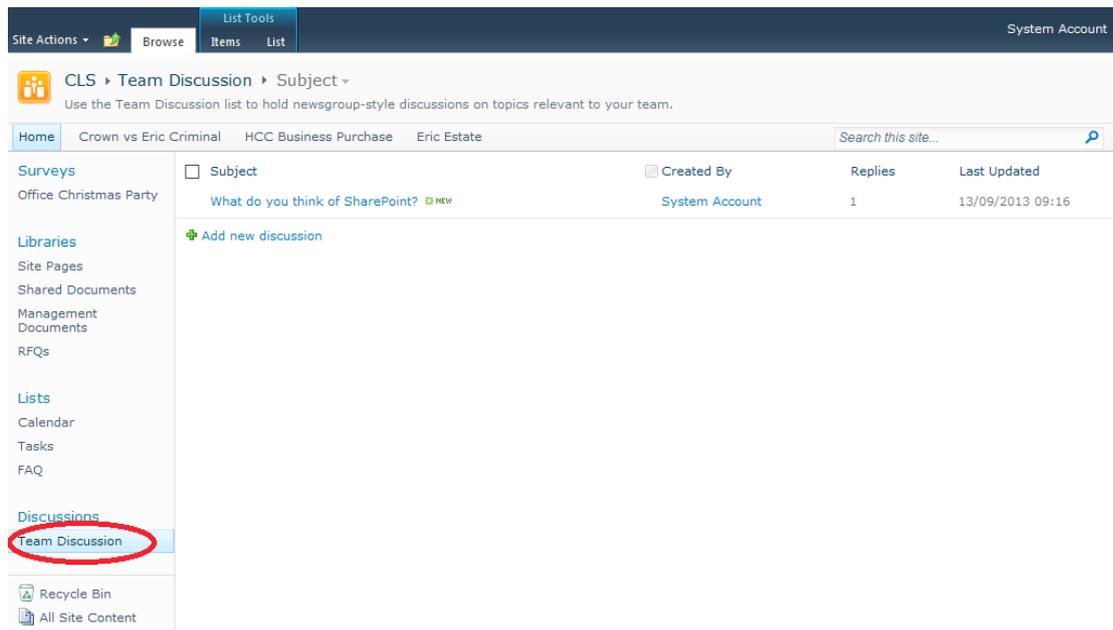
- Surveys**
  - Office Christmas Party
- Libraries**
  - Site Pages
  - Shared Documents
  - Management Documents
  - RFQs
- Lists**
  - Calendar
  - Tasks
  - FAQ
- Discussions**
  - Team Discussion

At the bottom of the navigation pane, there are links for 'Recycle Bin' and 'All Site Content'.

