Microsoft

Microsoft® SharePoint® 2010

Creating and Implementing Real-World Projects

Jennifer Mason, Christian Buckley,
Brian T. Jackett, Wes Preston

Microsoft®

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Creating and Implementing Real-World Projects

Build effective solutions for real-world business scenarios—using out-of-the-box tools in Microsoft SharePoint Server, SharePoint Foundation, and Office 365. Each chapter in this hands-on book focuses on a single business project, using a standard approach to guide you through the solution-building process from start to finish. Apply your skills as a SharePoint power user or site administrator—and get started now.

Tackle 10 common business problems with real-world SharePoint solutions

- Set up a help desk solution to track service requests
- Build a simple project management system
- Design a scheduling system to manage resources
- Create a site to support geographically dispersed teams
- Implement a course registration system
- Build a learning center with training classes and resources
- Design a team blog platform to review content
- Create a process to coordinate RFP responses
- Set up an FAQ system to help users find answers quickly
- Implement a cost-effective contact management system

For SharePoint administrators and power users

About the Authors

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I would like to dedicate this book to Chris Maiers. The idea for this book came from many of the conversations we have had over the past year. Thanks for being such a great client and friend!

—Jennifer Mason

I'd like to dedicate this book to my old echoTechnology team of Garry Smith, Sergio Otoya, Darshan Dalwadi (and team), Luis Juarez, Nick Kellett, and latecomer Mark McGovern. Thanks guys for all your support!

—Christian Buckley

I would like to dedicate this book to my family—Tom, Debbie, Dave, and Jay—and my girlfriend, Sarah, for all of your support through the writing process and beyond. Thanks for your support; it hasn't gone unnoticed.

—Brian T. Jackett

My work on this book is dedicated to my parents, who founded, owned, and operated the oldest computer store in Milwaukee, Wisconsin, for 17 years and forever instilled in me a love of technology and of helping others to embrace and benefit from it as well. Thanks Mom and Dad!

—Wes Preston

Contents at a Glance

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Introduction

If you are reading *Microsoft SharePoint 2010: Creating and Implementing Real-World Projects*, it is likely that you are experienced with SharePoint but looking for ways to really get the most from the out-of-the-box tools. Let's face it; the truth is that SharePoint is a large platform, with many different tools and methods for building and creating solutions. For someone who is getting started, there is much to take in and learn. That is where this book will come in handy! In the pages of this book, you will be working through and examining many different everyday examples that you are likely to have encountered at your organization.

This book is designed so that you can examine the business problems and then pull together the various tools and techniques available for building solutions within SharePoint to address the given business needs. We have quite a bit of ground to cover, so let's get started.

Who Should Read This Book

Before jumping into the chapters, you should be aware that we are expecting you to have a general understanding of the basics of SharePoint. This means that you should be somewhat familiar with common site administrator tasks. This allows us to focus more on why and how to do some advanced configurations. If you aren't familiar with some of these techniques, you can still continue with the book, and you will still gain lots of knowledge, but you might want to supplement your reading with some of the resources that we recommend in the resource appendix at the end of this book.

Assumptions

To help you understand the level of experience that is prerequisite for this book, the following is a list of common tasks that we expect you to be familiar with:

- Creating sites and webs (subsites)
- Creating lists and libraries
- Managing site permissions
- Creating and customizing list views

- Working with web parts
- Customizing a site with Microsoft SharePoint Designer 2010
- Customizing list forms with Microsoft InfoPath 2010
- SharePoint and Office integration

We define *familiar* as knowing the general concepts, not necessarily knowing how to configure and manage everything on the list. For example, in a chapter we might provide an instruction such as "Create a new view for this list." We expect that you know what a SharePoint view is, and our examples for the view will be specific to the solution at hand and won't really be focused on the general concept of a SharePoint view. If you are unfamiliar with any of the following items, don't worry, because it should be easy for you to get up to speed so that you are familiar enough to work through the chapters. Besides, if you are reading a chapter and run into something that you aren't familiar with, Bing is only a few clicks away!

Another assumption that we have made in the writing of this book is that all of our solutions have been built in separate and unique site collections. This was done as a way to provide a clean slate for each new solution. As you consider implementing the ideas within the book in your organization, it is important for you to review with your SharePoint team the governance in place, which determines when you should use a site collection and when you should use a site. You can easily adapt the solutions in this book so they can be created as a site in an existing site collection. There are many considerations to think about as you look at the best location to add these solutions within your organization. If your organization does not have any existing governance plans surrounding the creation of sites or site collections, we recommend you read "Plan sites and site collections (SharePoint Server 2010)" at *http://technet.microsoft.com/en-us/library/cc263267.aspx* to help you determine the best solution for your needs.

Organization of This Book

When you read each of this book's chapters, you should look for ways that you can apply the same solutions within your environment. Each chapter is structured in a way that allows you to start from the business problems and work through the implementation, followed by a discussion about maintaining the solution over time. This format is consistent across all chapters, so you gain experience in the process of evaluating business problems and applying SharePoint solutions to address specific needs. Because this book is intended to be read by a large, diverse audience, it is not likely that all scenarios will apply specifically to your needs. It might also be that your scenarios match only part of our solutions. What happens then? It is our intention in this book that you should be able to pull the pieces that apply specifically to your needs and then make adjustments as needed to meet your specific requirements. The chapters should be considered as starting points. If you are a master chef, you might follow a recipe but add your own spices to really enhance the meal you are creating. In the same way, you can think of this book as a collection of recipes. You might follow the recipe exactly, or you might enhance or make substitutions. In fact, you might very well combine the techniques from different chapters into a single solution. The point is, where you are able to, look at the different solutions proposed and then adapt them for your specific environment.

Here is a quick summary of what you can find in each of the chapters:

Chapter 1, “Building a Project Management Solution,” explores a project management solution that provides a way for the project team to collaborate and for the project manager to report project status to the management team.

Chapter 2, “Building a Training Registration Management System,” provides a solution that allows users to view a calendar of courses and then register for those courses directly from the calendar. This solution is built using many of the rich enterprise features in SharePoint, especially InfoPath.

Chapter 3, “Building a Basic FAQ Solution,” provides a solution that utilizes SharePoint Foundation to create a centralized location to store and manage FAQs. This solution highlights the rich feature set within SharePoint Foundation and guides you through making the most of the customizations available to you.

Chapter 4, “Building a Learning Center,” focuses on designing and implementing a learning center site that aggregates classes and the related documents, discussions, and links to external resources. SharePoint Foundation elements such as lists, lookup columns, and simple SharePoint Designer workflows are utilized to build the solution.

Chapter 5, “Building a Help Desk Solution,” focuses on designing and implementing a help desk solution for creating and tracking service requests for a departmental organization. SharePoint Server Standard elements such as more complex Visio to SharePoint Designer workflows, document libraries, and wiki pages are used to build the solution.

Chapter 6, “Building a Remote Teams Activity Site,” takes a look at a simple way to keep geographically dispersed teams connected and their schedules aligned by providing a shared calendar solution. The chapter also offers suggestions for further aligning tasks and documents.

Chapter 7, "Building a Team Blog Platform," walks through the building of a team blog platform, with all the expected blog components, and outlines a method for reviewing and approving content in a secure and managed way.

Chapter 8, "Building an RFP Response Solution," walks through the design and steps to build a solution for consulting or services organizations that respond to requests for proposals or bids. The solution enables consistent communication across the organization and manages bid-creation tasks across multiple teams. The solution can be built using any version of SharePoint 2010 or SharePoint Online (Office 365).

Chapter 9, "Building a Contact Management Solution," steps through the design and building of a contact management solution using core SharePoint functionality available in any version of SharePoint or SharePoint Online (Office 365). The solution extends the out-of-the-box contacts list and starts down the path of presenting multiple facets of data regarding contact management and activities.

Chapter 10, "Building a Resource Scheduling Solution," walks through the design and steps required to build a resource scheduling solution. This solution uses a relatively underutilized feature built into SharePoint sites, called Group Work Lists. The solution can be built using any version of SharePoint 2010 or SharePoint Online (Office 365).

Setting Expectations

The best thing we can do for our readers is to help them understand the expectations we have from this book. This way, as you are reading the book, you can get the most from it. When the team of authors started discussing this book, one of the key things we kept focusing on was the desire for the audience to be able to read through the chapters and use the information within the chapters to build solutions within their organization. While you learn lots of techniques in the pages of this book, the overall purpose is not to teach you how to create a workflow or how to configure a library, but instead to convey why you would want to perform those tasks. After reading this book, you should have the tools needed to look at business solutions objectively and then pick and choose the different approaches within SharePoint for building solutions that address the problems at hand.

What Is a Real-World Scenario?

