

Design and Build User-friendly vs. SharePoint User-friendly Solutions

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Abstract

- Audience: Info Workers, Dev
- Solution and application sites built in SharePoint or O365 often rely on a baseline understanding of how SharePoint works. This entry point can stifle user adoption and satisfaction. We can, however, design and build solutions that align more tightly with users' needs using SharePoint's out of the box capabilities and simple client-side rendering techniques.
- In this session we'll walk through a common example and show the advantages of web-user-centric design.

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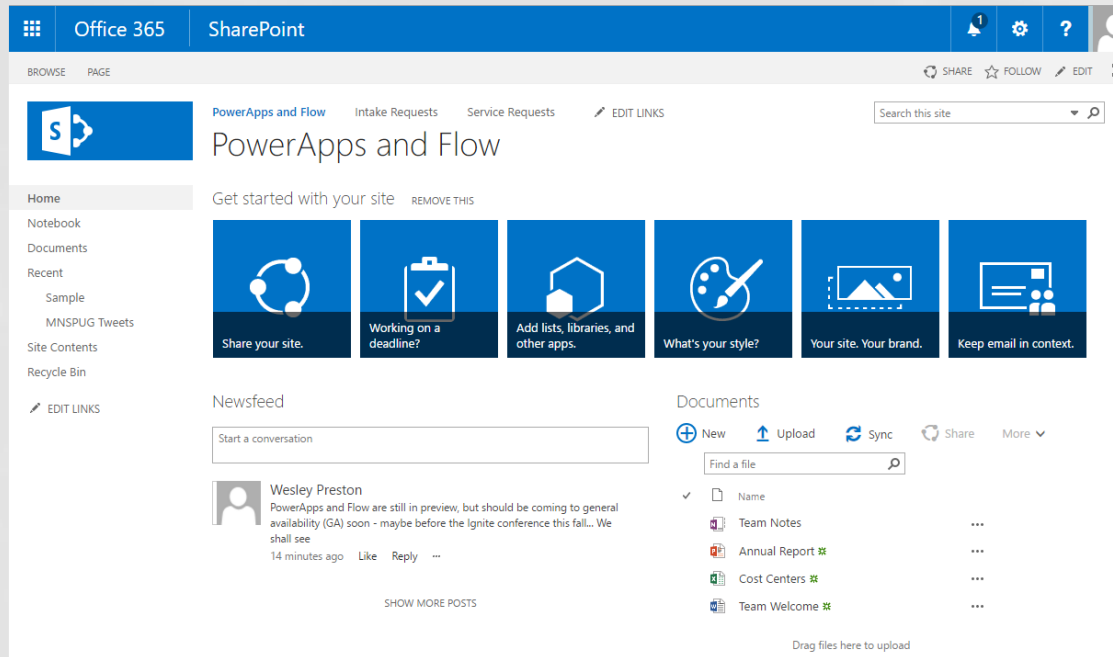
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Why are we talking about this

- Organizations want to get more out of current investments (SharePoint, O365, etc.)
- Microsoft's push to power users
- Business solutions that don't require development, or less of it
- Users report not enough training (reference)

What are we talking about...



• Sites for collaboration:
Do a great job

• The 'new experience':
even better.

From this:

The screenshot displays a SharePoint 'Service Requests' list. The top navigation bar includes 'Office 365' and 'SharePoint'. The left sidebar contains links for 'Home', 'Service Requests', 'Notebook', 'Documents', 'Recent', 'Departments', 'Site Contents', 'Recycle Bin', and 'EDIT LINKS'. The main content area shows the 'Service Requests' list with columns: Title, Request Type, Notes, Request By Date, Assigned To, Status, Priority, Comments, Dept, and DeptID. Two items are listed: 'Broken chair' (Request Type: Other, Status: New, Priority: Low, Dept: Sales) and 'The internet doesn't work' (Request Type: PEBKaC, Status: New, Priority: High, Dept: Accounting).