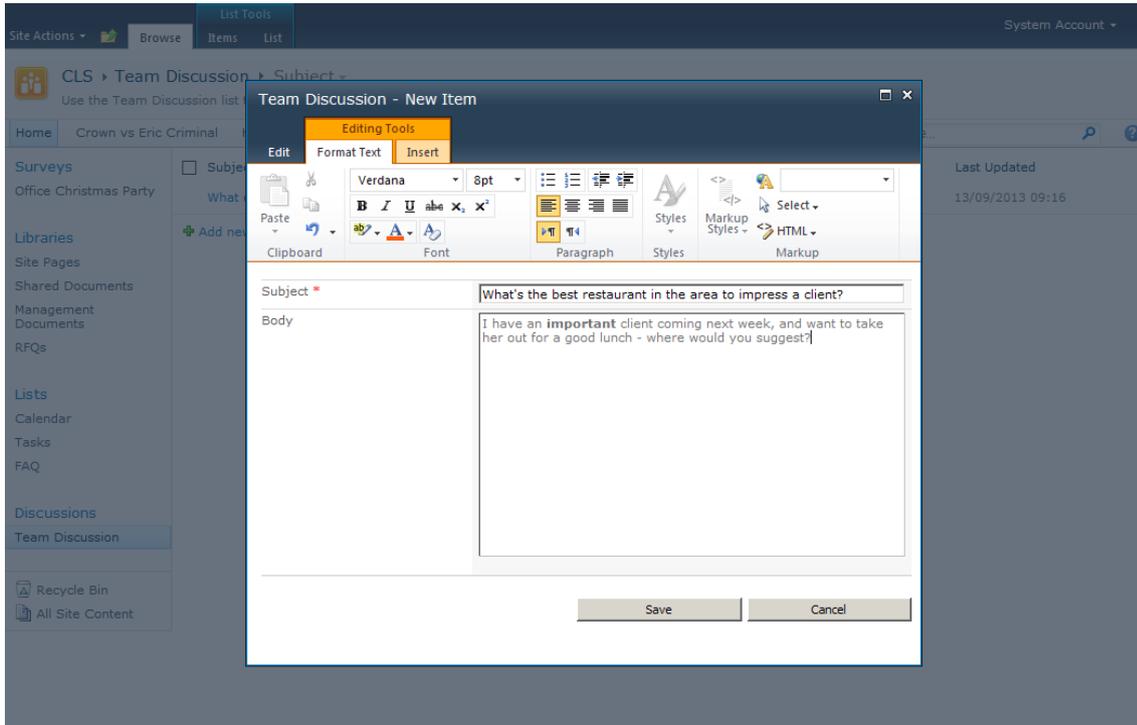
# Chapter 8. Team Discussions

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.

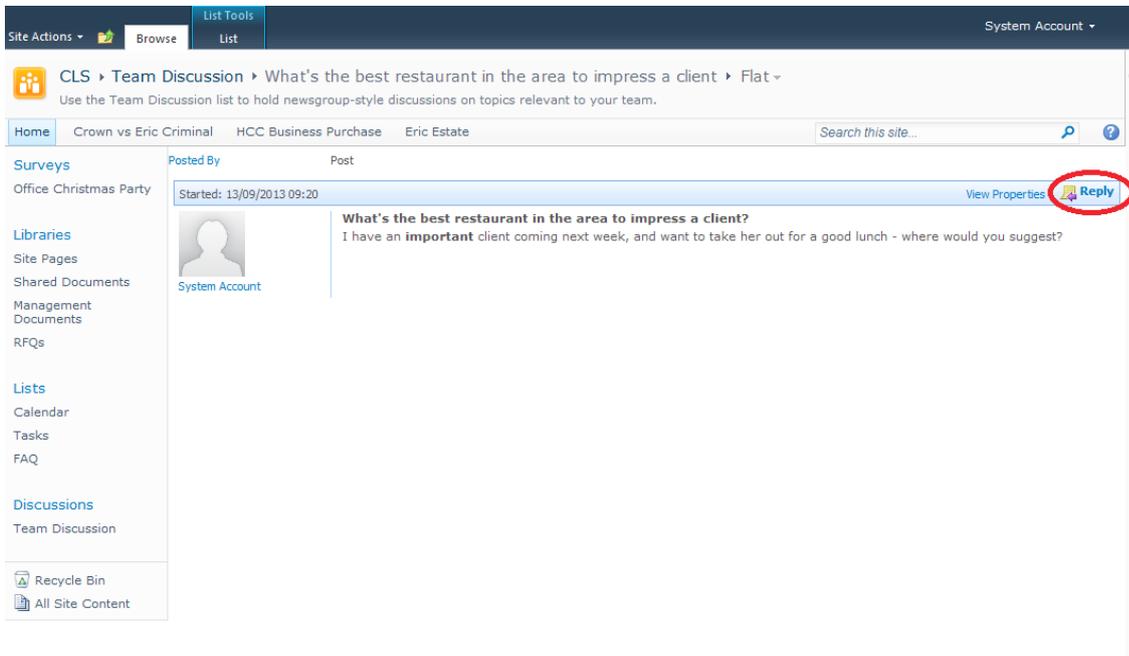
1. Click on the “Team Discussion” link on the Quick Launch bar