In the title of the book we use the term *real-world* projects. Because this term can be slightly overused and underexplained at times, we want to be sure to define what we mean when we use it. In the context of this book, *real world* is defined as various scenarios encountered by the authors as we have used SharePoint as a tool to build solutions that address business needs. As the authors came together for this book, each of us submitted ideas based on concepts we have built solutions for. Each of the solutions has been implemented within one or more organizations. The solutions we selected are ones that we feel address a large audience. This approach allows us to offer solutions that most readers can relate to in their everyday work experiences.

Introduction to SharePoint

No SharePoint book would be complete without an introduction to each of the platforms. The term SharePoint is tossed around quite a bit in general, and at times it can be hard to understand whether a particular discussion applies to your environment. Later in this chapter, in the section "Different SharePoint Versions," we give you a high-level summary of each of the available platforms in SharePoint. This section can serve as a reference point if you have questions later in the book about the different platforms we use.

What Is SharePoint?

So what is SharePoint? There are two ways you can look at SharePoint—what it is and what you do with it. Think of the process of building a house. There are many different tools and materials that are combined for the final product. Each of the materials alone might or might not be anything by itself, but once they are combined with the proper use of tools, you have a strong, reliable structure that fulfills a purpose. In the same way, SharePoint is like the various tools and materials, and the final business solutions you build are like the house. There are many features and tools in SharePoint, and within this book you will see different ways to combine and structure them into business solutions.

If you head over to the official Microsoft SharePoint website (*SharePoint.com*), you will see a discussion of six capabilities that SharePoint provides. In the following sections, we summarize each of them.

Sites

Within SharePoint you can use sites to store and manage data in many different forms. You can create a site that publishes content internally for users: this is typically referred to as your corporate intranet. You can also push information to the web for public, anonymous access, which is referred to as your Internet site. You can also use sites to store and manage data that is used and referenced by a group of named users who have access to the sites. These are typically referred to as collaboration sites. Some common types of collaboration sites include project sites, team sites, and department sites. In some cases these collaboration sites are extended outside the corporation, and vendor and third-party users are invited to join in the collaboration. These types of sites are typically referred to as extranet sites.

Communities

Communities are the various social features that allow us to collaborate more efficiently. These features can help you locate other users within your organization on the basis of information about them or their areas of expertise. Once you are connected, you can easily communicate and collaborate with them through their My Sites. Communities also provide some tagging and rating features. These features allow you to quickly classify content, and these classifications are shared across the organization and used by others as they try to locate content.

Composites

Composites define the way that you can interact with various line of business systems within your organization. Using the composite features, you can easily incorporate business data into SharePoint. The two primary features within the composites structure are Access Services and Business Connectivity Services (BCS). Access Services allow you to use Microsoft Access to build and configure applications that can be published to SharePoint. Users will have visibility to the data within SharePoint, through the browser alone, without needing to have the Access client installed. BCS is used to configure connections to external data. Once the connection is configured, the external data is available within SharePoint through the standard features of lists, metadata, and external content types.

Content

Within the content features of SharePoint, some of the most common features are records management, document management, web content management, and search. The records and document management features allow you to manage how data is added to the environment and let you create policies to manage data compliance.

Insights

Insights are considered the business intelligence features within SharePoint and include the following technologies: Excel Services, Visio Services, Chart web part, key performance indicators (KPIs), and PerformancePoint Services. These services provide the capabilities for you to use common tools such as Visio and Excel to manage and report on data, while allowing users to access the content without needing a client application. The chart and KPI features can connect to the data that is published through the services, giving you another way to present the data to your users through SharePoint. PerformancePoint is a downloadable application that allows you to create rich charts, graphs, and reports on data that is stored within SharePoint, Excel Services, or SQL Server. As with the other tools mentioned earlier, the reports are generated within the PerformancePoint dashboard builder and published to the SharePoint sites, allowing users to have clientless access to the data.

Search

The search features within SharePoint allow you to easily find and locate relevant content. Since search is configured for both content and people, users within the organization can rely on search to help them quickly find what they need. The search experience is completely configurable, allowing for each organization to provide a search experience that best works for its users.

So now that we have covered some of the primary functionality available within SharePoint, let's dive into the different versions of the product. There are several versions of the product, and it is important to understand what version you are working with so that you can fully understand the features that are available for you to use in your solutions.

Different SharePoint Versions

We could write books dedicated to mapping out the differences in the various versions of SharePoint. But since we are ready to get started building our solutions, we have decided to offer just very quick overviews and point you to locations online where you can get the most up-to-date information.

SharePoint Online

SharePoint Online is the newest SharePoint offering provided by Microsoft. This version comes with Office 365 as part of the SharePoint hosted model. There are several different versions of SharePoint Online, including ones for small businesses and ones for enterprises.

See Also *For more information on the specific features included in SharePoint Online, refer to the Microsoft website* technet.microsoft.com/en-us/sharepoint/gg144571.

SharePoint Foundation Server

SharePoint Foundation Server is the free version of SharePoint that comes with Windows Server 2008. This version allows you to create and manage sites, but it does not include any of the enterprise features or services.

See Also *For more information on the specific features included in SharePoint Foundation Server, refer to the Microsoft website* technet.microsoft.com/en-us/sharepoint/ee263910.

SharePoint Server

SharePoint Server comes in two different versions, Standard and Enterprise. Both versions include the features required for web content management and search. The Enterprise version, however, includes all the enterprise services, such as Visio Services, Excel Services, Access Services, and InfoPath Form Services.

See Also *For more information on the specific features included in SharePoint Server, refer to the Microsoft website* technet.microsoft.com/en-us/sharepoint/ee263917.

SharePoint Environment Used for This Book

Throughout this book, we use all the versions of SharePoint as examples. Each chapter's solution, depending on its topic, is built in a single environment. At the beginning of each chapter, we outline what environment we are using, as well as what decisions we made for selecting that environment. At the end of each chapter, we review the different environments and highlight how the solution would be different in each of them. In some cases this means we explain the limitations and workarounds required if you aren't running the same set of services, or we explain the different enhancements that you can make to the solution if you are running additional services. The authors have selected this approach to create a holistic approach to building solutions using SharePoint. By looking at each of the solutions based on different environments, you will be able to get a broad understanding of the different features available. If you are currently running in an environment with fewer features, you will be able to gain some practical insight and valid business justification for upgrading to more services. If you are running with all the features, you will see that sometimes "less is more." There might be cases where you are going out of your way to use all the features available when only some are required.

Acknowledgments

God has blessed me beyond belief, and I am so thankful for all the opportunities I have been presented with. With each book I finish, it is exciting to look back and see all that went into the process. In doing that, it is impossible to not be thankful to those around me who help make the process possible! In this small section I want to thank those who have influenced me along the way. While it is impossible to thank everyone, I will give it my best shot.

First off, I need to thank Shane and Nicola and all my wonderful crew at SharePoint911. I can honestly say that you have become like a family to me. Life would be boring without you, and I would be lost if I had to work without you. Thanks for being the best coworkers anyone could ask for!

Second, I want to thank my coauthors for such a fun journey discussing the need for this book and then seeing it come to life. Christian, Brian, and Wes, I am honored to get to work with you.

Third, I need to thank Shannon, our tech editor. I appreciate your insight and your additions to the book. In my book, you are the best MCM there is. Thanks for everything!

Fourth, I want to thank the community that makes all of this so much fun. There are far too many of you to name, but each of you makes my days so much more enjoyable. I look forward to continuing this journey together.

And finally, a group that needs to be thanked is the team at Microsoft Press who made this book happen. Ken Brown, there is no way this would be done without your organization and coordination. Thanks for all you did to make this come together. Working with authors is never easy, but we appreciate all you do for us.

—Jennifer Mason

I'd like to thank a few of my former Microsoft team members for their contributions to my SharePoint career path, whether they recognize their influence or not, and for making things a little more sane during the early days of my Microsoft tenure. Specifically, I'd like to thank Mike Watson, Joel Oleson, Bill Baer, Charles Ofori, Sean Livingston, Derek O'Loughlin, and Kimberley Ward. I'd also like to say thank you to Jennifer for inviting me to participate in this project, to Wes and Brian for the team support, and to friends in the SharePoint community who are always there to answer my questions and share their ideas—people like Geoff Varosky, Jason Himmelstein, Laura Docherty, Michael Doyle, Chris Beckett, Nedra Allmond, Jeff Shuey, Owen Allen, Paul Culmsee, Becky Isserman, and so many others. Thanks.

—Christian Buckley

I would like to thank my friends, family, and girlfriend, Sarah, for being supportive throughout the writing process. I would also like to thank those who helped me become who I am today: Frank Fernandez for introducing me to SharePoint, Kelly Jones for mentoring me during my early SharePoint days and beyond, Jeff Blankenburg for encouraging me to start a blog, Jennifer Mason for getting me more involved in the SharePoint community and getting this book concept started, Eric Harlan for providing career guidance, and Sean McDonough for helping with community events and numerous miscellaneous other things. I also thank my coauthors Wes and Christian for providing great content and support during the writing process. Lastly, I would like to thank God for all of the graces and blessings He gives to me each and every day.

