Social Squared 2013

Manual

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Lightning Tools

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Introduction

Social Squared is Lightning Tools' enterprise Forum solution for Microsoft® SharePoint® 2007, 2010 and 2013. The following documentation is for Social Squared for SharePoint 2013. If you have any questions during evaluation, or would like a remote support session, to install or use Social Square 2013, please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site.

For an overview of the Social Squared for SharePoint 2013, view the following video:

If you have any questions related to this documentation or the Social Squared product, please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site.

Deploying Social Squared

This section details how to deploy Social Squared 2013 for Microsoft® SharePoint® 2013. It is essential to read this section of the online documentation and complete the step in the Installing Social Squared section, before you can use Social Squared. Information on using and administering Social Squared can be found later in the documentation.

To successfully deploy Social Squared within your organization, you will need to complete the following steps:

- Plan the use of Social Squared within your organisation.
- Plan the installation of Social Squared
- Install Social Squared
- Activate at least the Social Squared Forums site collection feature on one site collection.
- Within that site collection, configure each site with the Social Squared database that should be used, by users of that site.
- Create and Manage Forum Groups and Forums
- Administer Social Squared, configure pages to display Social Squared related information and get your users to use the forums.

If you have any questions related to this documentation or the Social Squared product, please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site.

Installation Planning

To install Social Squared, you will require access to both:

- Microsoft® SQL Server®
- Microsoft® SharePoint®.

In a production environment you will need to raise a change request to install Social Squared.

Database server

Social Squared 2013 uses Microsoft® SQL Server® as the repository for Social Squared user profile information along with the topics, posts and configuration settings. The main reason for using an SQL Server database, is performance and scalability, allowing for an Enterprise-wide forum tool to be used without performance issues for hundreds or thousands of active users.

Not only can you use Social Squared as an Enterprise-wide forum tool with multiple forum categories, you can also use Social Squared for multiple smaller forums perhaps at Team site or site collection level, whereby you require the posts to be separate. Either of these configurations are possible using Social Squared. Although, it is possible to have multiple separate instances of Social Squared, using a single SQL Server database by configuring the Social Squared Web Parts to display specific the forum groups; however, if you wish to keep forums totally isolated from each other, for security reasons, Lightning Tools, recommend using separate SQL Server databases. You configure at a site level, the Social Squared database that should be used; that is, all users in a site could use forums stored in one Social Squared database, whereas users in another site, even within the same site collection, could use forums stored in a different Social Squared database.

Social Squared supports Microsoft® SQL Server® 2005, 2008, 2008 R2, and 2012. On the computer where you want to create the Social Square SQL Server database(s), you will require an SQL Server login that is a member of the following SQL Server roles:

- **securityadmin** fixed server role.
- **dbcreator** fixed server role.

Once you have created the database(s), and you want to run Windows PowerShell® cmdlets that affect the database(s), the account that is used to run the cmdlets must be a member of the **db_owner** fixed database role for the database(s).

In a development or test environments, both SharePoint and SQL Server may be install on one server. In a production environment, then most likely these products are installed on separate servers. If your IT department have install Kerberos, this will not affect Social Squared. However, if your organization still uses NTLM Windows Authentication, and the SQL Server database resides on a separate physical machine to the SharePoint (IIS) server, the pass-through authentication between the Social Squared SharePoint components and the Social Squared database will fail, since Windows Authentication only works over a single hop. That single hop is from the user's machine, where the web browser is opened, to the SharePoint server. The token cannot pass over a second hop – from the SharePoint server to the SQL Server. This is known as the double hop issue, and is not specific to Social Squared but an issue associated with Windows Authentication and the NTLM protocol, and affects all distributed Windows applications.

If you cannot persuade your IT department to use Kerberos, then your Social Squared installation will need to use a SQL Server Authentication userid so that the Social Squared SharePoint components can connect to the Social Squared database. To use SQL Server Authentication userids, you need to configure the SQL Server in Mixed mode, which enables both Windows Authentication and SQL Server Authentication. On SQL Server, Windows Authentication is always available and cannot be disabled.

Plan for Kerberos authentication in SharePoint 2013 →
Go to top →

SharePoint server

The Microsoft® SharePoint® 2013 related component of Social Squared 2013 are packaged as a SharePoint farm solution, and therefore cannot be install in Office 365™. The farm solution once activated, installs:

- A number of application pages that can be accessed in the **Social Squared Forum** section on a site's site settings page.
- One Farm feature, which enables you to licence Social Squared, using the **Manage Lightning Tools products licensing** link on the **System Settings** page on the *SharePoint 2013 Central Administration* web site.
- Two Web Application features, which map to two timer jobs that are created for each Web Application created in the SharePoint farm:
    - **Social Squared Digest Email Job**, By default this timer job is scheduled to run daily starting every day between 10:00 AM and no later than 12:00 AM.
    - Social Squared Reply Via Email Job. By default this timer job is scheduled to run every 5 minutes.
- Five site collections features:
    - SocialSquared Forums Web Part
    - SocialSquared Forums Active Users Web Part
    - SocialSquared Forums Popular Topics Web Part
    - SocialSquared Forums Tagging Web Part
    - SocialSquared Reporting
- Two site (web) features:
    - Social Squared Digest Email Registration
    - Social Squared Reply Via Email

The site collection and site features are not activated when the Social Squared farm solution is deployed to Web Applications.

Social Squared 2013 can be used on any version of a SharePoint 2013 on-premises installation, that is, the site collection features and Web Parts can be used on pages in a SharePoint Foundation 2013 on-premises installation, and can be used and seen on pages where users are assigned either the standard or enterprise SharePoint Server 2013 licenses. At the moment Lightning Tools has not produced an Office 365™ Apps version of the Social Squared.

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Installing Social Squared

This section details how to install Social Squared 2013 for Microsoft® SharePoint® 2013.

Installing Social Squared, consists of:

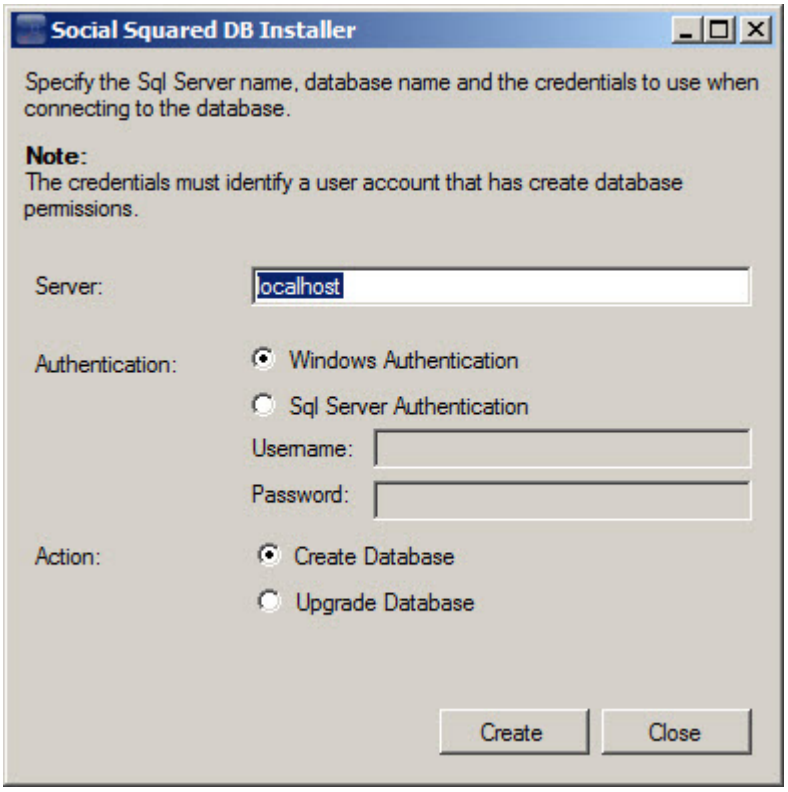
- Create one or more SQL Server databases.
- Install the Social Squared SharePoint® farm solution.
- Activate at least the Social Squared Forums site collection feature on one site collection.
- Within that site collection, configure each site with the Social Squared database that should be used, by users of that site.
- Create and Manage Forum Groups and Forums.
- Add the Social Squared Web Parts to a page so that users can use Social Squared.

Creating a Social Squared SQL Server database

To create a Social Squared database, using the Lightning Tools wizard, complete the following steps:

1. Logon to a server with the credentials that allows you to create an SQL Server database. See the Installation Planning.
2. Unzip the downloaded **SocialSquared2013.zip** file, which creates a folder, **SocialSquared2013**, that contains an number of folders and files.
3. In the **Social Squared Database Installer** sub folder, double click **SocialSquared.DatabaseInstaller.exe** to open the **Social Squared DB Installer** dialog box.
4. In the **Server** text box, type the name of the server and SQL Server instance name, if applicable, where you want the Social Square SQL Server® database to be created

5. Select one of the authentication radio buttons, and leave the **Create Database** radio button selected.



6. Click **Create** to display the **CreateDatabase** dialog box.
7. In the **Database Name** text box, type the name of the Social Squared database that you want to use, and then click **OK**.

If you want to create the Social Squared SQL Server database manually, please consult your SQL Server database administrator. Also if your IT infrastructure is not using Kerberos you will need to create an SQL Authentication userid, and configure it as a member of the **db_owner** fixed database role for the Social Squared database(s). This userid will be needed when you configure the connection string at the site level.

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Installing the Social Squared SharePoint farm solution

The installation consists of the following SharePoint related steps. You will need to be a SharePoint server farm administrator to complete these steps:

1. Upload the SocialSquared.SocialSquaredForum.wsp solution package to the SharePoint® farm.

2. Deploy the solution to the required Web Applications.
3. Activate the Social Squared 2013 license key, if you are not using the trial version of the Web Part.
4. Activate at least the Social Squared Forums site collection feature on the required site collections.
5. Test the installation by adding a Social Squared Web Part to a page

From time to time Lightning Tools will provide an update for Social Squared 2013. This is on average every 12 weeks.

Uploading the Social Squared SharePoint farm solution

To upload the SocialSquared.SocialSquaredForum.wsp to your Microsoft® SharePoint® 2013 server farm, complete the following steps using the Add-SPSolution Windows PowerShell® command:

> You will need to be a SharePoint server farm administrator to complete these steps.

1. Unzip the downloaded Social Squared zip file to you computer.
2. Copy SocialSquared.SocialSquaredForum.wsp to a folder on your SharePoint 2013 server, for example **c:\Tools**.
3. Open the SharePoint 2013 Management Shell and type on one line, **Add-SPSolution c:\Tools\SocialSquared.SocialSquaredForum.wsp**
   replacing c:\tools with the location where you stored the wsp file.

Note: Do not copy and paste this command from this page, as hidden characters may be included which will cause the Windows PowerShell® command to fail in your environment.
The solution has now been added to the solution store. Next deploy the solution.

> More information on the SharePoint 2013 Management Shell can be found at: Accessing Windows PowerShell for SharePoint 2013.

Install and manage solutions for SharePoint 2013 →
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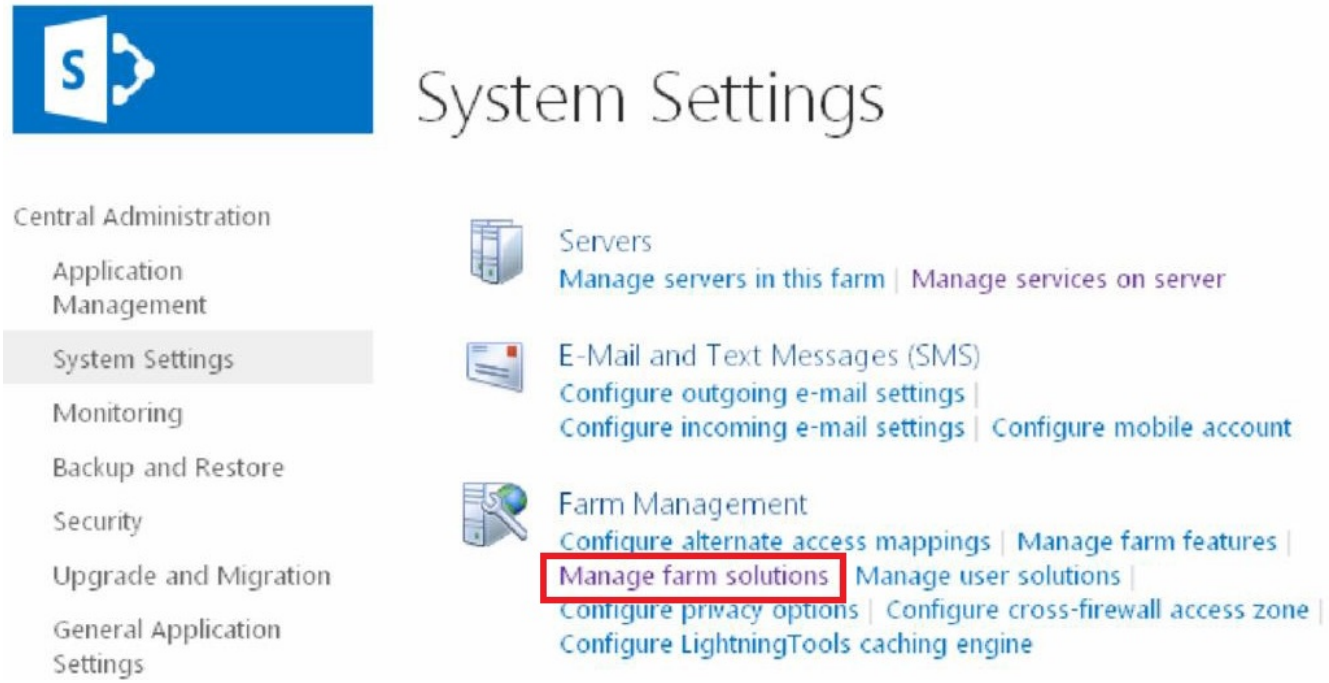
Deploying the Social Squared solution package

To deploy a Microsoft® SharePoint® 2013 farm solutions to a Web Application you can use Windows PowerShell® commands or the SharePoint 2013 Central Administration web site.

> Which ever method you choose to deploy the farm solution you must be a SharePoint farm administrator.

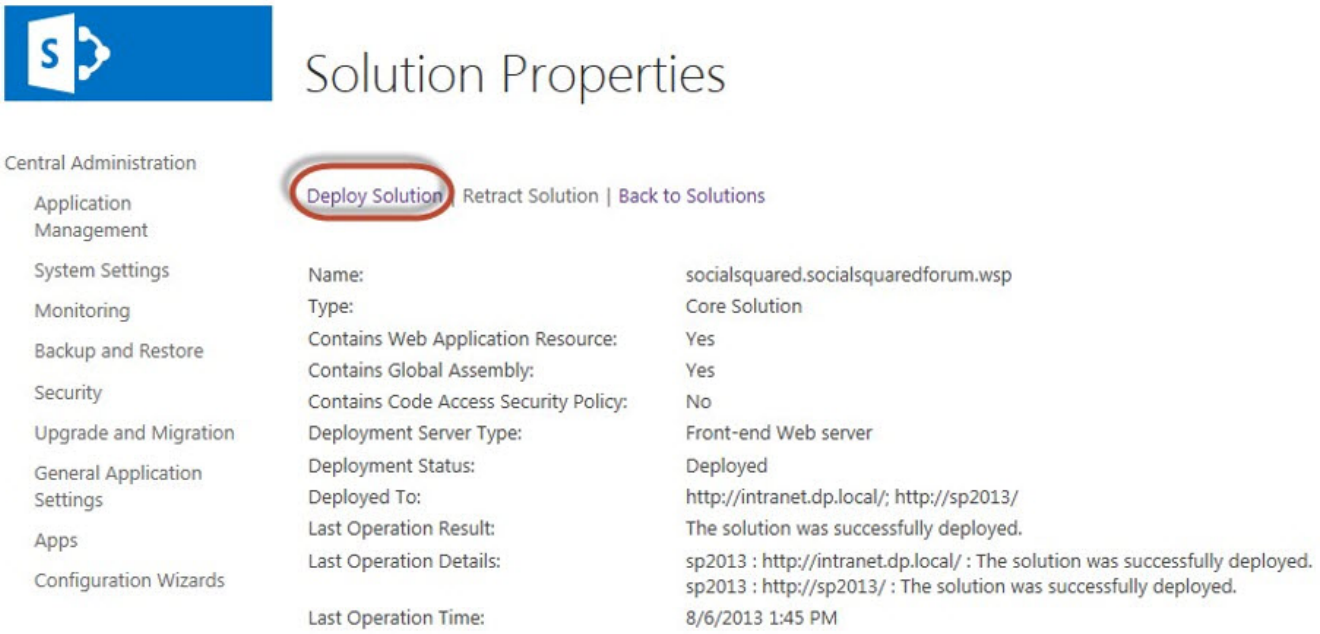
The following instructions use the SharePoint 2013 Central Administration web site to deploy the farm solution.

1. In the browser, open Microsoft SharePoint Central Administration web site. On the Quick Launch click **System Settings**, and then under **Farm Management**, click **Manage farm solutions**.



2. On the **Solution Management** page, click **SocialSquaredForum.SocialSquared.wsp**.

3. On the **Solution Properties** page, click **Deploy Solution**.



4. On the **Deploy Solution** page, in the **Deploy To?** section, in the dropdown list select the Web application where you want to deploy the solution or select **All content Web applications** if you want to use the Social Squared in all sites in all Web applications.
5. Click **OK**

Troubleshooting: If the **SocialSquaredForum.SocialSquared.wsp** solution is missing on the **Solution Management** page, upload the **Social Squared** solution package using the Add-SPSolution Windows PowerShell® command.

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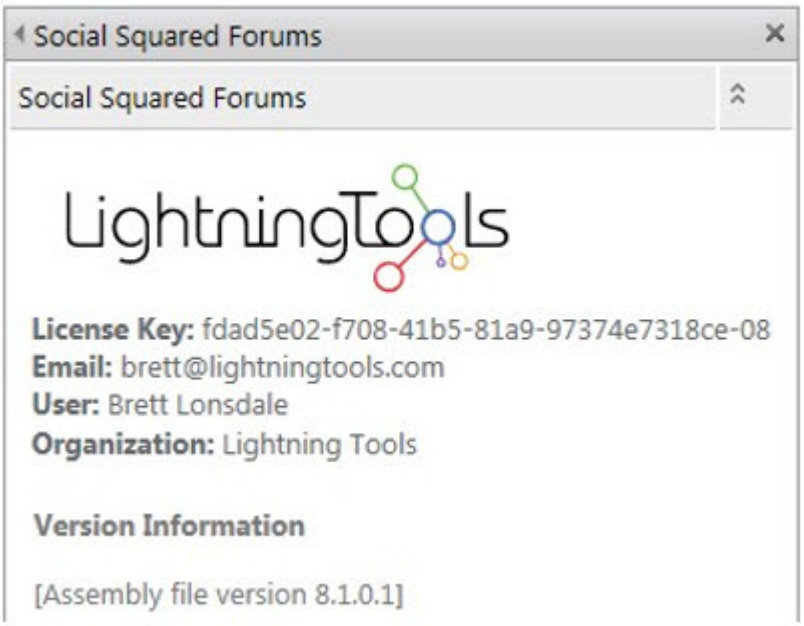
Activating your Social Squared License

The Social Squared 2013 is available as a 14 day trial. You can use the full functionality of the Social Squared for 14 days, after which the product will need to be licensed. The number of days remaining in your trial will be shown within the Social Squared Web Part. After the 14 day period has expired, the Web Part will not display any posts until Social Squared is licensed.

You can check the license information within each instance of the Social Squared Web Part by selecting **Edit Web Part** on the Web Parts drop down menu.



If you have purchased a license of the product already and believe that the information in the Web Part tool pane is incorrect, please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site. We will then gladly provide you with a license key.

When you purchase the Social Squared 2013, you will need to inform Lightning Tools of the number of Web Front-ends and the number of SharePoint farms you wish to purchase a license, including production and non-production Microsoft® SharePoint® environments. We will then provide you with a valid license key for each SharePoint farm where you want to use Social Squared.

For licensing purposes, a SharePoint Web Front-end (WFE) is a server that has the Microsoft SharePoint Foundation Web Application service started.

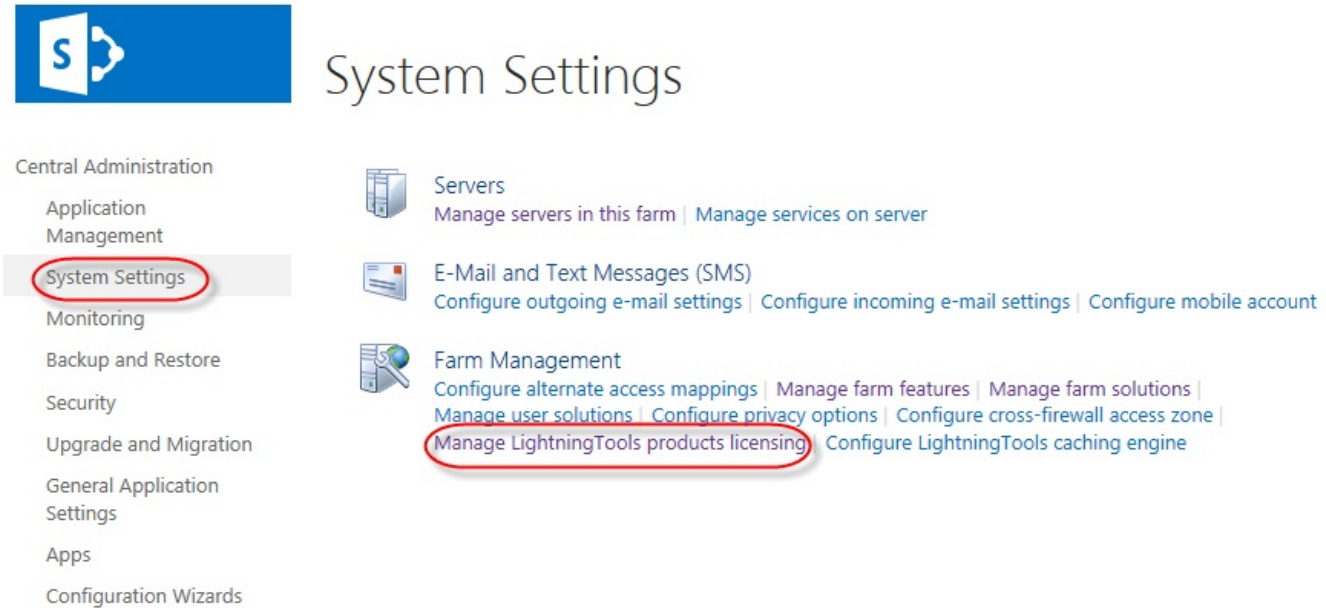
Once you have purchased Social Squared and have received the license key, you need to enter the key and activate the product via the Lightning Tools license manager which can be found in SharePoint 2013 Central Administration web site.

You can activate Social Squared over the Internet or manually. Once a license key is activated, it will be associated with a specific SharePoint farm, and can not be activated on a different SharePoint farm. License keys are also specific to a Lightning Tools product, therefore you need a license key for each Lightning Tools product that you install on your SharePoint farm.

Activate with Internet Access

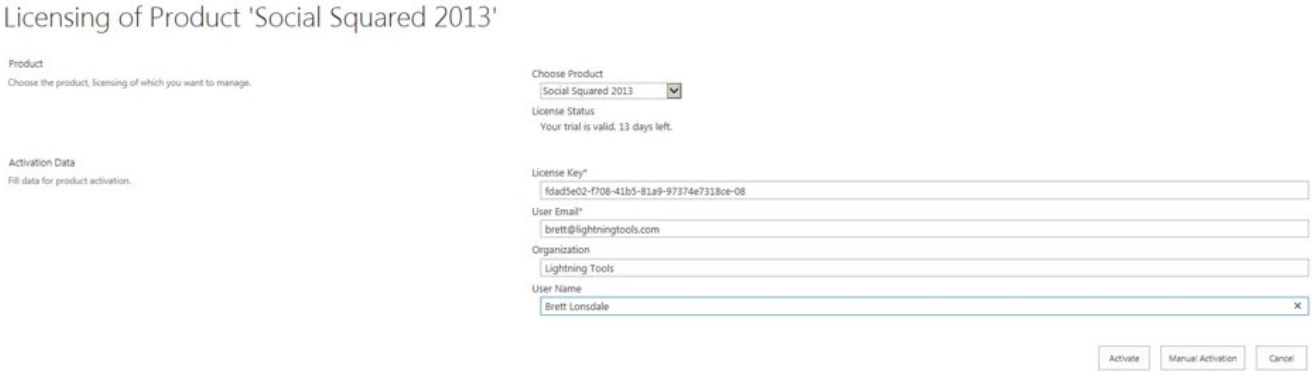
To activate Social Squared, automatically when your machine has access to the internet:

1. In the browser, open **SharePoint 2013 Central Administration** web site.
2. On the Quick Launch, click **System Settings**, and then under **Farm Management** click **Manage LightningTools products licensing**.



3. Select the **Social Squared 2013** product from the **Choose Product** drop down list.
4. In the **License Key** text box, type the license key sent to you when you completed your purchase of Social Squared.
5. In the **User Email** text box, type your email address.
6. In the **Organization** text box, type your organization or company name.

7. In the **User Name** text box, type your first name and last name.



8. Click **Activate**
   The page is redisplayed with a **License Status**: **The Product is properly licensed**.

The Social Squared license is now activated and registered with Lightning Tools. You can check the license information within each instance of the Social Squared Web Part by choosing **Edit Web Part** on the Web Parts drop down menu. If you have purchased a license of the product already and believe that the information in the Web Part tool pane is incorrect, please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site. We will then gladly provide you with a license key.

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Activate without Internet Access

To activate Social Squared automatically when your machine has access to the internet:

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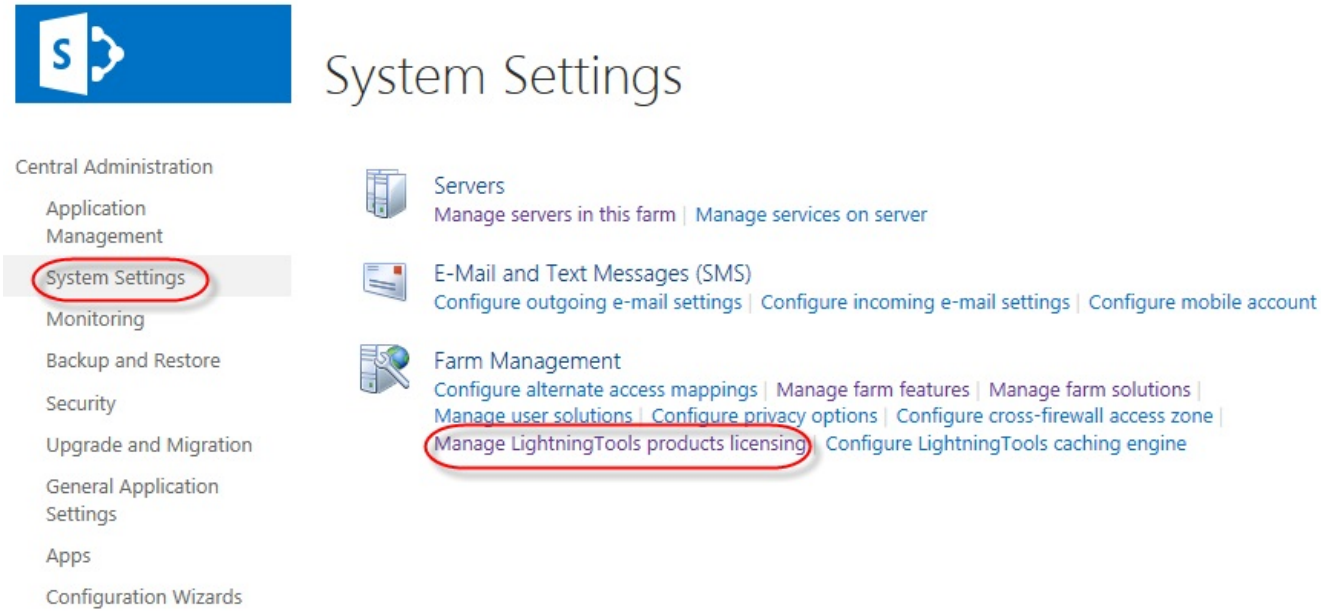
2. On the Quick Launch, click **System Settings**, and then under **Farm Management** click **Manage LightningTools products licensing**.