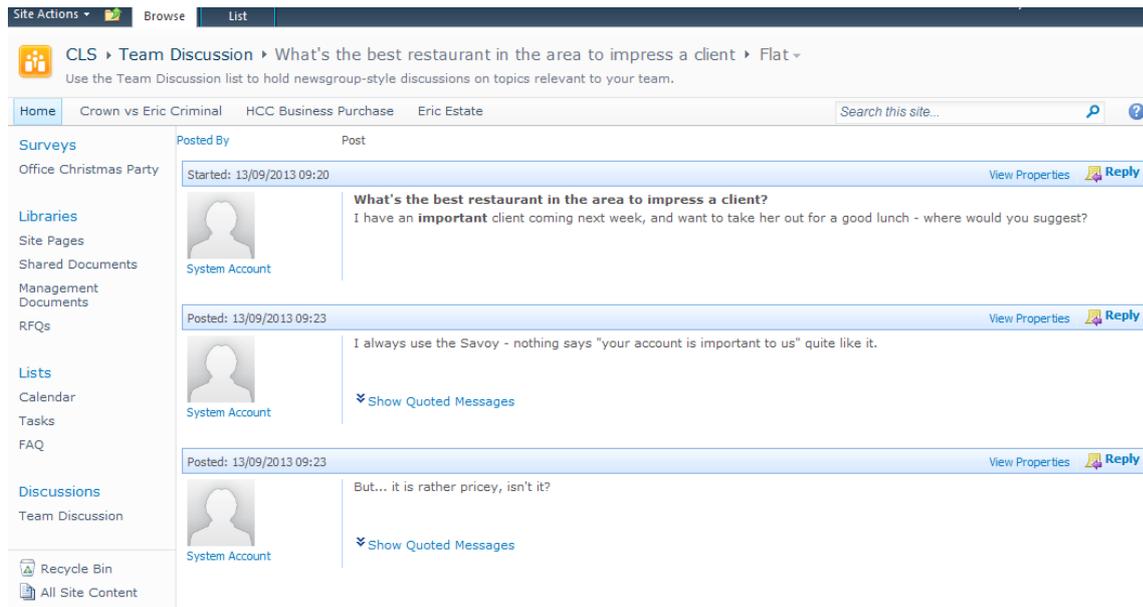
2. To start a new discussion, simply click on Add New Discussion, complete the form and click “Save”



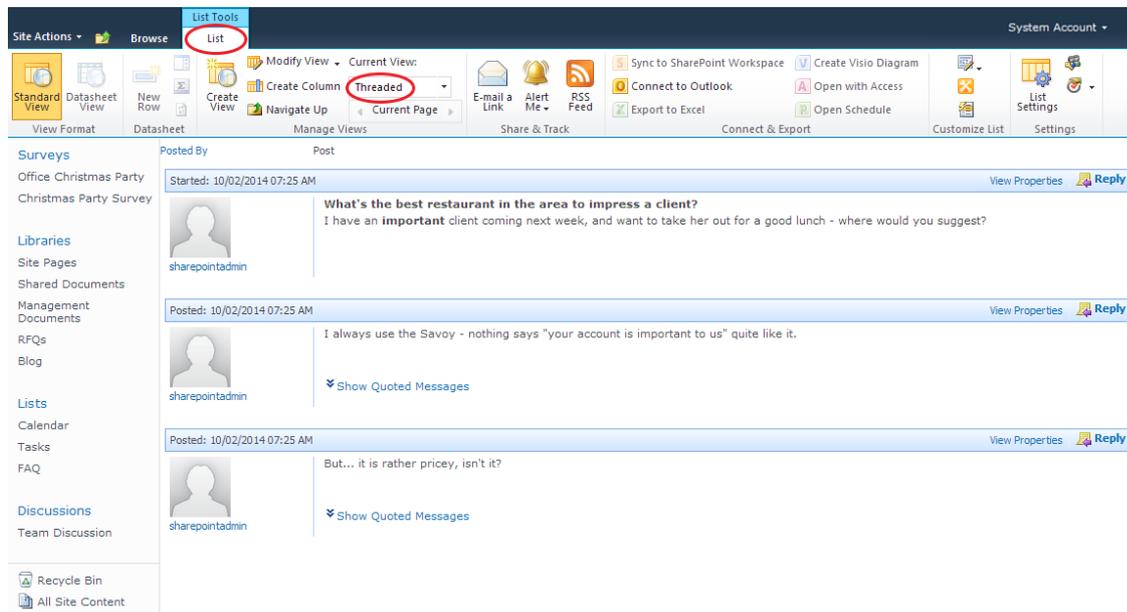
3. To reply to an existing discussion, click on it and then click the “Reply” button. Enter your reply and click “Save”



