# Administrator Guide – Social Squared in SharePoint Online

## Introduction

As a Site Owner of a SharePoint Site, you have the required level of permissions to instantiate and configure an instance of Social Squared for the SharePoint Site that you manage. In this guide, we will use the example of building a Community of Practice with the fictional company "Contoso" being the subject. Of course, you can design your instance of Social Squared however you please, but hopefully you will find the example to be useful.

A Community of Practice is a valuable asset in any organization. It allows for decreasing the learning curve of new employees, responding more rapidly to questions and inquiries, reducing rework, and spawning new ideas for products and services.

A successful community of practice will have subject matter experts (moderators) who can field questions on their area of specialization. However, the community (users) can engage in discussions within forums with the outcome of decisions or goals.

Within this guide, we'll configure a brand-new instance of Social Squared for the Community of Practice, and discuss the benefits of each feature that can be configured. An End User Guide is also available, which explains how to navigate forums, and create Topics and Replies as a user.
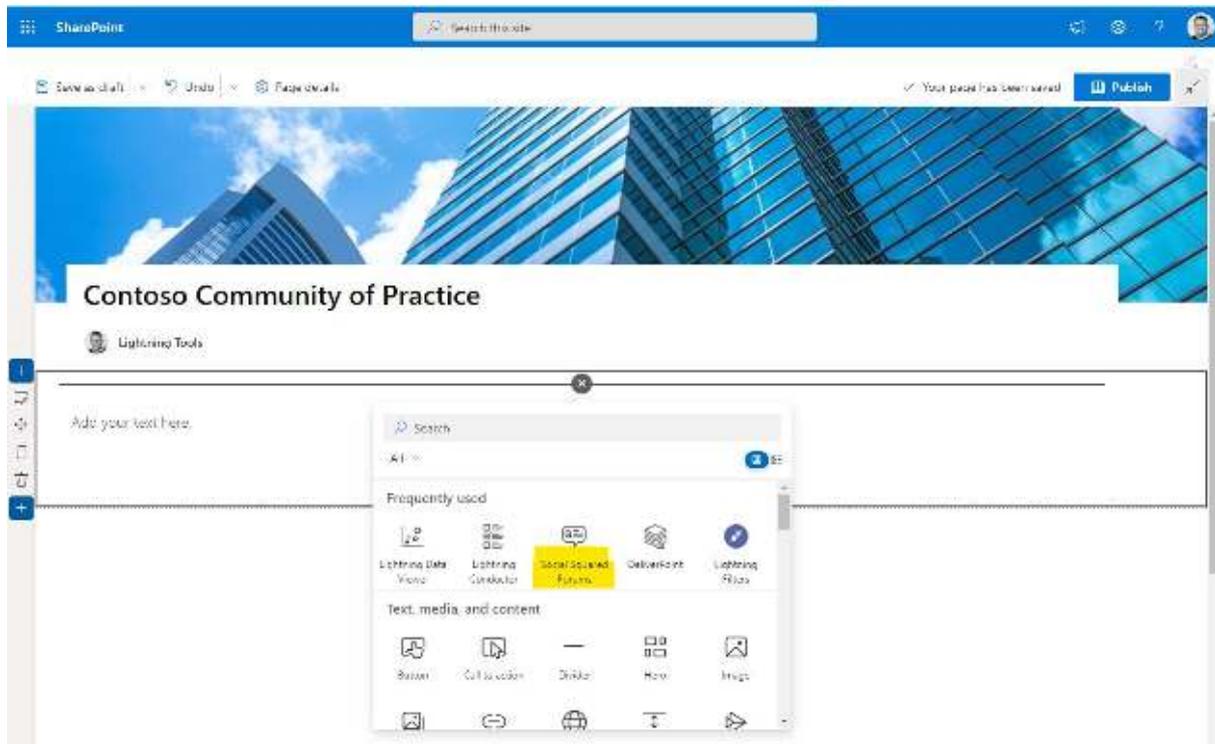
## Adding Social Squared

If you are reading this, you have already added Social Squared to your SharePoint Site! However, hopefully this section will provide you with some insights, tips, and tricks on adding Social Squared.

Social Squared can be added to any Modern SharePoint page, and that includes the home page of a SharePoint Team Site or Communication Site.

To add Social Squared:

1. Edit the SharePoint page by clicking Edit in the top right-hand corner.
2. Click the + icon in the section of the page where you wish to add Social Squared.
3. Click the Social Squared Forums app.