✓	Title	Request Type	Notes	Request By Date	Assigned To	Status	Priority	Comments	Dept	DeptID
	Broken chair	...	Other	Someone broke my chair. It won't adjust height		New	Low		Sales	3
	The internet doesn't work	...	PEBKaC			New	High		Accounting	1

To this:

The screenshot shows a SharePoint site titled "Service Requests". The top navigation bar includes "Office 365" and "SharePoint". The left sidebar contains links for "Home", "New Request", "My Requests", and "Recycle Bin". The main content area features three large blue tiles labeled "New Request", "All My Requests", and "Instructions". Below these tiles is a section titled "My Open Service Requests" with a "new item" button and a table of requests.

Title	Request Type	Request By Date	Assigned To	Status
Broken chair ...	Other			New
The internet doesn't work ...	PEBKaC			New

Challenges:

- Accessibility of the list
 - Where is it? Part of a team site?
 - Are permissions set up correctly?
- Lack of instructions on how to use the list
 - The trend is to simplify... break it down to easy options, steps, targeted data, etc.
- Can't find their own requests easily
 - What happened to my request?
- Folks managing the list aren't working effectively
 - Oh, didn't see that one request...

Benefits:

- Role-based experience
- Simplified and/or enhanced views
 - “Simplified”: Still use views, but put more thought into them
 - “Enhanced”: CSR to make them more powerful
- Well documented
 - Use SP’s capabilities to build doco right into the site
- Easily supported
 - Self-document the solution using SP’s features

Benefits:

Why is this approach so useful?

- It works really well for non-office workers
- It works really well when there are a significant number of users without SharePoint training or experience
- It works well for SharePoint people too...

Tips on Design

- Whatever works in your organization...
 - Agile vs. Waterfall, etc.
 - Best to be iterative – users WILL want changes
- Agile: User Stories
 - Helps identify roles / user types
- Wireframing: Balsamiq

- Maybe this is just a style guide, tips and tricks for best practices
- When we're done, you tell me...

Let's get to it.

Understand the use cases

- Identify the people and roles involved
- Work through 'user stories' for each role
- As with 'Agile' approaches, the site will likely evolve over time
- Once site is created, it's a good time to start documentation... even just placeholders

Site Taxonomy

Where should the solution be built?

- It's own site collection?
- A sub web of another site?
- Within an existing site?
- Cloud or on-premises?

Important considerations:

- Users and access

Example: Service Request

- Lots of people outside the team need access
 - Part of a service team that likely has a public-facing site already
- Not overly complex, so *could* be built into a site
- Prefer isolation – so either site collection or sub web
- Might want to put on O365 for easier mobile access... (if hybrid)
- Demo: Sub site

Identify User Stories and Roles

- Who needs this solution?
- Who's creating / adding items
- Who needs to view items?
- Who's updating items
- What kinds of notifications are needed?
- Who needs access to the whole process/site?

Example: Service Request

- Requester
 - Submit requests
 - See status of requests
- Persons doing triage on incoming requests
 - View request statuses
 - Assign request to someone
- Persons responding to requests
 - See what requests have been assigned to me
 - Work on assignments
- Management
 - See statuses of requests
 - See any reporting
- Dev/SharePoint team

Lists and Views

- Create core lists
- Create any lookup or other lists
- Start building out core views
 - Pay attention to which views you want to show up in Views dropdown, vs. one-off views per web parts

Example: Service Requests

- Create the 'Requests' list
- Create any lookup lists (departments, request types, etc.)
- Later we'll use SPD to hide the lists
SP knowledgeable folks could still figure out URLs – this isn't security, it's just locking down the UX
 - Don't want users distracted by the default list views

Site Pages

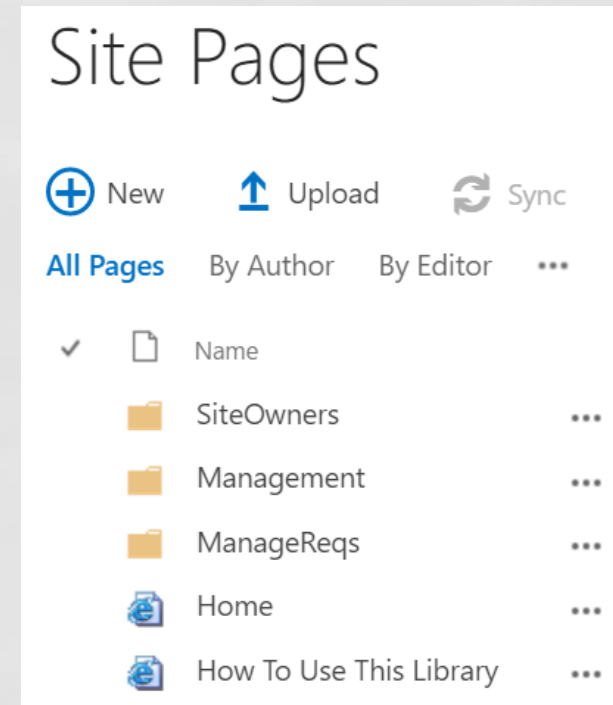
- Create a folder for each role*
 - May need to change library settings for this
- Later: Set security at the folder level
- Home page for each role
- Page per key functionality
 - Allows for clear actions and on-page instructions