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

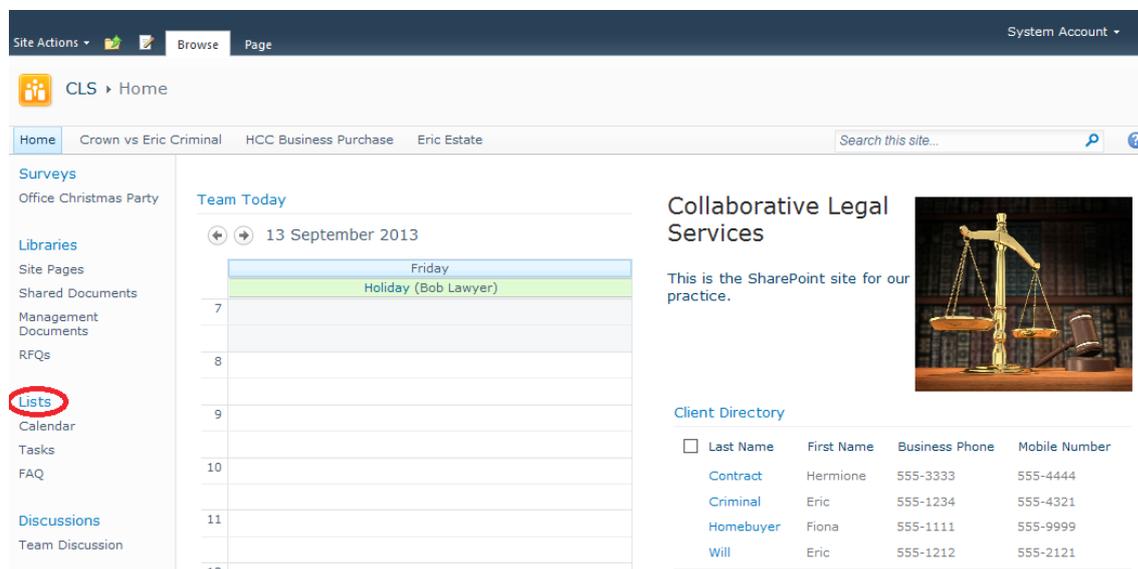


# Chapter 9. Gathering Feedback

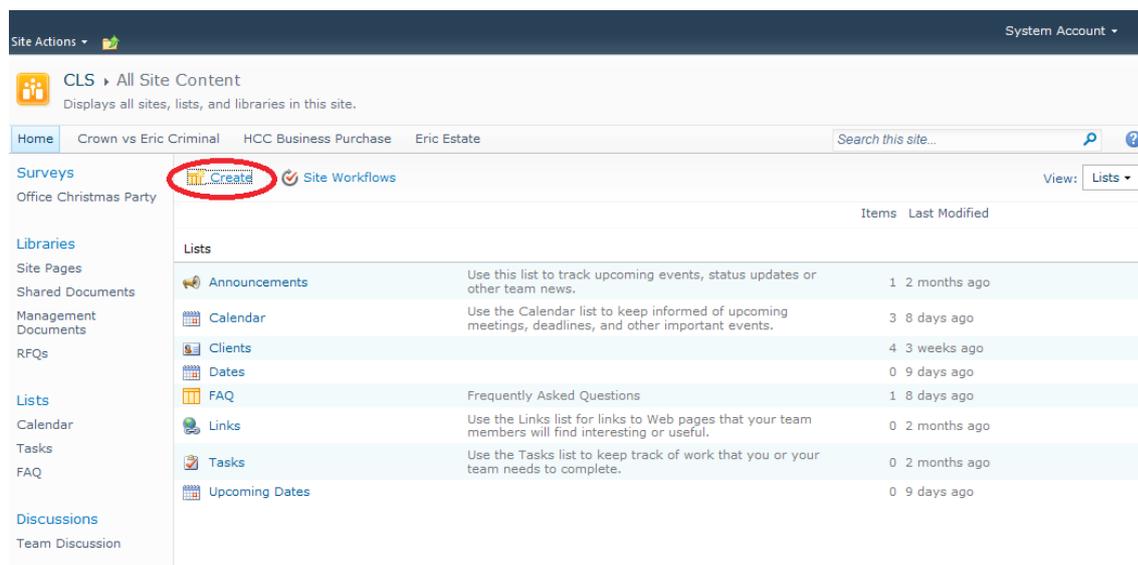
Quite often, something arises in an office which requires gathering feedback. Usually, the question is emailed out, and voting buttons may be used, or responses manually collated. SharePoint provides a powerful survey mechanism which makes it easy to ask questions and analyse the responses. For example,

