



SP Marketplace SP Facilities Portal How-It's-Built

Module Version 11.0



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Introduction

The SP Facilities Portal How-It's-Built document reviews the application's basic design, its SharePoint components, and provide a summary of the administrative tasks you must do to maintain the application.

Overview

Refer to the *SP Facilities Portal How-It-Works V11* document for an application overview.

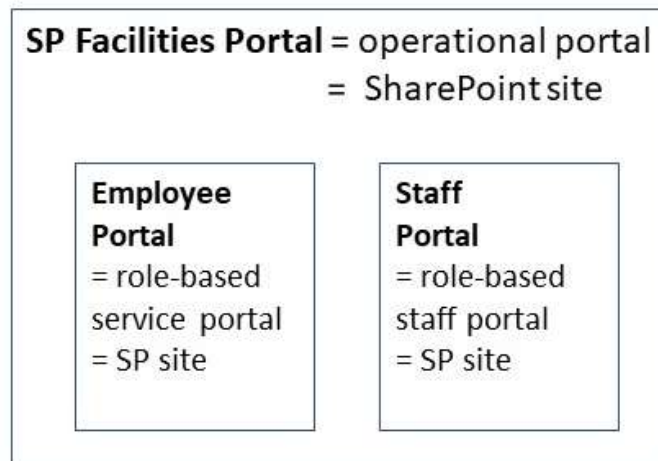
Template Design

The first step to understanding the template design is to refer to the Portal Design section of the *SP Marketplace Facilities Portal How-It-Works V11* document. Secondly, read the following to get an understanding of the actual SharePoint components utilized in the overall design.

The SP Facilities Portal is an operational portal that provides a template solution to enhance an organization's use of Microsoft Office 365 and SharePoint implementation. The SP Facilities Portal is a SharePoint site that contains SharePoint pages, lists and libraries.

This Facilities operational portal consists of two role based service portals called the Facilities Staff Portal and the Facilities Employee Portal, each of which is a SharePoint page with SharePoint supporting pages, lists and libraries.

The following diagram illustrates this operational portal/service portal concept.



Related Resources

- SP Facilities Portal How-It-Works V11
- SP Facilities Portal Configuration Guide V11
- SP Facilities Portal Customization Guide V11

Basic Design Principals

Native SharePoint

All the SP Marketplace applications, including the SP Facilities Portal, are SharePoint templates that were built on the Office 365 and SharePoint platform allowing them to leverage all the native Office 365 and SharePoint components and applications. The SP Facilities Portal application therefore adapts to any future Microsoft 365 changes, and is also 100% customizable by SharePoint business power users.

The SP Facilities Portal application utilizes native SharePoint sites, lists, and libraries. What is not included or used in the application are content types, or site columns.

The SPMP Administrator has the capability to customize the out-of-the-box template. For details on customizing the SP Facilities Portal template, please refer to the *SP Facilities Portal Customization Guide V11* document.

This application supports all versions of SharePoint 2013 and 2016 both on premise and Office 365 SharePoint Online. SharePoint Foundation for on-premise installations is NOT supported. The minimal level for support is SharePoint Standard Server.

Added Features for SharePoint

While we strive to build our templates using standard SharePoint features, lists, libraries and pages, we also included a set of tools which allow for enhanced usability without taking away the ability to customize the application using the SharePoint web interface. The following tools and features have been added to our templates behind the scenes:

- Dynamic Forms (DFFS) – enhanced form building tool that allows for tabs, rules driven form displays, headings, help notes, etc. This is a fantastic tool, learn more for the DFFS docs in our customer portal
- Virtual Lookup – this is a feature of DFFS that allows for cross list/library links from any items. We use this to build our Super Views.
- Tabs on site pages to present extra details in a simple and organized manner
- Enhanced alerts and notifications utilizing the Infowise SharePoint Smart Apps (Note: If using SharePoint On-Premise, then SharePoint Workflows are used.)
- Smart Import tool is used to import external data from email, databases, web forms, web services etc
- Optionally create workorders from incoming email using Infowise Smart Import

All the above features have corresponding documentation available on the SP Marketplace Customer Portal. We recommend that the SPMP Administrator learn the DFFS tool in order to utilize its many capabilities.

Look and Feel

The SP Marketplace design team has the objective of maintaining a consistent look and feel across all its applications, as well as to match the Office 365 look and feel.

The application uses the standard Oslo site layout. Changes to the layout, colors and fonts can be made using standard SharePoint page editing and with our CSS Style Designer tool.

