Outsourcery Hosted SharePoint Quick Start Guide

Step-by-Step Guide to Account Set-up & Administration on the 2007 Platform

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Introduction

Thank you for choosing Outsourcery Limited for your Hosted SharePoint services. This guide is designed to help you get started with your new SharePoint service as soon as possible.

Once your order has been processed for the SharePoint service, we will set-up your organisation and the SharePoint site name in our control panel and configure the administrator user account (usually *admin@yourdomain*).

The administration account is only used for the configuration of users and cannot have any services attached to it.

Important: You have to make sure your SharePoint site has an 'A' record created for your sites address; otherwise your site will not appear and will not be accessible. The details of the 'A' record setup are explained in the Section 1.

Section 1 – Setting up an ‘A’ Record (Host Record)

Before you can access your SharePoint site, you will need an ‘A’ Record pointing to the URL of your SharePoint site, resolving to the hosted SharePoint server IP address. This section explains what you’ll need to implement in order to make your new Hosted SharePoint site accessible:

1.1 You or your domain host will need to point an ‘A’ record for SharePoint site to the IP address: **89.31.236.21** or **89.31.236.22** – Which IP address you need to use will be communicated to you after we have confirmed your SharePoint site.

Once this is complete, you will be able to fully access your SharePoint via the site address, which you have had the ‘A’ record create for.

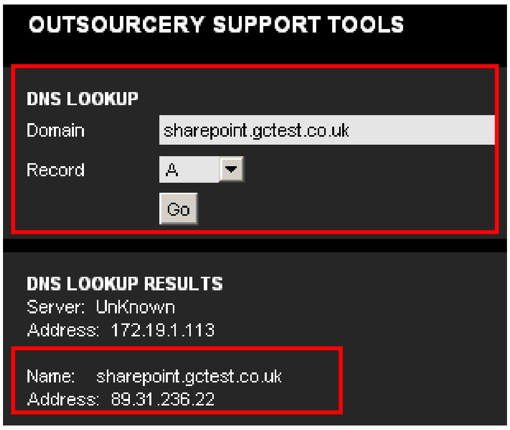
1.2 The ‘A’ record will take between **12 - 48 hours** to propagate throughout the Internet. The time it takes depends on your domain host and will vary. Once propagation is complete you will be able to log into your SharePoint site using the URL provided.

1.3 You can check if the propagation is completed by going to:
http://www.outsourcery.co.uk/support/tools/

1.4 Enter the domain name in the domain field of DNS Lookup and change the record type to **‘A’** and then click **‘Go’**. The A record should show as:

Name: sharepoint.yourdomain
Address: 89.31.236.21/22

e.g. The above is an example; you may not have SharePoint as the name in your SharePoint address.



1.5 If the address doesn’t point to the hosted server address, then your A record is pointing to the wrong location or has not been created yet. You will need to speak to your current domain host and ask them to create the ‘A’ record as specified by Outsourcery. If Outsourcery is your domain host, then this can be changed though the control panel.

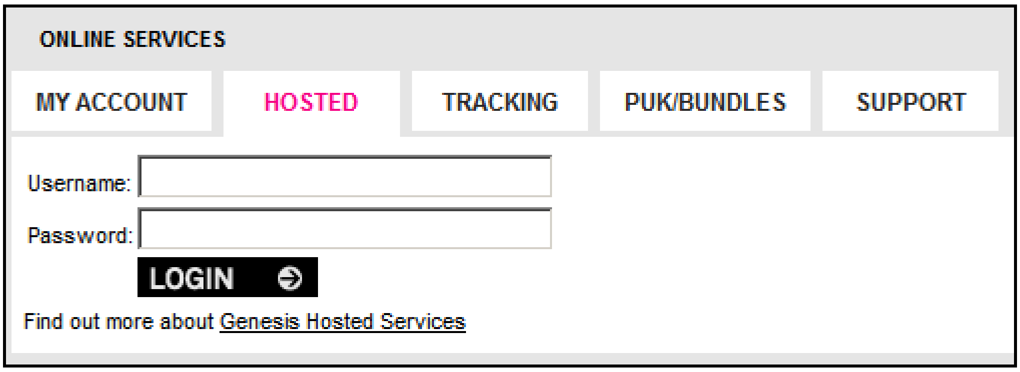
Note: If you are unsure of how to action the above or if you domain host cannot make these changes for you, then please contact the **Technical Support Team on 0844 847 9699** select **option 7** for assistance. You will need to ask to be transferred to a member of the technical team.