Site Pages – Tips

- Create placeholder pages
 - Will help see how solution is being built out
- Change Site Pages settings to show in Quick Links
 - Just easier to get to pages more quickly while building out
 - Remove from Quick Links before launch

Example: Folders

- ManageReqs
 - Could be separated by triage and workers
- SiteOwners
 - Could be separated between business owners and SharePoint Team
- Management
 - Generally only give as few permissions as possible



Example: Pages

- Requesters – ‘Normal’ users
 - Home page is site home
 - Create new requests
 - See status of open requests
 - My Requests Page
 - See open requests
 - See historical requests
 - Instructions / Information page
 - How to create, view, etc.
 - Who to contact with questions, set expectations, etc.

Creating Pages

- Add text description of what the page is for.
- Add the app part
- 'Help' links

The screenshot displays the SharePoint page editor interface. The top ribbon includes tabs for BROWSE, PAGE, FORMAT TEXT (selected), and INSERT. The FORMAT TEXT tab shows options for Save, Check Out, Edit, Clipboard (Paste, Cut, Copy, Undo), Font (Body, 13px, Bold, Italic, Underline, Text Color, Background Color), Paragraph (Bulleted List, Numbered List, Indent, Outdent, Paragraph, Head), and Styles (Paragraph, Head). The main content area on the left shows a navigation pane with links to Home, Service Requests, Notebook, Documents, Recent, Departments, Site Contents, Recycle Bin, and EDIT LINKS. The main content area on the right shows a text box with the text "These are all your requests - current and historical". Below this is a section titled "My Service Requests" with a "+ new item" link. A table follows with columns "Title", "Request Type", and "Request By Date". The table contains two rows of data: "Broken chair" with "Other" as the request type, and "The internet doesn't work" with "PEBKaC" as the request type. At the bottom, there is a link to "PeopleInCharge" and a link to "More info: The service request process".

Home
Service Requests
Notebook
Documents
Recent
Departments
Site Contents
Recycle Bin
EDIT LINKS

These are all your requests - current and historical

My Service Requests

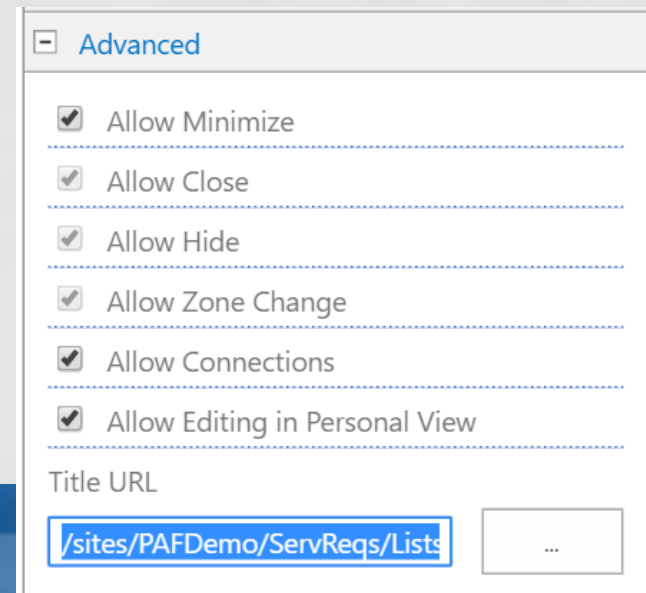
+ new item

Title	Request Type	Request By Date
Broken chair	...	Other
The internet doesn't work	...	PEBKaC