—Brian T. Jackett

I would like to thank my wife, Kirsten, and boys, Connor and Ryan, for their unwavering support while I wrote this book. Making the time to commit to the project would have been impossible without their support. I'd like to thank Jennifer for inviting me to contribute to this project, as well as Christian and Brian. I also need to thank my cohorts Raymond Mitchell (the other half of "Wesmond") and Phil Jirsa for helping with lots of input, feedback, and gap filling. Finally, I'd like to thank the SharePoint community. There are so many great contributors out there who deserve a lot more credit than they are often given. It's difficult to name a few without including everyone, but a few standouts are Sarah Haase, Mark Rackley, Chris Geier, Kris Wagner, and Bill English.

—Wes Preston

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CHAPTER 3

Building a Basic FAQ Solution

In this chapter you will step through the process of creating a basic FAQ solution using SharePoint Foundation. This solution relies on some of the basic features in SharePoint Foundation and will highlight simple things you can implement in any solution to provide large benefits. As in the other chapters in this book, you will start by reviewing the business problems. You'll then work through the solution's design and then build the solution.

Identifying the Business Problems

The business need driving an FAQ solution is common across many organizations and is focused on helping users quickly find the data they need when they run into questions. For example, the following sections describe the key areas of concern at Tailspin Toys.

Self-Service Access to Common Information

One of the biggest issues within the organization is that users do not know where to go to find information. Since the data within the organization is so spread out, it is a common occurrence for users to quickly become frustrated and open support tickets if their initial search fails. Since the help desk is available only during certain working hours, this means that users who work after hours or who try to gain assistance during peak working hours have a hard time getting access to the data that they need. If a self-service solution was implemented, users would be able to access the needed data and submit help desk claims only when they were unable to find the data they need in the solution.

Extended Time on Help Desk Calls

Currently, with the added volume of calls to the help desk, the completion time for many calls is above the average threshold. Users have become frustrated because it is difficult to reach the help desk. Help desk staff have become frustrated because they are answering the same questions over and over again and are not able to focus more on the higher-level support requests.

Support for Third-Party Vendors and Partners

Recently, Tailspin Toys has entered into a partnership with several small toy companies. The partnership requires that the companies work together on several initiatives. As a result, many internal users are now responsible for working with internal systems as well as with several external environments. In addition, a collection of vendors now has access to Tailspin Toys' systems. The vendors have requested that each environment include a standardized FAQ solution that allows users to quickly search for and find information that they need.

Summarizing the Business Problems

We have briefly covered three problems that are affecting the working environment for three user groups:

- Difficulty finding answers to common questions
- Lack of quick turnaround on support questions
- Desire to use similar systems in multiple environments

Looking at these issues, it is clear that a centralized FAQ solution would address them and would improve the general working environment for employees, vendors, and the help desk support team.

Gathering Information

With the business problems defined, we can turn our attention to gathering specific requirements. This step includes looking at the unique users of the solution as well as their specific needs.

System Users

Our solution is going to be built to focus on the needs of two groups of users. For us to fully understand the requirements of the solution, the users in each group need to provide information about the specific items that they would like to include in the solution. This information will then be used to design and develop the solution.

All Employees and Partners

Employees and partners who will be accessing the solution have requested that the following items be included:

- Quick access to the newest FAQs
- Ability to search existing FAQs
- Ability for the site to guide them in the process of looking for content
- Ability to request more information if they are unable to find what they need on the site

Help Desk Support Team

The help desk support team would like to have the following items included in the solution's site:

- Easy interface for adding new FAQs and content
- Ability to provide additional information for users, such as links to other content or other documentation
- Ability for users to submit requests for additional information directly on the site

Solution Data

The key piece of information within these requirements is the FAQ. For our solution, an FAQ includes the following data elements:

- Question
- Answer
- Additional links
- Additional documentation
- Keywords
- FAQ category

Summarizing the Requirements Gathering Process

Now we have completed the process of looking at the requirements of the users of the solution and the types of data that it will include. It is time to start defining the solution's design. Before we do that, however, we should take a few minutes and summarize the process we just completed:

- Users are requesting a central location that they can access to find the answers to common questions. This would reduce their need to contact the help desk directly and allow them anytime access to the data.
- The help desk is requesting that its staff have a central FAQ location that will reduce the number of calls made to the help desk about simple questions, allowing staff members to spend more time working on more complicated requests.
- Since users have started working closely with partners, they have expressed a need for a common solution so that they can use the same approach for finding content no matter what environment they are working in.

It is now time to start designing the FAQ solution. In the next section of the chapter we are going to look at how we can translate these requirements into a working design.

Designing the Solution

With the requirements gathered, it is time to look at the decisions that need to be made before the solution is built. It is important to look at these items prior to completing any hands-on development. By following this process you can be sure that you have completed the due diligence required to fully understand the business needs and requirements.

In the sections that follow, two areas will be described: design decisions and wireframes. The design decisions section reviews the tools that we will use to create this solution as well as details about why they were selected. The section about wireframes presents the required pages. Ideally, in a real-world scenario, the wireframes would be created and then reviewed and approved by the solution's stakeholders prior to any development being completed.

Design Decisions

Several key points need to be discussed about the tools that will be used to create this solution and the methods for creating and managing the content the solution will manage. The following sections review each of these areas and provide information about the reasons that the selections were made.

SharePoint Foundation

The most important design decision for this chapter's solution is the use of SharePoint Foundation as our platform. Because there are different organizations working together that want to build a common solution, this is the best tool to use to ensure that requirements are satisfied.

Single Site Collection

Based on the projected amount of data, it was determined that our solution will remain within the quota (40 gigabytes) that has been set up for our environment. This means that a single site collection can be created for our FAQ solution, which will provide users a single location to search for and access common FAQs.

Permissions

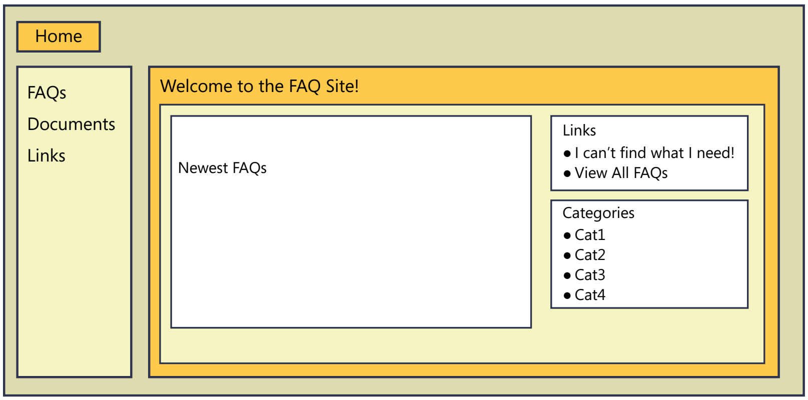
All users will be given read access to all FAQs. Each FAQ will be assigned to a category and some keywords will be defined for the FAQs so that the questions remain easy to find and access. Help desk staff will be given permission to add FAQs, but any new FAQs will require approval before they are visible to the organization. This will allow for help desk managers to review and approve content before it goes live to a large audience.

Solution Wireframes

Three pages will be created for the solution in this chapter. Each of the wireframes will be created and then approved by the project's stakeholders before any development is completed.

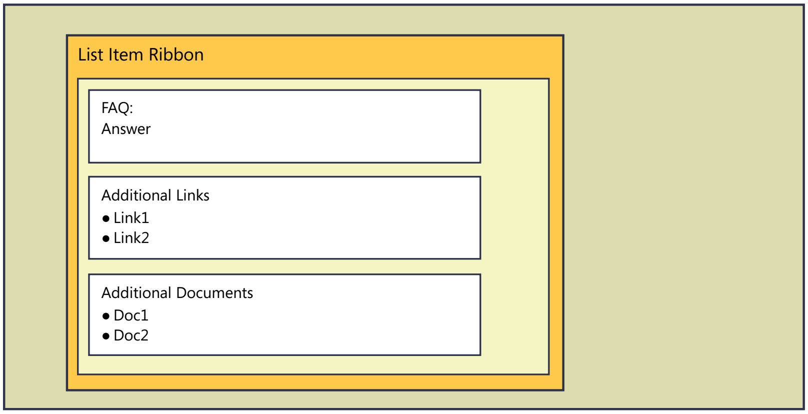
FAQ Home Page

This page will be the landing page for the FAQ solution. It will highlight the newest FAQs as well as provide links to the remaining FAQs based on category.