4. The first time you add Social Squared to a SharePoint Site, it will create some hidden lists within the site. These lists store the content and configuration of Social Squared. Please be patient while these lists are generated.
5. Once the lists have finished installing, you can begin to configure Social Squared. Before we do, let's discuss some ideas around the structure of the Forum Groups and Forums in the next section.

## Forum Groups & Forums

In this section, we'll explore how to go about planning your Forum Groups and Forums, and also how to actually configure them using Social Squared.

### Planning your Forum Groups and Forums

Social Squared provides three levels for categorising discussions:

- Forum Group
- Forum
- Topic

A Forum Group is the outer category for conversations. The Forum is an inner category, and the Topic is the start of the conversation which of course could be an idea, a statement, or a question.

There are many examples on the internet of Forums for different interests. Let's see an example below of how a layout could be created for a Community of Practice around BMW cars:

Site Name: BMW Forums

Forum Groups & Forums:

- BMW 1 Series (Forum Group)
    - General
    - Bodywork
    - Interior
    - Electrical
    - Engine
    - Brakes
- BMW 3 Series (Forum Group)
    - General
    - Bodywork
    - Interior
    - Electrical
    - Engine
    - Brakes
- BMW 5 Series (Forum Group)
    - General
    - Bodywork
    - Interior
    - Electrical
    - Engine
    - Brakes

Topics:

A topic may be created by a person who owns a 2014 BMW 330I. The person has a question about a warning light showing on his dashboard. The best place for that question to be asked would be in the Electrical forum under the BMW 3 Series Forum Group. A Moderator would be a specialist in BMW 3 Series Electrics and would be able to offer sound advice in the form of a reply. However, other members who may have also experienced the same warning light, may also be able to offer advice. Those users can reply to the topic. Once the Author of the topic (the owner of the BMW 330I) has read the advice and resolved the problem, he/she can mark the best reply as the answer. This will go on to help other people in the future who may have the same warning light displayed on their dashboards.

Social Squared can be configured in the same way as the above example, but it's more likely that you will be configuring it for a business purpose. So, in the below example, we will plan Forum Groups and Forums for Contoso Corporation. The Forums will help the community (employees) to contribute to a better company with improved or new products, better marketing techniques, and

sales strategies. Moderators would be assigned to each forum; for example, a Marketing Specialist would be an appropriate moderator on the Marketing Forums.

Depending on your requirements, if we were to create a Forum for everyone in the organization to contribute to, we may plan our forum groups and forums as per below on a communication site:

Site Name: Contoso Corporation

Forum Groups and Forums:

- Product Ideas and Questions
  - Home Electronics
  - Business Electronics
  - Car Electronics
- Marketing Ideas and Discussions
  - Events & Conferences
  - Social Media
  - Microsoft Advertising
  - Other
- Sales Strategies
  - Direct Sales
  - Partner Network
- Employees
  - Wellbeing
  - Benefits

It is possible, however, that you wish to use Social Squared in a more focused way, such as for a specific business unit, department, office location, or project. In the below example, we focus on Marketing:

Site name: Contoso Marketing

Forum Groups and Forums

- Online Marketing
  - Summer Campaign
  - Fall Campaign
  - Twitter
  - LinkedIn
  - Pay per Click Advertising
- Offline Marketing
  - North America Events
  - EMEA Events
  - Southeast Asia Events

Planning your Forum Groups and Forum structure is key to the success of the forums for your employees. Discussions with Moderators and Users will help to brainstorm the ideal structure. In the next section, we'll explore how to configure the Forum Groups and Forums.

## Creating Forum Groups and Forums

Once you have a plan for creating your forum groups and forums, you can begin to build the Forum Groups and Forums.