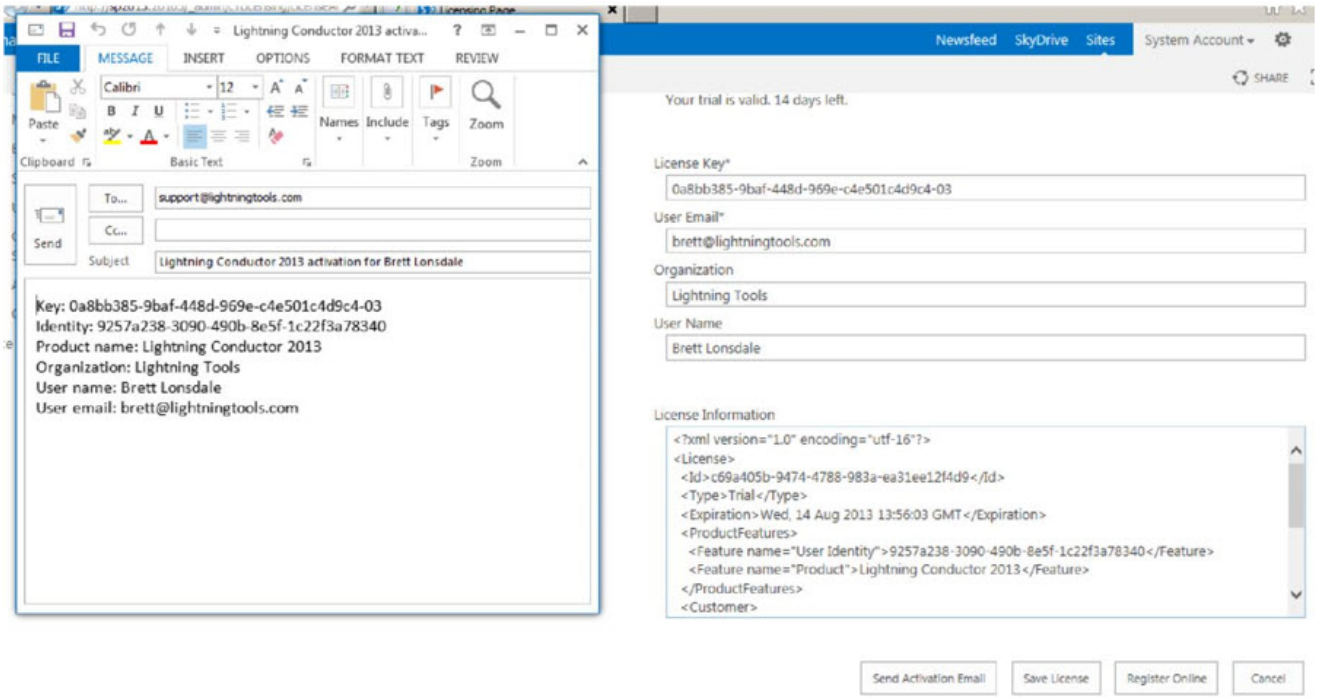


3. Select the **Social Squared 2013** product from the **Choose Product** drop down list.
4. In the **License Key** text box, type the license key sent to you when you completed your purchase of Social Squared.
5. In the **User Email** text box, type your email address.
6. In the **Organization** text box, type your organization or company name.
7. In the **User Name** text box, type your first name and last name.
8. Now complete one of the following steps.

    - If the server that you are using has mail access, click **Send Activation Email** to send an email to Lightning Tools with your identity key and license key, which is used to generate the license.

      Or

    - Copy the contents from **License Information** text box, and save it in a manner so you have access to that information from another computer.
    - On a computer where you can send emails, paste the *License Information* into the body of the email, and send to support@lightningtools.com with a **Subject** line of: **Social Squared 2013 activation request**.



4. Activation information will be sent in an email to the email address you provided in step 6.The email contains an XML license which can be pasted in the **License Information** text box replacing the existing contents.
5. Click **Save License**.

The Social Squared license is now activated and registered with Lightning Tools. You can check the license information within each instance of the Social Squared Web Part by choosing **Edit Web Part** on the Web Parts drop down menu. If you have purchased a license of the product already and believe that the information in the Web Part tool pane is incorrect, please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site. We will then gladly provide you with a license key.

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Upgrading the Social Squared Database and WSP

From time to time, Lightning Tools provide an update to Social Squared 2013. This is on average every 12 weeks. Before upgrading to the latest version of Social Squared 2013, especially when it is installed in a production environment, Lightning Tools, highly recommend that you backup your Social Squared SQL Server® database(s) and restore them to a development or quality assurance environment, so you can run the upgrade and test the upgraded version of Social Squared, to ensure the upgrade has worked and to test that your existing topics and posts function correctly.

> Lightning Tools does all they can to test the upgrade process and the upgraded version of Social Squared, however, you should still take every standard precaution with your data. Even if you do not want to take the recommended testing steps, please ensure you backup your Social Squared database(s) before running any Microsoft® SQL Server® upgrade scripts.

You can find the version of Social Squared you have installed on your Microsoft® SharePoint® 2013 farm, by opening the Web Part tool pane for any Social Squared Web Part.

To upgrade Social Squared you will need to upgrade the:

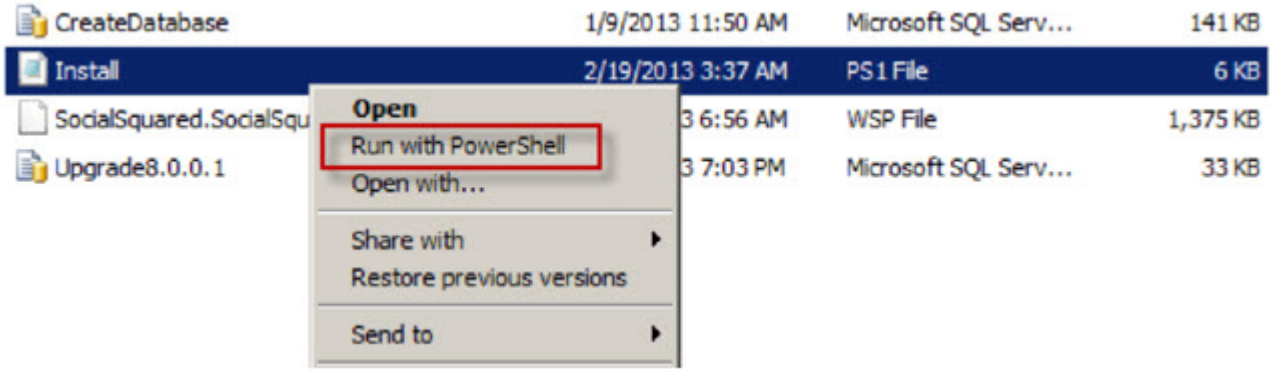
- SharePoint components.
- Social Squared SQL Server database(s).

You can upgrade Social Square using scripts, provided by Lightning Tools, or manually using the instruction below.

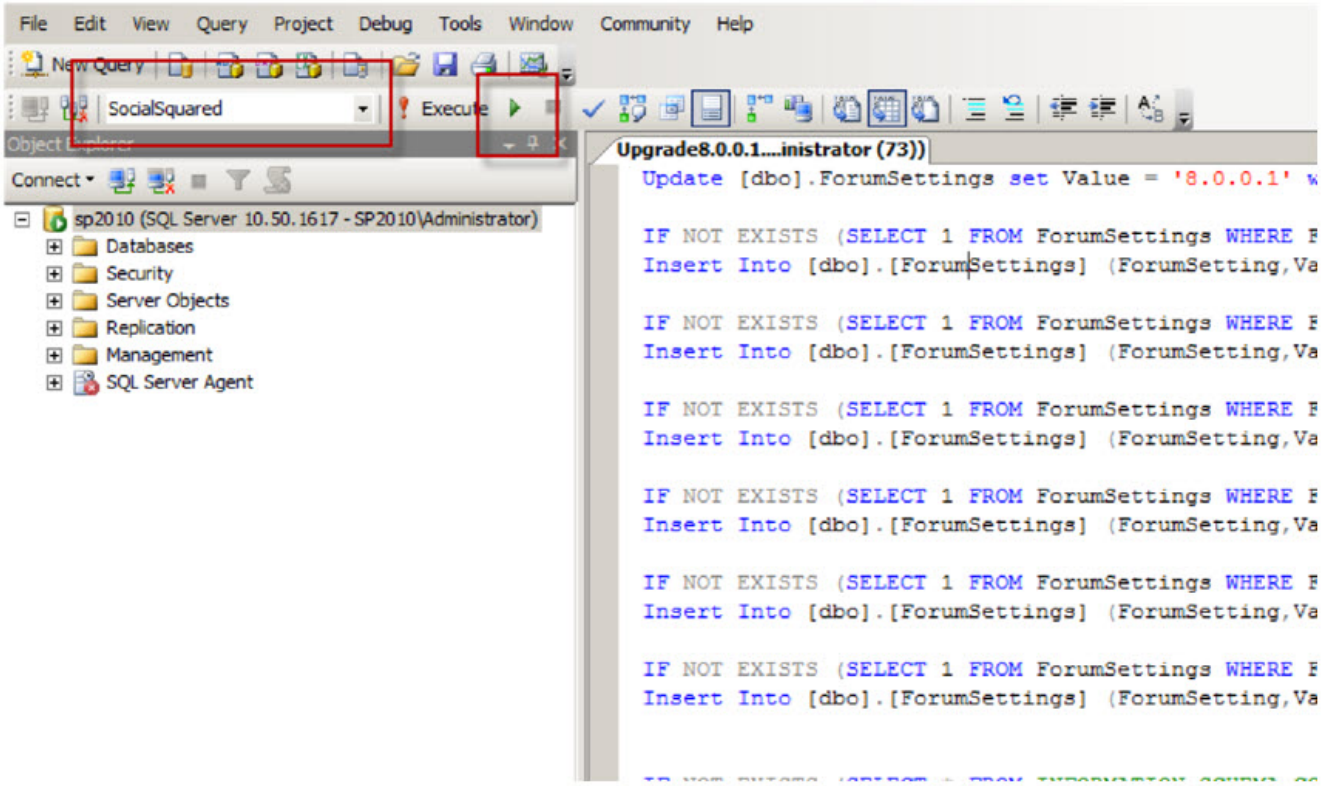
Upgrade Social Squared using scripts

Use the following steps to upgrade Social Squared using a Windows PowerShell® and SQL scripts

1. Extract the Social Squared zip file to your computer.
2. Within the root of the extracted **SocialSquared** folder, right click **install.ps1** file, and from the drop down menu, click **Run with PowerShell**:



3. Open SQL Server Management Studio, and on the standard toolbar, click **New Query**.
4. Open the **UpgradeX.X.X.X.sql** file in **SocialSquared** folder, by either clicking the **Open File** icon on the standard toolbar, or by clicking **File**, **Open**, **File** on the menu bar.
5. On the SQL Editor toolbar, select your *Social Squared Database* from the **Available Databases** drop down list, and then click **Execute**.



Manual steps to upgrade Social Squared

Use the following steps to manually upgrade Social Squared

1. Extract the download of Social Squared zip file to your computer.
2. Within the root of the extracted SocialSquared folder and locate the .WSP file.
3. Copy **SocialSquared.SocialSquaredForum.wsp** to a folder on your SharePoint 2013 server.
4. Open the **SharePoint 2013 Management Shell Window** and type on one line:

   Update-SPSolution -Identity SocialSquared.SocialSquaredForum.wsp -LiteralPath C:\tools\SocialSquared.SocialSquaredForum.wsp -GACDeployment

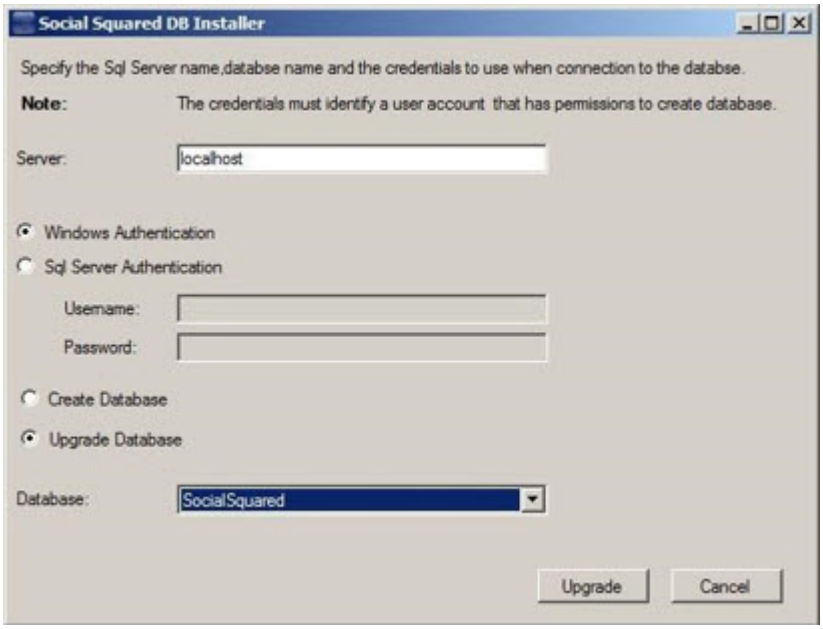
   This command retracts the old Social Squared SharePoint far solution, and deploys the new one.

   Note: Do not copy and paste this command from this page, as hidden characters may be included which will cause the Windows PowerShell® command to fail in your environment.

   Next upgrade the Social Squared database using the **SocialSquared.DatabaseInstaller.exe**

application, which is in the extracted subfolder, **Social Squared Database Installer**.

5. Double click **SocialSquared.DatabaseInstaller.exe**.
6. In the Server text box, type the computer name, and SQL Server instance, if applicable, where the Social Squared database is stored.
7. Select one of the radio buttons in the **Authentication** section so you are using an account that has the necessary permissions to modify and create tables and stored procedures.
8. Select the **Upgrade Database** radio button, and then from the Database drop down list, select the database you need to upgrade.



9. Click **Upgrade**.

The SocialSquared.DatabaseInstaller application executes the necessary scripts to bring your database up to the same version as the SharePoint .WSP file you have used to upgrade the SharePoint components.

Testing the installation

Use the following steps to test your Social Squared 2013 installation:

1. In the Web applications where you have deployed Social Squared, choose a site where you will create a page to test the Web Part.
2. In the browser, open the top level site of the site collection where you will test Social Squared.
3. Activate the Social Squared site collection feature.
4. Configure the connection string to point to the Social Squared SQL Server database where the forums for this site collection will be stored.
5. Create a test Forum Group and a Forum.
6. Navigate to the site in the site collection where you are going to test the usage of Social Squared.
7. Create a new page.
8. Add the Social Squared Forum Web Part to the page.
9. Configure the Web Part and stop editing the page.
10. Add a post.
11. Review the page and check that the Web Part is displayed as expected.

Troubleshooting →

Creating pages

A website is a collection of webpages. The types of pages that you can create depend on the site that you have created. Most users will be familiar with Team sites within a Microsoft® SharePoint® 2013 installation. When you create a new Team site, SharePoint creates a wiki page library, named Site Pages, where webpages are stored and new pages are created. Two types of webpages can be created in the Site Pages library:

- wiki pages. These are the default pages when a site is created from the Team site template. Wiki pages are easy to edit and are used when users need to add static text, images, tables and a small number of Web Parts.
- Web Part pages. These pages can only contain App Parts and Web Parts, and are a popular choice for creating interactive dashboards or pages that aggregate information from several content sources.

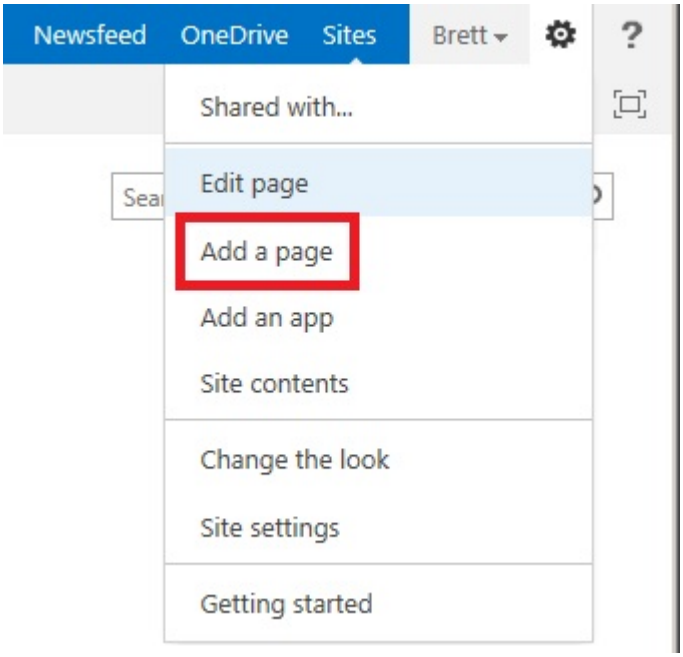
Web Content Management (WCM) sites, also known as publishing sites are used for public facing sites or for company portals. When you create a WCM page, known as a publishing page, they are created from page layouts. Publishing pages may be able to contain Web Parts and SharePoint App Parts; however, it depends on the page layout you have chosen for the publishing page.

Creating a wiki page —>
Creating a Web Part page →
Keyboard shortcuts for common tasks on SharePoint pages →
Create and manage pages in a publishing site →

Creating a wiki page

To create a wiki page on a site created from the Team site template, complete the following steps:

1. Navigate to the site where you wish to create a wiki page.
2. Click the **Settings** icon and then click **Add a page**.



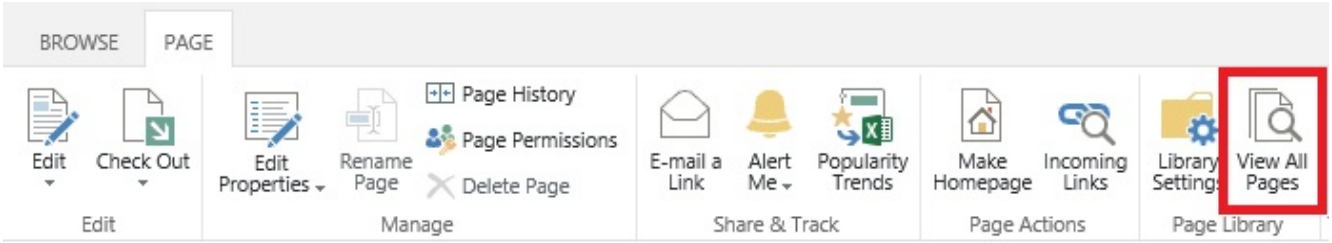
3. Type the name of your page and then click **Create**.

Adding Web Parts to a page →
Change the layout of a wiki page →

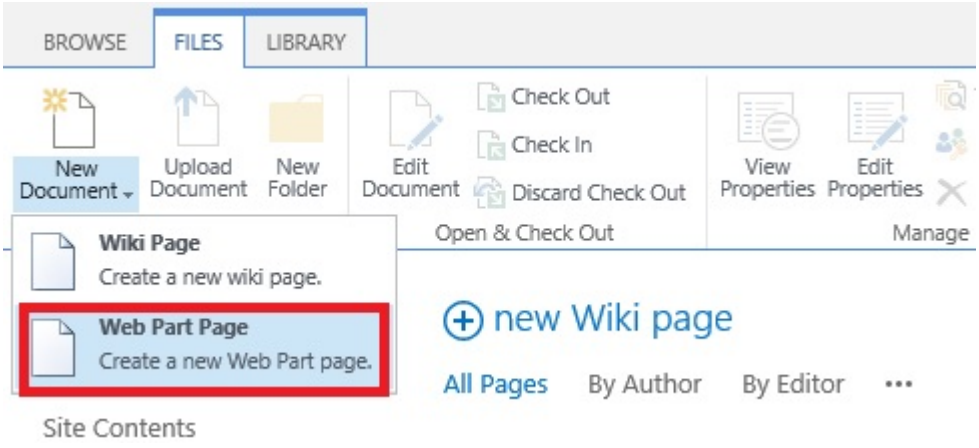
Creating a Web Part page

To create a Web Part page on a Microsoft® SharePoint® 2013 Team site,

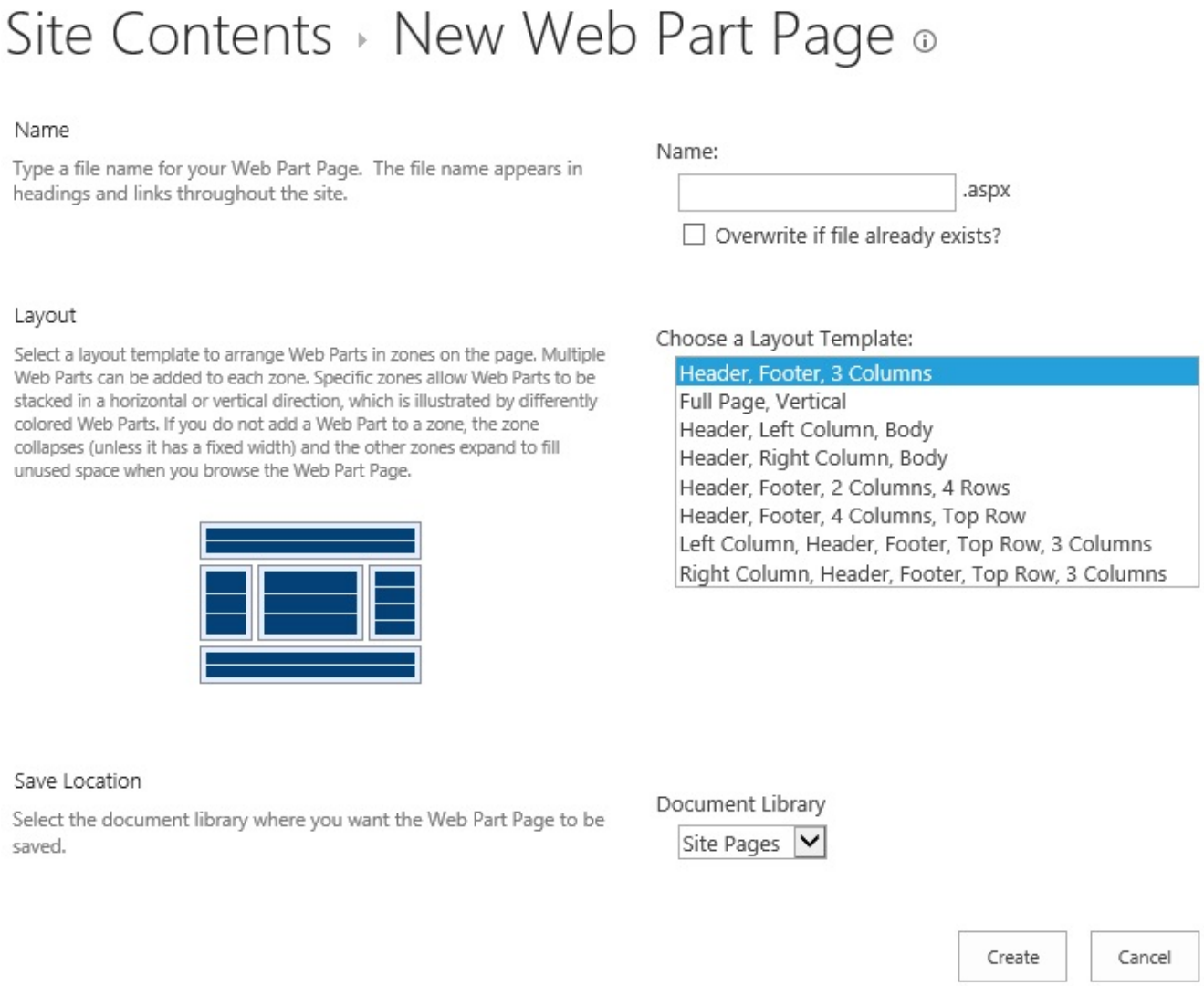
1. Navigate to the site where you wish to create a Web Part page.
2. On the **Page** ribbon tab, click **View All Pages** in the **Page Library** group.



3. On the **Files** ribbon tab, click the **New Document** down arrow and then click **Web Part Page**.



4. In the **Name** text box, type the name of your page and in the **Choose a Layout Template** list, select the layout you require.



5. Click **Create**.

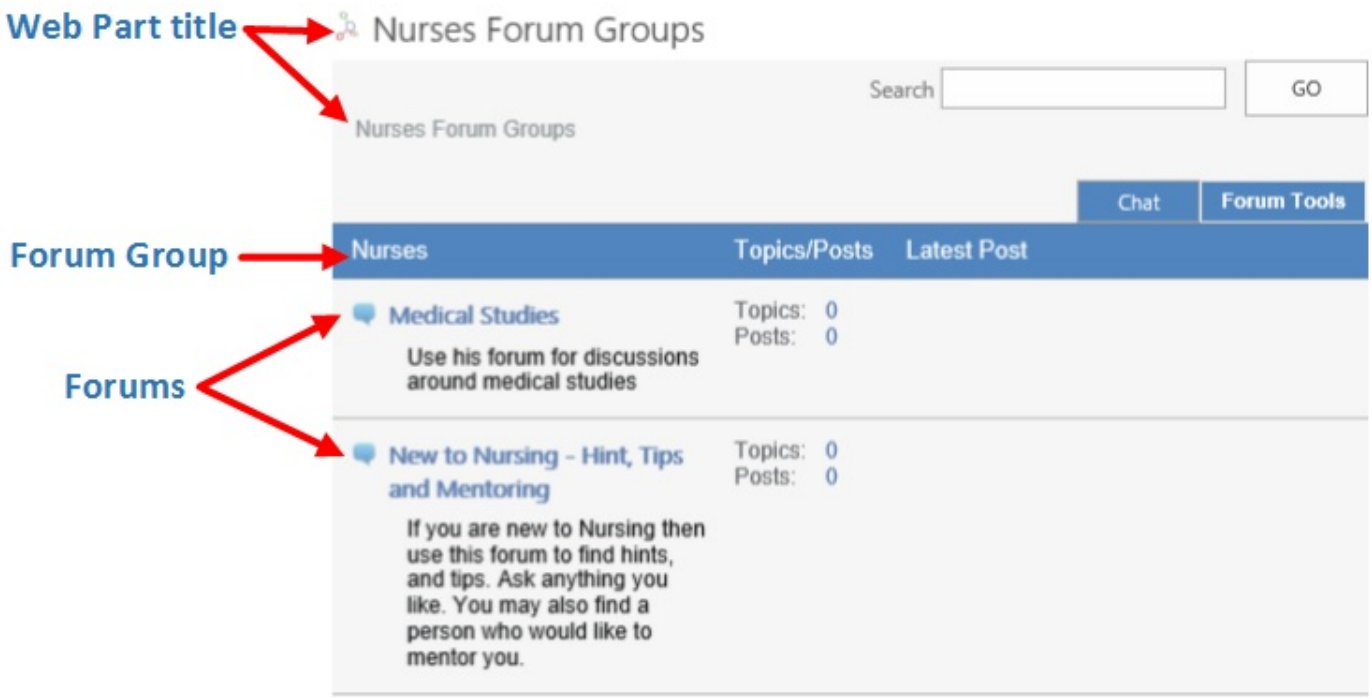
[Adding Social Web Parts to a page →]
[Keyboard shortcuts for Web Part Pages →]

Using Social Squared

Social Squared allows you to create topics, which can be in the form of a question, or a description of a discussion area. Users can reply to topics and therefore be part of the conversation. In Social Squared you will also see reference to posts. A post can be a topic, a reply to a topic, or a reply to a reply.

Social Squared also offers a forum experience that categorize topics around subject areas, thereby allowing users to seek or provide information about the subject area, and connect to users who have subject matter expertise. Social Squared also provides reporting.

Forums are arranged into forum groups. Forum groups allows the development of dashboards, (SharePoint® pages), using Social Squared Web Parts, that display information from forums in one or more forum groups. Below is an example of the Social Squared Forums Web Part configured to displaying all forums in one forum group, **Nurses**. You can use this Web Part to find information by navigating the forum hierarchy and to search.



This Web Part also displays on the top far right, up to two tab :

- Chat. This can be used to show or hide the chat pane, allowing users to chat to each other. This tab is only displayed if Chat is set to true on the Forum Settings page.

- Forum Tools. When a user hoovers their mouse over this tab, they are provided with links to edit their Social Squared User Profile, view email subscriptions, and to see followers.

Go to top →

Navigation

The Social Squared Forums Web Part provides a mechanism of navigating down the forum hierarchy by clicking the title of the Social Squared object, for example, to navigate to a topic, in the forum group view, click the forum title to see a summary of the topics in the forum, and then click on the topic subject title. Once you have navigated down the forum hierarchy, the Web Part provides a breadcrumb that allows you navigate back up the hierarchy, for example, by clicking the Web Part title; or to a forum by clicking the forum name, and to a topic by clicking a topic name. The breadcrumb is displayed at the top of the Web Part which is not only a navigation aid but also allows you to keep track of your location within the forums. The breadcrumb is displayed in the format < Web Part tile > < forum > < topic >.

Go to top →

Search

An alternative to navigating the forum hierarchy, you can use the **Social Squared Forums** Web Part, to search the forums, by typing keywords in the Search text box, which is display to the top right of the Web Part.

Go to top →

Using Forums

A forum allows you to converse about topics of interest. In Social Squared forums are categorised into forum groups. When you have navigated to a forum, then to the right of the forum name on the breadcrumb is the RSS icon , that provides a link that you can use with your preferred RSS reader.

The Social Squared Forums Web Part provides a summary for each topic within a forum, displayed in activity order. For topics that have unread posts, the topic heading appears bold. A maximum of 10 topics are displayed per page. This number can be changed by the Social Squared administrator, using the Forms Settings page. The Web Part allows you to navigate between the pages.

The Web Part also provides two links:

- Add a New Topic. Use to create a new topic.
- **Subscribe**. Use to subscribe to email alerts for this forum. You can view manage your email alerts, by clicking **View Email Subscriptions** from the Forum Tools tab.

For each topic, the Web Part displays a summary of the topic. The diagram below, displays a topic, **Clinical Equipment in Nurses Room**, and looking at the breadcrumb, the name of the forum is, **New to Nursing: Hints, Tips and Mentoring**.

The topic summary includes the following information:

- Topic subject. This is a link, which displays a detailed view of the topic and topic posts.
- The user who created the topic and their online status. Use this link to display the user's Social Squared User Profile page.
- The date and time the topic was created,

- The number of replies (posts). This link displays the same information as when you click the *topic subject* link.
- The number of times the topic and its replies have been viewed. This link displays the same information as when you click the *topic subject* link.
- The user who last posted to this topic, and their online status. Use this link displays the user's Social Squared User Profile page.
- The date and time of the last post.
- When voting is enabled for the forum, then a **Votes** column displays the number of users who have voted for the topic.