Navigation

The SP Facilities Portal application utilizes the Oslo site layout which has a top navigation bar only. The navigation may be customized by the SPMP Administrator by using the SharePoint Publishing feature which has been turned on. In order to limit the audiences of the navigational menu items, the SPMP Administrator can change the Audience settings under Navigation in Site Settings.

The Top Navigation Bar is home to most of the functions in the SP Facilities Portal application.

The Administration menu item should only be available to the SPMP Administrator and includes template setup, license management and a link to the SP Marketplace Customer Portal.

Security

The SP Facilities Portal application provides functionality to prevent users from seeing information that is not relevant to them through by redirecting the user to the End User portals which filter out data not relevant for that user. SharePoint Audience settings allow menu item restrictions to the end user.

A good term for this restriction might be "soft security". These techniques are mostly applied for ease of use and while they may appear to provide some level of security they really do not – as there are techniques, not “simple” for users, to access any data that they have SharePoint Permissions to see and use.

If there is a need to prevent users from seeing any workorders that they did not create, that restriction can be setup through List Item Level security and can be implemented by utilizing SP Marketplace’s customization services. To fully protect information stored in SharePoint lists and libraries, SharePoint permissions must sometimes be used at the item level.

Permission Levels

The general structure of access for these sites and the default Quick Start permissions at setup is as follows:

Permission Group Name	Description	Permission Level
SPMP Admin	Administrators of the SP Marketplace applications	Full control
Facilities Staff	Facilities staff who manage Help Desk workorders submitted by the end users	Contribute
All Users	The end users who need to submit a workorder and access Facilities related resources	Contribute

The SP Facilities Portal application uses standard SharePoint permissions. All the users will be assigned to out-of-the-box SharePoint Groups using out-of-the-box permissions. The groups above are setup as part of the Quick Start Service. If the Quick Start service was not purchased, the SPMP Administrator will need to set up these groups and permissions.

The user's role will drive access in the following areas:

- Sites – only department staff can access the main department pages
- Home Page – Non-department staff will be redirected to the Employee Portal page
- Lists – Only department staff can access lists beyond workorders
- Forms – Using Dynamic Forms, only department staff can see tabs beyond the General Tab
- Navigation – The Left Navigation is hidden in the Employee Portal, and the Navigation can be controlled in the Department page through audiences

The assumption for the template design is that all internal department staff can access all department data. If access is to be limited for department staff, the SPMP Administrator will need to add permissions, or SP Marketplace's customization services can be utilized to setup a custom permission structure.

IMPORTANT: The permissions level of the SP Marketplace ID should NEVER be changed, because it can break functionality in the application. That ID should always be in the SPMP Admin group which has full control. If you wish to restrict SP Marketplace access, then you should change the password and not the permissions for the SP Marketplace SharePoint userid.

Portal Administration

The Admin menu is home of all the administrator functions. The follow guide will explain all of the available tiles and their functions in the Admin menu items.

Application Page

Facilities Portal Configuration

Getting Started: Access the getting started instructions and training for first-time application setup.

WO Categories: Create new categories for the Categories drop down that appears on the New Workorder form. Include an Facilities staff member if that person is to be notified of a new workorder in that category.

WO SubCategories: Create sub categories for any existing categories. These subcategories will appear in the SubCategories drop down that appears on the New Workorder form. Include an Facilities staff member if that person is to be notified of a new workorder in that subcategory.

Staff Portal Tiles: Manage the promoted links (tiles) that appear on the Facilities Staff Portal.

Employee Portal Tiles: Manage the promoted links (tiles) that appear on the Facilities Employee Portal.

O365 Team Tiles: Manage the Office 365 team tiles used in the Facilities Staff Portal Home page.

Navigation Menus: Configure the navigation menus.

Site Permissions: Assign user permissions by adding a user to a group.

Site Images: Manage the Site Images folder.

DFFS Rules and Tabs: Dynamic Forms for SharePoint configuration for each configured list - Allows changes to rules and tabs.

Style Designer: Style Designer to test changing page elements colors and generate a new style file.

Change Logo: Change the logo in the site header.

Configuration Reference

Configuration Reference: The Configuration Reference for administrative tasks to manage the Facilities Portal.

Installation Page

Installation Setup

Configure Redirects: Edit and update the Security Group list which defines the redirects.

Configure Navigation Menus: Configure navigation menus.

Configure URL to Intranet Site: Configure the Intranet URL used by Smart action for Intranet automatic content push.