For more information contact [PeopleInCharge](#)
[More info: The service request process](#)

App Part Configuration

- Select an existing view or create a view
- Change the app part title: 'My Service Requests'
- Change the link from the app part Title
 - We don't want users navigating to normal list views
 - Return to current page



☐ Advanced

☒ Allow Minimize

☒ Allow Close

☒ Allow Hide

☒ Allow Zone Change

☒ Allow Connections

☒ Allow Editing in Personal View

Title URL

Example: Pages

- ManageReqs

- Home – ‘Triage’ Page

- New, unassigned requests – to be assigned or ‘grabbed’
 - Open but incomplete requests

- My Work Page

- Filtered by current user to see what is open and assigned

- Link to ‘normal’ list views

- Default to All Items

- Links back to home

Example: ManageReqs Home

● Aka: Team Home

The screenshot displays the 'Team Home' page within the Office 365 SharePoint environment. The top navigation bar is blue, featuring the Office 365 logo, 'Office 365' text, 'SharePoint' text, and icons for notifications (1), settings, help, and a user profile. Below this, a secondary bar contains 'BROWSE' and 'PAGE' links, along with 'SHARE', 'FOLLOW', 'EDIT', and a view toggle icon. The main content area has a blue header with the SharePoint logo and 'Team Home' title, with an 'EDIT LINKS' option. A search bar on the right prompts 'Search this site'. The left sidebar lists 'Home', 'New Request', 'My Requests', and 'Recycle Bin', with an 'EDIT LINKS' option at the bottom. The main content area includes a subtitle 'This is the home page for folks managing Service Requests' and four blue-tinted tiles: 'Unassigned Requests', 'My Work', 'Service Requests List', and 'Departments List'.

Office 365 | SharePoint

BROWSE PAGE

SHARE FOLLOW EDIT

Home EDIT LINKS

Search this site

Home

New Request

My Requests

Recycle Bin

EDIT LINKS

This is the home page for folks managing Service Requests

Unassigned Requests

My Work

Service Requests List

Departments List

Example: Pages

- Management

- Home
- Separate views / report pages as needed
 - Group by summary view
 - If require something like monthly numbers will need to add new fields for year and month to group on
- Folks working requests may want access to these views / reports

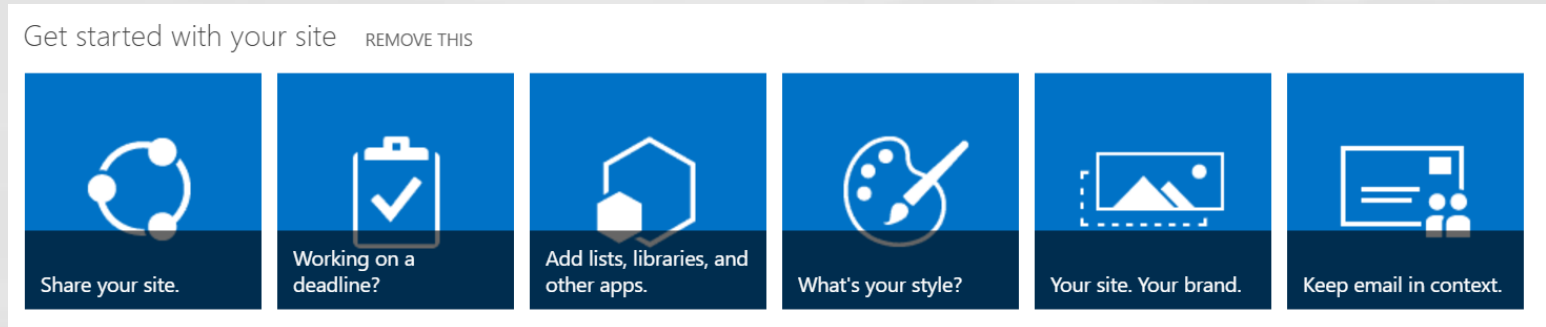
Example: Pages

- SiteOwners

- Home - Links to all hidden lists for maintenance
- About (opt) – Overview of solution, history, etc.
- About Dev (opt) – as needed for development notes