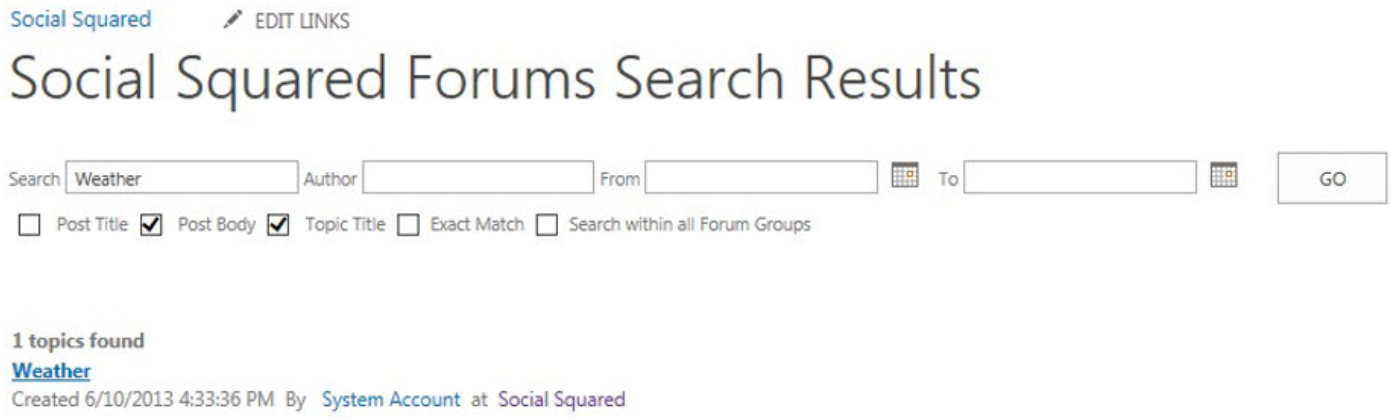
To navigate to a topic, click either the topic subject, the **Replies** count or the **Views** count.

Go to top →

Searching Forums and Posts

It is possible for users to search forums using Social Squared integrated search. To the top right of the Social Squared Forums Web Part you can use the **Search** text box to type keywords.

Once you have click **Go**, the **Social Squared Forums Search Results** page is displayed, where you see the topics and replies that contain the keywords you typed.



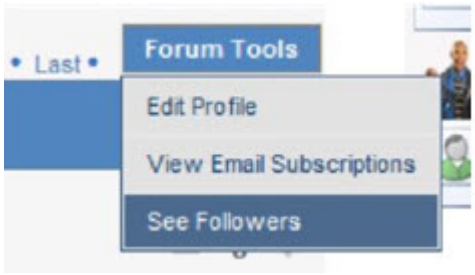
The **Social Squared Forums Search Results** page provides a number of advanced search options that will help you narrow down the results displayed on the page.

Social Squared can be integrated in to SharePoint search by using Business Connectivity Services (BCS) in Microsoft® SharePoint® 2013 or Microsoft® SharePoint® 2010 or as it was known in Microsoft Office SharePoint Server 2007, Business Data Catalog. This allows Social Squared topics and posts to appear in the standard SharePoint search results page along with other SharePoint content. If you wish to use this method of integration Social Squared content with SharePoint search, please contact Lightning Tools for further documentation, by clicking Submit Support Ticket on Lightning Tools web site.

Send a private message

To send an email message using your default mail program, click the mail icon to the right of the users name. The mail icon only appears when the user has a email address configured in their Social Squared profile.

Forum Tools Menu



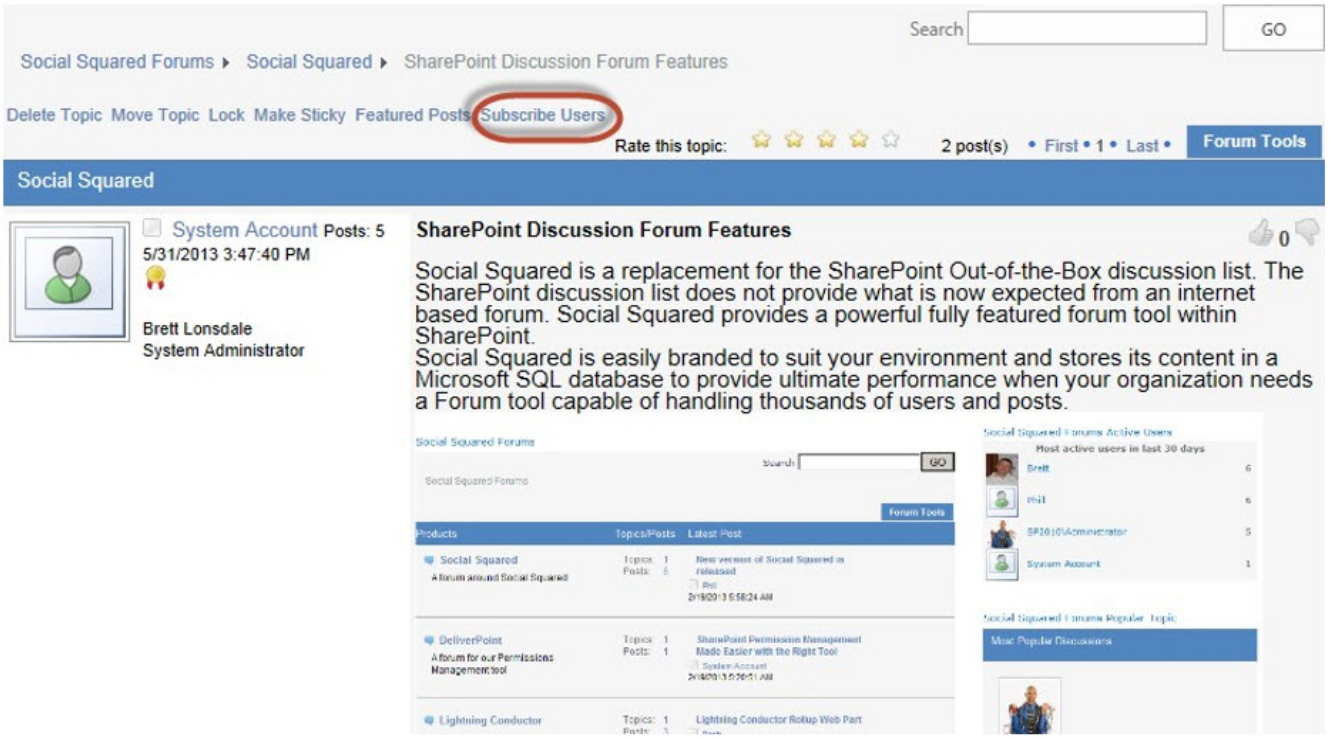
In the top right of the **Social Squared Forums** Web Part you'll see the **Forum Tools** that provides a drop down menu with the following links:

- **Edit Profile**. This displays the **Edit Profile** dialog where users can set their Social Squared User Profile properties and upload a profile picture.
- **View Email Subscriptions**. This displays the **Forum Subscription** dialog where users can view the forums and topics they have subscribed to receive alerts. Users can use this dialog to delete their subscriptions.
- **See Followers**. This displays users who are following them.

Email Alerts

Email alerts are a great way for your users to be notified of changes to topics that interest them. There are a number of ways of subscribing to email alerts in Social Squared

1. Forum wide alerts can be enabled by clicking the **Subscribe** link within a forum. You can also subscribe other users by clicking **Subscribe Users**.



You can subscribe to receive email notifications whenever a new topic is added to a forum.

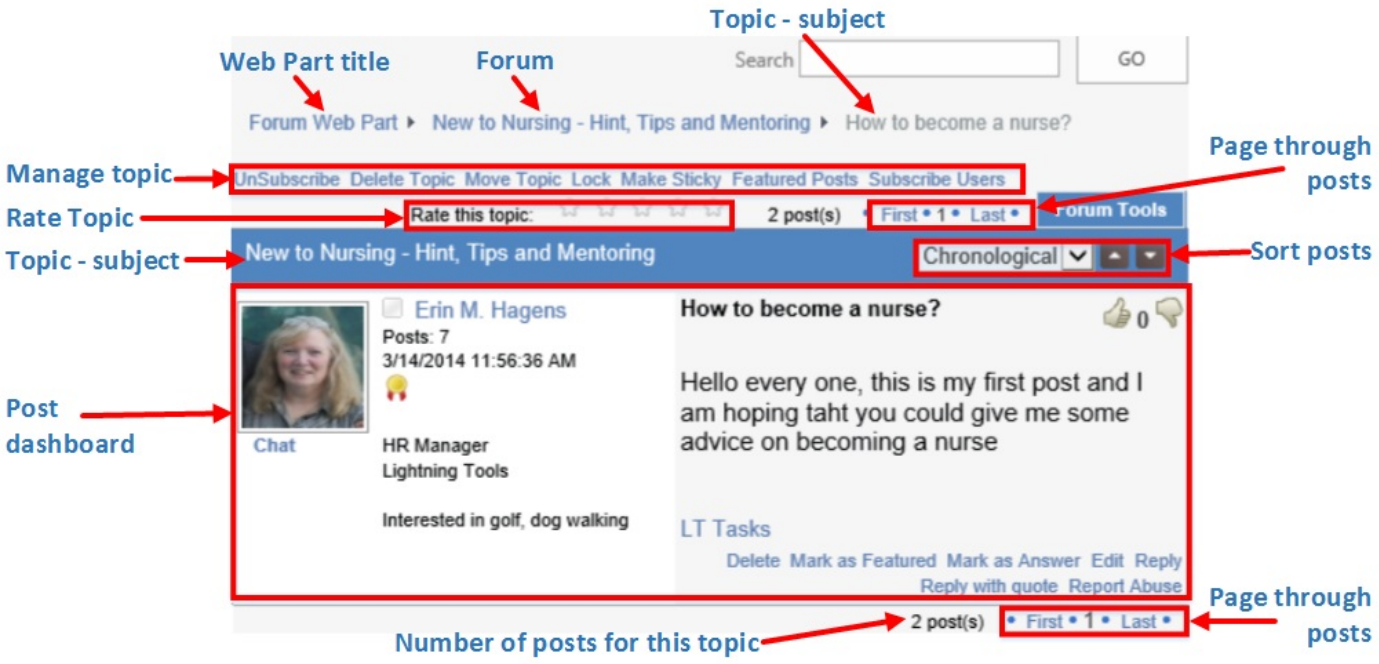
2. Topic wide alerts If you are interested in a particular topic, then you can subscribe for alerts for that topic. You then receive an email notification whenever a new reply is create for that topic.
3. Subscribe for an alert when creating a new topic or reply. You most likely want to receive forum email alerts when a topic you are created is updated with a new reply. When you create a new topic or reply, receiving alerts is really easy as there is a checkbox that is selected by default to subscribe to

alerts.

Tags
e.g. JSON deployment .NET
Attach Files:
Browse...
Select SharePoint Library Items:
Browse...
Alert me when new reply appears
Post
Cancel

Topics

A topic is a way to start a conversation with other users in a forum. The subject of the topic can be in the form of a question or the title of what you want to discuss. You can find a previous created topic using the Search box in the Social Squared Forums Web Part or by navigating down the forum hierarchy by clicking a forum group name, then a forum and finally the subject title of the topic, again using the Social Squared Forums Web Part.



When this Web Part displays a topic, a set of links are displayed that allow you to:

- Manage the topic,
- A control that allows users to rate on the topic.
- Allow users to sort posts chronologically in ascending or descending order.
- Forum Tools tab.
- For each post a dashboard that details the creator of the post, the post subject and body, plus links to any attached files or to list items, and then a set of links that allow you to manage the post.

Managing Topics

Above the Topic title, the following links are displayed:

- **Subscribe**. Use to subscribe to email alerts for this topic. Once you have subscribe to email alerts for a topic, the wording of this link changes from **Subscribe** to **Unsubscribe**, which you can use to remove email alerts for this topic. You can also manage your email alerts, by clicking **View Email Subscriptions** from the Forum Tools tab.

- **Delete Topic**. Use to delete the topic. A dialog box displays asking if you are sure to delete the topic. When a topic is deleted all the posts associated with that topic is deleted. Using the Social Square Forums Web Part there is no mechanism to undelete topics and posts. To retrieve deleted topics and posts you need to contact your IT department.

- **Move Topic**. Use to move a topic to a different forum, including forum in other forum groups.

- **Lock**. Use to make a topic read only. Users can not create, edit, reply or vote for posts, neither can they rate the topic. However a lock topic can be deleted. Once you have locked a topic, the wording of this link changes from **Lock** to **Unlock**, which you can use to remove the lock on the topic. When you navigate to a forum, then topics that are locked have a lock icon to the right of the topic in the **Details** column.

- **Make Sticky**. Social Squared Web Parts display topic in the order of most activity. Use this link to place this topic above the list of most active topics. This is useful for a topic that you want to highlight or a topic that is an announcement or an event. Once the topic is a sticky topic, the wording of this link changes from **Make Sticky** to **Make Unsticky**. The topic remains sticky indefinitely until you click **Make Unsticky**.

- **Featured Posts**. Use this to display only featured posts for this topic. To mark a post as Featured, click **Mark as Featured** at the bottom of the post.

- Subscribe Users

Go to top →

Sorting posts within a Topic

On the Social Squared Forums Web Part you can sort topics chronologically, by author name and by votes.

By default, the ability to sort posts is not activated. This can be configured using the Forum Settings page.

Create a Topic

Within the Social Squared Forums Web Part you will find forums where you can leave a reply. Also if you are a Social Squared administrator or if the Social Squared administrator has allowed non-administrators to create new topics. Once you have created a new topic, you should monitor the replies, by subscribing to the topic, vote on the replies, click Report Abuse when you find any inappropriate replies and when a reply answers your question correctly let other users know by clicking **Mark as Answer**.

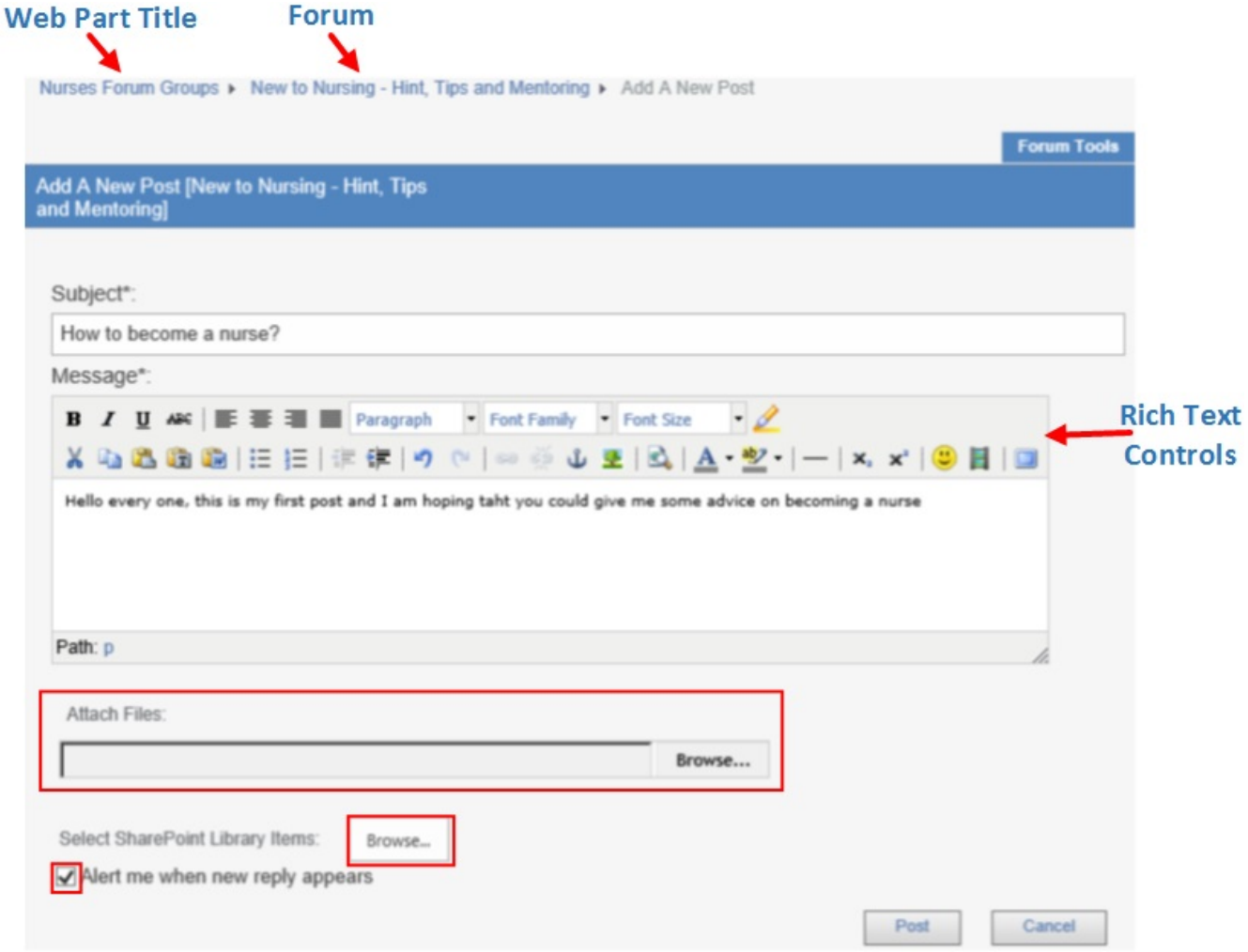
> Before creating a new topic in a forum, you should familiarise yourself with the types of subjects that are created in the forum. Instead of creating a new topic, it may be best to reply to a post in an existing topic, or if you want to ask a question then there may be a topic that answers your question. By reviewing existing posts and topics, you will soon recognize those posts you like most, and that you can use as a guideline for the content you provide in your own topics and posts.

When you want to start a new conversation, decide which forum where you want to create the new topic, and the use the following steps:

1. Navigate to the forum group that contains the forum where you want to create a topic.

2. Click **Add a New Topic**.

3. Text boxes, and rich text toolbar are displayed on the page.



- Type the **Subject** of the new topic. Although Social Squared does not prevent you from creating a topic with a subject the same as another topic, you should use a unique subject to prevent confusion, and to ensure that you are not generating a topic for a conversation that has already been created. The length of the title should not be so long that it looks like a full message, nor should it be so vague that it does not help users to decide whether the subject of the topic is of interest to them. Users browsing forums do not have time to click through and read each and every post, so provide a descriptive and accurate topic subject. The subject of a topic also appears in the search results, when keywords match works in the subject. Do not sensationalize the subject of a topic by using asterisks or using all capitals.

- Type and format the body of your topic **Message**. Use the rich text toolbar to format the text and include links , images , emotions , embed media and code .

- Attach files, by clicking the **Browse** button to the right of the **Attach Files** text box.
- Add links to list items in any list or library within the site collection, by clicking the **Browse** button to the right of **Select SharePoint Library Items**.
- Select or deselect the **Alert me when new reply appears** check box.

6. Click **Post** to save the new topic.

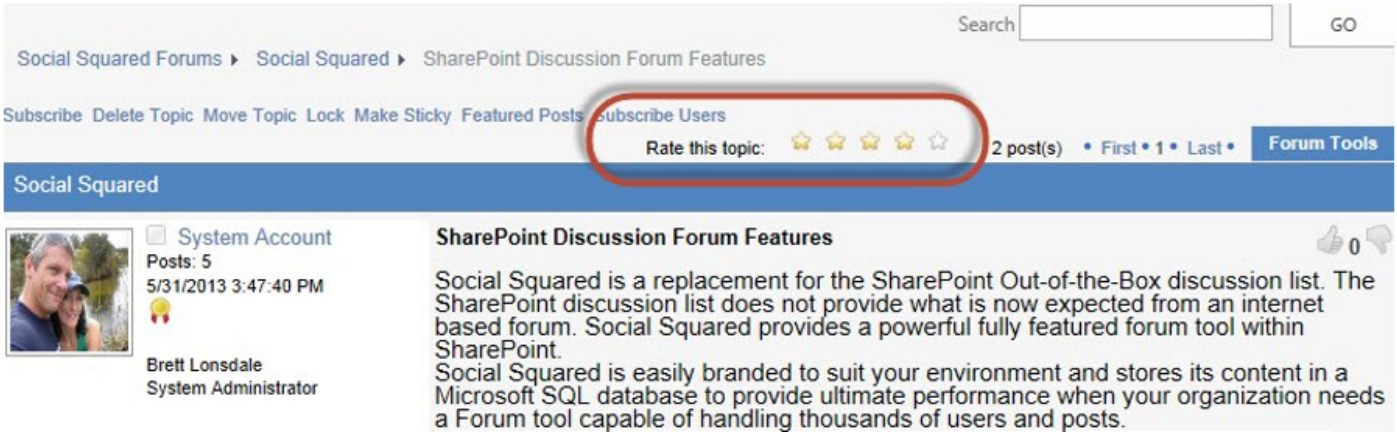
Un-read Topics

When you re-visit a forum although the topics are ordered in activity order it is sometimes difficult to tell which topics have had a reply since you last visited. With Social Squared, any topics that have a post that you have not seen have their topic heading appearing in bold characters. Once you have visited that topic and read the posts the topic heading appears in a standard font.

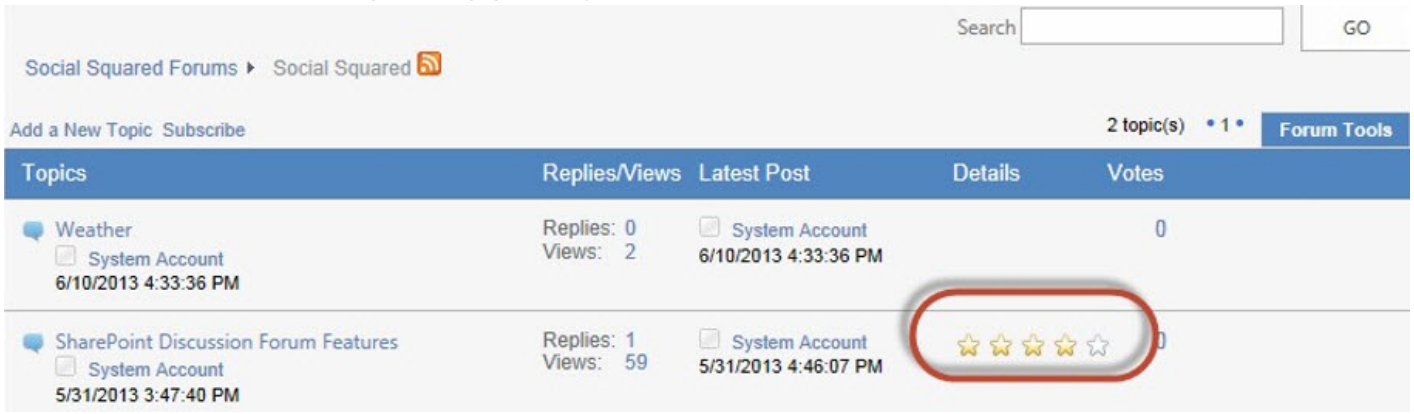
If you then navigate away and between now and your next visit another users adds a new reply to that topic, upon re-visiting the topic title will again appear as bold.

Topic Ratings

You can let your fellow forum users know how good or important you think a topic is by rating it:

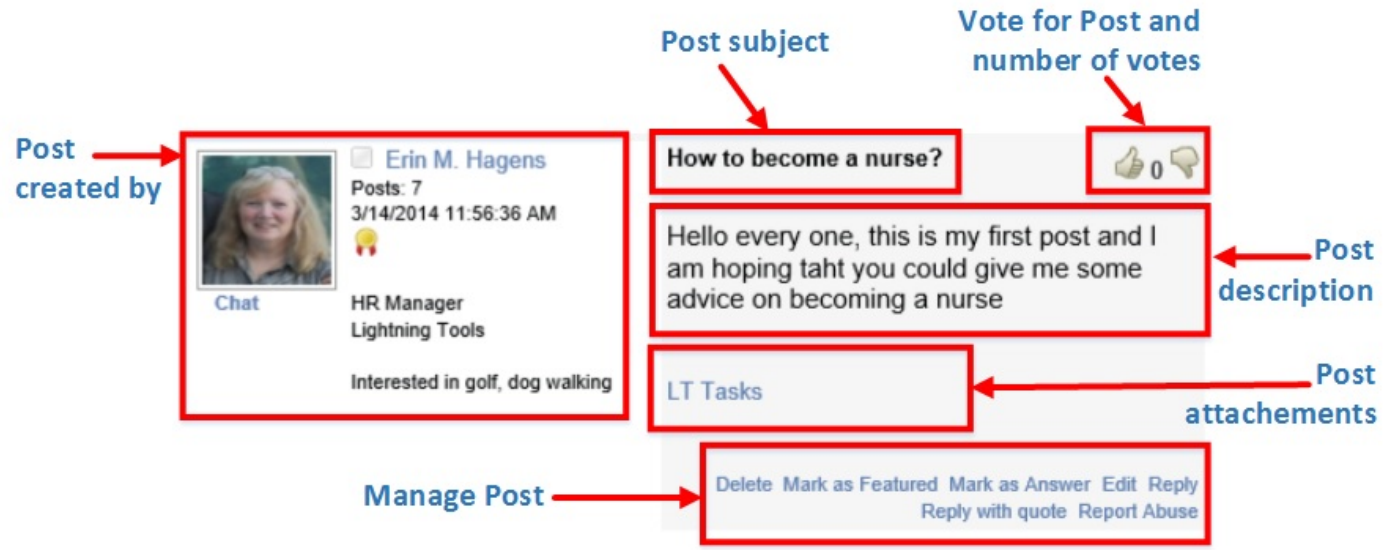


In the forum view, the average rating given by all users to the topic is shown.



Post dashboard

When a topic is displayed in the Social Squared Forums Web Part, for each post in that topic a post dashboard is displayed. A post is created when a topic is first created and a reply to a post.



The post dashboard allows you to:

- See who created the post, with information from the user's Profile, for example, the number of posts that they have created within Socials Squared, one or more badges that represent their achievement level / reputation, signature, and if chat is enabled, a link that allows you to instantly chat to the user if they are online.

- Post subject. The subject or title of the post. When you reply to a post, the default title of the post is the title of the post that you are replying to. This can be changed when the post is created. You can modify the post and it's subject if you created the post or if you are a moderator of the forum.

- The ability to vote on the post, and to see the number of votes by other users. This option is only available if voting has be activated for the forum.

- Post description. The description of the post. This can include formatted text, as well as links, images, video and emotions.

- Post attachments and links to list items and files in libraries.

- Tags. When tagging is enabled, the creator of the post can associate keywords with the post. Keywords quickly tell users what a post is about. Tags also make it easier for users to find content

especially when the Social Squared Forums Tagging Web Part is added on the same SharePoint® page as the Social Squared Forums Web Part.

- Links that allow you to manage the post:
  - **Delete**. Use this link to delete the post. A dialog box displays asking if you are sure you want to delete the post. Using the Social Square Forums Web Part there is no mechanism to undelete a post. To retrieve deleted posts you need to contact your IT department.
  - Mark as Featured.
  - **Mark as Answer**.
  - **Edit**. Allows you to edit the post.
  - **Reply**. Allows you to reply to the post.
  - Reply with Quote
  - Report Abuse

When a topic is locked, the links **Edit**, **Reply**, **Reply with Quote** are not available.

Go to top →

Using the Rich Text Toolbar

When you create a topic, reply or reply to a reply then a number of input controls allow you to type content, such as the Subject, Message, Tags, Attach Files and list items. The Message input control allow you to add text, format the text, as well as including adding images, emotions and embed media, using a Rich Text toolbar.

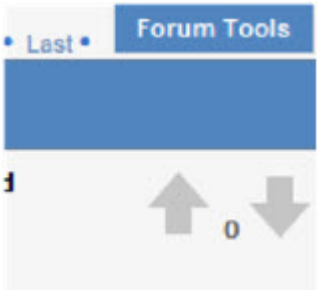
The toolbar contains two rows of controls that allow you to customise your content.

Icon	Control	Keystroke
B	Bold	Ctrl+B
I	Italic	Ctrl+I
U	Underline	Ctrl+U
ABC	Strikethrough	–
	Align Left	–
	Align Center	–
	Align Right	–
	Align Full	–
Paragraph	Format	–
Font Family	Font Family	–
Font Family	Font Size	–
	Insert Code using Syntaxhighlighter	–
	Cut	Ctrl+X
	Copy	Ctrl+C
	Paste	Ctrl+V

	Paste as Plain Text	–
	Paste from Word	–
	Insert/Remove Bullet List	–
	Insert/Remove Numbered List	–
	Decrease Indent	–
	Increase Indent	–
	Undo	Ctrl+Z
	Redo	Ctrl+Y
	Insert/Edit Link	–
	Unlink	–
	Insert/Edit Anchor	–
	Insert/Edit Image	–
	Preview	–
	Select Text Color	–
	Select Background Color	–
	Insert Horizontal Line	–
	Subscript	–
	Superscript	–
	Emotions	–
	Insert/Edit Embedded Media	–
	Toggle Full Screen Mode	–

Voting on Posts

As of Social Squared version 4.0.0.1, voting functionality can be enable, which allows users to vote on posts, as well as rate an entire topic. You will soon recognize posts and topics you like most and those users who provide great content, great ideas, great links, and breaking news. It is good practice to vote for posts and rate topics that you like. Also when you find a person who does provide good content you should consider following them.



When you like a post click the up voting icon, which can be an arrow or a thumb . The voting icon is configured by a Social Squared administrator, using the Forum Settings page. You may also be able to vote to dislike a post.You can only vote once on each post, and you cannot vote on your own topics or posts. Topics and posts can be sorted so that they are displayed with the highest number of votes appearing first.

Post voting is activated on a forum by forum basis using the Edit Forum page. In the **Voting** section, there are two checkboxes:

- **Allow Voting**.
- **Allow Only Up Voting**.