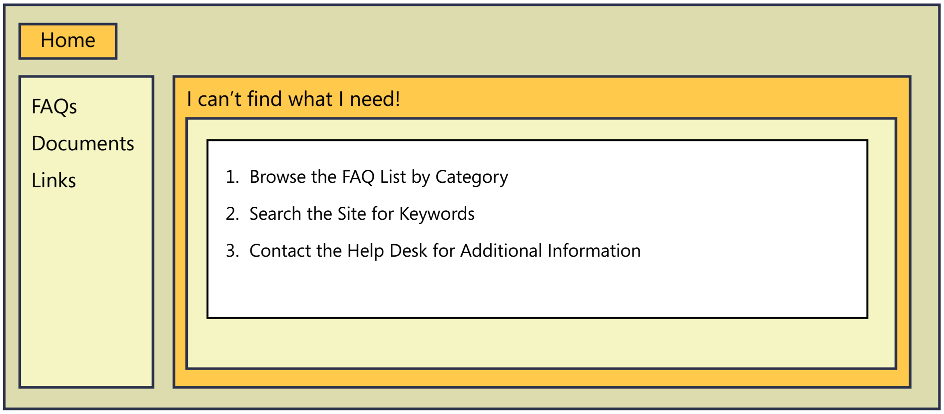
FAQ Item View Page

This page will be displayed when a user clicks on an FAQ item. It will be a customized version of the default list view and will be created simply by adding related web parts to the existing page.



Help Me Page

This page will provide users with additional information about using the site. When users go to this page, they will be able to access additional help and guidance for finding the content they are looking for. If they are still unable to find the content, they will be able to quickly contact the help desk.



Building the Solution

It is now time to start building the simple FAQ solution. You start by building the FAQ site and then you configure the various lists. Once the lists are configured, the final step is to add the web parts to the different pages in our solution.

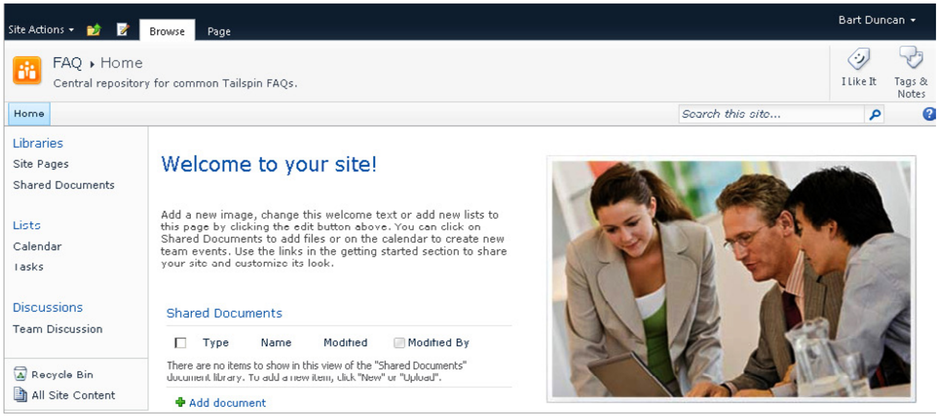
Build the FAQ Site

The FAQ site collection will be created from Central Administration using the settings in the following table. If you don't have access to the farm's Central Administration pages, you should request that a site be created using this information.

Field	Value
Web Application	http://www.tailspintoys.com
Title	FAQ
Description	Central repository for common Tailspin FAQs.
URL	.../sites/FAQ
Template Selection	Team Site
Primary Site Collection Owner	Wallace, Anne
Secondary Site Collection Owner	Duncan, Bart
Quota Template	Application_40GB

1. On the Central Admin home page, click Create Site Collections in the Application Management group.
2. Enter the information provided in the preceding table, and click OK to provision the site collection.

3. Once the site is provisioned, follow the link that's provided to open the new site collection.

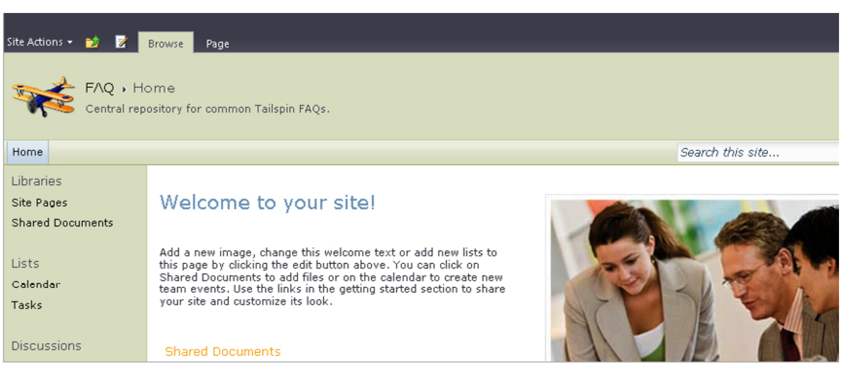


Change the Site Logo and Theme

To provide some additional styling to the site, you can update the site logo and theme. You first need to upload the logo to the site and copy the URL. You then specify that URL on the Title, Description And Logo page:

1. On the Site Actions menu, click the Site Settings link.
2. Click Title, Description, And Icon in the Look And Feel section.
3. Enter the URL for the company logo in the URL text box, and then click OK.
4. Click Site Theme in the Look And Feel section.
5. Select the Construct theme, and then click Apply.

The home page will now reflect your corporate logo and the updated theme.



Create and Customize the FAQs List

Use the information provided in the following procedure to create the FAQs list:

1. From the Site Actions menu, select the More Options link.
2. Locate the Custom List template, and then click the More Options button.
3. Enter the information from the following table, and then click the Create button.

List	Name	Template	Description	Navigation
FAQs	FAQs	Custom List	(Leave blank)	No

Create the Columns

For this list you need to create several custom columns. Each column is described in detail in the following table. After the table, the steps you need to complete to create each of the columns are provided.

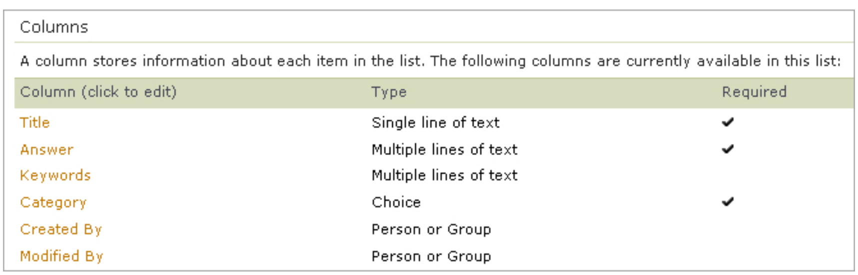
Column Name	Field	Value
Answer	Type	Multiple Lines of Text
	Description	(Leave blank since the column title is self-descriptive.)
	Specify Type of Text	Rich text (bold, italics, text alignment, hyperlinks)
	Required	Yes
	Append Changes to Existing Text	No
	Add to Default View	Yes
Keywords	Type	Multiple Lines of Text
	Description	(Leave blank since the column title is self-descriptive.)
	Specify Type of Text	Rich text (bold, italics, text alignment, hyperlinks)
	Required	No
	Append Changes to Existing Text	No
	Add to Default View	Yes

Column Name	Field	Value
Category	Type	Choice
	Description	This FAQ falls into the following category:
	Values	General FAQ Human Resources Benefits IT / Technology
	Display Choices Using	Drop-down
	Required	Yes
	Enforce Unique Values	No
	Default Value	General
	Add to Default View	Yes
	Column Validation	NA

To create each of the columns, follow these steps:

1. From the Site Actions menu, select the View All Site Content link.
2. Click the FAQs link to open the list.
3. Under List Tools on the ribbon, click the List tab.
4. Click Create Column.
5. Enter the information for each column from the preceding table.

When you have completed the process, the Columns section on the List Settings page should appear like the following screenshot.



Columns

A column stores information about each item in the list. The following columns are currently available in this list:

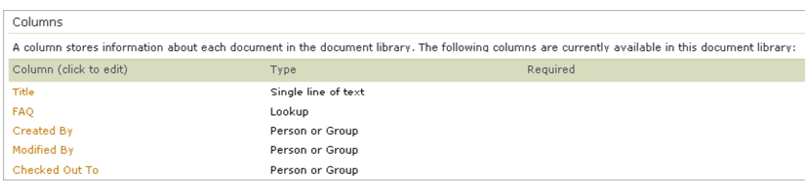
Column (click to edit)	Type	Required
Title	Single line of text	✔
Answer	Multiple lines of text	✔
Keywords	Multiple lines of text	
Category	Choice	✔
Created By	Person or Group	
Modified By	Person or Group	

Customize the Shared Documents List

One of the solution requirements is that each FAQ item can be linked to additional documents. To manage this, we can use the default document library that is created as part of the Team Site template. The only item you need to configure is a column that provides a way to associate the documents with an FAQ. You can do this is by adding a lookup column using the information from the following table.