Section 2 – Creating a new SharePoint user and selecting the SharePoint Site template

This section explains the procedure for logging in as the administrator user and adding a new SharePoint user. Then it continues with logging in to the SharePoint site for the first time to set what template your site will use.

The procedure is as follows:

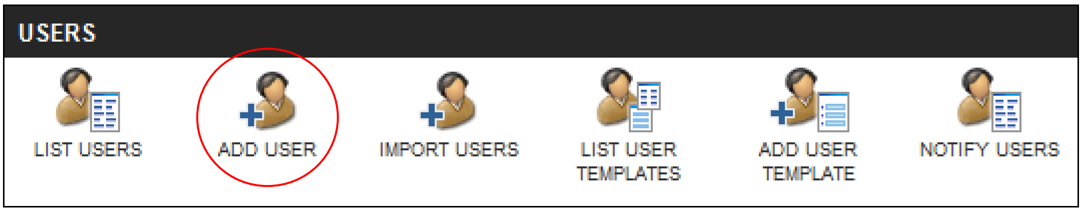
2.1 Go to **https://www.outsourcery.co.uk/login/** and click on the **Hosted** tab:



2.2 Login to the control panel using your **administrator username** and **password** (in the format: admin@yourdomain).

Your password is what was agreed at the Pre Connect Courtesy Call and should be on the signed contract. If you have forgotten this, please e-mail in to **hostingsupport@outsourcery.co.uk** and the password will be resent to the account holders e-mail address.

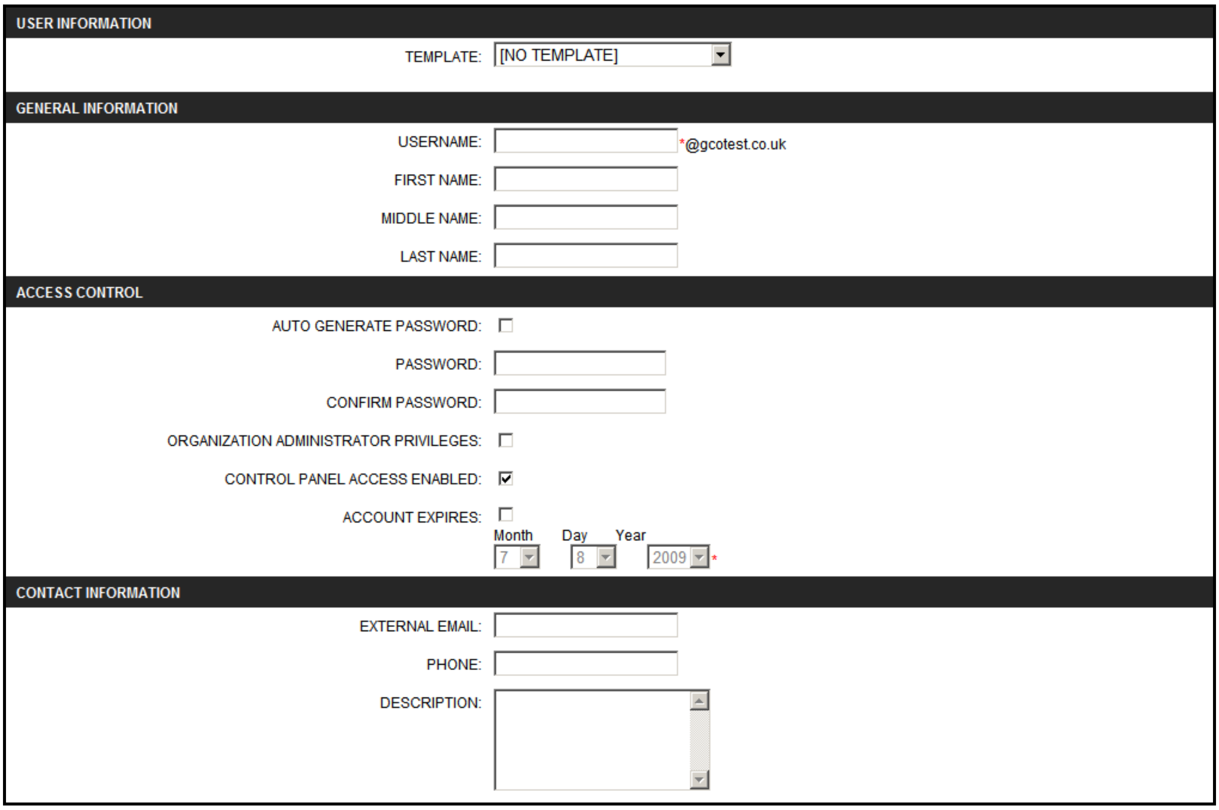
2.3 Once you're on the control panel, click on the **Add User** icon:



2.4 You will now see the screen below. Proceed to enter all required details relating to the new user. You also have the option of giving the user administrator rights to the account by ticking the **'organisation administrator privileges'** box. Once completed, click **next**.

Organisation administrator privileges refers only to the Control Panel itself, and not the SharePoint site.

Note: Ensure you provide an alternative email address as a set-up confirmation e-mail will be sent to this address once provisioned. Also if you forget your password it will be sent to the alternative e-mail address.



The sections are explained as follows:

User Information

- **Template:** This option is not required – please leave it on default.

General Information:

- **Username**: This is the username the user can use to log into the Control Panel and the SharePoint site.
- **First Name**: Enter a first name (Required)
- **Middle Name**: Optional
- **Last Name**: Enter a Surname (Optional)

Access Control:

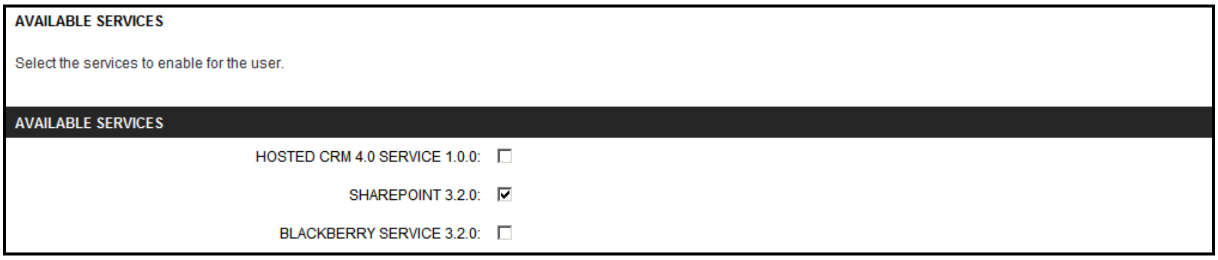
- **Password**: Enter a password – The password must have at least one uppercase character and one number in it.
- **Confirm Password**:   Confirm the password
- **Organization Administrator Privileges**: Confirm if the user needs admin rights to the Control Panel or not.
- **Account Expires**: You can set an expiry date for the account – if it's a temp user for example.

Contact Information:

- **External Email**: You can assign an external e-mail for the user if required (Recommended)
- **Phone**: Optional
- **Description**: Optional

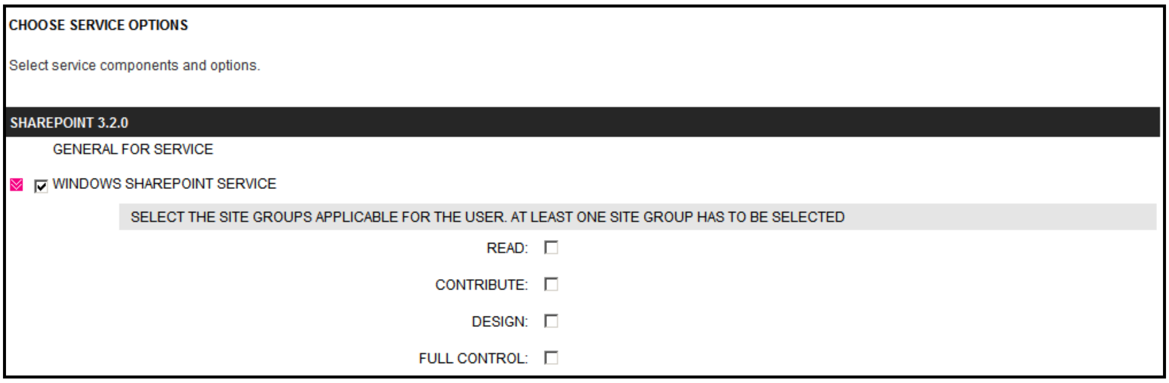
Once you're finished editing the new user details, click **next**.