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



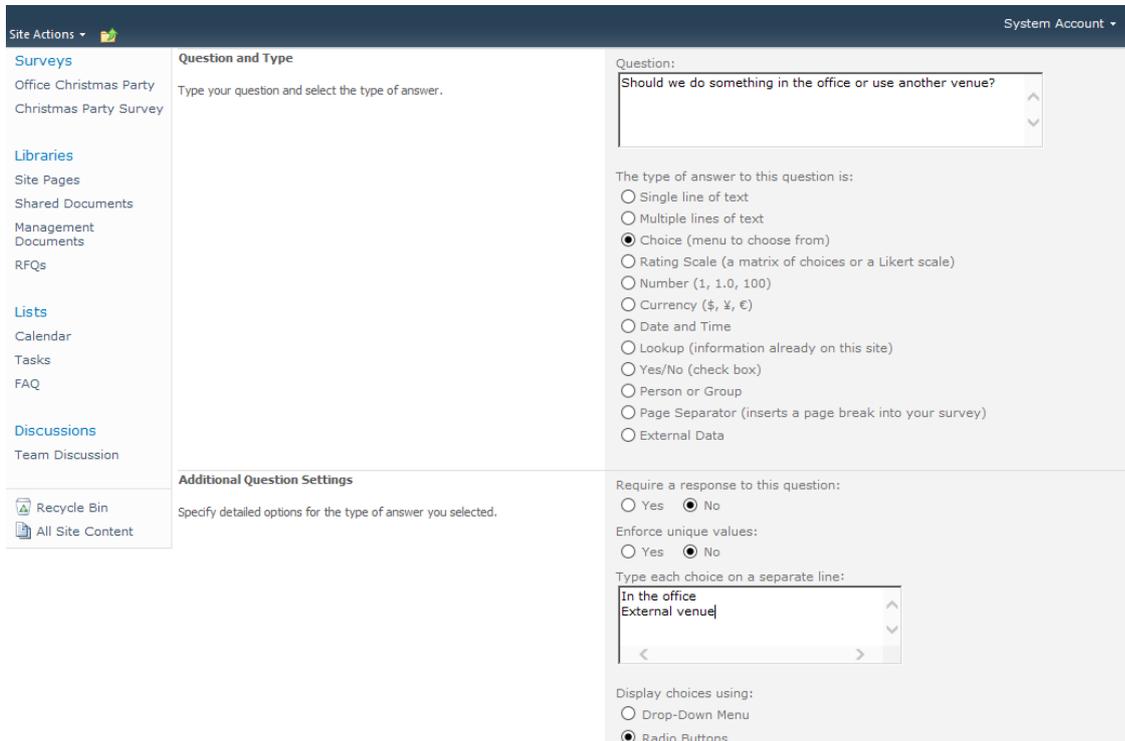
3. Note all the preconfigured list types SharePoint offers – select the “Survey” template

The screenshot shows the SharePoint 'Create' page. At the top, there's a 'Site Actions' menu and a 'System Account' dropdown. Below that, a 'CLS > Create' header with a sub-header 'Add new sites, pages, libraries, or lists to this site.' A navigation bar includes 'Home', 'Crown vs Eric Criminal', 'HCC Business Purchase', and 'Eric Estate'. A yellow banner reads 'Improve the Creation Experience Install Microsoft Silverlight'. Below this, instructions state: 'Select an item to create a new list, library, discussion board, survey, page or site. Hover over an item to view details.' The main content area is a grid of categories: Libraries, Communications, Tracking, Custom Lists, and Pages and Sites. Under 'Tracking', the 'Survey' option is circled in red.