When the main purpose of a forum is for questions and answers, **post voting** and **order by vote** is an excellent aid for identify posts with useful information. When a forum contains more discussion type topics, post voting can be useful, however, many forum owners do not select the **Allow Voting** check box on the Edit Forum page, thereby allowing posts to flow in a discussion type manner.

Featured Posts

At the bottom of a post, is a link, **Mark as Featured**, which allows moderators and site owners to highlight replies. If the forum topic title is in the formed of a question, the reply may not be an answer to the forum topic, but the reply may contain useful information related to the topic, and allows the post to be highlighted. A featured posts can be cleared by clicking **Unmark as Featured** when you are logged in as a Moderator or Site Administrator.

Moderator

SP2010\Administrator
Posts: 10
2/19/2013 4:15:31 AM

The Most Important SharePoint Company in the World!

New version of Social Squared is released

1

> Posted by SP2010\Administrator

New version of Social Squared

Social Squared version 8 has been released by Lightning Tools and offers the following improvements:

- Great New Look and Feel
- Recent Topics
- Popular Topics

Great New Look and Feel

The new look and feel provides a more intuitive and pleasing interface for users who participate in the Social Squared Forums. It's not just the Forum Web Part itself that has been improved, but the settings pages have been improved also.

Recent Topics

The recent topics is a new category at the bottom of the forum web part that displays the most recent topics.

Popular Topics

Popular Topics is a seperate web part that can be added to your page to show the topics that have the most views.

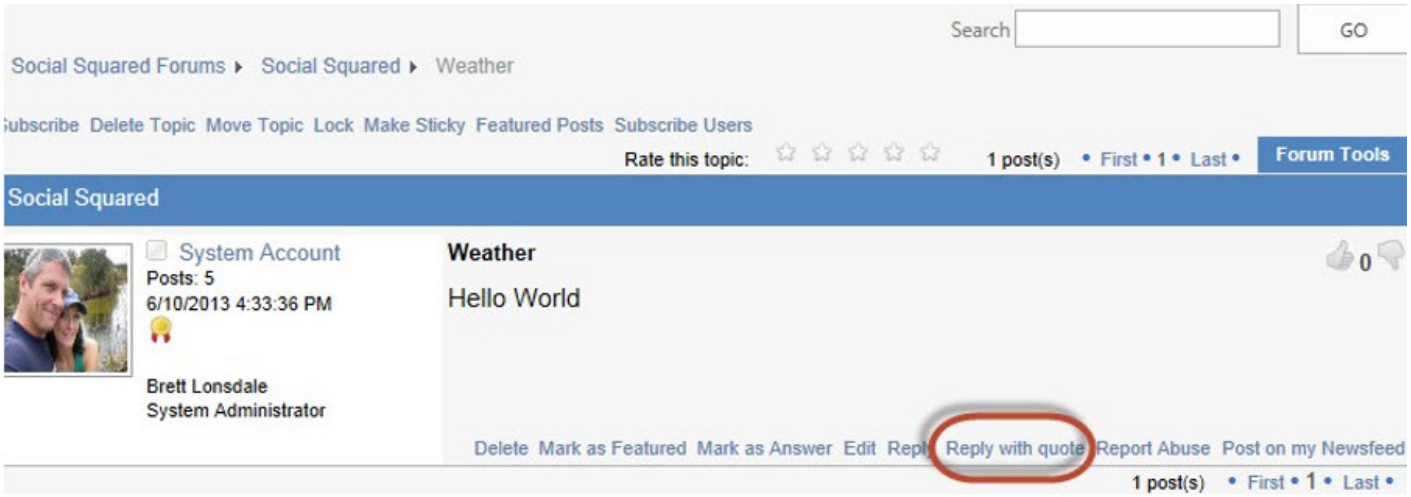
We hope you enjoy using the new product by Lightning Tools

This is awesome! The Reply with quote looks tonnes better than before!

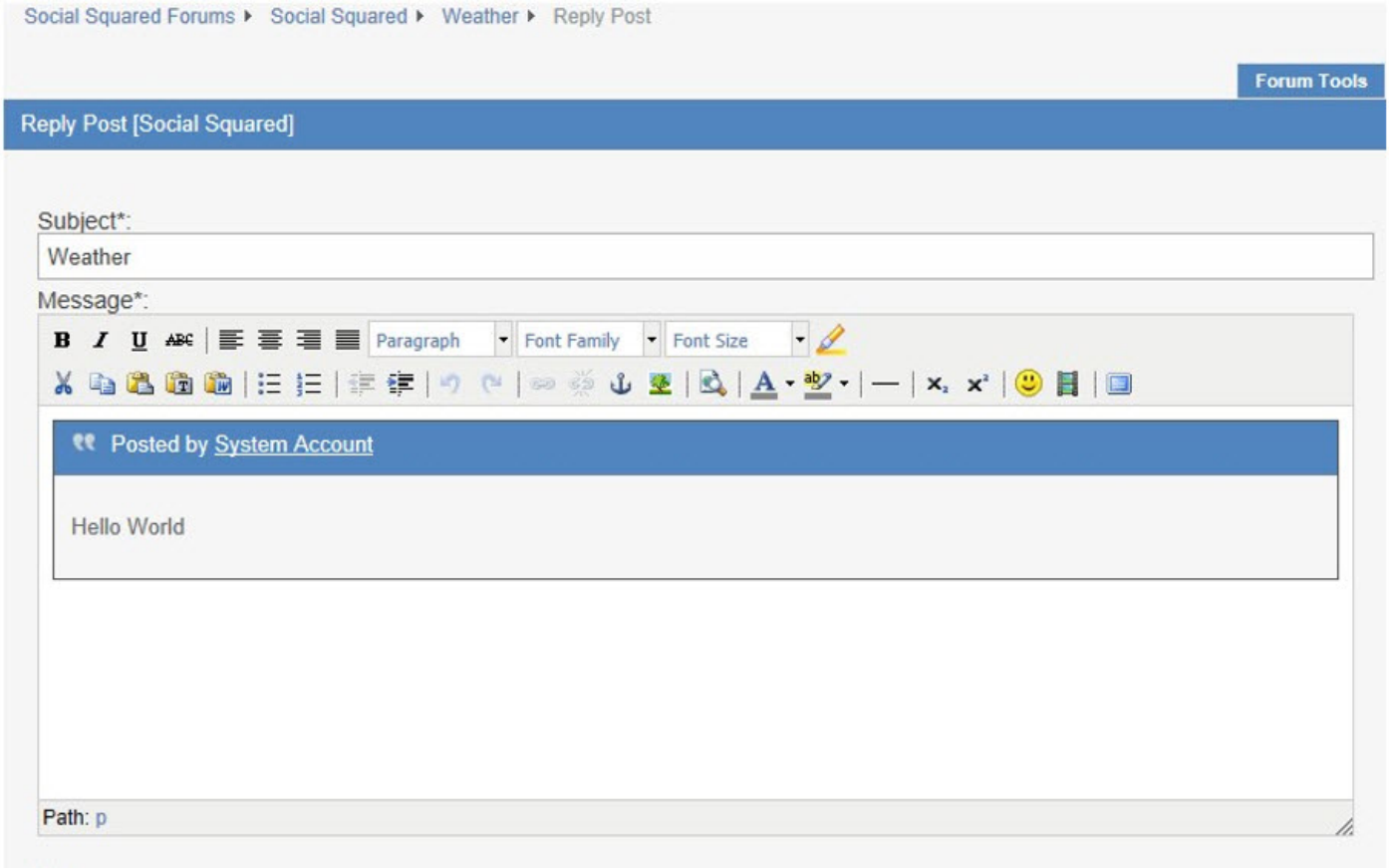
Delete Mark as Featured Mark as Answer Edit Reply Reply with quote Report Abuse

Reply with quote

When you reply to someone's post you may want to include the text of their post in your reply. You can do this by clicking **Reply with quote**, which is displayed at the bottom of their post.



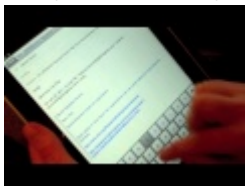
This will include the text from the original post



And when you have finished typing your reply, click **Post** at the bottom of the page, and you'll see the quote included

Replying to a post or creating a new Topic using Email

A new feature introduced in Social Squared version 5.5.0.1, is the ability to create a new topic using an email, when Reply Via Email is enabled. Using this new functionality either create a new topic using email or reply to a post by replying to the email that notified you of the post.



To create a new topic by email, simply send a new email to the email account your Social Squared administrator has configured in the Reply Via Email settings. The subject of the email should be in the format:

< ForumName >:The title of your new topic
Or
< ForumGroupName >:< ForumName>:The title of your new topic

For example:

BDC Meta Man:How do you use Stored Procedures?

This creates a new topic in the **BDC Meta Man** forum with the title **How do you use Stored Procedures?**.

Report Abuse

If a user has created a topic or post that you find inappropriate you can report it by clicking **Report Abuse** at the bottom right of each post:

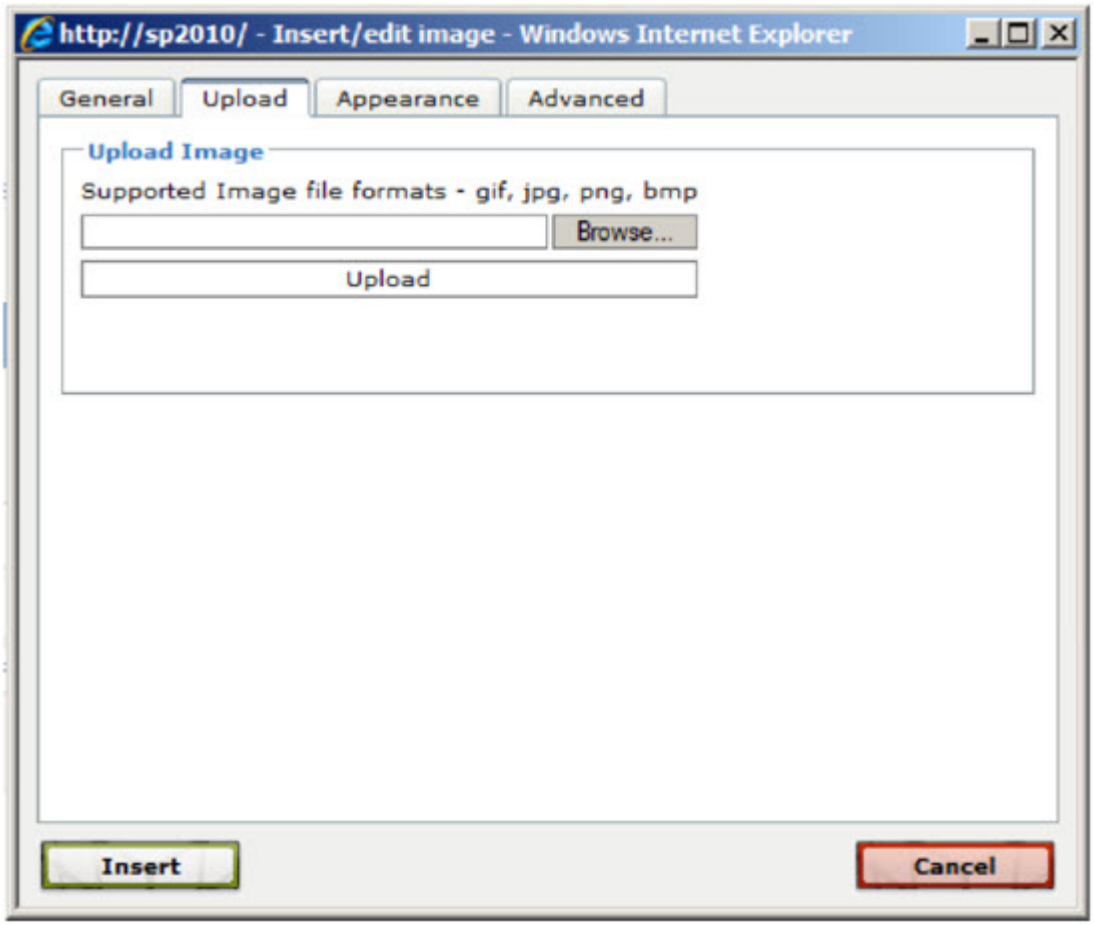
When clicked the **Report Abuse** page is displayed. In the **Reason** text box, type why you think the post is not acceptable and then click **Report**. An email alert is then sent to the site owners and any moderators that may have been setup for the forum where the post was created.

Inserting and Uploading an Image

In previous versions of Social Squared, when you wanted to include an image into your post or reply to a post, you had to already have the image loaded on the web somewhere or upload the image to a SharePoint® library. In either case you had to know the url of the image. Then using the url, you were able to insert the image into your post. Either way, it wasn't the best experience.

Inserting an image is now easier. From Social Squared version 3.0.0.2, the Insert Image functionality has been extended. Now when you click on the insert image icon in the rich text toolbar, you can still provide the image url if the image is already uploaded, however you will see that a new **Upload** tab has been added to the **Insert/edit image** dialog box, that allows you to quickly upload an image from your computer.

The **Insert/edit image** dialog box contains four tabs: General, Upload, Appearance and Advanced, which are described below. Once you have provided the necessary information click **Insert**. If you are editing a previously inserted image, then the text of the button is **Update** and not **Insert**. A link to the image is provided at the bottom of the post.



Go to top →

General

Use the **General** tab to specify the **Image URL**, **Image description** and **Title**. You will see a preview of the image in the **Preview** box. If the image is not uploaded to the web, then use the Upload tab. For accessibility reasons you should provide the text for both the **Title**, which appears when a user moves their cursor over the image; and **Image description**, which is assigned to the **alt** attribute that is displayed if the image can not be display, and is used by screen readers.

When you use the **Upload** tab to upload your images, they are stored in the Social Squared database, thereby ensuring that everyone who sees the post can see the image, no matter which site the post is displayed. If you choose to upload your images, for example, into a SharePoint® document library and then provide the URL to the image in the **Image URL** text box on the **General** tab, then you must ensure that which ever site the post is accessible, that all users have permissions to see the image in your post.

Go to top →

Upload

To upload an image, click **Browse**, select the image you want to use, and then click **Upload**. When the image has been uploaded a message in red text appears below the **Upload** button, Image has been uploaded, please click on the General tab to preview your image. A link to the uploaded image is displayed at the bottom of the post as a file attachment.

Support image file formats are: gif, jpg, png and bmp. If you try to upload an unsupported image file format a message in red text appears below the **Upload** button, Not supported Image file format.

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Appearance

On this tab you can configure how the image is displayed within the post, using the following options:

- **Alignment**. From the drop down list, select, **Not Set**, **Baseline**, **Top**, **Middle**, **Bottom**, **Text top**, **Text bottom**, **Left** or **Right**. This is equivalent to using vertical-align CSS property.

- **Dimensions**. Use the two text boxes to control the height and width of the image in pixels. If no values are typed into the boxes then the image is rendered using the dimension of the original image. Ideally you should not use these text boxes to constrain the dimensions of the image when rendered in the browser – the size of the image should be changed before uploading it to the web, using Paint, iPhoto®, Microsoft® Office Picture Manager, Photoshop®, other third party image editing tools or free online web sites. If you're unsure of the dimensions of your image, before you upload your image, right-click on the image file, click **Properties** and then on the **Details** tab you should see the dimensions of the picture.
- **Constrain proportions**. Select this check box, when you want the proportion of the height when compared to the width remains that same as those in the image file.
- **Vertical space**. This specifies the whitespace that appears above and below the image, and is equivalent to using the margin-top and margin-bottom CSS properties.
- **Horizontal space**. This specifies the whitespace to the right and left of the image, and is equivalent to using margin-left and margin-right CSS properties.
- **Border**. Use this option to configure a solid black border around your image. Type the width of the border in pixels for the border to appear. When no value is typed in the text box, no border is displayed around the image.
- **Style**. As you specify the previous options, in the **Style** text bottom you will see the CSS properties that the options translate too. If you know CSS you can type CSS properties in this text box.

Go to top →

Advanced

Use the **Advanced** tab to configure the following options:

- **Swap image**. You can specify an alternative image when a user's moves their cursor over the image and / or when a user moves away from the image. You must previously upload the **mouse over** and **mouse out** images, and then specify the URL of the images in the text boxes.
- **Id**. In this text box, specify a unique identifier for the image.
- **Language direction**. From the drop down list you can select, **Not Set**, **Left to right** or **Right to left**. This specifies the text direction/writing direction.
- **Image map**. Use this text box to specify an image map, which is a list of coordinates relating to the image, which when clicked directs the user to different web destinations. Image maps provide an easy way of linking various parts of an image to hyperlinks, without the need to divide the image into separate image files.
- **Long description link**.

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User Profile

Social Squared provides two modes for configuring user profiles:

- Social Squared can maintain User Profiles for users who do not have Microsoft® SharePoint® My Site functionality, either because your organization is using Microsoft® SharePoint® Foundation or in your organization has not made My Sites available for all users. SharePoint® My Site functionality is part of the User Profile service in SharePoint Server.
- Social Squared can work with your SharePoint® User Profile service, allowing users to manage their User Profile signatures, **About me** and User Profile picture through their **My Site**. In addition, Social Squared can be configured to integrate Social Squared posts with the SharePoint® newsfeeds.

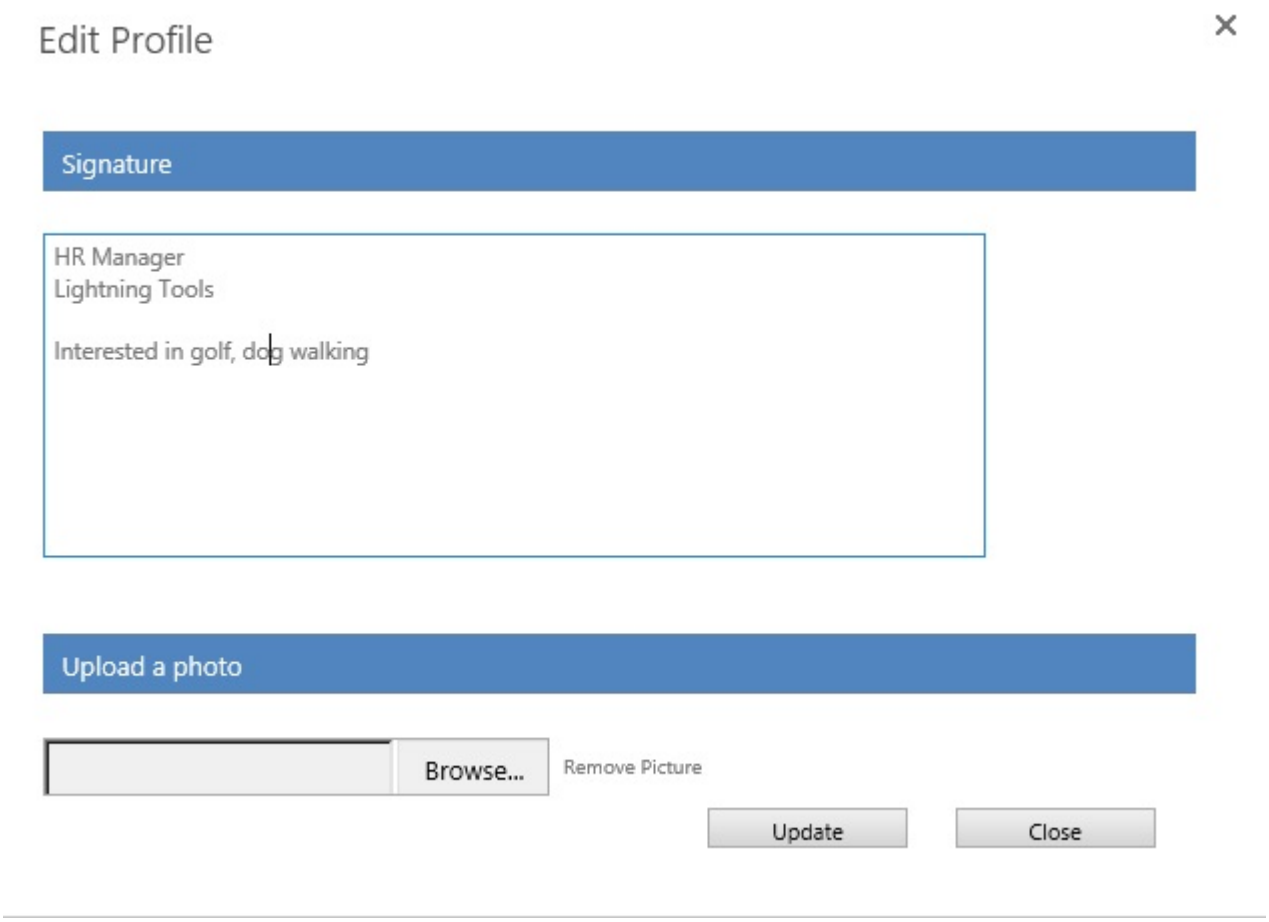
A summary of the User's Profile is displayed within the Social Squared Forums Web Part, when a forum or a topic is displayed, and the user has contributed to topics within the forum. The user's name is a link to either the their SharePoint® My Site **About Me** page or the Social Squared **User Profile** page, depending on how the Social Squared administrator has configure Profile Settings.

The Social Squared **User Profile** page, contains information about the user, such as, their name, photo, email address, a count of the posts they have created and signature. The **User Profile** page also allows you to follow the user.

Links to a user's profile page can also be found within the Social Squared Forums Popular Topic Web Part and the Social Squared Forums Active Users Web Part.

Users can modify their User Profile by clicking **Edit Profile** from the Forum Tools tab, or by clicking **Edit Profile** on the User Profile page, to display the Edit Profile dialog, where users can modify their signature and upload a new image of themselves. Depending on how your Social Squared administrator has

configured Profile Settings, the user may also be able to type a nickname and modify their email address.



User Signatures

Social Squared users can create a custom signatures that appear below every post they create. Typically this is a link to their blog, or maybe a quote they feel represents their views in life.

You can create a signature using your User Profile page, which can be displayed using one of the following steps:

- From the Forum Tools tab, click **Edit Profile**.
- Clicking your name in a post and then click **Edit Profile**.

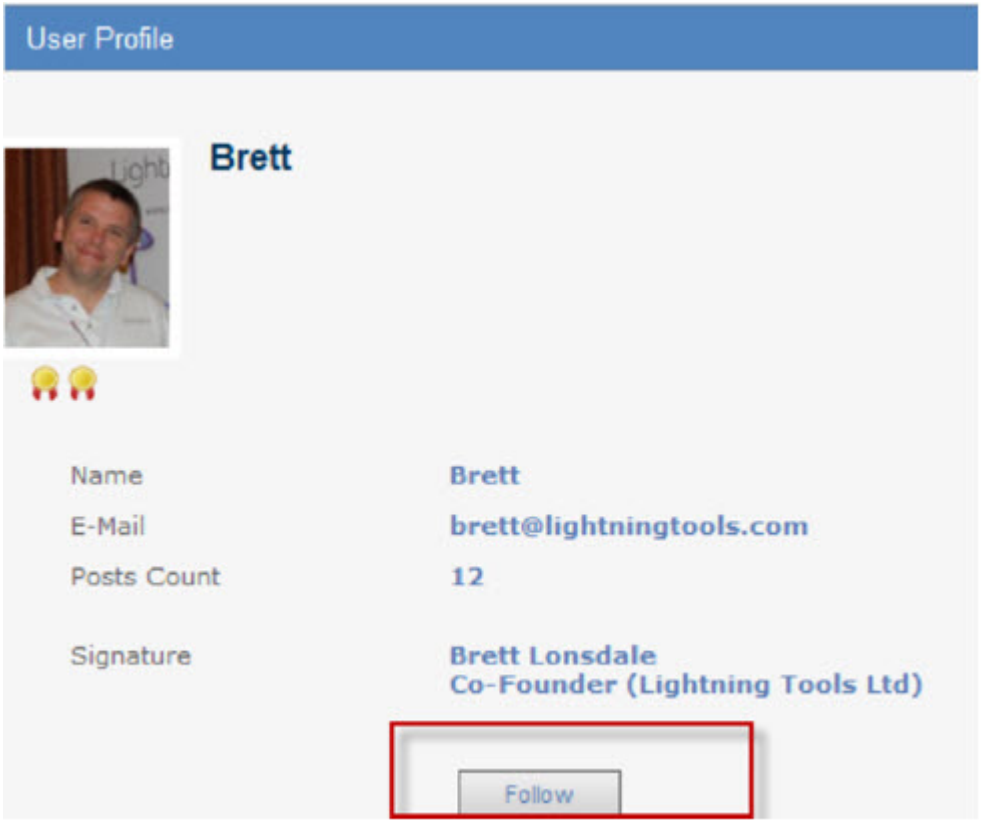
Once the User Profile page is displayed, in the **Signature** text box, type your signature, and then click **Update**.

User Post Count

To find out who the most influential users are in your forum, view the user post count that is displayed just below their name for each post

Follow a user

If you like the answers or discussions a particular user contributes to Social Squared forums, you can subscribe to get alerts each time they post. Click the person's name to display their User Profile page, and then at the bottom of the page, click **Follow**.



Administering Social Squared

To administer Social Squared 2013, you must activate the **Social Squared Forums** site collection feature, on at least one site collection. The **Social Squared Forums** site collection feature, when activated, adds:

- A set of links, under the section heading, **Social Squared Forum**, on the **Site Settings** page.
- The **Lightning Tools Web Parts** category in the Web Part gallery, if it does not already exist and displays the **Social Squared Forums** Web Part in that category.

Once the **Social Squared Forums** collection feature is activated, you can administer Social Squared using any site in that site collection, where you will see on the **Site Settings** page, a heading **Social Squared Forum**. Under the **Social Squared Forum**, you can use the following links to administer Social Squared:

- Forum Groups: Use this to create, modify and delete Forum Groups and Forums.
- **Role Manager**: Microsoft® SharePoint® 2013, like previous versions Forms Based Authentication (FBA). Use this option to specify the role for FBA registration.
- Connection String: Use to connect to the Social Squared SQL Server database, where all configurations and forum data is stored.
- Path Manager: Use to specify where the CSS files, images and user controls are stored.
- Forum Settings
- **User Merge**. Use to merge users from the free phpBB bulletin board software solution to Social Squared.
- Modify Email Template
- Timer Jobs Log
- **Online Documentation**. A link to this online documentation.

Activating the Site Collection Feature

By installing Social Squared on your Microsoft® SharePoint® 2013 environment, five site collections features, allow you to use Social Squared functionality. The five site collection features are:

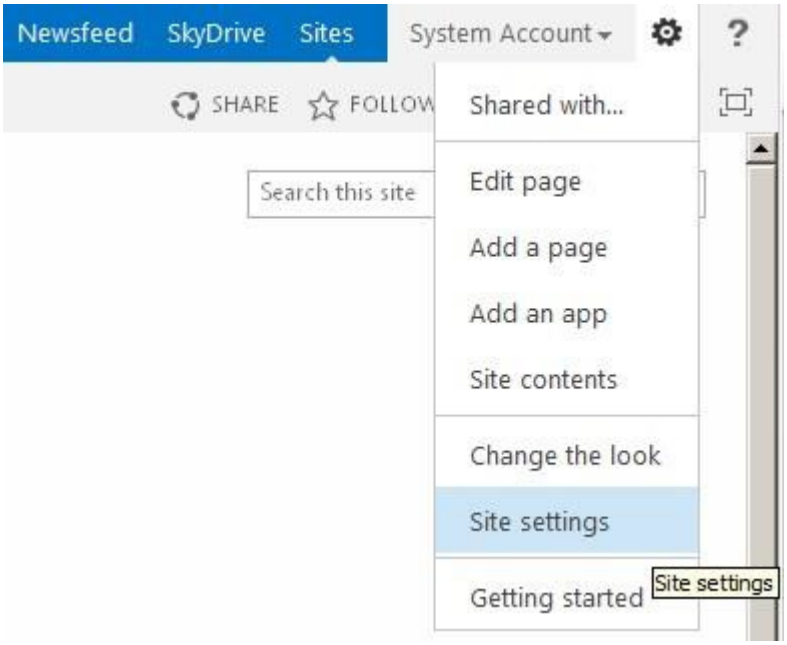
- Social Squared Forums
- SocialSquared Forums Active Users
- SocialSquared Forums Popular Topic
- SocialSquared Forums Tagging
- SocialSquared Reporting

To administer Social Squared 2013, you must activate the **Social Squared Forums** collection feature, on at least one site collection.