Field	Value
Column Name	FAQ
Type	Lookup
Description	(Leave blank)
Required	No
Enforce Unique Values	No
Get Information From	FAQs
In This Column	Title (linked to item)
Allow Multiple Values	No
Allow Unlimited Length	No
Add a Column to Show Additional Fields	None
Enforce Relationship Behavior	Yes, Restrict Delete

When you have created the column, your List Settings page should look like the following. If you need step-by-step instructions for creating the column, see the preceding section.


Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

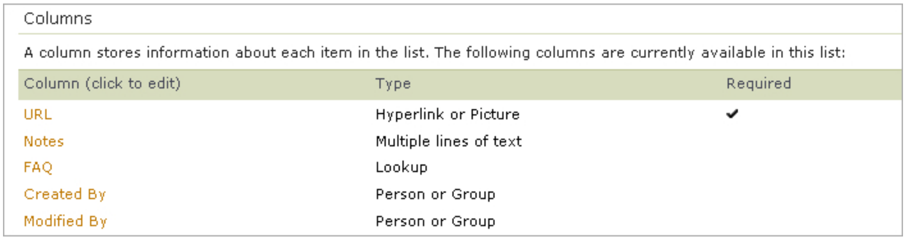
Column (click to edit)	Type	Required
Title	Single line of text	
FAQ	Lookup	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

Customize the Links List

In addition to referencing documents related to various FAQs, the solution includes a requirement to be able to easily link to additional content. You can do this by adding a column to the Links list that is included in the Team Site template. The information for the column is found in the following table.

Field	Property
Column Name	FAQ
Type	Lookup
Description	(Leave blank)
Required	No
Enforce Unique Values	No
Get Information From	FAQ
In This Column	Title (linked to Item)
Allow Multiple Values	No
Allow Unlimited Length	No
Add a Column to Show Additional Fields	None
Enforce Relationship Behavior	Yes, Restrict Delete

When you have created this column, your List Settings page should look like the following. If you need step-by-step instructions for creating the column, see "Create the Columns" earlier in this chapter.


Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
URL	Hyperlink or Picture	✔
Notes	Multiple lines of text	
FAQ	Lookup	
Created By	Person or Group	
Modified By	Person or Group	

Create and Customize the Help Me List

Within the solution, users need to send a request for additional information to the help desk. We will implement this requirement by creating a list to manage these requests. The list will be secured so that users see only the items they have submitted. Once a user submits an item, a workflow will start that notifies the help desk that a new request has been submitted. The help desk will review the request and provide a response to the user who submitted it.

The first step in configuring this feature is to create the list. After the list is in place, you will use SharePoint Designer to build the workflow.

1. From the Site Actions menu, select the More Options link.
2. Locate the Custom List template, and then click the More Options button.

3. Enter the information from the following table, and then click the Create button.

List	Name	Template	Description	Navigation
Help Me	HelpMe	Custom List	(Leave blank)	No

4. When the list is displayed, select the List Settings option on the ribbon.
5. Click the Title, Description And Navigation link in the General Settings group.
6. Update the title to **Help Me**, and then click OK.
7. Click the Advanced Settings option in the General Settings group.
8. Change the settings under Item-Level Permissions so that users can read only items that were created by the current user and create and edit only items that were created by the current user. Click OK.

Create the Columns

For the Help Me list, you need to create several custom columns. Each column is described in detail in the following table.

Column Name	Field	Value
Question	Type	Multiple Lines of Text
	Description	(Leave blank since the column title is self-descriptive.)
	Specify Type of Text	Rich text (bold, italics, text alignment, hyperlinks)
	Required	Yes
	Append Changes to Existing Text	No
	Add to Default View	Yes
Response	Type	Multiple Lines of Text
	Description	(Leave blank since the column title is self-descriptive.)
	Specify Type of Text	Rich text (bold, italics, text alignment, hyperlinks)
	Required	Yes
	Append Changes to Existing Text	No
	Add to Default View	Yes

Column Name	Field	Value
FAQ	Type	Lookup
	Description	If this question prompted the creation of a new FAQ, the link will be provided here.
	Required	No
	Enforce Unique Values	No
	Get Information From	FAQs
	In This Column	Title (linked to item)
	Allow Multiple Values	No
	Allow Unlimited Length	No
	Add a Column to Show Additional Fields	None
	Enforce Relationship Behavior	Yes, Restrict Delete

When you have created the columns, your List Settings page should look like the following screenshot. If you need step-by-step instructions for creating the columns, see the section "Create the Columns" on page 128.

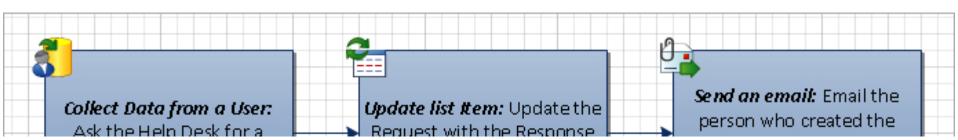
Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✔
Question	Multiple lines of text	
Response	Multiple lines of text	
FAQ	Lookup	
Created By	Person or Group	
Modified By	Person or Group	

Configure the Workflow

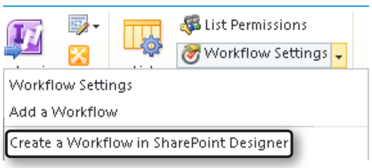
You will use SharePoint Designer to configure the workflow for this list. Later in the chapter you will create a page with a custom view for users to add items to this list, but for now we will focus on the workflow. The workflow will follow the process shown here:



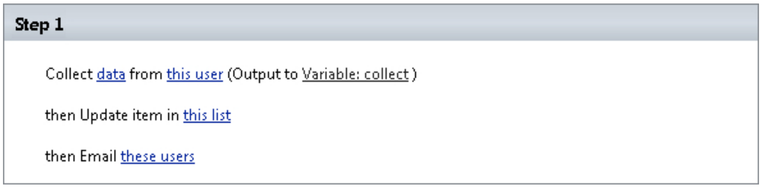
The purpose of the workflow is to notify the help desk that a new request has been submitted. The workflow notifies all users in the Help Desk Site Owners group. Everyone in that group will receive an email message that a new task has been assigned. Once a help desk staff member accesses the task, she can respond and complete the task, or she can claim the task to let others in the group know she is working on a response. After the task is completed, the item's creator will receive an email with the response and the workflow will be marked as completed.

Here are the steps to create the workflow using SharePoint Designer:

1. Navigate to the List tab for the Help Me list that you created earlier.
2. Click the Workflow Settings option, and select Create A Workflow In SharePoint Designer.

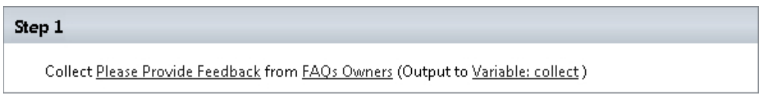


3. When prompted, enter the following information, and then click OK:
   - Title: New Request
   - Description: Workflow that is started when a user requests additional information from the FAQ site.
4. In the Workflow editor, use the ribbon to add the following actions within Step 1:
   - Collect Data From This User (Output To Variable: Collect)
   - Update Item In This list
   - Email These Users

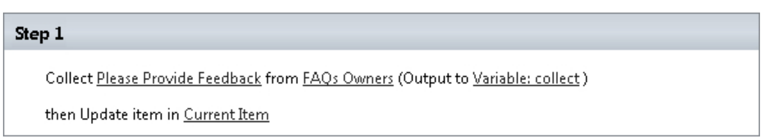


5. Click *data* in the first action, and enter the following information when prompted:
   - Next
   - Name: Please Provide Feedback
   - Description: A new FAQ has been submitted to the site. Please review and provide a response.
   - Next

6. Click the Add button on the screen, and then enter the following information:
    - Field Name: Help Desk Response
    - Description: Please provide a response to the user. This response will be sent to the user via email after you complete the task.
    - Information Type: Multiple Lines of Text
    - Next
7. Click the check box next to all options and click Finish.
8. Click *this user* in the first action. When prompted, add the FAQs Owners group to the Selected Users column, and then click OK.