**To create the Forum Groups:**

1. Click the Ellipses in the top left corner of Social Squared, and choose Forum Settings.
2. In the right-hand side panel, click 'Add Forum Group'.
3. Provide a Title for your Forum Group – for example Online Marketing.
4. Click Add.
5. Repeat these steps for each Forum Group.
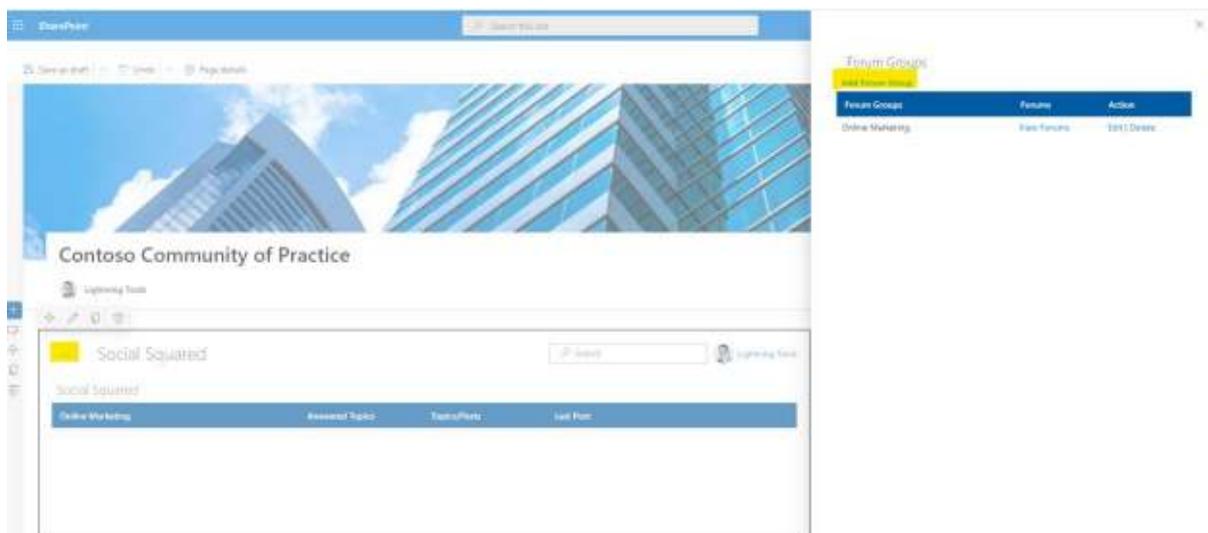


To Create Forums within the Forum Groups:

1. Click View Forums in the side panel next to the Forum Group within which the forum will be created.

2. Click Add Forum.
3. Provide a Title for your Forum – for example 'Social Media'.
4. Provide a Description for your Forum – for example 'Social Media campaign ideas'.
5. Optionally, add a moderator (Moderators are covered in the next section).
6. Click Add.
7. Repeat for each Forum in your Forum Groups.



## Configuring Moderators

Moderators can be configured at the time you create a forum, or after the forum is created. A moderator is a subject matter expert who has the required permissions to remove posts and topics, edit posts and topics, move topics, mark posts as the answer or featured, and approve topics. You can define multiple moderators per forum, if required.

**To set a moderator:**

1. Click the Ellipses in the top left corner of Social Squared.
2. In the right-hand side panel, click View Forums.
3. Click Edit next to the Forum that you wish to assign the moderator to.
4. Add moderator(s) using the Moderators field.
5. Refine the options which are described below:


- Enable additional moderators who are not picked by People Picker. (This allows you to add external users (guests) as moderators using an email address rather than the people picker).
- Allow users to create topics and post messages while the forum is under moderation (enabled by default). (Moderators will have to approve new topics and posts before they are displayed to all users if this is turned off)
- Allow only Admins and Moderators to create new Topics (Only moderators or administrators can create topics for discussion. This is ideal for the education sector where teachers could be the only people allowed to add new topics).
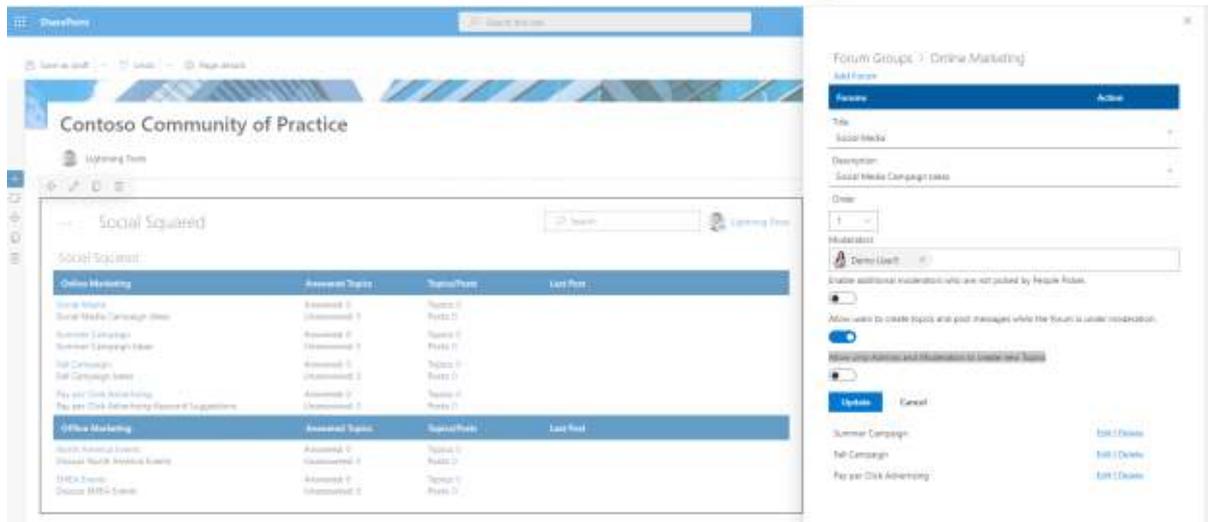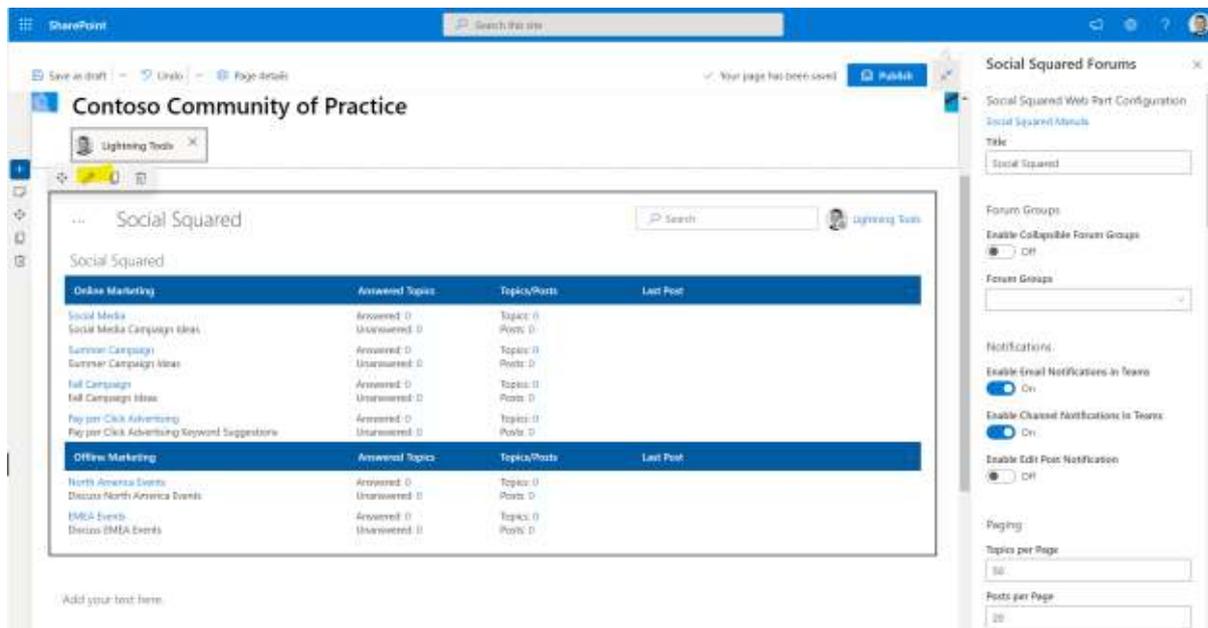
## Setting Properties

To open the Social Squared property pane:

1. Click 'Edit' on the page
2. Click the 'Edit Web Part' pencil icon in the top left corner of Social Squared.
3. The property pane will appear.



## Title

The default title for Social Squared is 'Social Squared'. In the property pane, you can change the title which will display in the top left hand corner. An example may be: "Contoso Marketing".

## Forum Groups Properties

By default, the Forum Groups can be collapsed or expanded by clicking anywhere on the Forum Group bar. All Forum Groups created within the current site will also be displayed. However, it is possible to be selective as to which Forum Groups should display on each page within the SharePoint Site. For example, you may have a page within your SharePoint Site that is intended specifically for Online Marketing. Therefore, you could add Social Squared to the Online Marketing page and choose to only display the Online Marketing Forum Group.