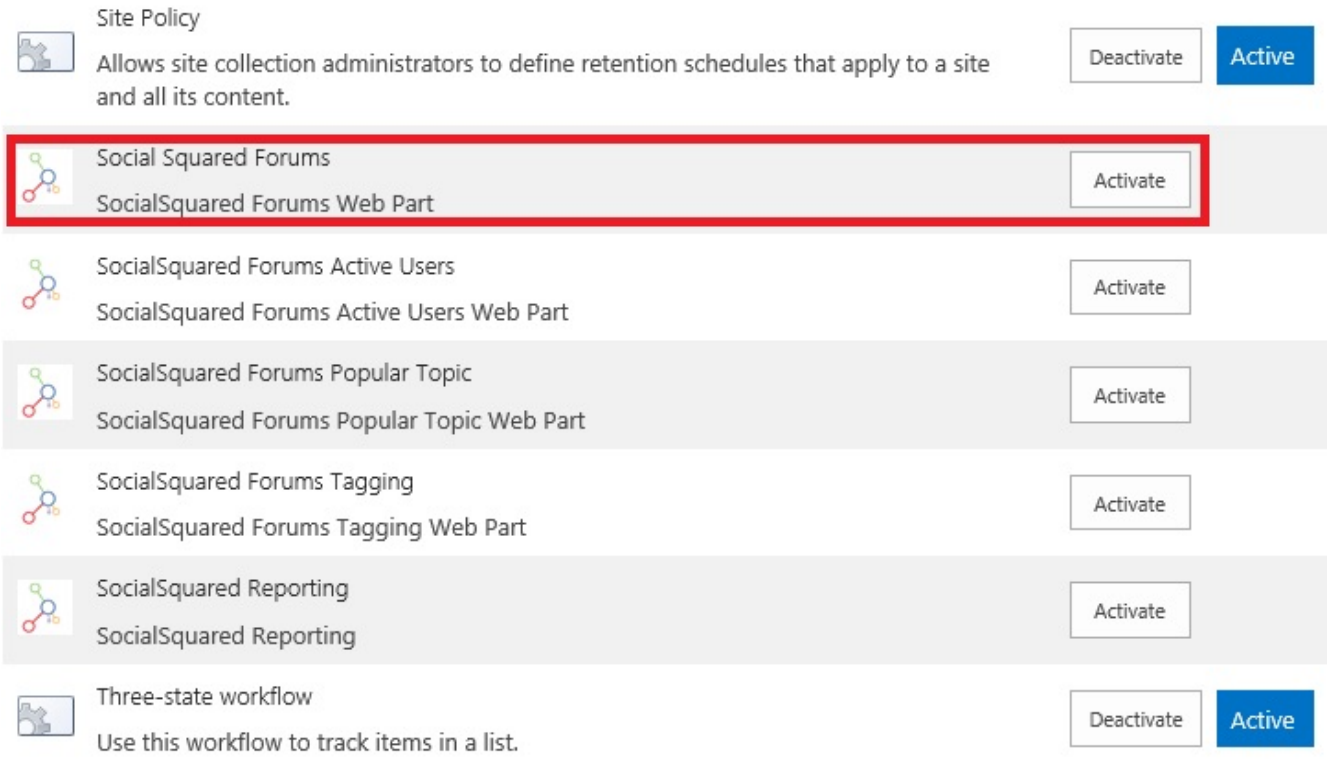
Use the following steps to activate a Social Squared site collection feature:

> You must be a site collection administrator to complete these steps.

1. In the browser, open the top level site of the site collection where your site exists.
2. Click the **Settings** icon, and then click **Site settings**.



3. On the **Site Settings** page, under **Site Collection Administration**, click **Site collection features**.
4. On the **Site Collection Features** page, to the right of **Lightning Conductor Web Part** click **Activate**.
5. To the right of a Social Squared site collection feature, click **Activate**.



Administering Social Squared and using the Social Squared Web Parts are discussed in the Using Social Squared section of this online documentation.

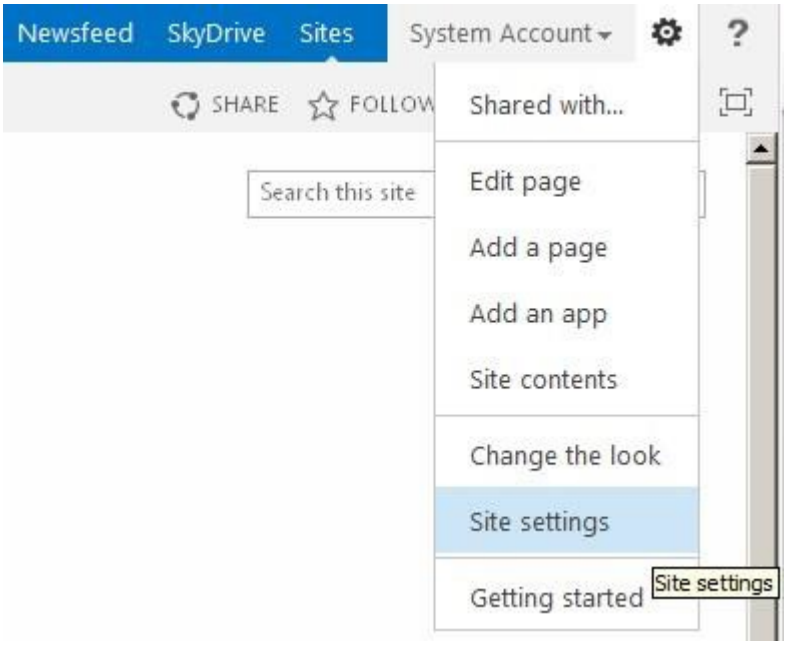
Setting the connection string —>
Using the Social Squared →
More information on site collection features →

Setting the connection string

A Social Squared Microsoft® SQL Server® database stores configuration and forum data. An organization may have multiple Social Squared databases to separate forums for security reasons. You configure at a site level, the Social Squared database that should be used, by users of that site, that is, all users in a site could use forums stored in one Social Squared database, whereas users in another site, even within the same site collection, could use forums stored in a different Social Squared database.

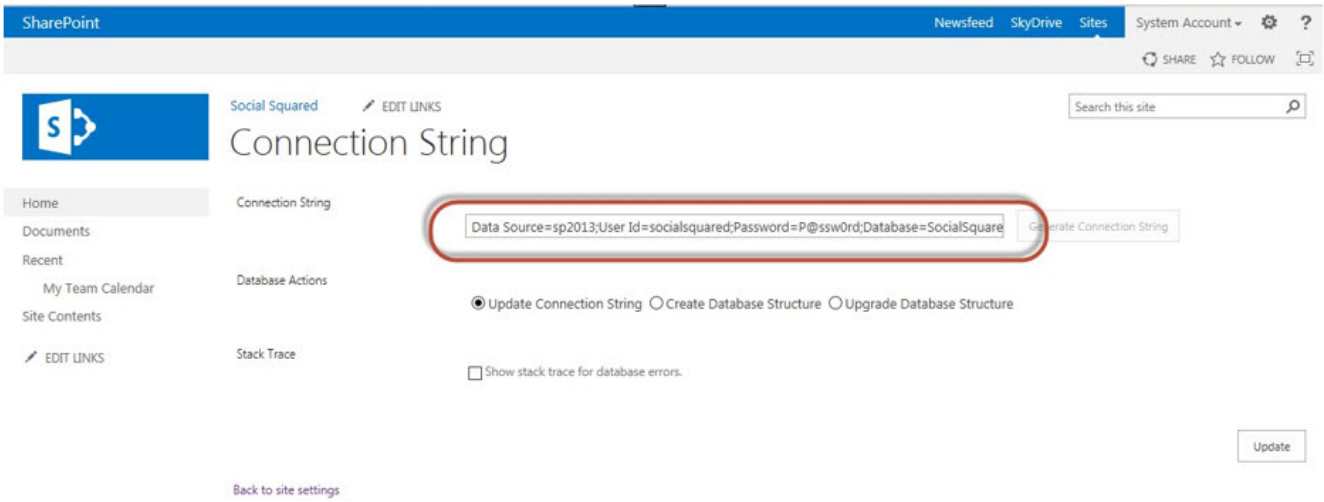
To configure the Social Squared database that a site should use, use the following steps:

1. In the browse navigate to your site.
2. Click the **Settings** icon, and then click **Site settings**.



3. On the **Site Settings** page, under **Social Squared Forum**, click on the **Connection String**.

4. On the **Connection String** page, in the **Connection String** section, type the connection string for the Social Squared database.



5. Click **Update**.

When SharePoint® and SQL Server® are on separate servers, and you are not using Kerberos, then you will need to use a SQL Server® account to authenticate to the Social Squared database database, to remove any issues such as the Double Hop problem that occurs with Windows Authentication. For more information, see the section in this online manual: Plan the installation of Social Squared. Once you have created a SQL Server® account that has access to your Social Squared database you can use a connection string similar to the one shown below:

Data Source=sql1;User Id=socialsquared;Password=P@ssw0rd;Database=SocialSquared

If you'd like assistance configuring this via a remote support session please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site.

Managing Forums

This page details the key components of Social Squared, how to manage forums and forum groups, and what you need to create to start using Social Squared.

Key Components

The two key components of Social Squared are **Forums** and **Forum Groups**.

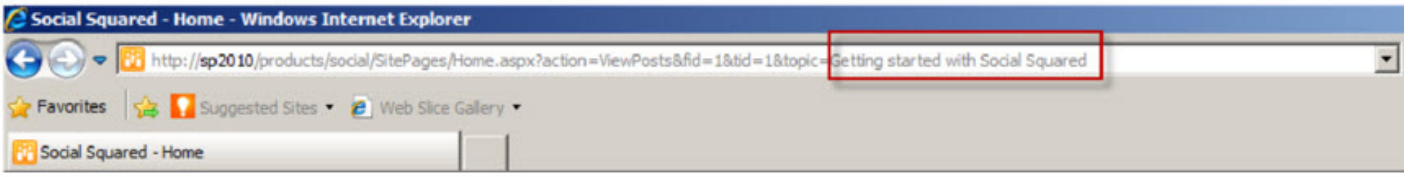
- A **forum** is the place, where like-minded users contribute information and ask for help from other forum members. Such groups of users were probably in existence in your organization and communicating prior to the creation of the forums within Social Squared. They may have previously used SharePoint® discussion list apps to facilitate communication and exchange information. Such forums can be department based, but can be based on job types that span the entire organization, such as nurses, lead firefighters, or project managers.

  Forums consist of members and moderators. When a user first views a page that contains a Forums Web Part, that user is included in user's list within the Social Squared database"#db, which is associated with the site, where the page lives. Moderators manage the forum, for example, by setting rules, reviewing and addressing inappropriate posts.

  By default, all users can view the posts in all the forums in all the forum groups that are displayed by a Forums Web Part. Users can therefore create any new topics in those forums, and new posts in existing topics. You can alter this default behaviour. You can also allow users who are authenticated into SharePoint to post anonymously and if your SharePoint site allows access to non authenticated users, you can let those anonymous visitors to post anonymous topics or replies to forums.

- A **forum group** is a container of forums. You can create multiple forum groups, for example, one for each department in your organization, where all the forums for that department are created in their department's forum group. Then on different sites you can configure the Social Squared Forums Web Part to display forums, from one or more forum groups. This would allow you to have a single instance of Social Squared with different forum groups used throughout different areas of SharePoint®. However, it is important to note that forum groups should not be used as security boundaries as somebody who can edit the Web Parts properties of the **Forums** Web Part, could select a different forum group.

As stated in the Deploying Social Squared section, it is important to plan your forum groups and your forums before fully deploy Social Squared in your organization; including forum topic names as, to assist with Search Engine Optimization (SEO), the forum topic is shown in the URL.



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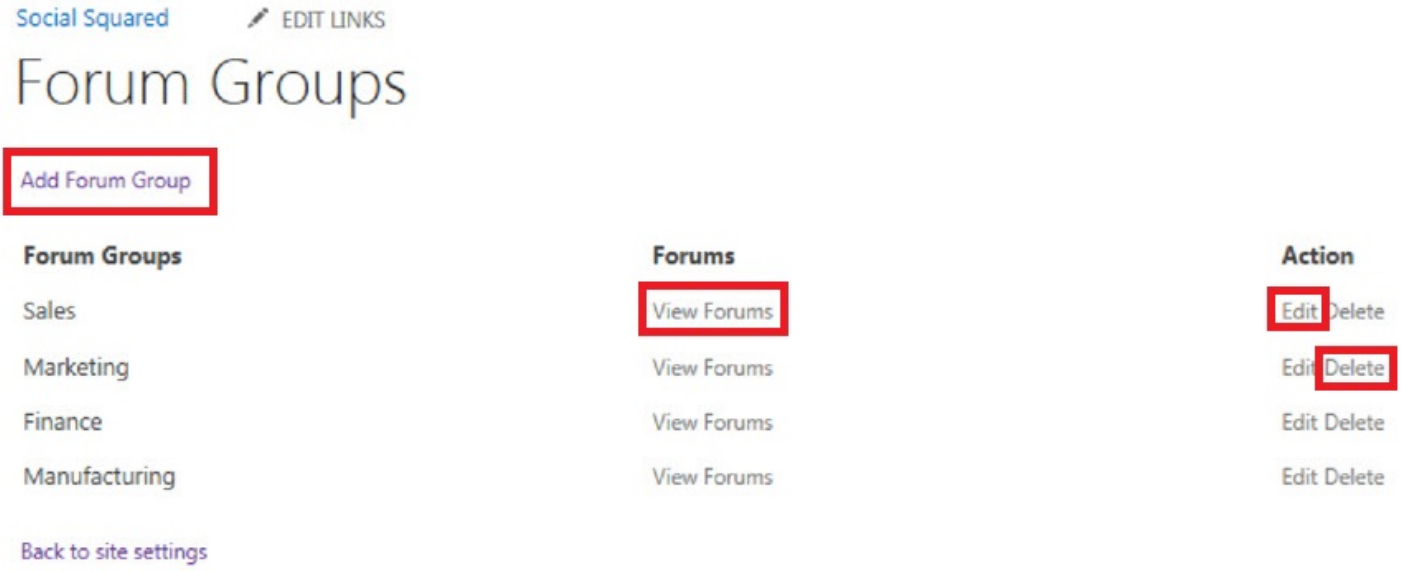
How to Manage Forums and Forum Groups

To manage forum and forum groups, you need to navigate to any site in a site collection where the Social Squared Forums collection feature is activated, and where you have configured the site with the connection string to the Social Squared database where information about the new *Forum Group* or *Forum* are to be stored.

Once the **Social Squared Forums** collection feature is activated. To manage forum and forum group on the **Site Settings** page, under **Social Squared Forum**, click **Forum Groups** to display the **Forums Groups** page.

The **Forum Groups** page allows you to create new forum groups, and provides three links for each forum group, that you can use to manage the forum group:



- **View Forums**. Use this link to display the Forum [*forum group name*] page. This page allows you to create new forum; edit, delete and manage subscribers for existing forums.

- **Edit**. Use this link to display the **Edit forum group** page. This a page allows you to:
  - Change the name of the forum group.
  - Specify the forum group ordering.
  - Configure permissions. The permission settings made on this page can be propagated to all forums within the forum group. Permission options including:
    - Users who will have no permissions to forums in the group.
    - Users who can approve topics and posts.
    - Whether topics and posts appear without approval.
    - Users who can administrate forums
- **Delete**. Use this link to delete the forum group.

The **Forums [*forum group name*]** page allows you to create new forums, and provides the **Moderate All Forums** link and up to four links for each forum that you can use to manage the forum.

- **Edit**. Use this link to display the **Edit Forum** page. This a page allows you to:
  - Change the name of the forum and the forum description.
  - Specify the forum ordering.
  - Allow users to vote on posts, as well as preventing users from negative voting.
  - Allow attachments for the forum. Note: you can configure this at a global level by using Forum Settings.
  - Allow links to SharePoint® list items and files stored in libraries.
  - Send E-mail for users own new topics and replies.
  - Allow administrators to highlight important posts as featured posts. Users can filter on featured posts and topics.
  - Allow Non-Administrators to create new topics.
  - Allow authenticated users to post anonymously, as well as allowing anonymous users to post.
  - Specify forum permissions, including.
    - Users who will have no permissions to the forum.
    - Users who can approve topics and posts.
    - Whether topics and posts appear without approval.
    - Users who can administrate the forum.
- **Delete**. Use this link to delete the forum group.
- **Manage Subscribers**. Use this link to display the Manage Subscribers page, which allows the addition or removal of forum subscribers.
- **Moderate**. This link is available when moderation is enabled.

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What to create when you first install Social Squared

In Social Squared before users can create posts, respond to posts, rate posts, and use the voting controls, you need to create complete the following tasks:

1. Create Forums, and group like forums into Forum Groups. You must create at least one Forum Group, which has at least one Forum.
2. Configure permissions to Forum Groups and Forums.
3. Identify and create moderators. Moderators manage the forum, for example, by setting rules, reviewing and addressing inappropriate posts, and marking interesting content.
4. Manage the Forum Settings.

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Creating Forum Groups and Forums

This page details how to create a Forum Group, and a Forum for Social Squared from Lightning Tools. First, you need to navigate to any site in a site collection where the Social Squared Forums collection feature is activated, and where you have configured the site with the connection string to the Social Squared database where information about the new *Forum Group* or *Forum* are to be stored.

> Although Social Squared does not prevent you from creating a *Forum Group* or a *Forum* with a name or an existing *Forum Group* or *Forum*, you should use a unique name to prevent confusion, and to ensure that you are not generating a *Forum Group* or *Forum* that has already been created. Unique *Forum Group* and *Forum* names, is particular important if you want to allow users to create topics using Reply Via Email functionality.

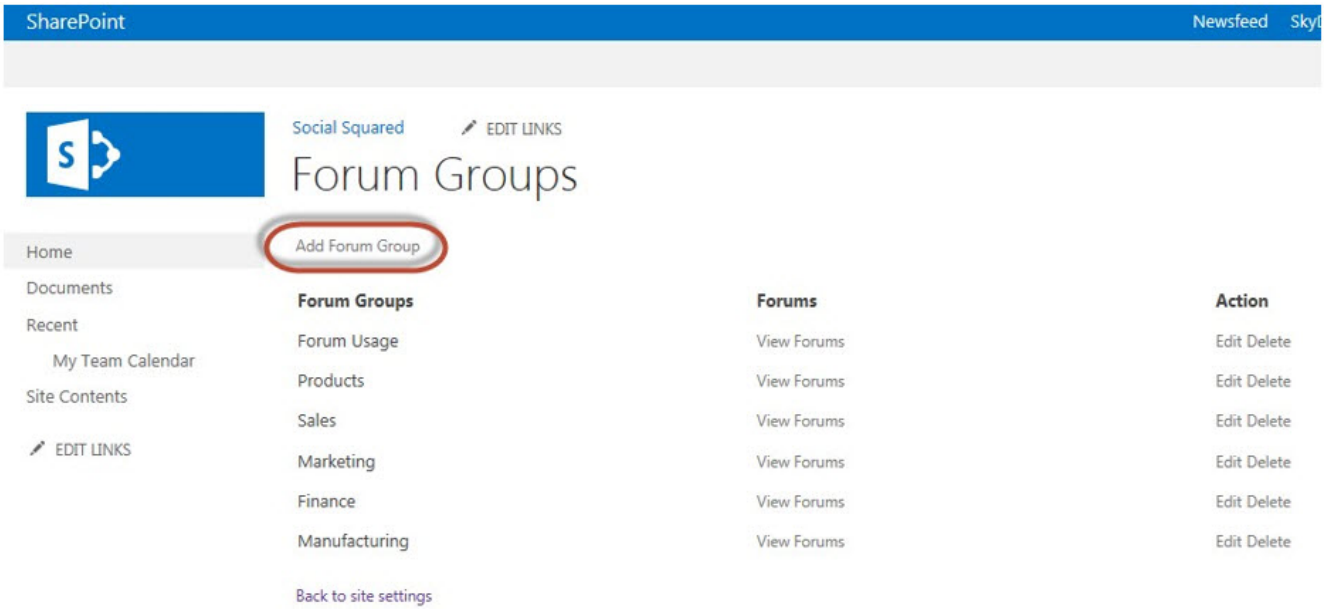
Note: You must create at least one forum group, which contains at least one forum, before you will be able to use the Social Squared Forums Web Part on a SharePoint® page.

Creating a Forum Group

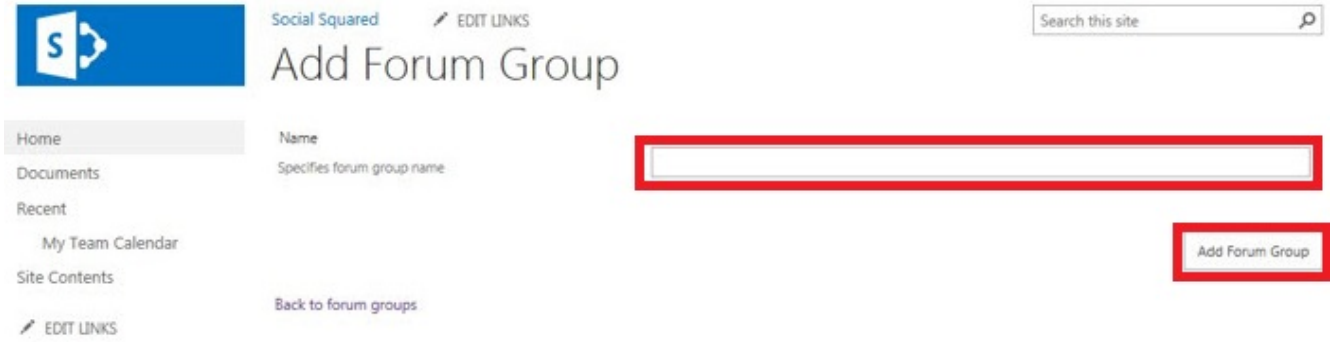
To create a forum group, complete the following steps:

1. Click **Settings** , and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Groups**.

3. On the **Forum Groups** page, click **Add Forum Group**.



4. In the **Name** text box, type your Forum Group a name, click **Add Forum Group**.



The **Forum Groups** page is displayed, where you should see the new forum group you just created.

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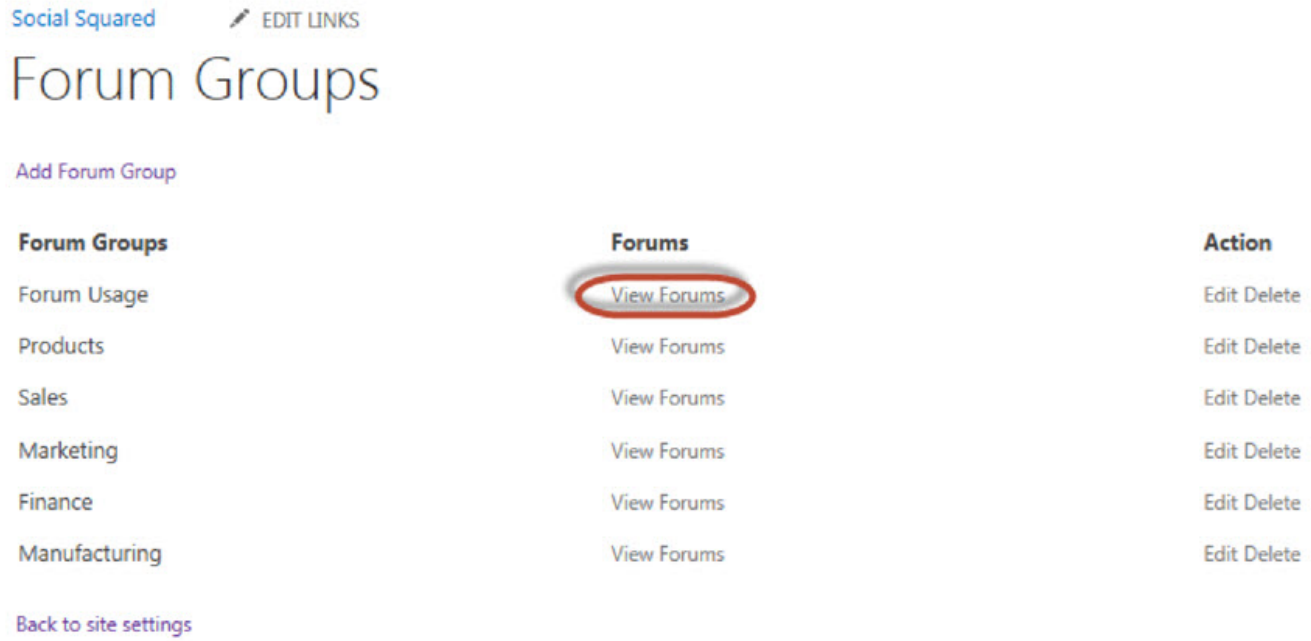
Creating a Forum

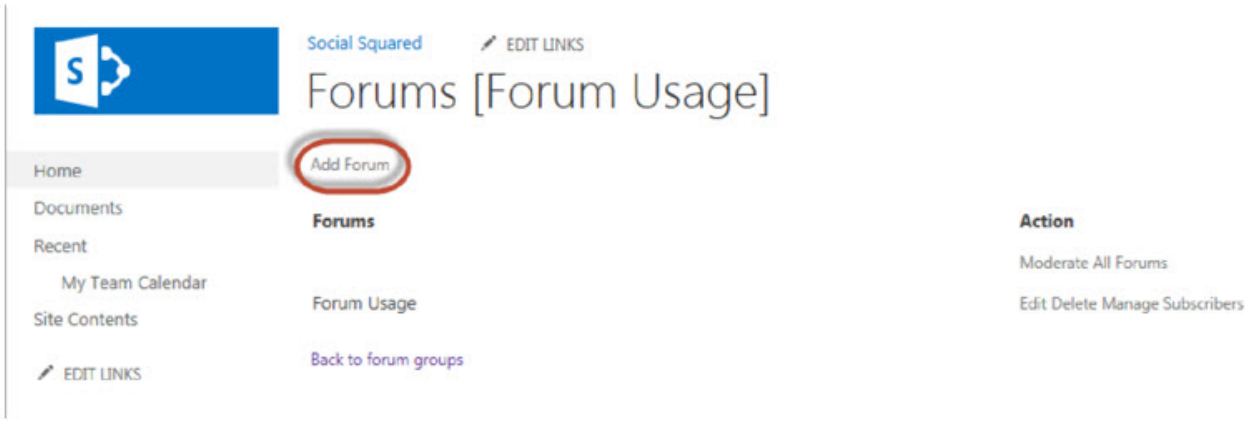
To add a forum to a forum group, complete the following steps:

1. Navigate to the **Forum Groups** page, that is, on the **Site Settings** page, under **Social Squared Forum**, click **Forum Groups**.

2. Click the **View Forums** link for the forum group where you want to add a new forum.



3. On the **Forum [*forum group name*]** page, click **Add Forum**.



4. In the **Name** text box, type name of your new forum and type a brief description in the **Description** text box. Both of these text boxes are required fields.
5. Click **Add Forum**.
   The **Forums [*forum group name*]** page is displayed, where you should see the forum you just created.

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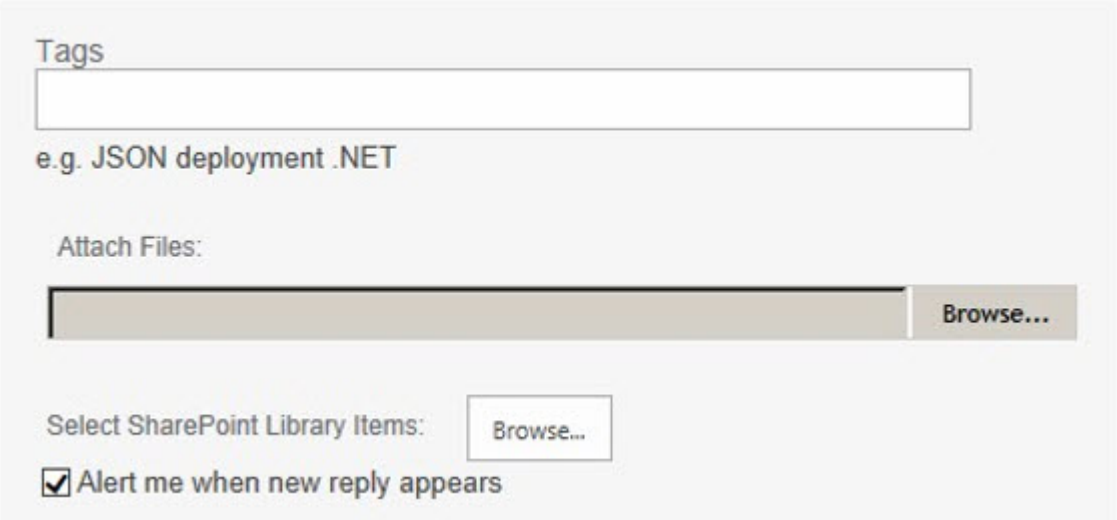
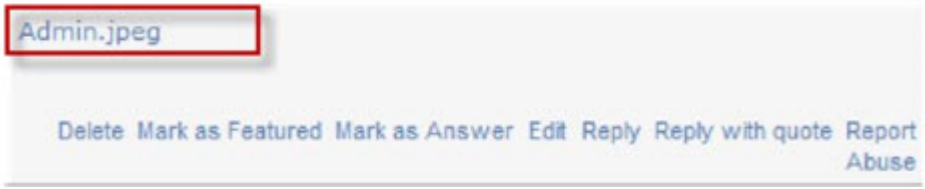
Attaching Files to Posts

From Social Squared version 1.0.0.7 it is possible to attach files to posts within a forum. By default this is turned off. When this is enabled users will see the **Attach Files** text box together with a **Browse** button.

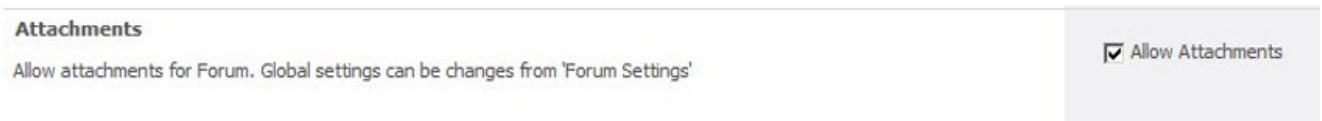


It is also possible to select from files that are stored within SharePoint® libraries.
When the post is created, links to attached files appear below the main body of the post.



To activate the *attach file* functionality for a forum, complete the following steps:

1. Click **Site Actions**, and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Groups**.
3. On the **Forum Groups** page, to the right of the forum group which contains your forum, click **View Forums** to display the **Forums [*forum group name*]** page.
4. For the forum you wish to configure permissions, click **Edit**.
   The **Edit forum group** page is displayed.
5. In the Attachments section, select the **Allow Attachments** checkbox.