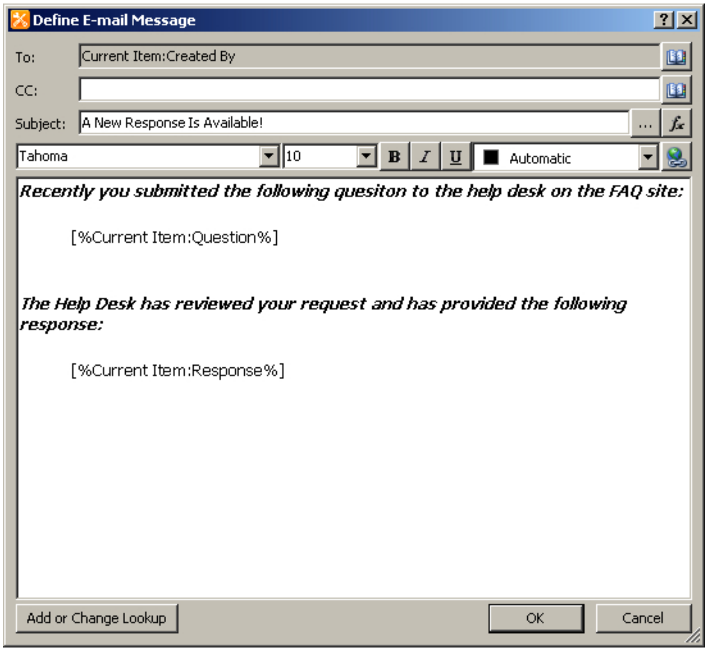


9. Click *this list* in the next action.
10. Select Current Item from the list drop-down menu.
11. Click Add.
12. Select Response from the Set This field list.
13. Click the *fx* button to open the lookup configuration.
14. Enter the following values, and then click OK:
    - Data Source: Association: Task List
    - Field From Source: Help Desk Response
    - Field: ID
    - Value: Variable: Collect
15. Click OK.



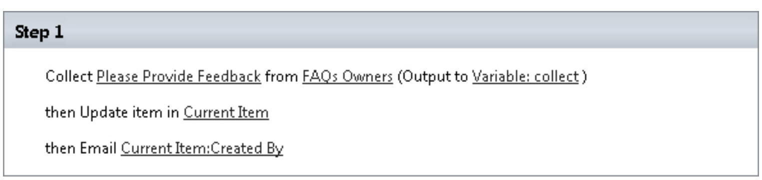
16. Click *these users* in the final action. When prompted, complete the email as follows:

- To: Current Item: Created By
- Subject: A New Response Is Available!
- Body: Recently you submitted the following question to the help desk on the FAQ site: [%Current Item: Question%]. The Help Desk has reviewed your request and has provided the following response: [%Current Item: Response%].

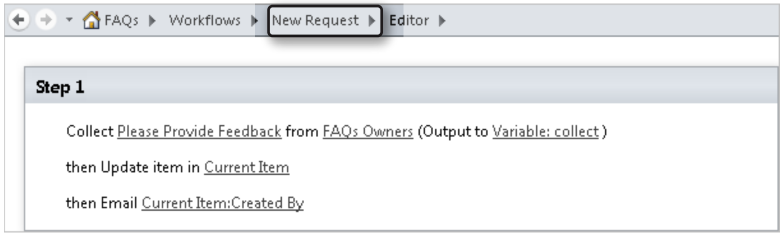


17. Click OK to close the email generator.

The final workflow should look like the screenshot shown here:

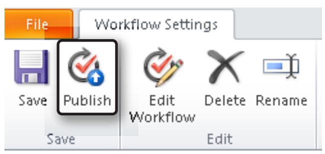


18. Click New Request in the breadcrumbs to open the workflow details page.



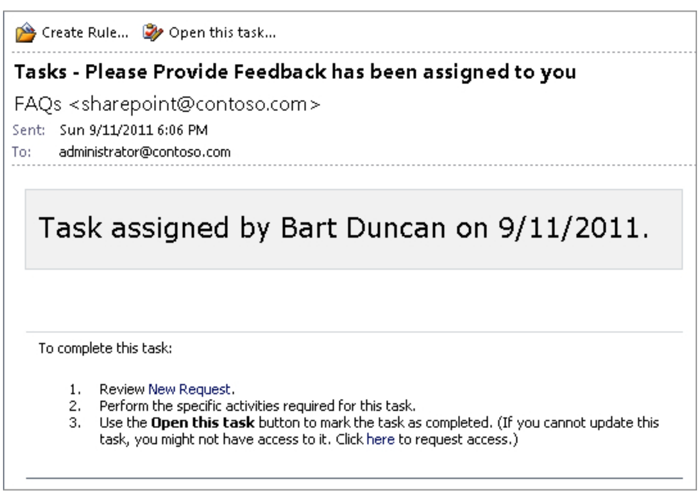
19. Select the check box for Start The Workflow Automatically When An Item Is Created in the Start Options.

20. Click the Publish option on the ribbon to publish the workflow to the Help Me list.



Workflow in Action

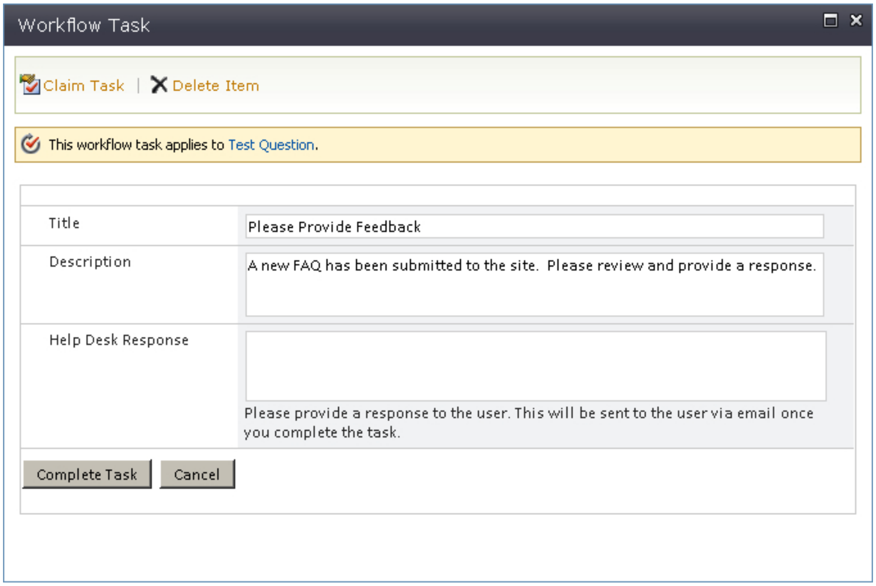
To test the workflow, create an item in the list. Assuming you are a member of the Owners group for the site, you will receive an email that informs you that a new task has been created.



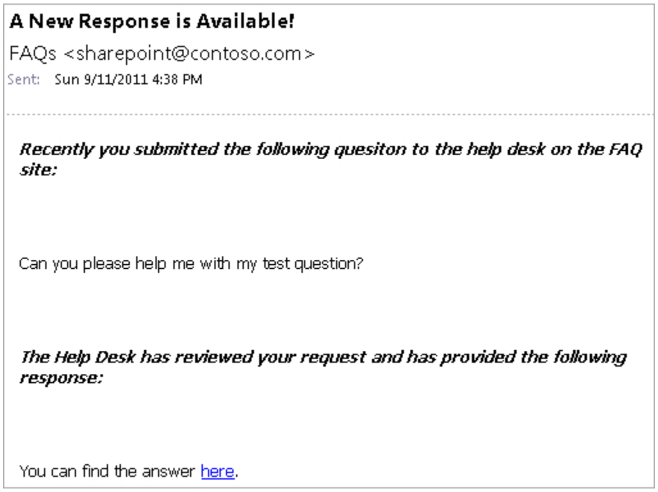
1. Click Open This Task to add your response.

2. Close the task.

Notice that you are presented with an option to claim the task, as shown in the following screenshot. If you select this option, the task is assigned to you individually instead of to the group. Others in the group who open the task will see that you have claimed the task.



Once the task has been completed, the person who created the item will receive an email such as this:

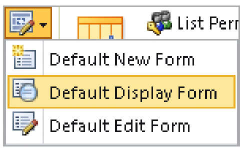


This workflow provides a simple way for users to communicate directly with the help desk if they have any questions that they can't find an answer to within the site. Since the help desk can respond via email, the workflow helps reduce the amount of time help desk staff spend on the phone answering requests.

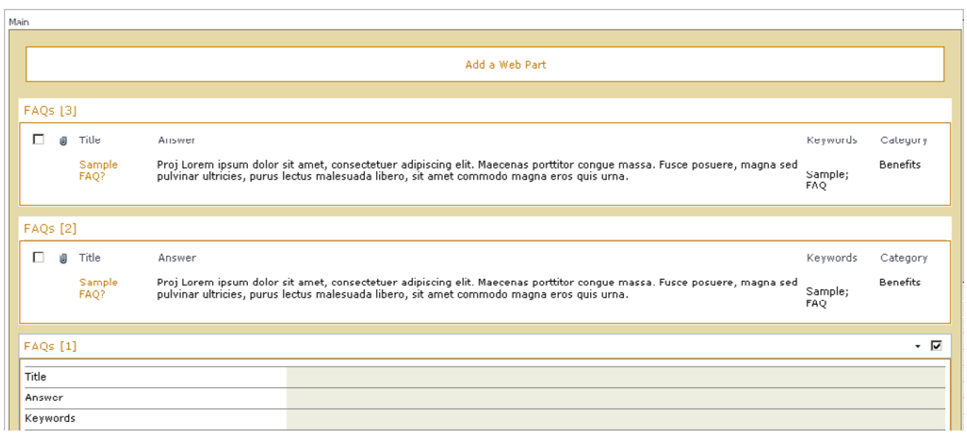
Design the List View Page

Now that the content has been built, it is time to work on a few of the design elements. The first area that you will focus on is the customizations that need to be made to the FAQs list view. Because you are using SharePoint Foundation you do not have access to InfoPath Forms services to customize the list form. However, this doesn't mean that you can't make any customizations. In this section you will make several simple web part customizations that help improve the value of the FAQs list view.