Promoted Links

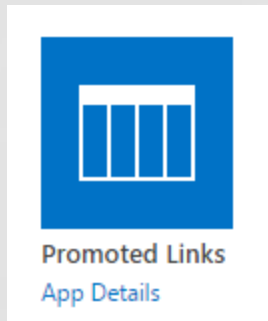
- Microsoft has found them to be effective, so let's use them too:



- Audience targeting
 - Apply security to list items - mainly Home page
- Create separate lists for each *role* homepage

Example:


- Remove the default 'getting started' part
- Create a new one, add a few placeholders, and drop it on the home page



NavHome

[+ new item](#) or [edit](#) this list

Tiles [All Promoted Links](#) ...

Find an item 

✓	Title	Background Image Location	Description	Link Location	Launch Behavior	Order
	New Request			New Request	In page navigation	1
	All My Requests			http://www.bing.com	In page navigation	2
	Instructions			http://www.bing.com	In page navigation	3
	Team Home			Team Home	In page navigation	4

Security

Set up:

- SharePoint group per role
- Apply group access to lists by usage
- Apply group access to folders in site pages
- Apply group access to items in main promoted links

Example: List Security

- Service Request List
 - Generally pretty open
 - May limit users to create – not edit
- Departments list
 - View only for users

Example: Site Pages Security

● Share With - Advanced

The screenshot displays the SharePoint interface for the 'ManageReqs' folder. The left sidebar shows a navigation pane with 'ManageReqs' selected. The main area shows the folder's details, including the URL 'https://l5prof.sharepoint.com/sites/PAFD'. A 'Share' dialog box is open, showing the folder is shared with 'Raymond Mitchell'. Below the dialog, a context menu is visible with options: 'Share', 'Get a link', 'Rename', 'Delete', 'Properties', and 'Advanced'. The 'Advanced' option is expanded, showing a list of sharing options: 'Shared With', 'Connect to Client', 'Compliance Details', 'Workflows', and 'Change New Button Order'.

Name	Created
SiteOwners	Preston Monday at 10:18 PM
Management	Preston Monday at 10:18 PM
ManageReqs	Preston Monday at 10:17 PM
Home	Preston July 28
My Requests	Preston About an hour ago
How To Use This Library	Preston July 28

Example: Promoted Links Security

- Key to audience-targeting home page:
Set permissions on individual items in the Promoted Links (NavHome) list
- Note: Don't need to lock down permissions to separate promoted links lists – only seen by group that can see the page anyway

Example: Promoted Links Security

As seen by team users:

The screenshot shows a SharePoint page titled 'Service Requests'. The top navigation bar includes 'Office 365' and 'SharePoint'. The left sidebar contains links for 'Home', 'New Request', 'My Requests', and 'Recycle Bin'. The main content area features a 'Home' section with a description and four promoted links: 'New Request', 'All My Requests', 'Instructions', and 'Team Home'. Below this is a section for 'My Open Service Requests' with a table of open items.

Title	Request Type	Request By Date	Assigned To	Status
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The internet doesn't work ...	PEBKaC			New

Example: Promoted Links Security

As seen by request users:

The screenshot displays a SharePoint site titled 'Service Requests'. The top navigation bar includes 'Office 365' and 'SharePoint'. The left sidebar shows a navigation menu with 'Home', 'New Request', 'My Requests', and 'Recycle Bin'. The main content area features a 'Home' section with a description and three promoted links: 'New Request', 'All My Requests', and 'Instructions'. Below this is a section titled 'My Open Service Requests' with a '+ new item' link and a table of open requests.

Title	Request Type	Request By Date	Assigned To	Status
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The internet doesn't work ...	PEBKaC			New

Forms, Content Types, Custom

- What fields are needed on each form?
- Are additional forms required?
- Content types... for new items or 'Sarah' method...
- Custom JS or other forms... Stratus, etc.
- CSR nice for linking access to additional forms

Example:

- New request shows only limited fields
- User view – limited fields (custom form?)
- View for person working issue – all fields (use the default form?)

Web parts, Views, CSR/JSLink

- Not *required* for MVP...
- Anything to add to views to enhance the user experience?