To display all Forum Groups as initially collapsed, turn the Enable Collapsible Groups to On.

To show specific Forum Groups, select one or more forum groups from the Forum Groups drop down. Deselecting all forum groups will display all forum groups.

## Notifications Properties

When users subscribe to a topic, to a forum, or follow a user, they will receive an email notification of a new topic, reply to topic, or a new post from a specific user that they are following. When the post is created within SharePoint, the notification will only be in email format. However, it is also possible to use Social Squared within Microsoft Teams. You then have a choice over using Teams Channel notifications and/or email notifications when a post is created from within Teams.

If you are using Microsoft Teams, you can set the first two options shown below from within Teams.

- Enable Email Notifications in Teams
- Enable Channel Notifications in Teams

You can also select whether you would like notifications to be triggered by a user editing a post that you are subscribed to by setting Enable Edit Post Notification to On.

Notifications

Enable Email Notifications in Teams

On

Enable Channel Notifications in Teams

On

Enable Edit Post Notification

Off

## Paging Properties

Social Squared offers two paging properties. You can control how many Topics are shown within the forum view per page. The users can then use the page navigation controls to move to the next page.

+ Add new Topic    UnSubscribe    (Un)Subscribe Users

| Topics | Replies/Views | Latest Post |
|---|---|---|
| How can I work from home?<br>Lightning Tools<br>7/12/2022, 3:56:39 PM | Replies: 1<br>Views: 2 | Lightning Tools<br>7/12/2022, 3:56:10 PM |
| Emotional Intelligence as a leader.<br>Lightning Tools<br>6/23/2022, 6:21:54 PM<br>★★★★★ | Replies: 1<br>Views: 7 | Lightning Tools<br>6/23/2022, 6:22:22 PM |
| Flexible working in your business<br>Demo User6<br>2/7/2022, 12:46:53 PM<br>★★★★★ | Replies: 0<br>Views: 7 | Demo User6<br>2/7/2022, 12:46:53 PM |
| Reduced professional efficacy<br>Demo User6<br>2/7/2022, 12:42:37 PM<br>★★★★☆ | Replies: 8<br>Views: 28 | Lightning Tools<br>5/26/2022, 1:24:25 PM |
| How employees can protect their health<br>Demo User6<br>2/7/2022, 12:41:24 PM | Replies: 2<br>Views: 7 | Lightning Tools<br>2/24/2022, 4:35:50 PM |
| How companies can address WFH burnout<br>Demo User5<br>2/7/2022, 12:38:59 PM<br>★★★★☆ | Replies: 6<br>Views: 14 | Lightning Tools<br>3/14/2022, 4:05:57 PM |
| How can I achieve a better work-life balance?<br>Demo User5<br>2/7/2022, 12:35:46 PM<br>★★★★★ | Replies: 2<br>Views: 16 | Lightning Tools<br>3/9/2022, 6:42:27 PM |

« ‹ 1 › »

You can also configure the number of posts per page when reading a topic. The pagination controls will appear at the bottom of each page.



Introducing flexible working can benefit your business in several ways:

1. **Competitive edge**
Smaller businesses may not be able to match the benefits of larger, more established employers, but they can have an edge over their rivals when it comes to hiring talent if they offer flexible work arrangements. One in two small businesses with less than 50 employees offers flexible working, according to research by Smarter Working Initiative. Small British enterprises like London-based pet food brand Lily's Kitchen and Huntingdon-based water supplier and recycler Anglian Water have flexi-time policies.

2. **Staff retention and morale**
Flexible working arrangements can boost employee morale and motivation through higher job satisfaction and an improved sense of work life balance. Flexible working can reduce fatigue and stress, factors which may cause employees to lose focus and under perform as a result. Happier employees can mean improved retention levels, productivity and quality of work.

3. **Financial benefits**
In addition to flexible working arrangements helping to increase productivity, they can reduce hiring and training costs due to improved retention, along with the costs associated with sick leave, absenteeism and lateness. Flexible working is also relatively quick and inexpensive to introduce compared to other benefits.

**Flexible working arrangements: what are the rules?**

Since the Flexible Working Law was passed in June 2014, all UK employees –not just parents and carers –who have been working 26 continuous weeks and haven't made another application for flexible working within the previous 12 months are eligible to apply for flexible work conditions.