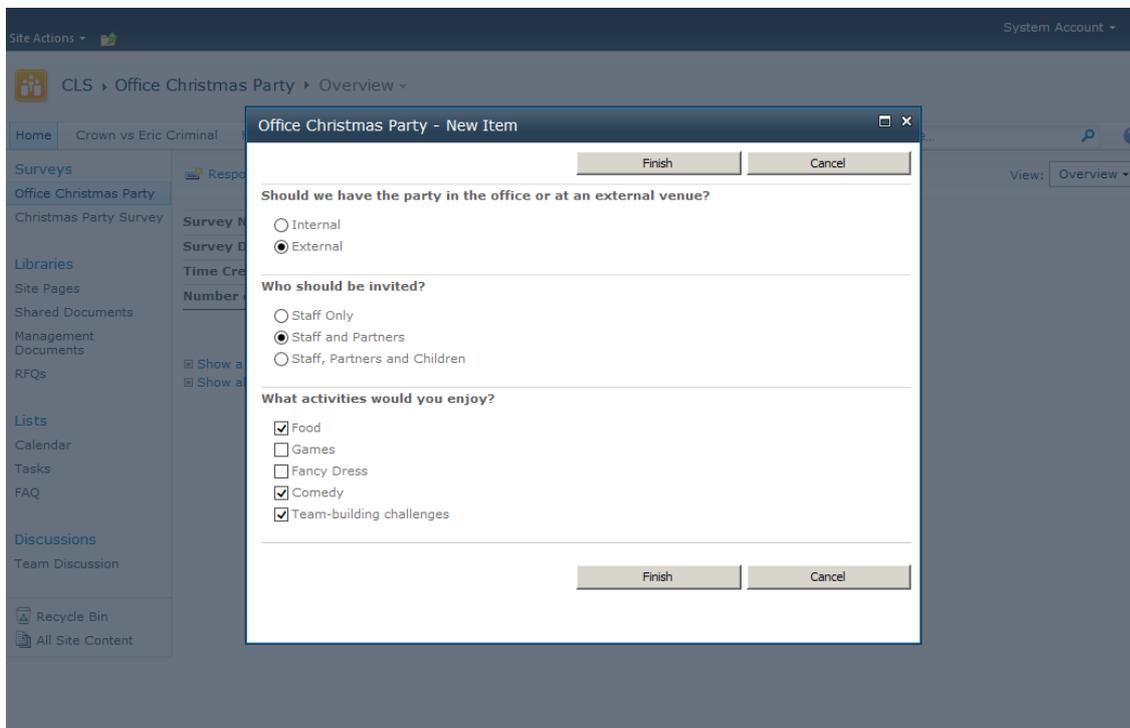
4. Fill out the “New Survey” form and click “Next”

The screenshot shows the 'New Survey' form. The left sidebar contains navigation links for 'Surveys', 'Libraries', 'Lists', and 'Discussions'. The main form area is divided into sections: 'Name and Description', 'Navigation', and 'Survey Options'. The 'Name and Description' section has a 'Name' field with 'Christmas Party Survey' and a 'Description' field with 'What shall we do this Christmas?'. The 'Navigation' section has a 'Display this survey on the Quick Launch?' checkbox which is checked, and radio buttons for 'Yes' (selected) and 'No'. The 'Survey Options' section has radio buttons for 'Show user names in survey results?' (selected 'Yes') and 'Allow multiple responses?' (selected 'No'). At the bottom, there are 'Next' and 'Cancel' buttons.

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.

The screenshot displays a survey graphical summary for 'Office Christmas Party'. The interface includes a navigation sidebar on the left with sections for Surveys, Libraries, Lists, Discussions, and Recycle Bin. The main content area shows three survey questions with horizontal bar charts representing the distribution of responses. A red circle highlights a 'View:' dropdown menu in the top right corner of the main content area, which contains the following options: 'Graphical Summary', 'Overview', 'Graphical Summary', and 'All Responses'.

**1. Should we have the party in the office or at an external venue?**

Response	Count	Percentage
Internal	2	40%
External	3	60%
<b>Total</b>	<b>5</b>	

**2. Who should be invited?**

Response	Count	Percentage
Staff Only	2	40%
Staff and Partners	1	20%
Staff, Partners and Children	2	40%
<b>Total</b>	<b>5</b>	

**3. What activities would you enjoy?**

Response	Count	Percentage
Food	1	20%
Games	0	0%

# Contact Us

Tel: 0843 462 0085

Email: [info@itg-uk.com](mailto:info@itg-uk.com)

Web: [www.inspiratechnologygroup.com](http://www.inspiratechnologygroup.com)