1. From the Site Actions menu, select the View All Site Content link.
2. Click the FAQs link to open the list.
3. Click the Customize Form item on the Lists tab, and then select the Default Display Form option.



4. Click Add A Web Part.
5. From the Web Parts menu, add the FAQs web part to the page twice.



6. Select Modify Web Part for the FAQs [3] web part, and then edit the web part by changing the following properties:

Property	Value
Selected View	Edit the Current View (see the followinginstructions)
Toolbar Type	No Toolbar
Chrome	None

7. To modify the web part's current view, select Edit The Current View directly below the Selected View list in the web part tool pane.

8. When the view is displayed, update the following settings:

Property	Value
Fields	Title
Style	Newsletter

9. Select Modify Web Part for the FAQs [2] web part, and then edit the web part by changing the following properties:

Property	Value
Selected View	Edit the Current View (see the following instructions)
Toolbar Type	No Toolbar
Chrome	None

10. To modify the web part's current view, select Edit The Current View directly below the Selected View list in the web part tool pane.

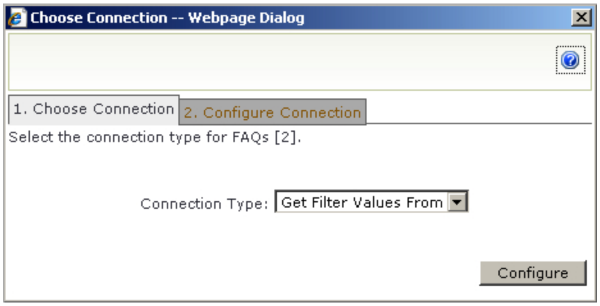
11. When the view is displayed, update the following settings:

Property	Value
Fields	Answer Keywords Category
Style	Newsletter

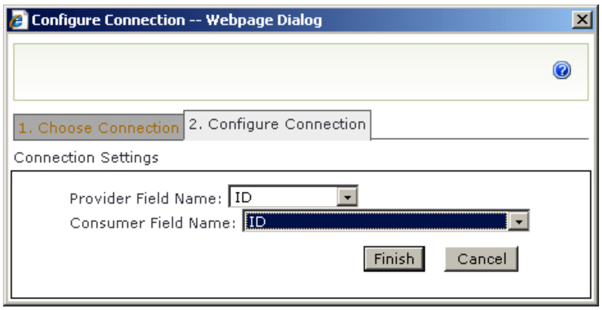
12. Select Modify Web Part for the FAQs [1] web part, and then edit the web part by changing the following property:

Property	Value
Layout	Hidden

13. In the FAQs [1] Web Part menu, click Web Part Connections, and then add a connection to FAQs [2] that passes the ID filter by using the Get Filters Value From connection type.

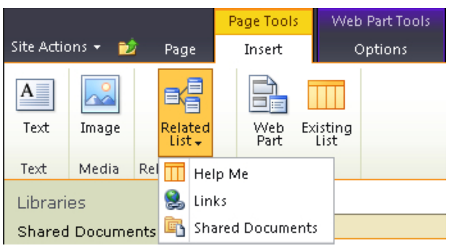


14. Configure the connection so that the Provider and Consumer fields are both set to ID, and then click Finish.



15. Add the same connection from FAQs [1] to FAQs [3].

16. On the ribbon's Page Tools Insert tab, open the Related List drop-down menu.



17. Click the Links option to add the related web part to the page.

18. Select the Modify Web Part menu for Related Items in the Links web part, and then edit the web part by changing the following properties:

Property	Value
Selected View	Summary View
Toolbar Type	No Toolbar
Title	Related Links (if applicable)

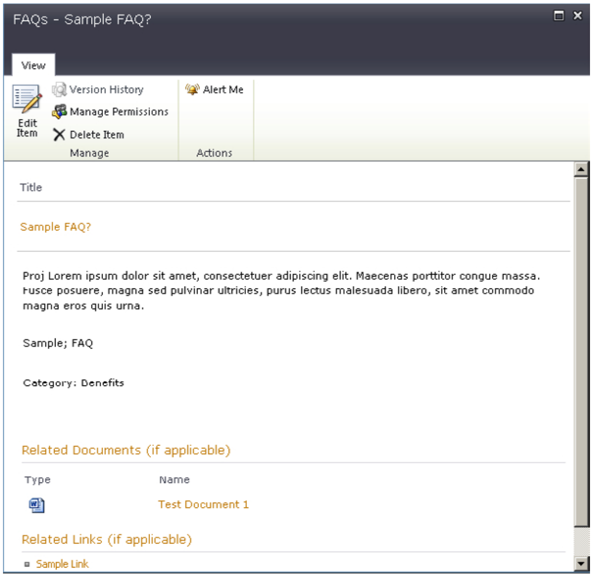
19. On the Related List menu, click the Shared Documents option to add the related web part to the page.
20. Select the Modify Web Part menu for Related Items in the Shared Documents web part, and then edit the web part by changing the following properties:

Property	Value
Selected View	Edit the Current View (see the following instructions)
Toolbar Type	No Toolbar
Title	Related Documents (if applicable)

21. To modify the web part's current view, select Edit The Current View directly below the Selected View list in the web part tool pane.
22. When the view is displayed, update the following settings:

Property	Value
Fields	Type (icon linked to document) Name (linked to document)
Style	Newsletter

You have just replaced the default list view with a collection of custom-configured web parts. The results can be seen in the following screenshot. This is a quick way to make the default views more user-friendly by using only browser-based changes.



Design the Help Me Page

One of the requirements for this solution is that users be able to quickly submit a request to the help desk when they can't find what they are looking for. To address this requirement, you created the Help Me list and its associated workflow. In this step you will create a page that users can access when they want to submit a request. After you create the page, you'll use SharePoint Designer to add a custom form web part.

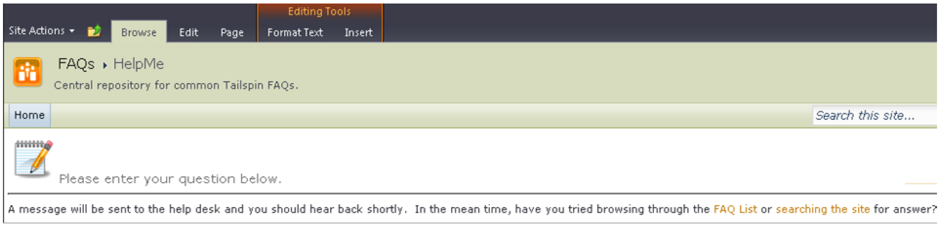
1. From the Site Actions menu, select the More Options link.
2. Locate the Web Part Page template, and then click the Create button.
3. For the page's name, type **HelpMe.aspx**.
4. For the layout template, select Header, Footer, 3 columns.
5. For the document library, enter **Site Assets**.
6. Click Create.
7. In the Header section, click Add A Web Part.
8. Locate the Content Editor web part, and then click Add.
9. For the web part that was just added, click the Modify Web Part menu.
10. Choose Chrome as the property.
11. Select None as the value for Chrome.

12. Click in the web part to add new content.

13. Type a welcome message for the Help Me page.

14. Click Stop Editing.

    Your page should look similar to the screenshot shown here:

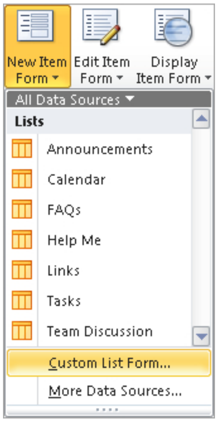


15. From the Site Actions menu, select the Edit In SharePoint Designer link.

16. Use the Navigation menu to open the HelpMe.aspx page in the Site Assets library.

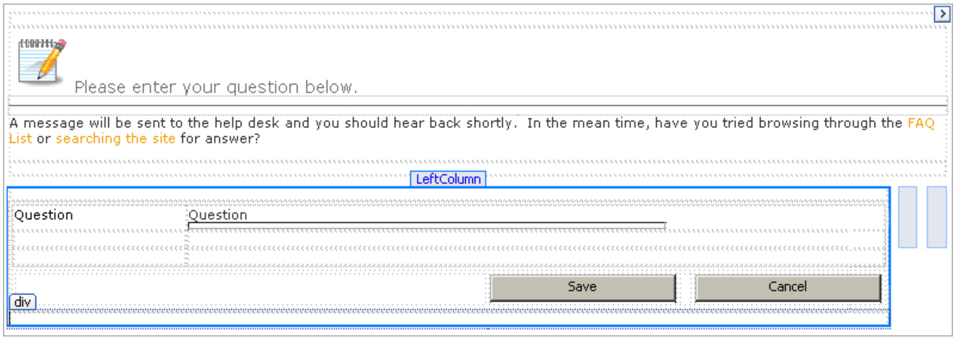
17. Click Edit File on the summary page.