Here are the guidelines from the ACAS Code of Practice for companies where flexible working isn't the norm:

1. Employees should know that they must make a written request for flexible work.
2. Employers must discuss the request with their employees. Whenever possible, they should talk in a private place where they won't be overheard.
3. The employer should consider the request carefully. Assess the employee and company benefits of the request against any potentially negative business impact of implementing the request.
4. Inform the employee about your decision within three months. Do this in writing to avoid confusion in the future on what was decided.

work-life balance    Work From Home

↩ Reply    ···

« ‹ 1 › »

## Paging

**Topics per Page**

50

**Posts per Page**

20

## Emojis Properties

When users are reading other people's posts, they can provide feedback using 'Likes'. By default, they can choose from several Emojis: Loveheart, Laugh, Shocked, Sad, Angry.



You can refine these options in the property page. Likes can be turned off completely (note that ratings and voting could still be used). Or, you can have the Loveheart Emoji only by setting Enable Other Emojis to off.

Emojis

**Enable Likes**

On

**Enable Other Emojis**

On

## Tagging Properties

Within Social Squared, users can tag their posts to make them more discoverable using the Tag Cloud view and Search. The default is that they can use any tags they like to describe their posts. Tags will be suggested to them if tags have been used previously within this instance of Social Squared and if the content is similar to that of another post.

You can turn Tagging off completely by turning Enable Tags to the Off position.

You may also use your organization's Managed Metadata Term Store for a predefined set of tags that the user can choose from by setting 'Enable Term Set Picker for Tagging' to On. You can then select the term set that you wish to use.



## File Properties

Users can attach files to Topics and Posts that they have created in Social Squared. The File section of the property panel controls the storage of those attachments, along with permitted file types, and maximum upload sizes. Below is a description of each of those properties.

- Enable Attachments – Using this property, you can turn off attachments if you would rather that attachments were not allowed at all.
- Upload files to – The options are Document Library or List Item Attachment.
  - o Document Library – A Social Squared document library (SS_Attachments) is automatically created and is the repository for all attachments to Social Squared posts within this site. The benefit to using this option is that Documents can be indexed and searched as part of the Microsoft Search, and you can use versioning and all other document management features of Social Squared. The content could also be aggregated with a tool such as the Lightning Conductor.
  - o List Item Attachment – A Social Squared post resides in a hidden list called SS_Posts. Using this option, the file will be an attachment to the list item for the post. This option is really for backwards compatibility and doesn't offer any advantages over the Document Library experience.
- File Types – A list of file types that can be uploaded to posts. If you have a discussion forum for architectural drawings for example, you could limit the attachments to just image or dwg files. The default is to allow jpg, png, gif, pdf, and mp4. You can simply add more file types separated with a comma.

- Max Upload File Size in MB – The maximum upload size is set to 8MB. This can be increased to a limit of your choosing. Note that if you reduce the file size below 8MB, the mobile phone experience will be poor when people try to attach photographs from their mobile phones.

File

Enable Attachments

 On

Upload files to

List Item Attachment ⌄

File Types (use , as separator)

jpg,png,gif,pdf,mp4

Max Upload File Size in MB

8

## Badges

Within Social Squared, when users provide replies to topics, have their posts voted on, or have a reply marked as answered, they are awarded points as follows:

- Reply – 1 point
- Post upvoted – 2 points
- Post downvoted – 2 points deducted
- Post marked as Answer – 3 points

Using the Social Squared properties, you can:

1. Enable or disable Badges.
2. Set the thresholds for when each badge is awarded, e.g. 1 point = 1 badge, 5 points = 2 badges.
3. Badge Icon Picker – You can select the badge icon to be used in this instance of Social Squared.

Badge

**Enable Badges**

(toggle) On

Badges (Enter the point levels you wish to
use for badges, separated by commas)

| 1,5,10,50 |

e.g. 1-5 one badge, 5-10 two badges, 10-50 three badges,
greater than or equal 50 four badges

**Badge Icon Picker**

(button) 📋 Select Badge Icon

## Voting

One of the many options for collecting feedback in Social Squared is voting. Voting is a great feature for brainstorming discussions, ideas, and question/answer type forums. If you feel that voting is not relevant to this instance of Social Squared, the voting feature can be turned off. Alternatively, you can enable just upvoting and disable downvoting. Disabling downvoting also means that users will not have points deducted from their total if you are using Badges.