Example:

- Conditional formatting opportunities
 - Triage page – unassigned
 - Reporting page – not closed after X days
- Replace view and edit links for main user view
- Change or remove Lookup field links
- Change 'no items' message for web parts

Notes: Workflows

- Certainly have an opportunity for automation but should also be reviewed with Microsoft Flow in mind

Example: Workflow

- None needed in this scenario
- Optional: Content type switch on new
See references for 'Sarah's approach'
- Optional: Notifications
 - New requests
 - Overdue requests

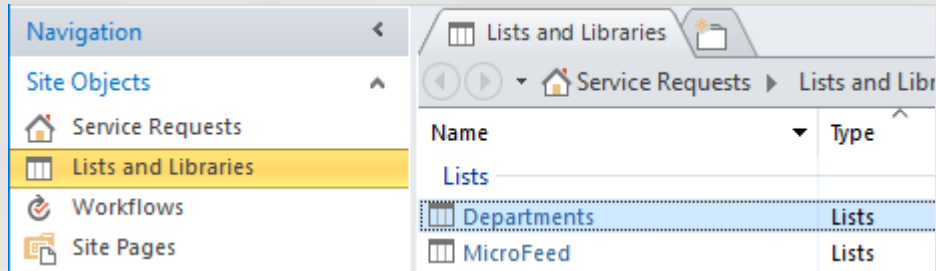
Cleanup

- Top and left navigation menus
 - Remove Site Pages (was added at start)
 - Clean up 'Recent'
- Use SPD to hide lists
- Test
 - Check web part headers on site pages
 - Navigation after forms
 - Revisit views with test data – filtering

SharePoint Designer – Hide Lists

- Not needed for non-SharePoint folks
- Useful for SharePointy people that like to poke around the site
- Also hides from folks managing the site
 - Add links for them

SharePoint Designer – Hide Lists



Settings

General settings for this list.

General Settings

- ☐ Display this list on the Quick Launch
- ☒ Hide from browser

Advanced Settings

- ☒ Allow attachments
- ☐ Display New Folder command on the New menu
- ☐ Require content approval for submitted items
- ☐ Create a version each time you edit an item
- ☐ Allow management of content types

Page Cleanup

- Remove unneeded space and app parts
- Possibly use different page layout

Usually put some text here briefly describing what the site is for in case someone stumbles across it... Don't want to assume. :)

NavHome

New Request

All My Requests

Instructions

Team Home

My Open Service Requests

[+ new item](#)

Title	Request Type	Request By Date	Assigned To	Status
Broken chair	...	Other		New
The internet doesn't work	...	PEBKaC		New

Review: Documentation

In general, consider each role:

- User documentation
- Process owner documentation
- Management documentation
- Dev documentation

Use site pages or documents

Finished Product

Office 365

SharePoint

1

BROWSE

PAGE

SHARE

FOLLOW

EDIT

S

Home

EDIT LINKS

Service Requests

Search this site

Home

New Request

My Requests

Recycle Bin

EDIT LINKS

Usually put some text here briefly describing what the site is for in case someone stumbles across it... Don't want to assume. :)

New Request

All My Requests

Instructions

My Open Service Requests

+ new item

Title		Request Type	Request By Date	Assigned To	Status
Broken chair	...	Other			New
The internet doesn't work	...	PEBKaC			New

Next Steps - Extras

- Solution Launch
- PowerApps
- Flow

PowerApps

- User App: New Requests and My Requests
- Manage Requests App: Triage and status

Note: Blog posts coming on these soon...

Microsoft Flow

• Notifications

- If a request is of a certain type and priority, send specific notifications out
- If a request is open for too long escalate by sending out different notifications

This specific scenario didn't have a lot of opportunity for Flow.

Summary and Notes

- Make actions clear and accessible
- Display targeted information
- Remove control confusion
- New page authoring and analytics coming to O365 will play a part
 - Easier to build pages
 - Better analytics for seeing if and how site is used

References

- Blog

<http://www.idubbs.com/blog/>

- It's not SharePoint, it's the People. :P

<http://www.cmswire.com/digital-workplace/the-problem-with-microsoft-sharepoint-people/>

- Modify Forms Using Content Types – Sarah Haase

<http://blog.splibrarian.com/2011/03/21/using-content-types-to-modify-the-newform.aspx-and-editform.aspx-pages/>

Thank you for attending!

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