Anonymous User Permissions

Social Squared allows users to anonymously create new topics or replies within a specific forum. There are two scenarios where an organization may wish their users to use Social Squared anonymously:

- **Authenticated Users**. Users have authenticated, say using their Active Directory user ids, and the organization wants to get honest feedback from employees. The feedback may be deemed better if employees can leave the comments completely anonymously.
- **Anonymous Users**. When an organization provides a public facing web site then it is unlikely that everyone that visits the site will be authenticated. Social Squared allows anonymous visitors to post anonymous topics or replies to forums that are configured for this.

To allow users to post anonymously or to allow anonymous users to post on a per forum basis use the Edit Forum page using the following steps:

1. Click **Settings** , and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Groups**.
3. On the **Forum Groups** page, to the right of the forum group which contains your forum, click **View Forums** to display the **Forums [forum group name]** page.
4. For the forum you wish to configure permissions, click **Edit**. The Edit forum group page is displayed.
5. Scroll down the page until the **Anonymous Users** section is displayed.

The **Anonymous Users** section initially consists of two check boxes.

- **Allow authenticated users to post anonymously**.
- **Allow Anonymous Posters**.

When you select either of these two check boxes, other check boxes are displayed:

- **Can create topics**. Allow users to anonymously create new topics.
- **Can create replies**. Allow users to anonymously create replies to existing topics.
- **Require name**. When this check box is selected, a textbox is provided where the user can type a name.
- **Require email**. When this check box is selected, a textbox is provided where the user can type an email address.

- **Store User Id**. This check box is only visible when authenticated users are allow to post anonymously.

Forum and Forum Group Permissions

There are five types of forum users:

- No Access. This user has no access to forum posts.
- Readers. This user can read and rate posts, they cannot create posts, or reply to posts.
- Contributors. This user can create posts, respond to posts, rate posts, and use the voting controls
- Moderators. This user can approve topics and posts.
- Administrators. This user can complete all management tasks, including, creating new topics and assigning permissions.

By default, when Social Squared is first install, only two types of users are configured:

- Administrators – that is those who are mapped at the site level, to the Full Control permission level.
- Contributors. All users who have access to a site, are allowed to create posts, respond to posts, rate posts, and use the voting controls for any forum group or forum that is displayed using the Forum Web Part.

You can override the default permissions at both:

- Forum Group,
- Forum.

If a user attempts to access a forum that they do not have permissions to, an access denied message will be displayed.

Managing Forum Group Permissions

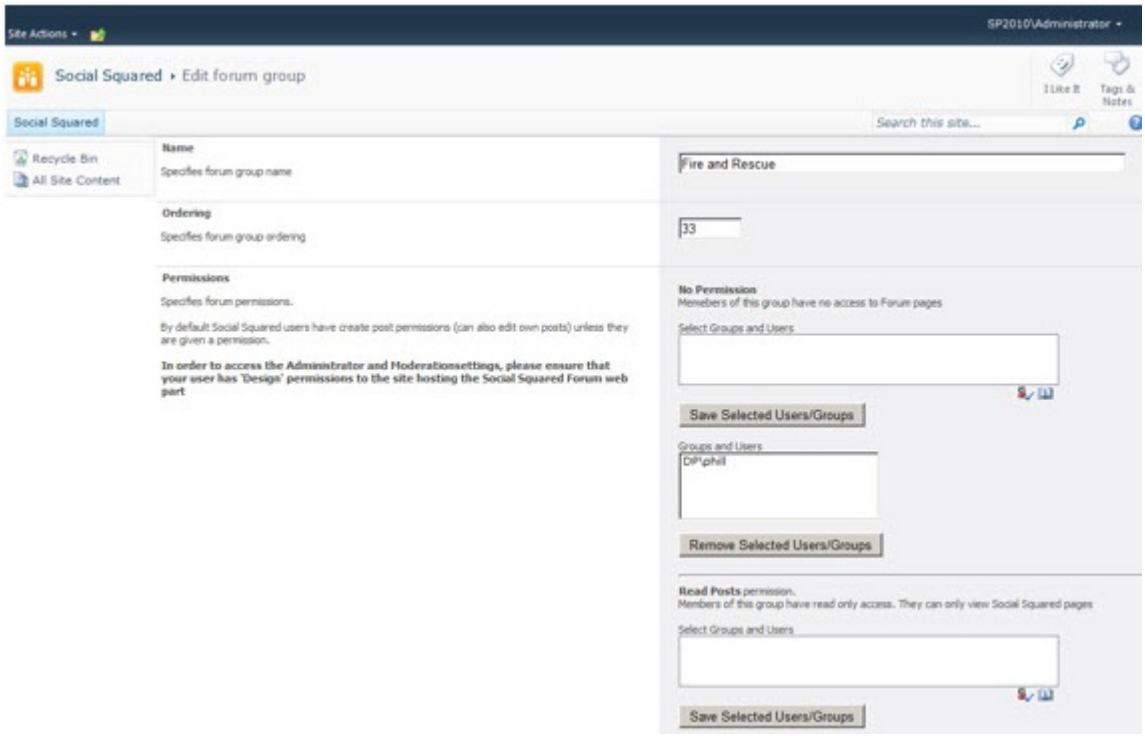
First navigate to any site in a site collection where the Social Squared Forums collection feature is activated, and where you have configured the site with the connection string to the Social Squared database where information about the new *Forum Group* or *Forum* are to be stored.

To manage the permissions of a forum group, complete the following steps:

1. Click **Settings** , and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Groups**.
3. To the right of the forum you wish to configure permissions, click **Edit**.
   The **Edit forum group** page is displayed.

   This page allows you to configure the following permission related settings:

   - **No Permissions**. You can configure *No Permissions* for each user means they cannot gain access to the Forum Group in question. Note that if the user is sent a link to a specific forum, the user will be able to see the forum in question. To avoid this, set the Deny permission on the forum in question in addition to the forum group.



   - **Read Post** permission. Members of this group cannot create posts, or reply to posts. Users with this permission will only be able to read the posts as well as rate them
   - **Moderate Post** permission. Members of this group can approve topics and posts. You can also, allow posts to appear before moderation.
   - **Administrate Forums** permission. Members of this forum group can administrate forums. They can configure users and groups to the **Read Post** permission, as well as, **Moderate Post** and other **Administrate Forum** permissions.
   - **Propagate All permissions**. When this check box is selected the permission settings to the forum group is propagate to all forums in this forum group.

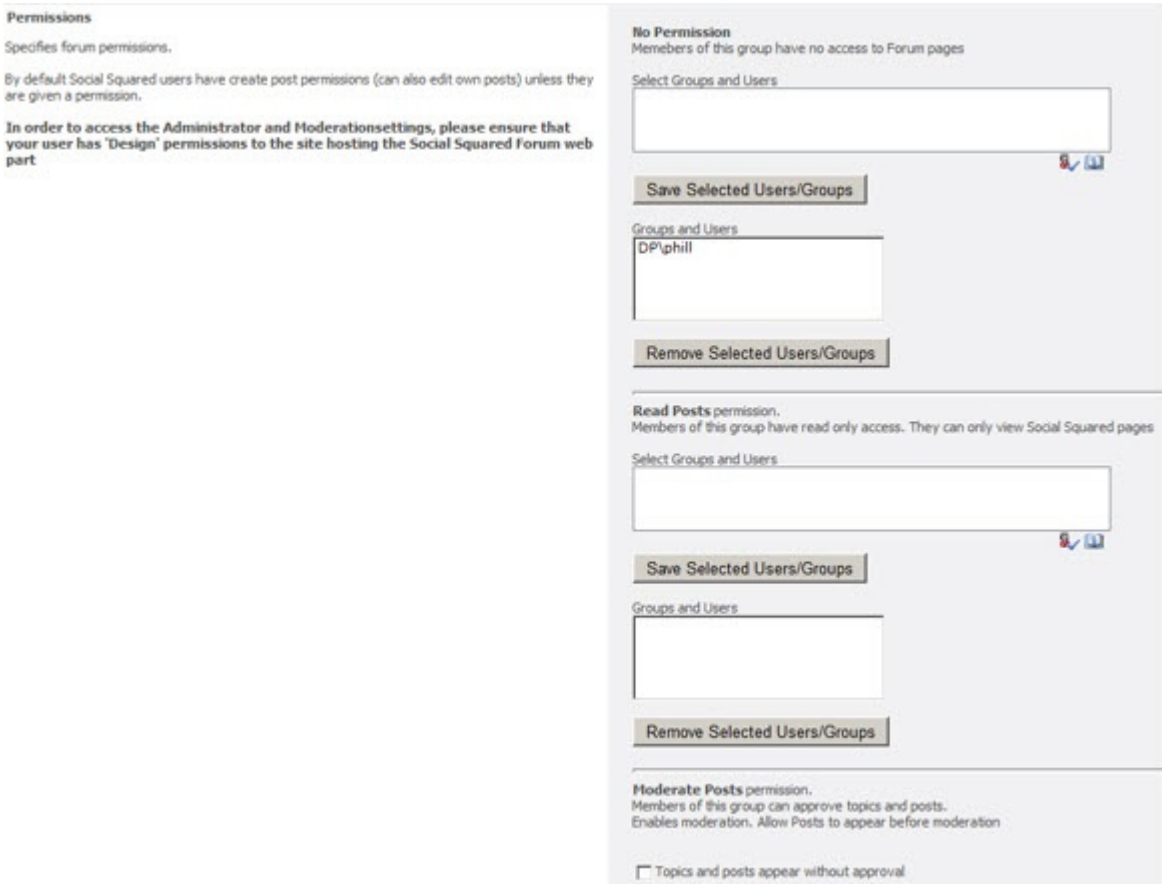
Go to top →

Managing Forum Permissions

As well as setting Forum Groups permissions, permissions can be set on a forum. This will override the permission setting configured at the forum group level. This allows you to deny permissions to the forum for specific users, set who can just read the forum, as well as who can moderate or administrate the forum.

To manage the permissions of a forum, complete the following steps:

1. First navigate to any site in a site collection where the Social Squared Forums collection feature is activated, and where you have configured the site with the connection string to the Social Squared database where information about the new *Forum Group* or *Forum* are to be stored.
2. Click **Settings** , and then click **Site Settings**.
3. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Groups**.
4. On the **Forum Groups** page, to the right of the forum group which contains your forum, click **View Forums** to display the **Forums [*forum group name*]** page.
5. For the forum you wish to configure permissions, click **Edit**.
   The **Edit forum group** page is displayed.



This page allows you to configure the following permission related settings:

- **No Permissions**. You can configure *No Permissions* for each user, this means they cannot gain access to the forum in question.
- **Read Post** permission. Members of this group cannot create posts, or reply to posts. Users with this permission will only be able to read the posts and rate them
- **Moderate Post** permission. Members of this group can approve topics and posts. You can also choose to allow posts to appear before moderation.
- **Administrate Forums** permission. Members of this group can administrate forums. They can add **Read Posts** permission users and groups, moderators and other administrators.

If you have any questions related to this documentation or the Social Squared product, please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site.

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Moderation

When Social Squared is first installed, all posts and replies are visible to all users. Depending on your organization and the forum, new topics, posts and replies may need to be reviewed before they are available for general viewing by all other members of the forum. Therefore when you create such a forum, you need the commitment of at least two or three moderators.

Moderators should welcome new members, be active in the community, and where appropriate, identify replies to posts as a **Featured** posts. Moderators should also manage topic titles, also know as the topic subject, to make them accurately reflect the discussion taking place in the forum. To edit the topic title, first the topic must be unlocked and then you edit the first post in the thread. The first post of a topic is always listed as the top most post no matter how you sort the posts. In your organization, there may be other guidelines that your moderators and users need to be aware of.

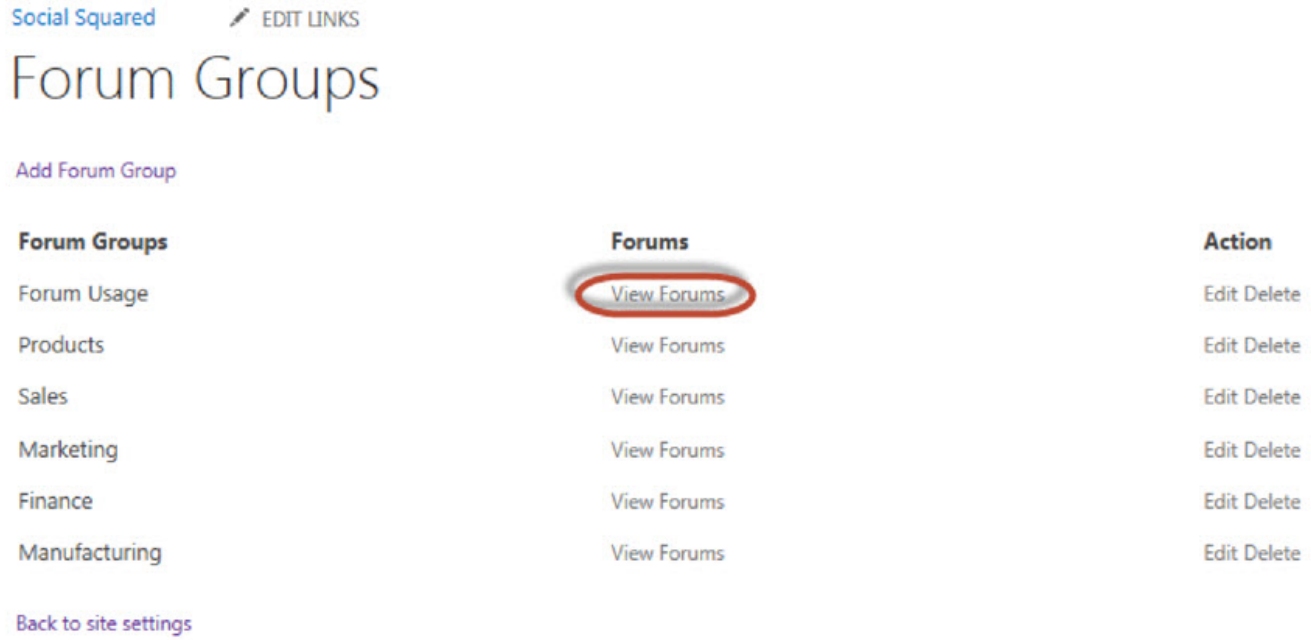
By default moderation is disabled. Moderation is enabled on a per forum basis and is activated when at least one moderator is specified. The **Moderate** link is then displayed to the right of the **Edit**, **Delete** and the **Manage Subscribers** links to the right of the forum on the **Forums [forum group name]** page. When at least one moderator is specified for a forum, then all users mapped to the *Full Control* permission level or who are a *Site Collection Administrator* can moderate that forum.

Specifying Moderators

To configure a user as a moderator, complete the following steps:

1. Navigate to the **Site Settings** page on a site associated with the Social Squared database that contains the forum you wish to add a user as a moderator.

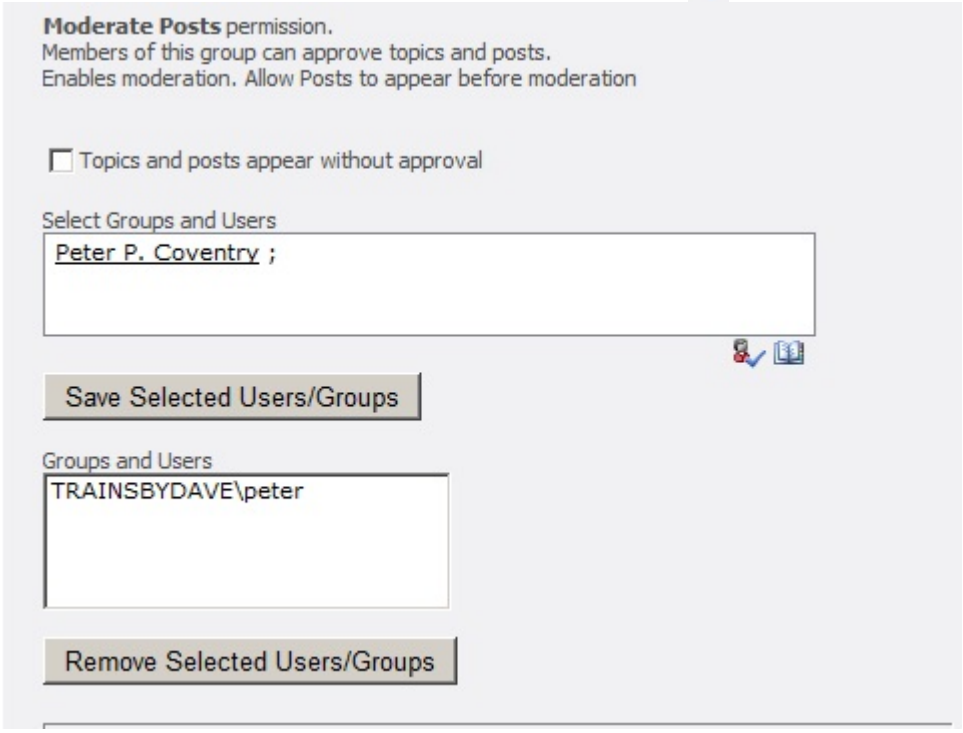
2. Under **Social Squared Forum**, click **Forum Groups** and then select **View Forums** for the forum group that contains the forum.



3. Click **Edit** to the right of the forum.

4. On the **Edit Forum** page, scroll down the page until you find the **Moderate Posts permission** in the **Permissions** section.

5. In the **Select Groups and Users** box, either use the **Browse** icon to search for a user or group; or type a user or group and click the **Check Name** icon to ensure the user / group exists.



6. Click **Save Selected Users/Groups**.
7. At the bottom of the page, click **Update**.

Now whenever a new topic or reply is added to this forum the user will receive a notification to let them know that it will not immediately appear. Moderators will also receive an email alert.
Screenshot

Specifying topics and posts to appear without approval

Once Moderation is enabled, and if you do not want posts to be in pending mode until a moderator approves them, then you can select the **Topics and posts appear without approval** check box. When this check box is selected, the users who are chosen as moderators can edit or delete posts after they've been created.

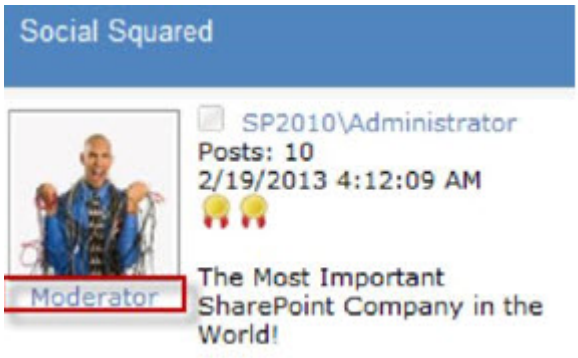
Moderating posts

To moderator a post.

1. Navigate to the **Site Settings** page on a site associated with the Social Squared database that contains the forum you wish to moderator.
2. Under **Social Squared Forum**, click **Forum Groups** and then select **View Forums** for the forum group that contains the forum.
3. Either click **Moderate All Forums**, or click **Moderate** to the right of the forum you wish to moderate.
   Screenshot
4. To the right of the post are links that you can use to **View**, **Approve** or **Delete** the post.
   Screenshot

Moderator Highlighting

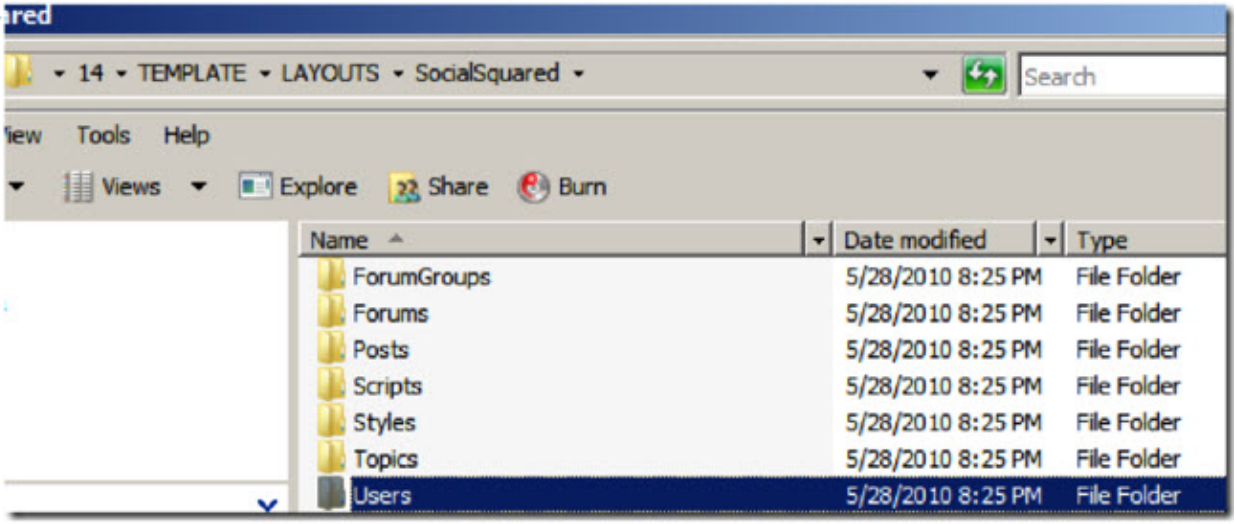
Moderators can now be more easily identified with their own css styling.



Customizing the Social Squared Look and Feel

When Social Squared is installed, User Controls, images and CSS files are deployed to the *SocialSquared* folder in the SharePoint root directory, also known as the 15 folder. You should not directly change the files that are deploy in the *SocialSquared* folder, because when you install an update to Social Squared your changes will be overwritten. To customize the look and feel of the Social Squared forums use the following these steps:

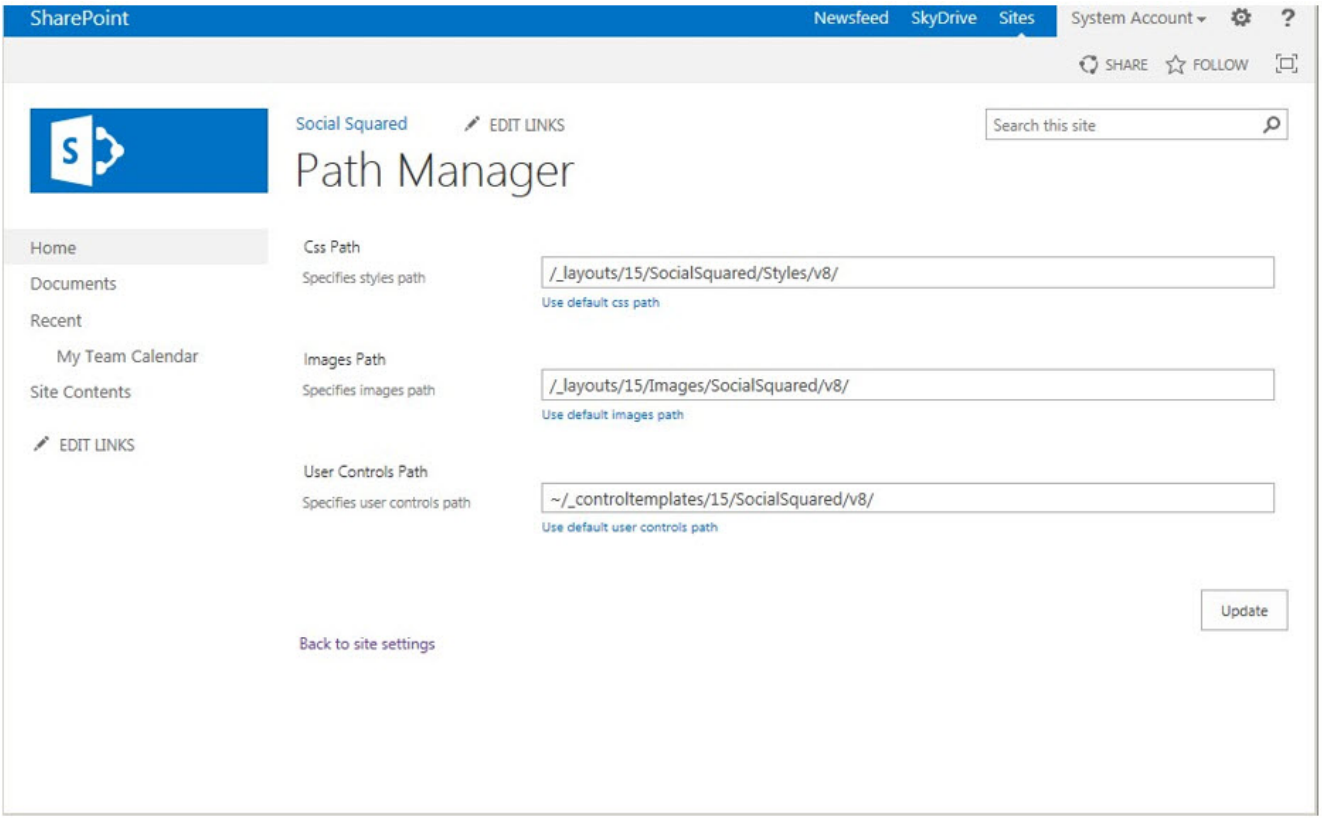
- Create a folder in the SharePoint root folder, copy the files install by Social Squared to your folder and customize them using the following rules.
  - The CSS file name must be **styles.css**.
  - New/modified image files must be named as they are in Social Squared folder, **/_layouts/15/Images/SocialSquared/**.
  - When you deploy Social Squared you'll find the Social Squared user controls in **/_layouts/15/SocialSquared/**. In this folder you'll find a structure where each user control is contained in its own sub folder. When you want to customize these user controls, copy the sub folder structure to your user control folder and then customize them.



You should only manually create your own customized user controls, images and CSS in a development environment. In production and integrated test environments, you should deploy your customized files as a wsp file to ensure that all your SharePoint servers contain your customizations.

- Once the files have been deployed into the SharePoint root folder, in the browser, navigate to a site which is configured to use the Social Squared database that contains the forums which you want to change the look and feel, click **Settings** , and then click **Site Settings**.
- On the **Site Settings** page, under **Social Squared Forum**, click **Path Manager**.

The *Path Manager* page is displayed, where you can type the new location where you have created you customized CSS, images and user controls.



If you want help implementing a custom Social Squared forum design please contact Lightning Tools by clicking Submit Support Ticket on Lightning Tools web site.

Forum Settings

To navigate to the **Form Settings** page, use the following steps:

1. Click **Settings** , and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Settings**.

Use the **Form Settings** page to configure the overall settings for any forum that is stored in the Social Squared database that the site is connected to. Therefore the configuration settings on this page need only be configured once for each Social Squared database, and not for each site that you connect to a Social Squared database.

Specifically you can configure:

- Specify terms and conditions, a relative URL, which is used when forums are not at the root of a Web Application; the number of topics and pages to be displayed per page.
- RSS
- Page Title: Specify words to be appended to the HTML page title
- Specify maximum upload file size and allowed file types
- Specify the voting icon to use. The choices are either Arrow or Thumb
- Allow Forms Based Authentication (FBA) registration, and enable Captcha in FBA registration.
- Enable Social Squared integrated search, sorting, post numbering, private messaging, original poster and moderator highlighting, chat,
- Enable tagging, specify the tag delimiter and allow both enterprise and term stores.
- Social Features. Enable publishing posts to the Social Feed of My Site including Mentions and Tags
- Configure Profile Settings
- Enable reply via email for either or both, POP3 and Exchange Web Services
- Configure Reputation Scores

You will need to be a Social Squared administrator to configure Forum Settings.

RSS feed

If your users prefer to see their forum update notifications through an RSS feed, then they can click on the RSS icon when viewing a forum. They can use this icon to display the data in RSS format or obtain the URL of the RSS feed, and subscribe to it in their preferred RSS reader.

Using the Forums Settings page, you can configure the extent of data that is displayed:

- Leave the **RSS** text box emply to display all feed.
- Type a value in the **RSS** text box, for example, **7**, to display feeds from the last 7 days.

Page Title Customization

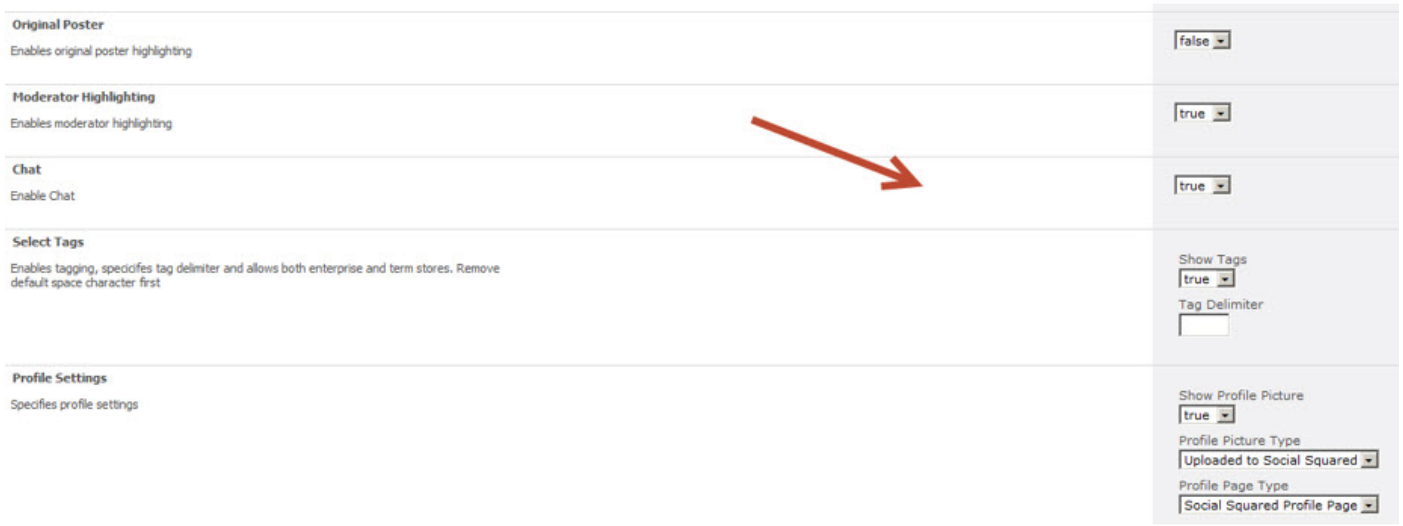
By default, the HTML page title is used in the browser to show the page that is displayed. In Internet Explorer, for example, the page title is display on the browser tab. You can customized the HTML page tile, to include the current forum title as well as additional text. To modify the Page Title to include extra text, complete the following steps:

> You will need to be a Social Squared administrator to complete these steps.