Voting

**Enable Votes**

(toggle) On

**Disable Downvoting**

(toggle) Off

## Content Date

Social Squared enables you to display Topics and Posts from a specific date onward. This is useful in some forums when older topics and posts become irrelevant. An example where this may be useful is in an education environment. Teachers could set the specified date to start at the beginning of the semester. You can choose a rolling date such as One Month, Three Months, Six Months, etc. – or display content beginning from a Date that you specify.

Content Date

Show content from Specified Date

| All | ⌄ |

Custom Date (From)

| | 📅 |

## View Refinements

In Social Squared, there are three views that can be controlled via the Social Squared property pane.

The Popular topics view by default will show the 5 most popular Topics based on the number of views that the topic has received. You can increase the number of Topics to be displayed in the Popular Topics view by increasing the Popular Topics Count.

The Recent Activities (last days) will show the most recent activity across the Forum Groups that are displayed in the current instance of Social Squared. You can refine what is considered recent within your organization by increasing or decreasing the day count for the Recent Activities.

The Active Users will show by default the most active users within the last 30 days. You can increase or decrease the day threshold based on your requirements.
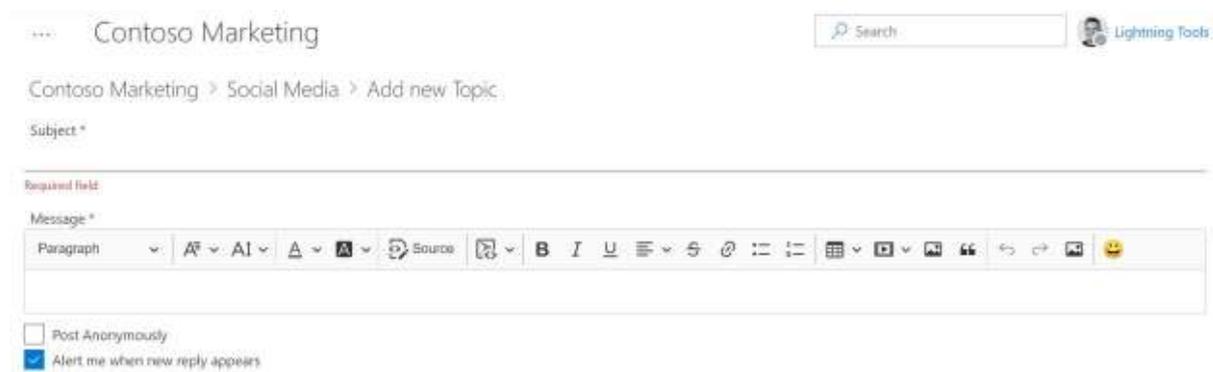


## Rich Text Editor

There are three styles of Rich Text Editor (RTE) in Social Squared. They all offer the same functionality, but with slightly different positioning.

"Classic" is a fixed RTE at the top of the post window.



The "Inline" option will hide the Rich Text Editor command bar until the mouse enters the content area. At that point it will display just above the content area.

The "Balloon" option will display the Rich Text Editor command bar only when text is highlighted in the content area.



After changing the Rich Text Editor style, you must publish your page for the changes to take affect.

**Rich Text Editor (RTE) options**

( • ) Classic

( ) Inline

( ) Balloon

## Admin Role

By default, Administrators of Social Squared are users who have Full Control to the SharePoint Site. This could be granted implicitly such as when the user is a Site Collection Administrator or Site Owner, or explicitly given Full Control. There are some circumstances where you may want another group of users to administrate Social Squared without having Full Control to the SharePoint Site. If this is the case, you can select the SharePoint Group you wish to use from the Admin Role drop down box. Users within the group that you specify will have Administrator rights over Social Squared so that they can define Forum Groups and Forums. Note that existing Site Owners will also still have full control to Social Squared.

## Alternate Content Source

The default behaviour for Social Squared is to display the configuration and the content from the hidden Social Squared lists within the current site. If you prefer, you can have the content source be another SharePoint Site. An example of when you might use this is when two departments want to enter discussions locally within their own departments' sites but for the conversations to also engage users of another department. For example, a Sales and Marketing discussion board could be displayed within the Sales Site and again in the Marketing Site. Note that people will need to have at least SharePoint Contribute permission on the site where the content is stored in order to participate in the forum.