2.5 Place a tick next to **'SharePoint 3.2.0'** and click **next**:



2.6 Click the **magenta arrow** icon next to Windows SharePoint Service.

Then select the site access group applicable to the user you are creating:

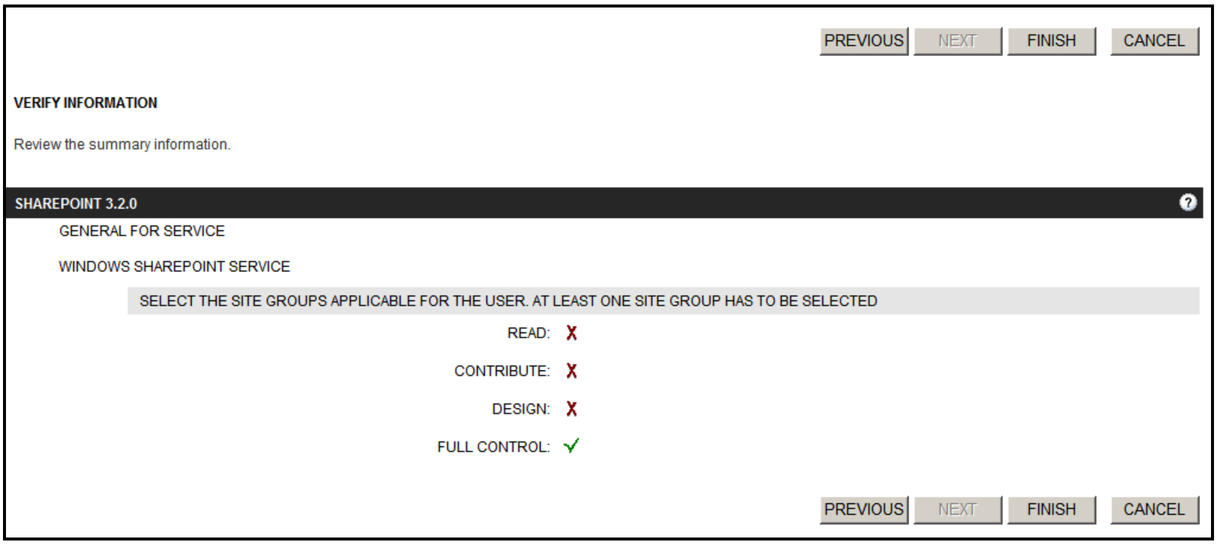


The permission levels are as follows:

- Read - Can view only
- Contribute - Can view, add, update, and delete.
- Design - Can view, add, update, delete, approve, and customize the site.
- Full Control - Has full control.

Make sure the box next to the **magenta arrow** icon is ticked and click **Next**.

2.7 You will now see a summary of the information provided. If you are satisfied that all details are correct, click **Finish**