18. With your cursor in the left column, use the ribbon to insert a custom list form.



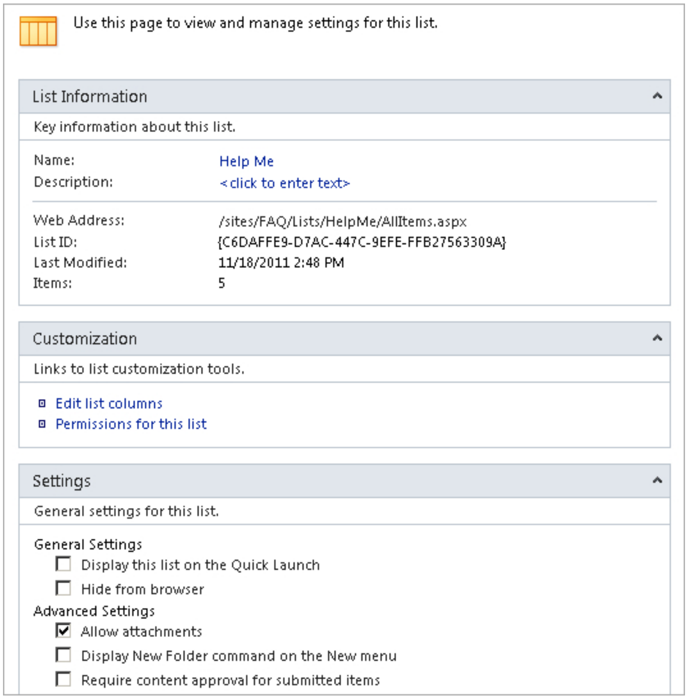
19. Select the Help Me list, the Item content type, and the Edit Item form, and then click OK.

20. Customize the form so that only the Question field is displayed with the Save and Cancel buttons at the bottom of the page.



21. Click the Save icon in the top menu bar.

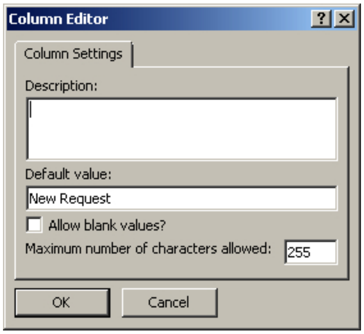
22. Use the Navigation menu to open the Help Me list.



23. Click Edit List Columns.

24. Click Title.

25. For the default value, enter **New Request**.



26. Click OK.

If you navigate back to the HelpMe.aspx page in the browser, your screen should look similar to the screenshot shown here.

Design the Home Page

The final step in configuring this solution is to create the home page. You'll do this simply by adding a few web parts and links to the home page.

1. Navigate to the site's home page.
2. Click Edit Page on the Site Actions menu.
3. Delete the existing default content.
4. Add a welcome message to the right column.
5. Add the FAQs List web part below the welcome message.

6. Select the Modify Web Part menu for the FAQs web part, and then edit the web part by changing the following properties:

Property	Value
Selected View	Edit the Current View (see the following instructions)
Toolbar Type	No Toolbar
Title	Most Recently Created FAQs

7. To modify the web part's current view, select Edit The Current View directly below the Selected View list in the web part tool pane.
8. When the view is displayed, update the following settings:

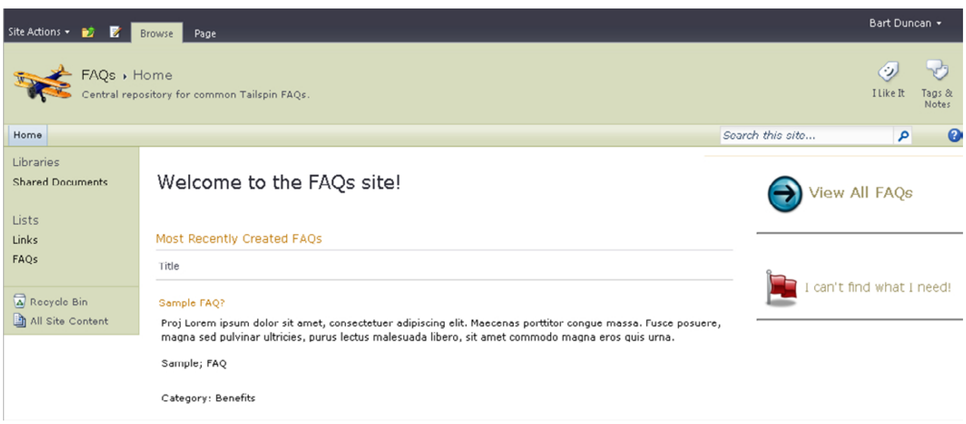
Property	Value
Fields	Title Answer Category Keywords
Sort	Modified
Style	Newsletter
Item Limit	5, Display items in batches of specified size.

9. Using the ribbon and the rich text tools, add links to the right column for the following items:

Link	URL
View All FAQs	http://tailspintoys.com/sites/FAQ/Lists/FAQs/AllItems.aspx
I can't find what I need!	http:// tailspintoys.com /sites/FAQ/Lists/FAQs/AllItems.aspx

10. From the Site Actions menu, select the View All Site Content link.
11. Open each of the list settings pages and check that only the Shared Documents, Links, and FAQs lists are displayed on the Quick Launch.
12. From the Site Actions menu, select the Site Settings link.
13. Click Quick Launch in the Look And Feel section.
14. Click the edit icon next to the Discussions heading.
15. Delete the heading.

The final home page should look similar to the following screenshot. Depending on how you created your links, you may have some differences. The links in the screenshot were created by inserting an image and a hyperlink followed by the horizontal rule markup style. This provides a styled look and feel to the site. Examples of the different styles and items used are provided for your reference in the following screenshots.



Managing the Solution

The management of this solution will be performed by the help desk team. This team will be responsible for creating FAQs and replying to the new requests that are generated by users.

Permissions for this site are relatively simple to manage. The help desk staff responsible for the site will be added to the Owners group. All other staff will be given read access to the site and contributor access to the Help Me list. This means that you need to break inheritance on the Help Me list.

Reviewing the Platform

The solution in this chapter was built using the features in SharePoint Foundation. The remainder of this section discusses the design options available to you if you are using a different version of SharePoint.

If You Are Using SharePoint Online with Office 365

This solution can be implemented as is on the Office 365 platform. If you are running a version of Office 365 that includes the enterprise features, refer to the following sections to learn about additional customizations you can make to this solution.

If You Are Using SharePoint Server Standard

If you are using the SharePoint Server Standard version, you can implement this solution as is. Because you have access to additional search capabilities, you could consider adding those to your solution by providing search links for your users that help them quickly locate various FAQs.

If You Are Using SharePoint Server Enterprise

If you have access to the features in SharePoint Server Enterprise, you can use InfoPath Forms services to further customize and style the list views. In this chapter, we added multiple web parts to the pages to accomplish some simple styling. With the enterprise features, you can easily do the same by using InfoPath Forms services.

Additional Customizations

This chapter covers several customizations, but there are still many features that can be added to this solution. The following information is provided so that you can consider some of the additional customizations you might want to incorporate into your solution.

Additional Customization	Benefits
Filtered views	One way to help users quickly find content is to provide filtered views of the FAQs. You could create views based on the assigned categories and then provide links to those views on the home page of the site.
Specific FAQ sites	This solution creates a single repository of FAQs, but this might not meet your needs if you have a large list of categories or subcategories. An alternative solution or customization would be to create this solution as is and then save it as a template. Then, for each area or application that you need to generate FAQs for, you could create a site based on this template. This would give you a collection of FAQ sites for users to search through.

Summary

In this chapter we looked at ways to implement a simple FAQ solution using SharePoint Foundation. This solution provides a one-stop experience for users who are looking for answers to common questions they have about the organization. This chapter should serve as a guideline for you as you address similar needs within your organization. While it is likely that you will need to customize this solution to meet your specific needs, the basic solution should get you started in addressing the needs of a centralized internal FAQ solution.

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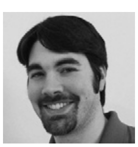

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