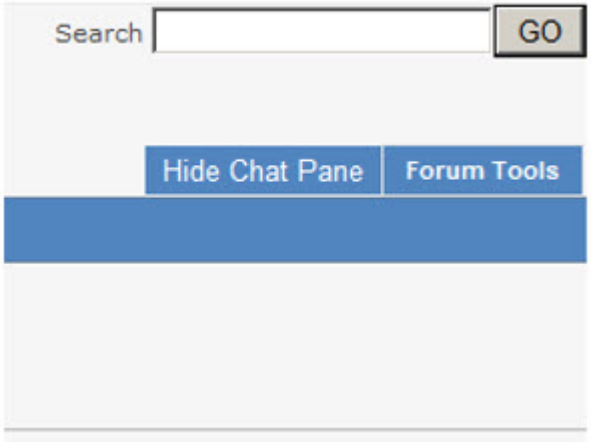
1. Click **Settings** , and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Settings**.
3. On the **Forum Settings** page, in the **Page Title** section type the text that you want to append to the HTML page title.
4. At the bottom of the page, click **Update**.
5. Navigate to the page where you have added the Social Squared Forums Web Part and put the page in edit mode.
6. From the Web Part menu, click **Edit Web Part**.
7. In the Web Part tool pane, select the **Page Title** check box, and if you want a Forum name included in the Page Title, select the appropriate check box(es).
8. Click **OK**, and then save the page.

Instant Messaging

Social Squared 2013 supports instant messaging, which allows users instantly chat with other users who have a Social Squared user profile, as well as posting within forum groups. The instant messaging feature can be enabled or disables from the Forum Settings page, by selecting **true** or **false** from the **Chat** drop down list:

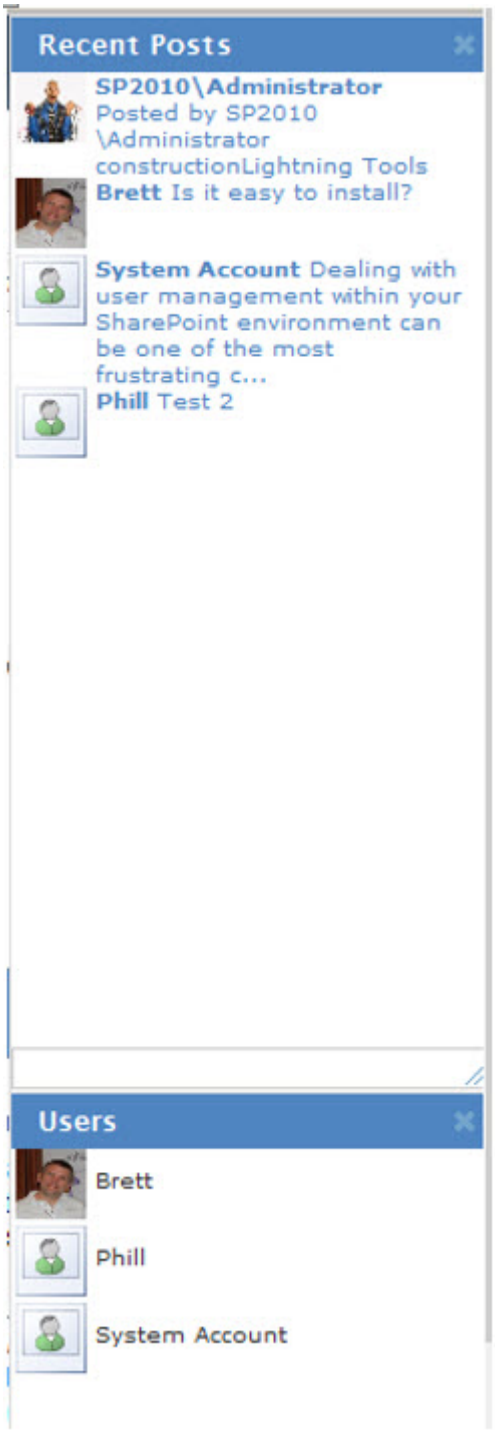


When **Chat** is set to **true**, when a page is displayed where the Social Squared Forums Web Part is added, each user can then show or hide the instant messaging pane by clicking the **Show*/ *Hide Chat Pane** tab:



The Chat pane initially floats to the right hand side of the page, but can be moved, resized or closed. The Chat pane is divided into two parts. The top part, shows **Recent Posts** and the lower part, shows **Users**

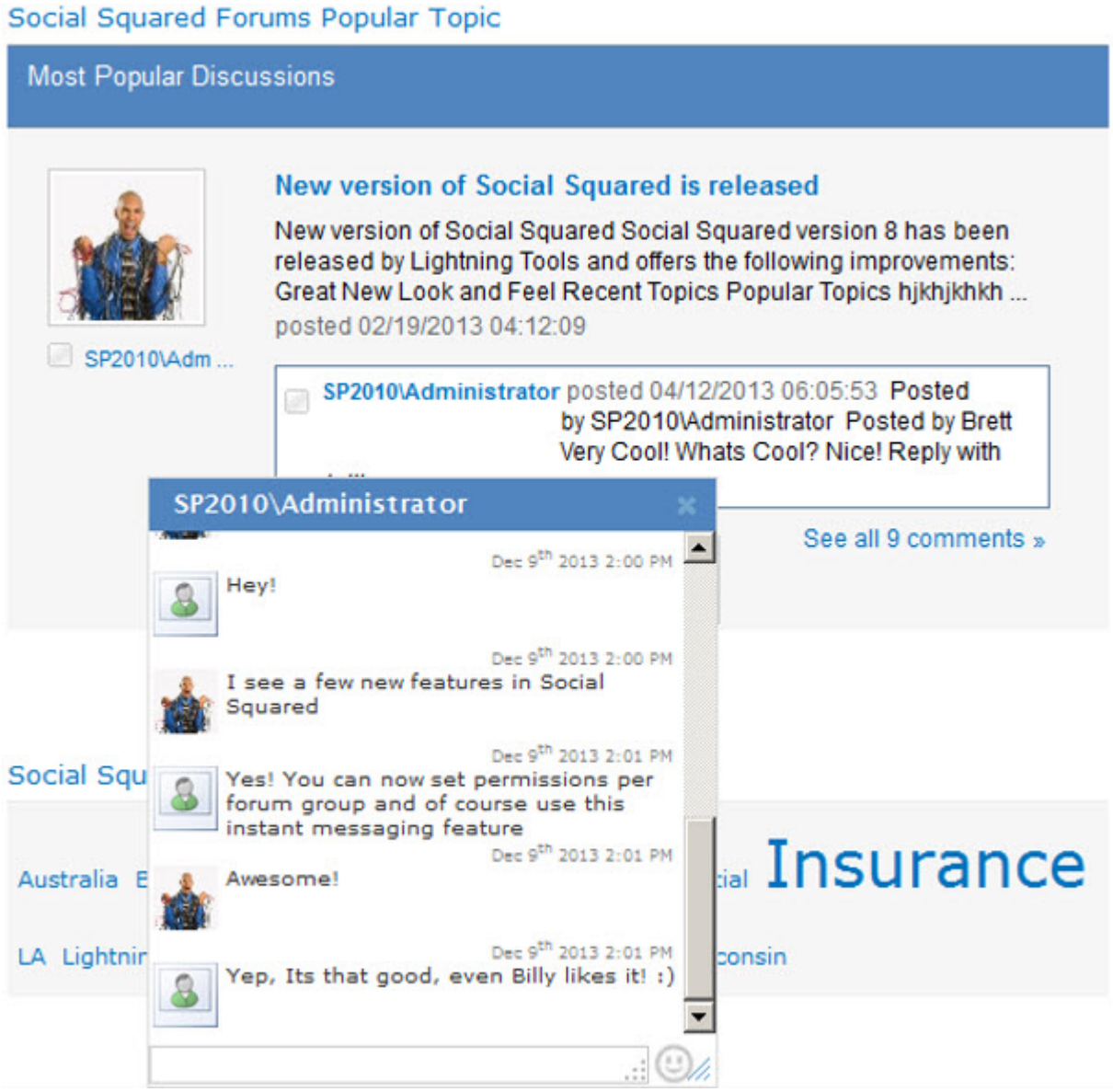
who have a Social Squared user profile.



Using the **Chat** pane, you can click a post in the **Recent Posts** part, and therefore see posts recently created by other users.

Using the **Users** part of the **Chat** pane, you can start an instant chat with a user by simply clicking their name. A chat window appears allowing you to send a message to the user and, emoticons. If the user is

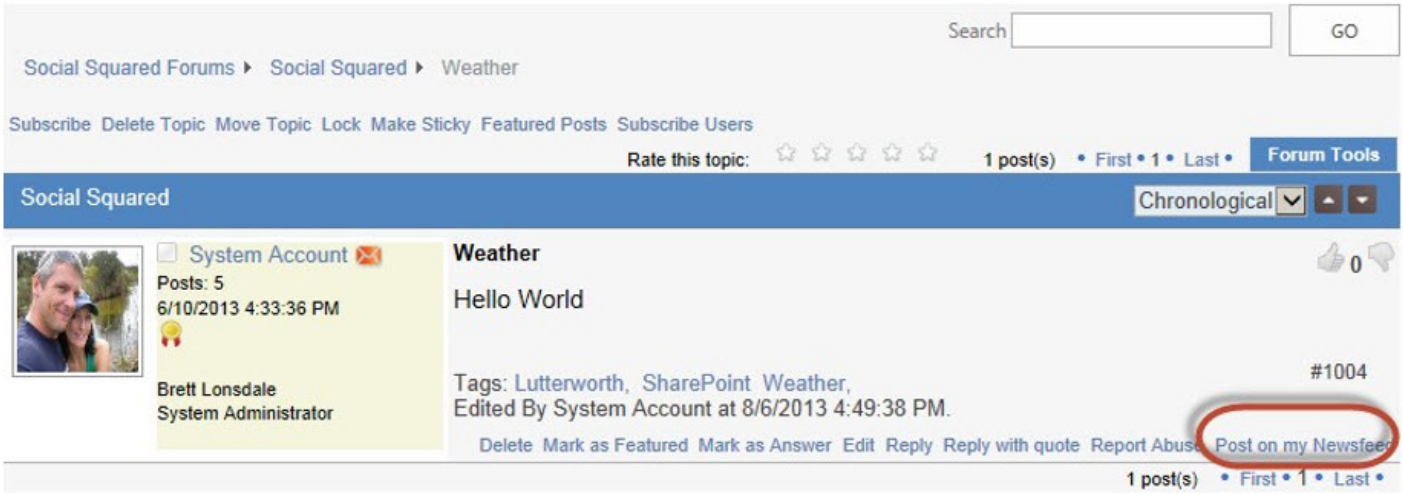
online, they may respond immediately. If not, they will see the chat pane open with their message when they next login to the team site containing the Social Squared Forms Web Part.



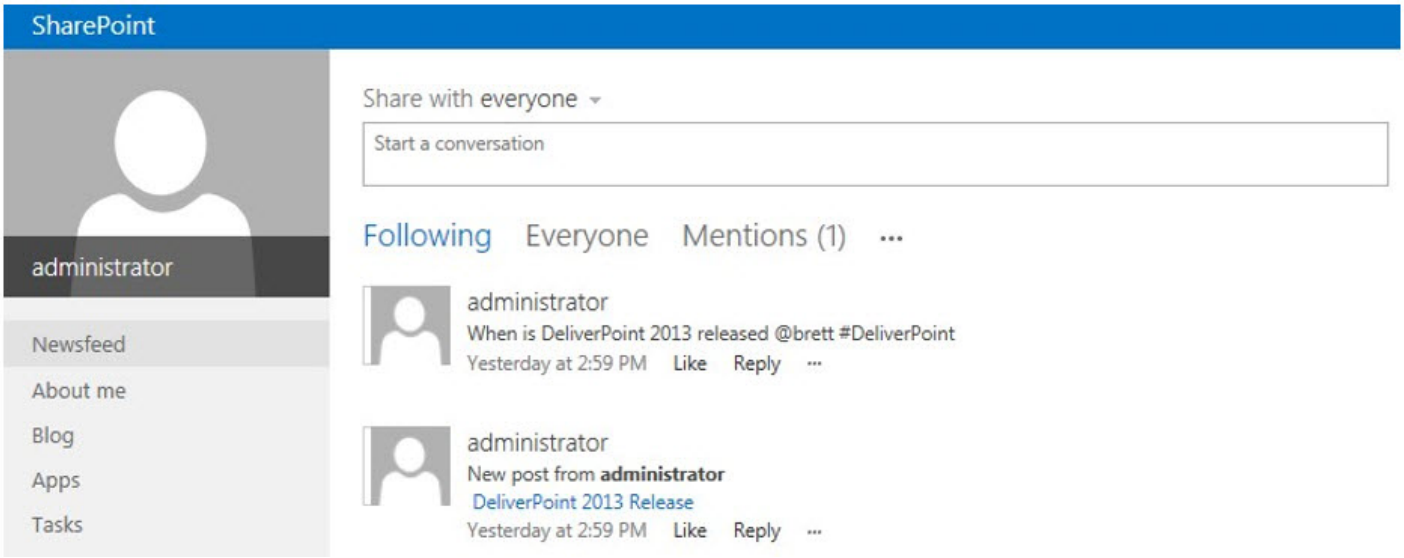
Emotion icons can be inserted by clicking the emotion icon symbol in the bottom right hand corner of the chat window. The chat window can also be moved by dragging it using the title bar, closed or resized.

Newsfeed Integration

If you use *My Sites* in your Microsoft® SharePoint® Server on-premises installation, it is possible for your Social Squared posts to appear on the My Site Newsfeed. This is set at Social Squared database level, that is, when the **Social Features** is set to **True**, then a link, **Post on my Newsfeed**, is added to a post for all forums in forum groups that are save in one Social Squared database. Therefore, any posts you create in any forum in any forum group in the associated Social Squared database, you can choose to post to the My Site Newsfeed.



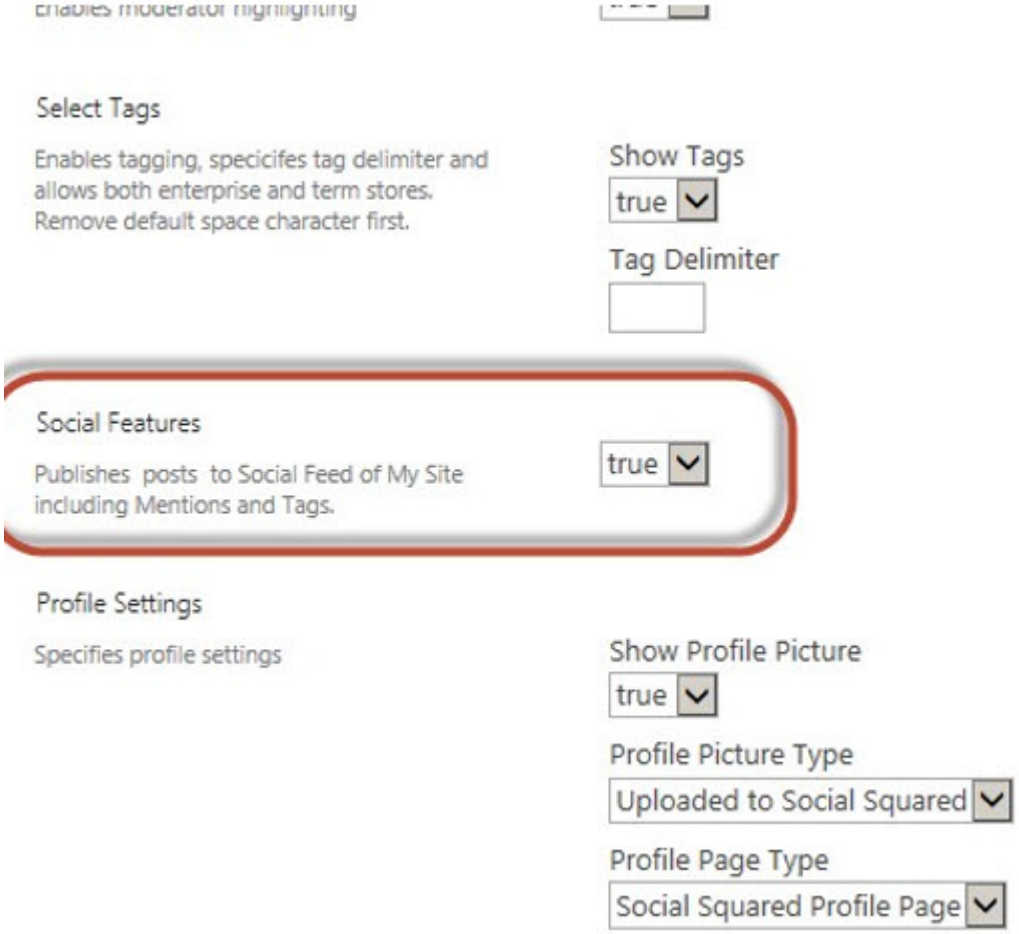
Any other SharePoint® user that *follows* you, will see that you have shared the post, when they navigate to their newsfeed.



To activate the newsfeed functionality, complete the following steps:

You will need to be a Social Squared administrator to complete these steps.

1. From the **Site Settings** page, under **Social Squared Forum**, click **Forum Settings**.
   The Forum Settings page is displayed.
2. Scroll down the page, and select **True** from the **Social Features** drop down list.



3. At the bottom of the page, click **Update**.
   The newsfeed posting functionality is now available.

Tagging

From Social Squared version 4.0.0.1, you to tag your topics and posts. Tagging by default is deactivated. Tagging can be activated at the Social Squared database level by using the Forum Settings page, and then selecting **true** from the **Show Tags** drop down list.

You can also type a character that you want to be used as the **Tag Delimiter** character. By default the delimiter is a space, that is, any word separated by a space is treated as a different tag, for example,

Football Rugby Liverpool-FC

The tags for the topic would be **Football**, **Rugby** and **Liverpool-FC**. When you set the Tag Delimiter character is a semi-colon, to enter the same tags you would have to type:

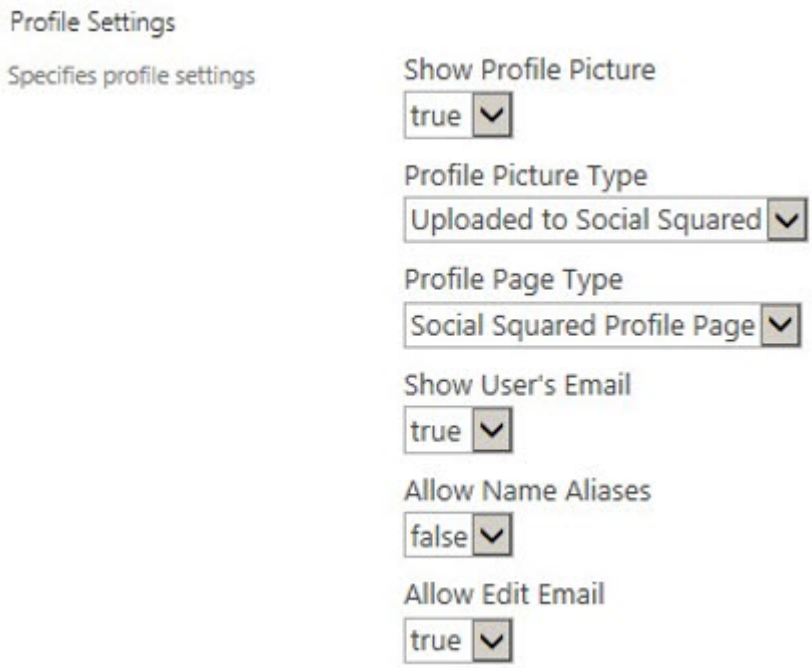
Football;Rubgy;Liverpool FC

Once users have begun tagging topics and posts you can add the Social Squared Forums Tagging Web Part to your SharePoint® page:

The more a tag has been used, the larger the font size. You can quickly find all posts that reference a tag, by clicking the tag. You will be taken to a forum view that shows all the topics that have posts that have been ‘tagged’ with the tag.

User Profile Configuration

On the Forum Settings page you can configure the Social Squared user profile settings.



The **Profile Settings** section of the Forum Settings page, allows you to configure the following options:

- **Show Profile Picture**. By default this is set as **true**. When false is select a user's image is not shown in the Social Squared Forums Web Part or the Social Squared Forums Popular Topic Web Part, however they are displayed in the Social Squared Forums Active Users Web Part and on a user's User Profile page.
- **Profile Picture Type**. Using the **Profile Picture Type** drop down list, you can either allow users to upload their own image to the Social Squared database, or allow Social Squared to use the user's image from the Microsoft® SharePoint® Server user profile database. The default is set to **Uploaded to Social Squared**.
- **Profile Page Type**. Use the **Profile Page Type** drop down list to select either **Social Squared Profile Page** or **SharePoint My Site**. The default is to use Social Squared's User Profile page.
- **Show User's Email**. By default this is set as **true**.
- **Allow Name Aliases**. A Name Alias is also known as a Nickname. Some organizations allow users to provide an alternative name, other than the one associated with their authentication credentials. In this way users are allowed to provide a name that they think better suits them. By default this is set as **false**.
- **Allow Edit Email**. By default this is set to **false**.

You need to be a Social Squared administrator to configure Forum Settings.

Enabling Reply via Email

In previous versions of Social Squared, users could subscribe to forums and individual topics to get alerts when new posts were created. Lightning Tools' customers wanted the ability to reply directly to these email alerts within their email client, whether this was Microsoft® Outlook® or on their iPhone® or BlackBerry®. Starting from Social Squared version 3.0.0.2, Social Squared can be configured to periodically poll a mailbox, retrieve replies and apply them to the correct topic.

Overview

Social Squared sends out an email alert to a user if they have subscribed to a forum or topic which has had activity. When the **Reply to Email** functionality has been configured, the user can then reply using their email client.

As part of the configuration of **Reply via Email** a SharePoint timer job needs to be configured for the web application where you use Social Squared. By default this timer job is scheduled to run every 5 minutes and checks the inbox of the email account, which is setup for **Reply via Email**. The SharePoint timer job processes each message in the inbox and assign it to the various topics.

Configuration

There is a choice of two options when configuring *Reply Via Email* functionality:

- **SMTP/POP3**
- **Exchange Web Services** (EWS), which you can use if you are using **Microsoft® Exchange Server 2007 SP1** or higher.

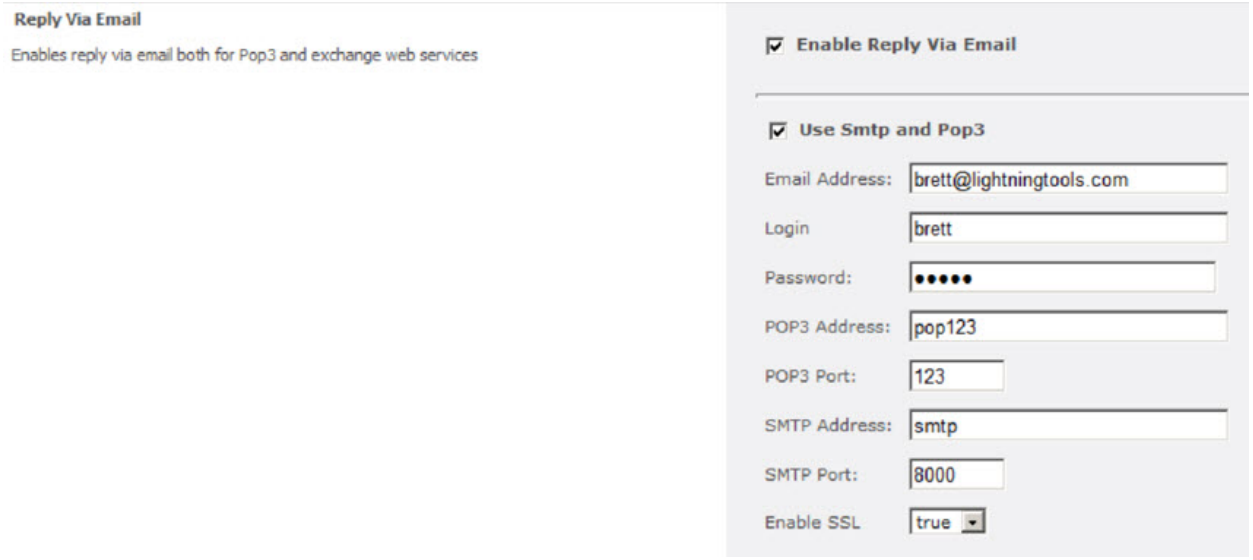
Lightning Tools, highly recommend you first check your configuration with **Email Checker tool** that is shipped with the Social Squared package, to ensure your SMTP/POP3 or EWS is configured correctly, before configuring Reply Via Email.

To configure *Reply Via Email*, complete the following 4 steps:

1. Decide and configure an inbox (email address) to be used by *Reply Via Email* for each Social Squared database where you want this functionality.

2. Navigate to a site associated with the Social Squared database that contains the forums that contains the topics that you want users to reply to using email. If you have multiple Social Squared databases and you want the *Reply Via Email* functionality available on each database you will need to complete this task for each database.

    - Click **Settings** , and then click **Site Settings**.
    - On the **Site Settings** page, under **Social Squared Forum**, click **Forum Settings**.
    - In the **Reply Via Email** section select the **Reply Via Email** check box, and then select either **Use Smtp and Pop3** or **Use Exchange Web Services**.



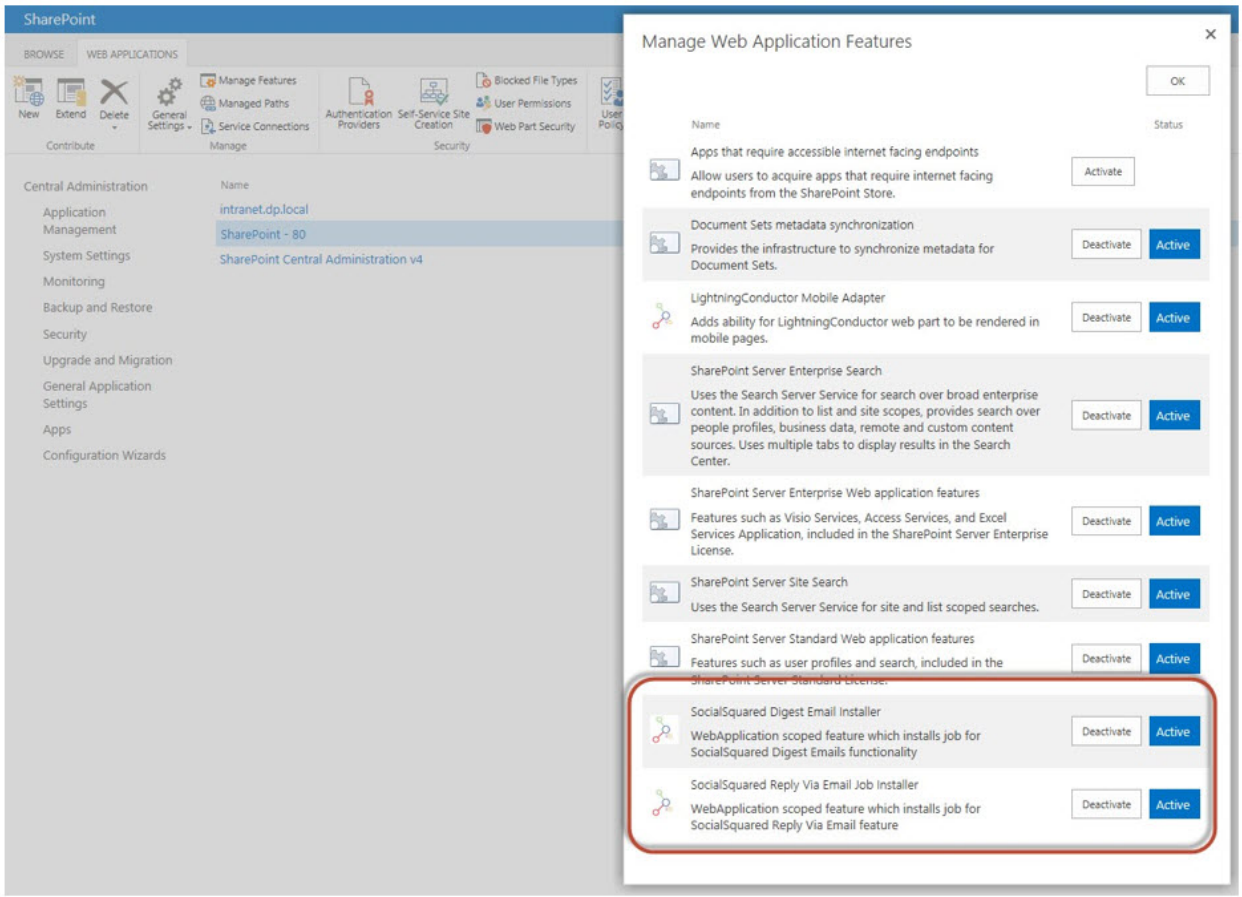
    You can configure **SMTP/POP3** to send alerts and other options as described below:
        - **Email address**: This is the email address that alerts will be sent out via, and also the mailbox that will be checked for new replies.
        - **Login**: This is the login to the email account. The login is often your email address, but in case you the use Fully Qualified Domain Name in your environment it can be different from the email address.
        - **Password** : This is the password for the mailbox
        - **POP3 Address** : POP3 address for the email account
        - **POP3 Port** : The port used to access the POP3 account. This is usually 995 or 110.
        - **SMTP Address** : SMTP address used to send email
        - **SMTP Port** : The port used to send alert emails. This is usually 25.
        - **Enable SSL**: If your server requires a secure connection, then this option should be set true.