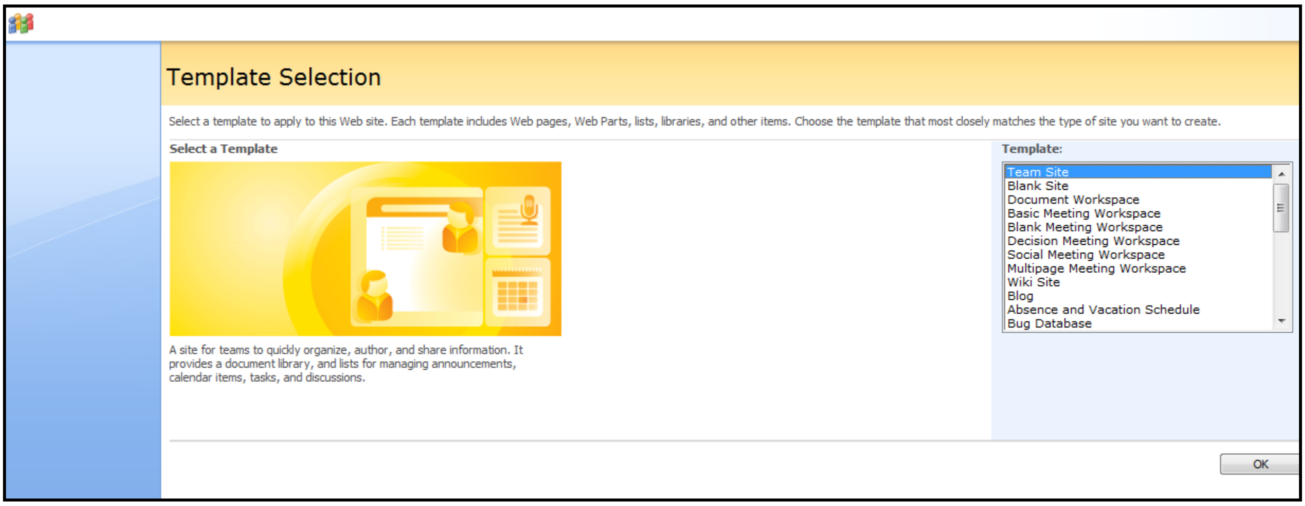


2.8 The services status screen will now appear confirming that the new SharePoint user has been set up successfully. Click **OK**

2.9 Once the user has been completed you will be able to log to the SharePoint site.

Section 3 – Selecting the SharePoint Site Template

3.1 The first time you log in to the SharePoint site you will be shown the template selection screen. From here you can view the different site templates available by selecting them in the drop down list. Please choose the site template carefully, as it cannot be changed unless the site is deleted:



3.2 The following table lists a description of the templates Outsourcery offer, which you can choice from:

Template Name	Description		
Team Site	A site for teams to quickly organize, author, and share information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.	**Blank Site**	Blank site for you to customize based on your requirements.
Document Workspace	A site for colleagues to work together on a document. It provides a document library for storing the primary document and supporting files, a tasks list for assigning to-do items, and a links list for resources related to the document.	**Blank Meeting Workspace**	Blank meeting site for you to customize based on your requirements.
Basic Meeting Workspace	Sites to plan, organize, and capture the results of a meeting. It provides lists for managing the agenda, meeting attendees, and documents.	**Decision Meeting Workspace**	A site for meetings that track status or make decisions. It provides lists for creating tasks, storing documents, and recording decisions.
Social Meeting Workspace	A site to plan social occasions. It provides lists for tracking attendees, providing directions, and storing pictures of the event.	**Multipage Meeting Workspace**	Sites to plan, organize, and capture the results of a meeting. It provides lists for managing the agenda and meeting attendees in addition to two blank pages for you to customize based on your requirements.

Template Name	Description		
Absence and Vacation Schedule	A site for teams to share information on when team members will be away from the office and who to contact for issues.	**Wiki Site**	A site for a community to brainstorm and share ideas. It provides Web pages that can be quickly edited to record information and then linked together through keywords
Bug Database	A site for teams to track bugs in their shared software projects.	**Blog**	A site for a person or team to post ideas, observations, and expertise that site visitors can comment on.
Call Centre	A site for teams to track customer support calls. It provides lists to track customers, service request history and includes a knowledge base.	**Contacts Management**	A site for teams to track their shared contacts.
Compliance Process Support Site	A site for teams to help plan compliance processes.	**Document Library and Review**	A site for teams to store documents and provide feedback on a per-version basis.
Event Planning	A site for teams to plan and manage events like conferences.	**Expense Reimbursement and Approval**	A site for teams to submit and manage expense reports.
Help Desk	A site for teams to submit and manage customer support issues. It provides lists to track service request history and includes a knowledge base.	**Inventory Tracking**	A site to track inventory items, levels, sales, and orders.
IT Team Workspace	A site for an IT team site to manage incoming issues, projects, and bugs.	**Job Requisition and Interview Management**	A site for teams to manage their job requisitions, candidates, and interviews.
Knowledge Base	A site to manage and create knowledge assets within an organization.	**Lending Library**	A site to track the assets of a team lending library.
Physical Asset Tracking and Management	A site for teams to track their existing physical assets and manage the process of proposing new assets.	**Change Request Management**	A site for teams to track change requests in multiple projects. It provides lists to track change requests, general project information, project tasks, project issues, and project risks.
Project Tracking Workspace	A site that supports team collaboration on projects. This site includes Project Documents, Project Issues, Project Risks, and Project Deliverables lists which may be linked to tasks in Microsoft Office Project Server 2007.	**Budgeting and Tracking Multiple Projects**	A site for teams to track multiple projects. It provides lists to track general project information, project tasks, and project issues.
Room and Equipment Reservations	A site for teams to manage the use of shared rooms and equipment.	**Sales Lead Pipeline**	A site for sales teams to track contacts, accounts, leads, and opportunities.