Add Logo: Upload company logo to the site.

Setup Permissions: Use Infowise actions to set permissions for the site.

Facilities Portal Configuration

See *Facilities Portal Configuration* in the *Application Administration* section above.

Support Page

Support Assistance Links

SPMP Customer Support Portal: Access SP Marketplace Customer Support Portal to access our knowledgebase, submit support tickets, see submitted cases, fill out the New User form, and submit feedback to SP Marketplace.

Facilities Support V11 Playlist: Training videos for Facilities Support V11 YouTube Playlist.

Support: Submit a support ticket to SP Marketplace.

Template Components

The SP Facilities Portal application is a SharePoint site that includes the following role-based portals:

- Facilities Staff Portal
- Facilities Employee Portal

Facilities Staff Portal Components

Facilities Staff Portal Pages

Core Pages	SharePoint Name (Site Contents)
Staff Portal Home	Home
Employee Portal Home	Facilities Services Portal
Supporting Pages	
My Workspace	My Workspace
Reports	reports
Application Administration	Application Administration
Installation Administration	Installation Administration
Support Administration	Support Administration

Facilities Staff Portal Lists and Libraries

Core Lists	SharePoint Name (Site Contents)
Facilities	Facilities
Workorders	Workorders
Assets	Assets
Change Requests	Change Requests
Supporting Lists and Libraries	SharePoint Name (Site Contents)
Staff Announcements	Staff Announcements
Dept News	Organization News
Knowledgebase	Knowledgebase
Contractors	Contractors
Equipment	Equipment
Facilities Staff	Staff
Facilities Documents	Facilities Documents
Vendors	Vendors
General Team Resource List and Libraries	SharePoint Name (Site Contents)
Staff Tasks	Tasks1
Staff Documents	Shared Documents
Staff Calendar	Staff Calendar
Staff Links	Links
Reference/Lookup Libraries	SharePoint Name (Site Contents)

Categories	Categories
<u>Note</u> : Categories have a field for who to notify upon ticket creation if that category is selected.	
Admin Libraries	SharePoint Name (Site Contents)
Promoted Links (Staff Home page links)	Home Page Icons
Site Images	Images (under Site Assets)
Team Links <u>Note</u> : If SharePoint On-Premise is being used, this Team Links section will be removed during installation.	Office365 Group Links

Facilities Employee Portal Components

Employee Portal Content	SharePoint Name (Site Contents)
Portal Promoted Links	Promoted Links
Dept Announcements	Announcements (URL has IT Announcements)
Dept News	Organization News
Dept Events	Calendar
Useful Documents	Facilities Documents
Useful Links	Portal Links
Knowledgebase	Knowledgebase
Feedback	How satisfied are you with:

Workflow

For on-premise All workflows are created using standard SharePoint 2010 or 2013 workflows and are ONLY used with On Premise installations (except for the Change Request Approval notification). They can be seen in SharePoint Designer.

Infowise Smart Alerts are used for Office/365. Generally, most of the workflows in the SP Facilities Portal application are related to email notifications on Workorder Status.

Object	Type	Trigger	Action Description	Action Type
Workorders	SP List	Email sent to defined online exchange Shared Email	WO is created Requestor = email sender WO Title = email subject WO Description = email body	Infowise Import
		WO is created in app Status = "1. Unassigned" or category /subcategory changed	Email Facilities Category Owner based on Category/Sub Category chosen	Infowise Alert
			Email Requestor, WO is submitted	Infowise Alert
		WO is assigned or reassigned WO Status = "2. Assigned To"	Email Assigned To	Infowise Alert
			Email Requestor, WO is assigned	Infowise Alert
		User Correspondence created Send to User checked	Email Requestor, send correspondence	Infowise Alert
		KB Checkbox = checked	Create KB article from WO using values from: Title Article Category Sub Category	Infowise Action
		WO is closed WO Status = "4. Closed"	Email Requestor, WO is closed	Infowise Alert
Change Requests	SP List	Change Request created in app	Email Approver request approval (if Approver field filled out)	SharePoint 2010 workflow
		Approval Status changed	Email Requester that the Change request has been Approved or Rejected	Infowise Alert

Object	Type	Trigger	Action Description	Action Type
News Announcements Events	SP List	IT Staff checks the Publish to Portal checkbox for (N/A/E) item	(N/A/E) item is copied to related Intranet SP list, Publish to Portal checkbox is unchecked on Intranet item	Infowise Action

Appendix

Document Change Log

Date	Description