    When you select **Exchange Web Services** you can configure the following options:

- **Exchange service version**: Exchange Server version(2007 SP1, 2010, 2010 SP1). Exchange Service URL: The exchange web service is located at http:///EWS/Exchange.asmx.You can first open this url in browser before putting it in forum settings.
- **Email Address**: This is the email address that alerts will be sent out via, and also the mailbox that will be checked for new replies
- **Login**: This is the login to the email account. The login is often the email address, but in case you use Fully Qualified Domain Name in your environment it can be different from the email address Password: This is the password for the mailbox.

3. Activate the SharePoint timer job for each Web Application where you want to use the *Reply Via Email* functionality.

- On the **SharePoint 2013 Central Administration** web site, under **Application Management**, click **Manage web application**.
- Select the Web Application where you want to use *Reply Via Email*, and then on the **Web Application** ribbon tab, click **Manage Features**.
- Activate the **Social Squared Reply Via Email Job Installer** feature if it is not already activated.



4. Activate the site feature **SocialSquared Reply via Email** for the site where you want to use *Reply Via Email*. This feature cannot be activated using the browser. You need to use Windows PowerShell®.
    - Open the SharePoint 2013 Management Shell.
    - Type on one line, the a command similar to.

Enable-SPFeature "SocialSquared.EmailJobWebFeature" -url http://< web app url >

Where < *web app url* > is the url of a Web Application that contains at least one site that has a connection string for each Social Squared database that contains the forums where users want to use **Reply Via Email** functionality. For example if your organization has two Social Squared database, *SS_DB_1* and *SS_DB_2*, then within the http://< web app url > web application the must be two sites: *SiteA*, and *SiteB*. *SiteA* is configured to use, forums from *SS_DB_1* and *SiteB* is configured to use *SS_DB_2*. The **Social Squared Reply Via Email Job Installer** timer job will find all sites that have a connection string configured, and according post the reply accordingly.

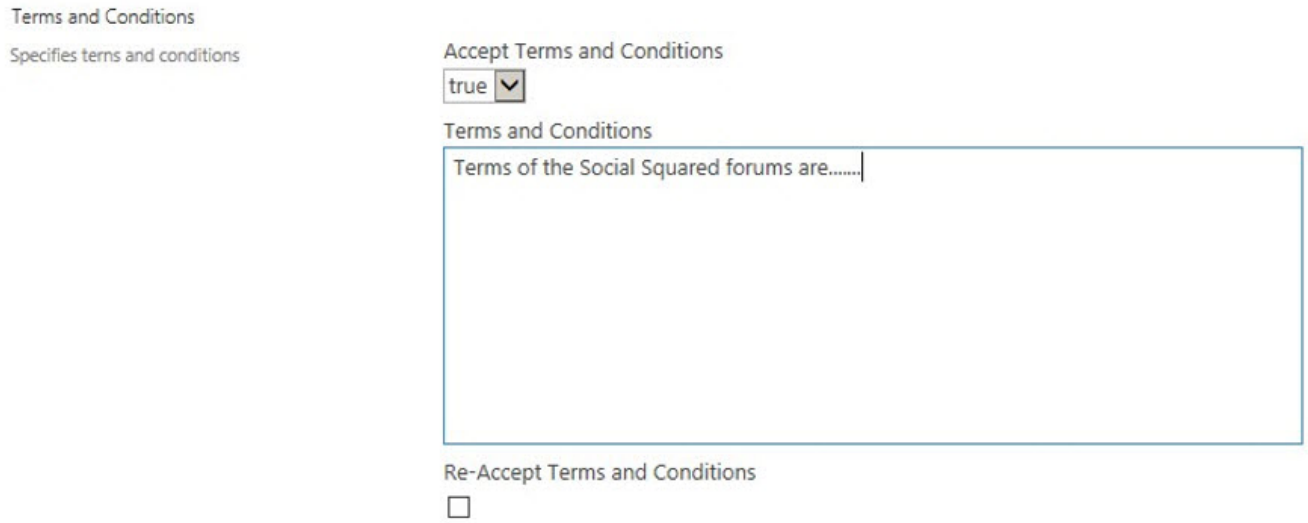
To complete step 2, you need to be a Social Squared administrator. To complete steps 3 and 4, you need to be a SharePoint Server Administrator.

Forum Terms and Conditions

You can configure **Terms and Conditions** for Social Squared. When activated, the *Terms and Conditions* are displayed and the user is asked to accept the conditions before the Social Squared forums are displayed. By default this option is turned off. To activate *Terms and Conditions*, complete the following steps:

> You need to be a Social Squared administrator to complete these steps.

1. Click **Settings** , and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Settings**.
3. On the **Forum Settings** page, scroll down to the **Terms and Conditions** section, select **true** from the **Accept Terms and Conditions** drop down list, and type text in the **Terms and Conditions** text box.



4. If you want all existing and new users to re-accept the new Terms and Conditions, select the **Re-Accept Terms and Conditions** check box.
5. Scroll to the bottom of the page, and click **Update**.

Badges and User Reputations

Badges and user reputation are an important way to encourage the usage of a forum through game mechanics. Gamification is not new to social media, but seems to be one of the key areas required in any Enterprise-wide forum product. Gamification is the use of game design elements in non-game contexts. The real benefit of gamification is about understanding how users behave, what motivates them, and using techniques that reward them for doing things that ultimately help an organization achieve their aims. Users see their scores and badges change as they use the forum, and as their colleague's score and status change users are encouraged to stay involved.

Social Squared awards points for creating new posts, having posts marked as an answer to a question, and receiving votes. The default badges are little medals. The more reputation points a user has the more medals are displayed.

A users reputation score is the sum of all the different awarded points. Using the reputation score, a badge is display depending on which achievement level the score falls into. Badges are a way for to provide special recognition to a user who has a particular impact in the forums. By default, User Reputation is enabled, with new posts awarded 1 point; when a post is voted up, 5 points; and for posts marked as answers, 10 points, and four achievement levels are configured by default, as shown in the table below. You can modify these achievement levels, reduce or increase the number of levels, and provide your own images.

Achievement Level	Minimum Score	Maximum Score
Newbie	0	100
Member	101	1000
Silver	1001	5000

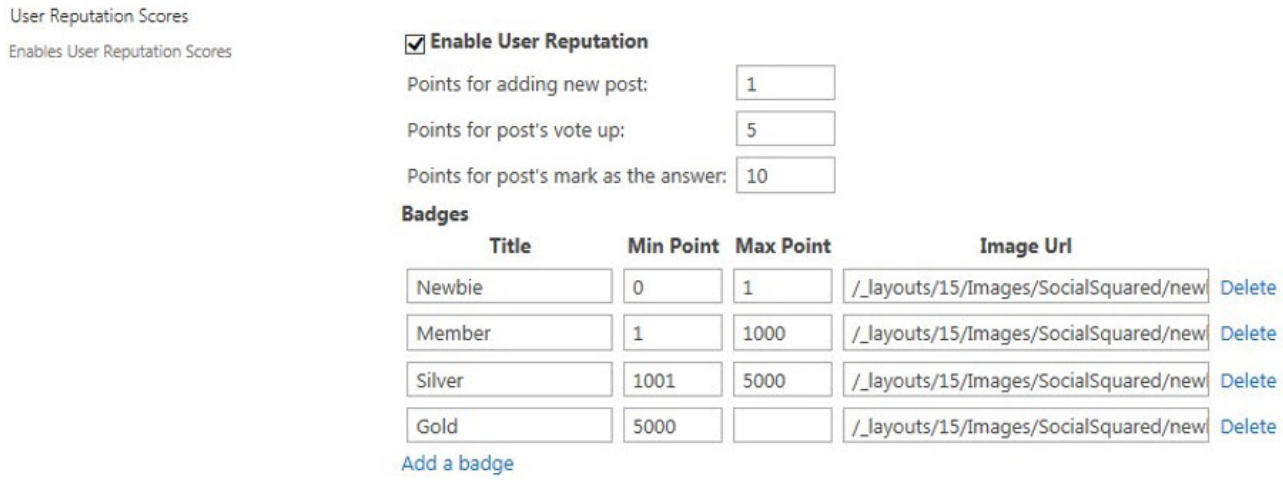
Gold	5000	

You use the Forum Settings page to configure the number of achievement levels and images to be used for the badges. These settings are configured at the Social Squared database level, that is, users scores are acculumated across all forums that are part of forum groups that are stored in the same Social Squared database.

To configure **User Reputation Scores**, use the following steps:

> You need to be a Social Squared administrator to complete these steps.

1. Click **Settings** , and then click **Site Settings**.
2. On the **Site Settings** page, under **Social Squared Forum**, click **Forum Settings**.
3. On the **Forum Settings** page, scroll down to the **User Reputation Scores** section, and configure accordingly.



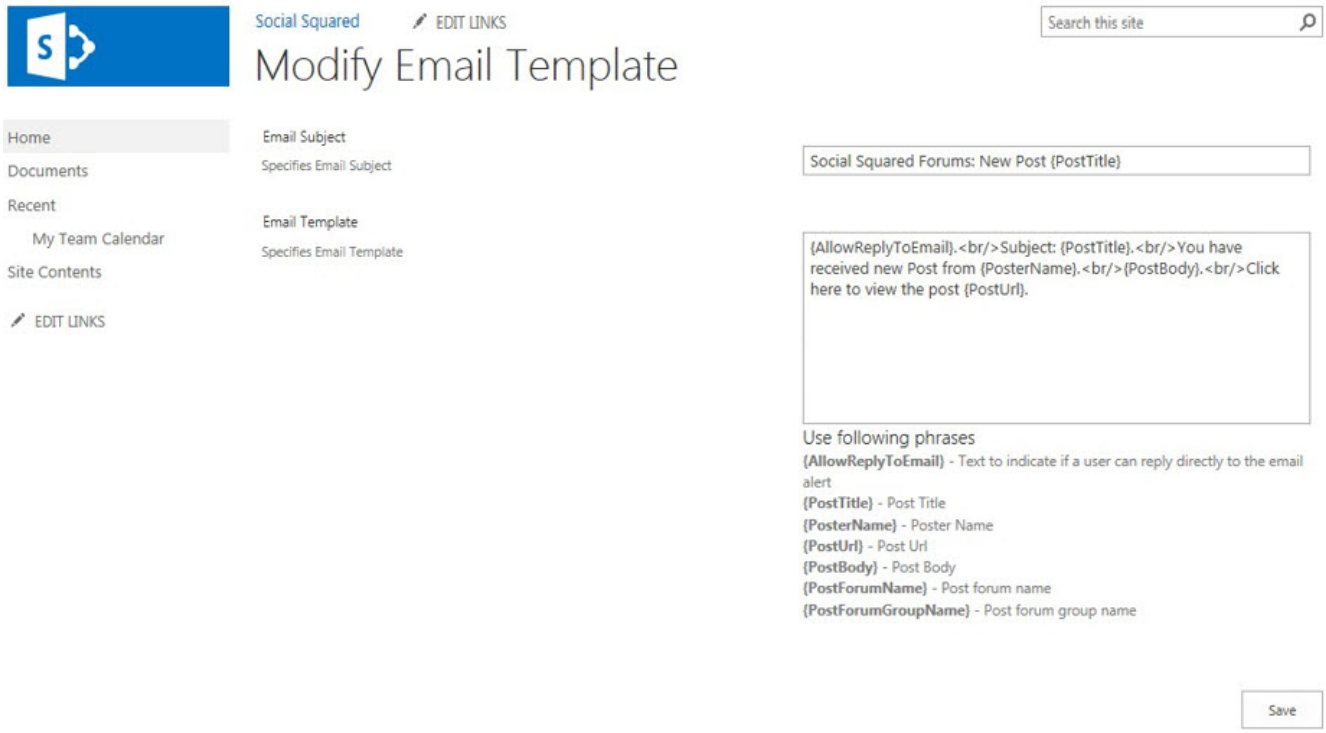
When posts are display or on the user profile page, Social Squared checks the user's reputation score, finds the appropriate badge, using the values typed in the **Min Point** and **Max Point** columns, and render badge image, detailed in the **Image Url** column displaying the tooltip from the **Title** column, when the cursor hovers over the image.

Customizing the Email Template

If you do not like the default email that is sent by Social Squared, you can customize it. To customize the email template that Social Squared uses, complete the following steps:

> You will need to be a Social Squared administrator to complete these steps.

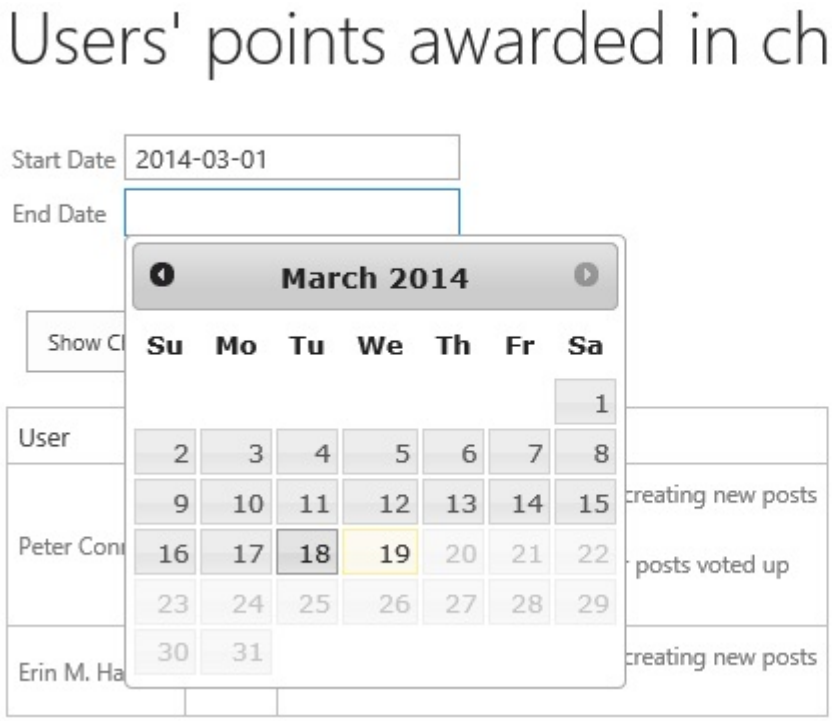
1. From the **Site Settings** page, under **Social Squared Forum**, click **Modify Email Template**.
2. Amend the contents in the **Email Subject**, and **Email Template** text boxes.



3. Click **Save**.

Reporting

Social Squared allows you to create reports. To report on Social Squared, you must activate the **Social Squared Reporting** site collection feature, on at least one site collection. The **Social Squared Forums** site collection feature, when activated, adds a section heading, **Social Squared Reporting**, on the **Site Settings** page, that contains links to Social Squared reports. The reports are based on data from one Social Squared database, and therefore you the site you are using to generate the reports must be connected to a Social Squared database.



You can provide information, as shown in the table below, to restrict the data used to generate the report. Then click **Show Chart** to generate the report:

Report	Description	Forum Group	Forum	Topic	Start Date	End Date
Topics per Forum	Count of number of topics for chosen forum in chosen date range.	x	x	–	x	x
Posts per Forum	Count of number of posts for chosen forum in chosen date range.	x	x	–	x	x
All Topics	Counts the number of topics per day in date range chosen.	–	–	–	x	x

All Posts	Counts the number of posts per day in date range chosen.	–	–	–	x	x
Topics' Replies	Count the number of replies per topic	–	–	–	x	x
User's Points	Points awarded per user within chosen date range.	–	–	–	x	x
New Users	Number of new users in chosen data range.	–	–	–	x	x
Marked As Answered Topics Per Forum	Number of posts marked as answers from chosen forum in chosen date range.	x	x	–	x	x
Topic Ratings	Users who rated a chosen topic.	x	x	x	–	–
Abuse Postings	Number of posts marked as abuse from a chosen forum in a chosen date range.	x	x	–	x	x

All input fields other than **Start Date** and **End Date** are required fields. When no **Start Date** is provided then the date when Social Squared was installed will be used. When no **End Date** is provided then today's date is used.

Using Social Squared Web Parts

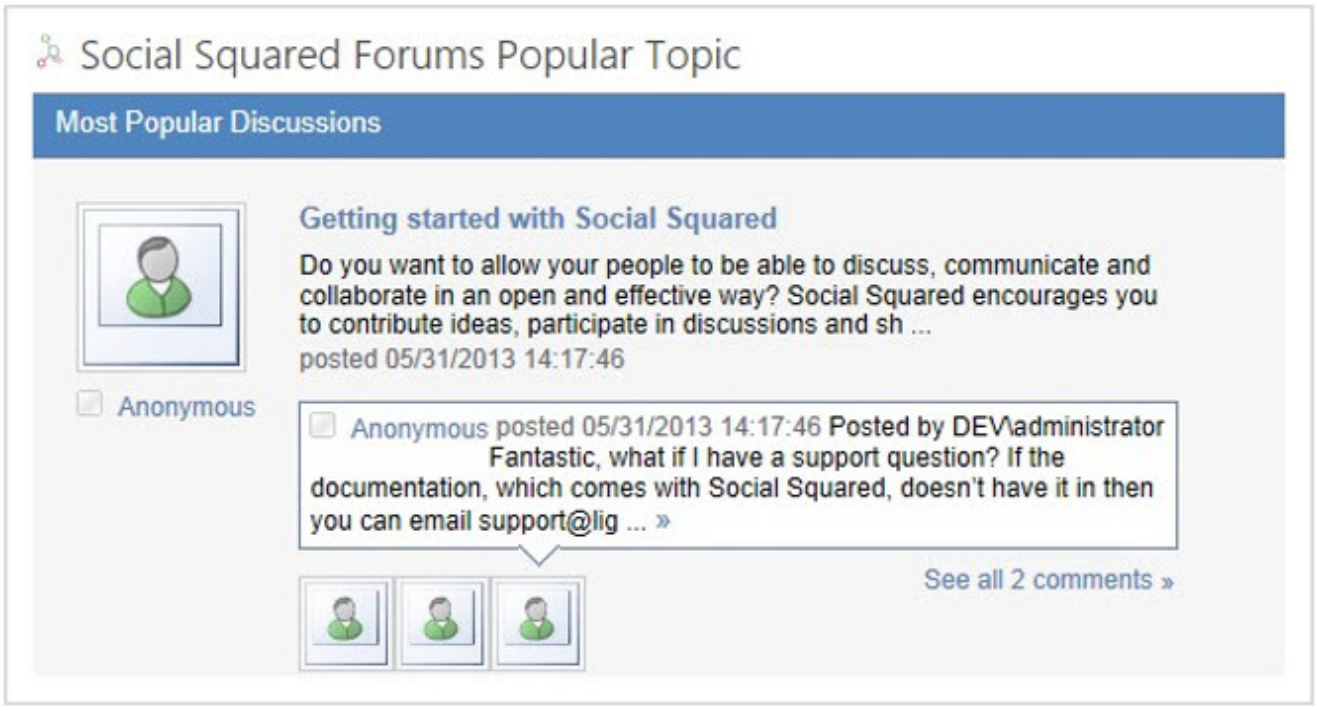
Social Squared provides four Web Parts, that can be added to any SharePoint® page, including wiki, Web Part or publishing pages, using the browser. Each Web Part has a number of properties specific to Social Squared plus the common Web Part properties, which can be configured.

- **Social Squared Forums**. This is the main Social Squared Web Part, that allows users to use Social Squared. Once you have created a forum, within a forum group, you should add this to a page, so that topics and posts can be created, and users can reply, identify posts as answers and vote on posts. This web part also displays two tab to the top far right:
  - Chat. This can be used to show or hide the chat pane, allowing users to chat to each other. This tab is only displayed if Chat is set to true on the Forum Settings page.
  - Forum Tools. When a user hoovers their mouse over this tab, they are provided with links to edit their profile, view email subscriptions, and to see followers.

- **Social Squared Forums Active Users**. Use this Web Part to display the 10 most active users over the past 30 days. Use this Web Part to encourage forum participation.

  This Web Part caches the results for 60 minutes to help with performance, and displays the top 10 people who've made the most posts across all the forums over the last 30 days. By editing the web part properties, you can show and hide forum groups. Otherwise, a user may show as most active, even if they do not participate within the forums on the current page.

- **Social Squared Forums Popular Topics**. Use this Web Part to display the most popular topics from the forum groups selected in the Web Parts tool pane. Users of the forums are able to view comments on a topic by hovering over a user's image.



- **Social Squared Forums Tagging**. Use this Web Part to display a visual depiction of the tags used in topics and posts, where the font size of the words that make up a tag name becomes larger as the frequency of that tag increases. Such a visual display is often known as a tag cloud.

By default tagging is deactivated, therefore first activate tagging using the Forum Settings page, before using this Web Part.

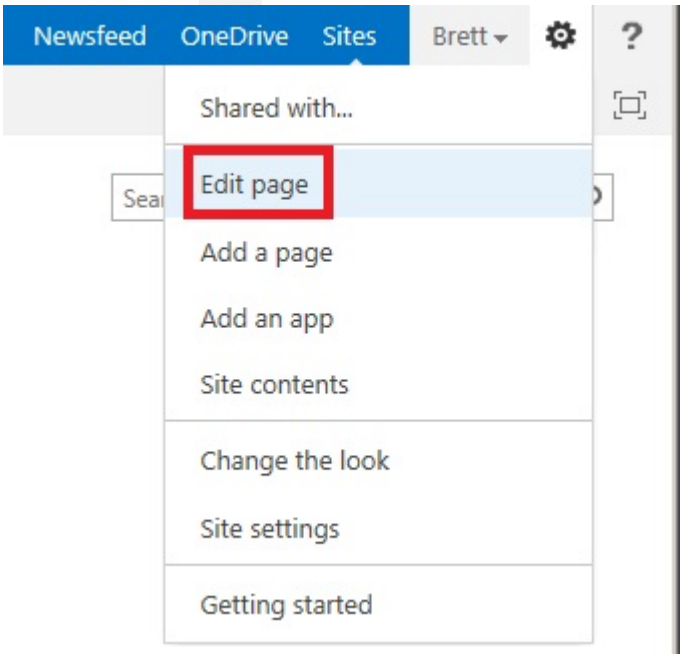
Adding a Social Squared Web Part to a page →
Configuring Social Squared Web Parts →

Adding a Social Squared Web Part to a page

To add a Social Squared Web Part to a Microsoft® SharePoint® 2013 page, use the following procedure.

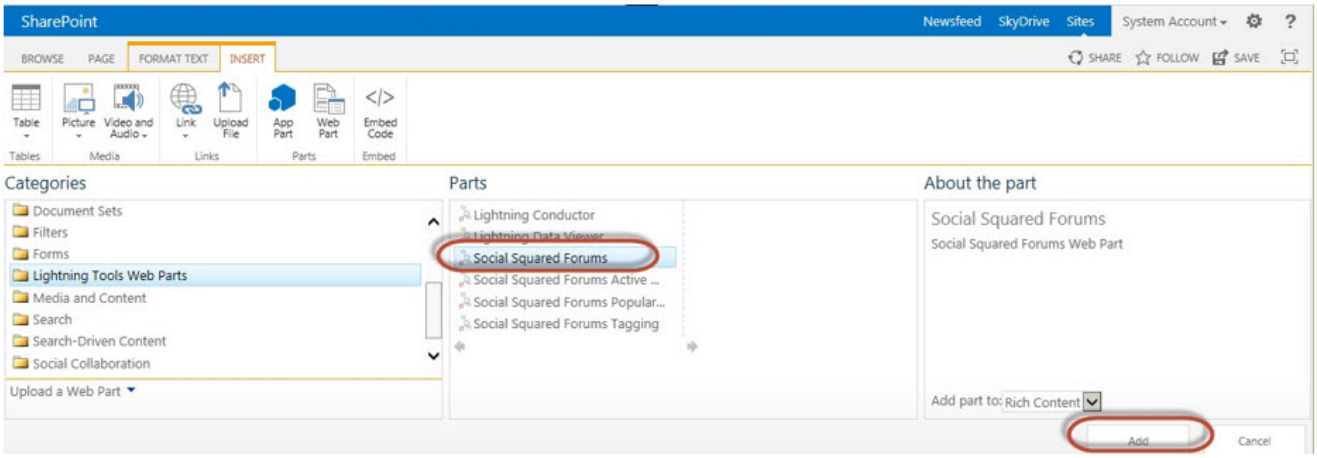
1. Navigate to the SharePoint page where you want to add a Social Squared Web Part.

2. Click **Settings** , and then click **Edit page**.



3. Depending on the page type, complete one of the following:
   - If it is a wiki page, place the cursor where you want the Web Part to be displayed, and on the **Insert** ribbon tab, click **Web Part**.
   - If it is a Web Part page or a publishing page, in the Web Part zone where you want to add the Web Part, click **Add a Web Part**.

3. Under **Categories**, click **Lightning Tools Web Parts** and then under **Parts**, click the **Social Squared** Web Part you wish to add to the page, and then click **Add**.



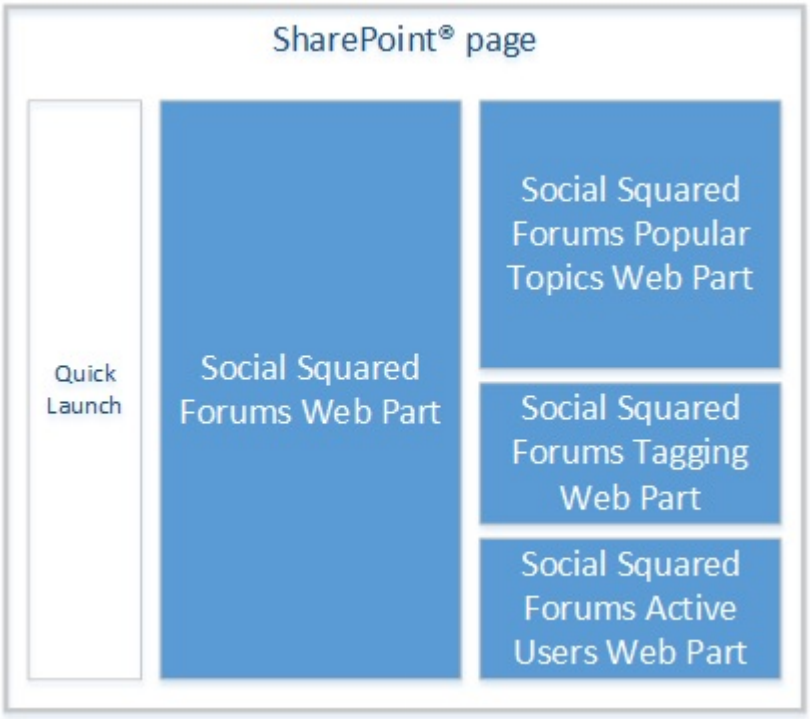
Troubleshooting: If the **Lightning Tools** category or the **Social Squared** Web Parts do not appear in the Web Part pane, the Social Squared Web Part site collection features have not been activated. Contact your site collection administrator to activate the Social Squared site collection feature(s).

References:

Add, move, minimize, or delete a Web Part from a page →
Create and manage pages in a publishing site →
Open and use the Web Part Maintenance Page →

Configuring Social Squared Web Parts

Social Squared consists of four Web Parts that are usually added to the same Microsoft® SharePoint® page to form a Social Squared forum dashboard, similar to the following diagram. Then on your site's home page you can provide a link to this page, so that users can use Social Squared.



Each Web Part has a number of properties specific to Social Squared plus the common Web Part properties. Using the Social Squared Web Parts properties, you can be configured these Web Parts to show all forum groups or only specific forum groups using the Web Part tool pane, as described below.

To display the Web Part tool pane, put the page in edit mode; point to the Web Part, click the down arrow that appears on the far right of the Web Part title and then on the Web Part menu, click **Edit Web Part**. The Web Part tool pane is displayed to the right of the page. You may have to scroll right to see the Web Part tool pane.

Social Squared Forums Web Part

The Web Part tool pane for the Social Squared Forums Web Part displays the following check boxes:

- **Show Page Title**. By default the page title is display on the browser tab. When this checkbox is selected, the browser tab contains the text, **Recent Forum Activity**, when a forum is selected, the tab displays the name of the forum name and when a topic is selected the browser tab contains the name of the topic. Additional text can be appended to the page title using the Forum Settings page.
- **All**.
- A check box for each forum group created in the Social Squared database associated with the site where the SharePoint page is created. When selected, only forums from those forum groups, and topics within those forums are displayed by the Web Part. When you configure to display only a subset of the available forum groups, it is recommended that in the Web Part tool pane, under **Appearance**, you type an appropriate title for the Web Part in the Title text box.

Other Social Squared Web Parts

The **Active Users**, **Popular Topics** and **Tagging** Web Parts require very little configuration. In most cases, you just need to add them to a SharePoint page. When the **Social Squared Forums** Web Part is display on the same page as one of these three Web Part, and you have configured the **Social Squared Forums** Web Part to display only a subset of the available forum groups, then it is recommended that you configure these Web Parts to show the same forum groups.

References:

Change the layout of a wiki page →
Add, move, minimize, or delete a Web Part from a page →
Common properties of Web Parts →
Open and use the Web Part Maintenance Page →
Keyboard shortcuts for common tasks on SharePoint pages →
Keyboard shortcuts for Web Part Pages →
Create and manage pages in a publishing site →