To use an alternate content source, paste or type the URL to the SharePoint site that will be the content source, e.g. https://lightningtoolsproductdemo.sharepoint.com/sites/ContosoCommunityofPractice/



## Other Properties

Other properties in Social Squared include:

- Social Squared Forum's Microsoft Teams Tab Display Name – This is specific to Social Squared within Teams only. If you rename the Teams Tab, we also need to specify the same name within this property to allow URLs within notifications to resolve the Tab name correctly as a link.
- Refresh Interval – Social Squared can have a refresh interval set to allow new or updated content to display without the need for a page refresh.
- Show Side Bar – Rather than the Ellipsis menu in the top left corner of Social Squared, a side bar can be enabled to permanently display the views on the left-hand side of Social Squared.

- Enable Live Persona Card – Displays the M365 profile card showing user presence and contact details for each user. Hovering over the user's avatar anywhere in Social Squared will display the Persona Card.
- Enable Anonymous Posting – By default, Social Squared allows users to post anonymously. This is a great feature to enable when some users are not forthcoming with questions in fear of asking questions to an audience that they consider more knowledgeable. If you wish to turn off this feature, users will not be able to post anonymously.

**Social Squared Forum's Microsoft Teams Tab display name**

Social Squared Forums

**Refresh Interval**

0

Refresh Interval in seconds (zero means no Refresh Interval)

**Show Side Bar**
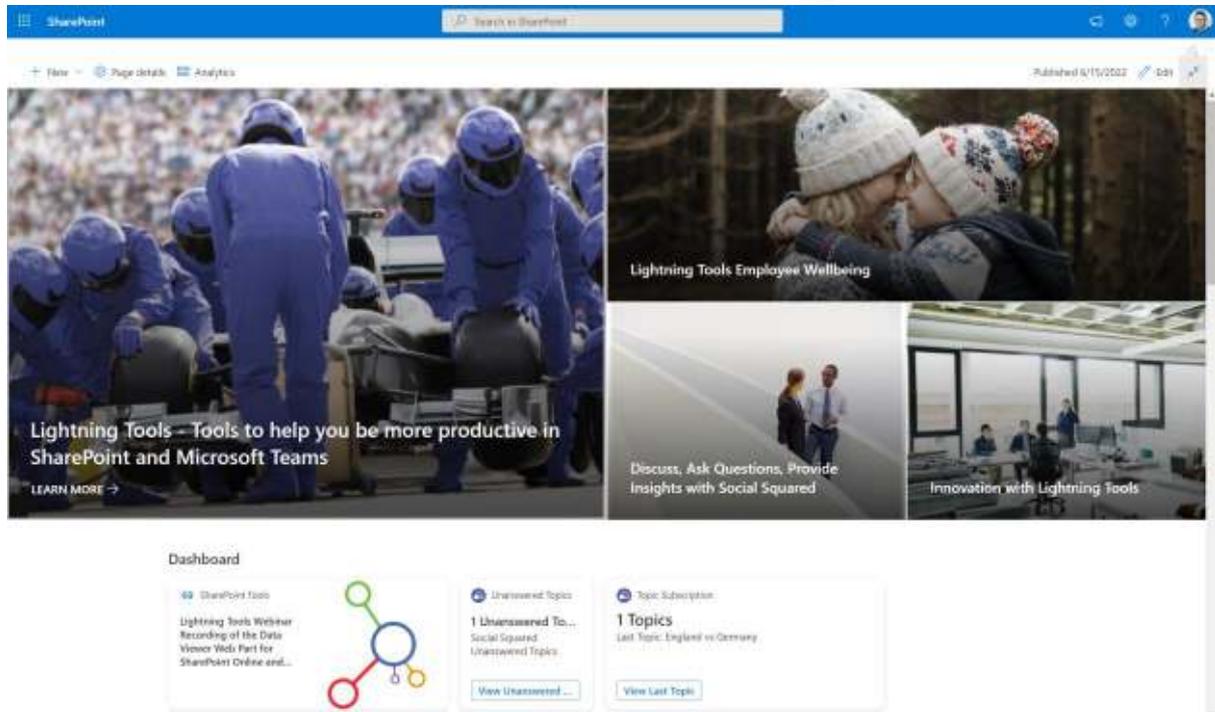
⚫◯ Off

**Enable Live Persona Card**

🔵⚪ On

**Enable Anonymous Posting**
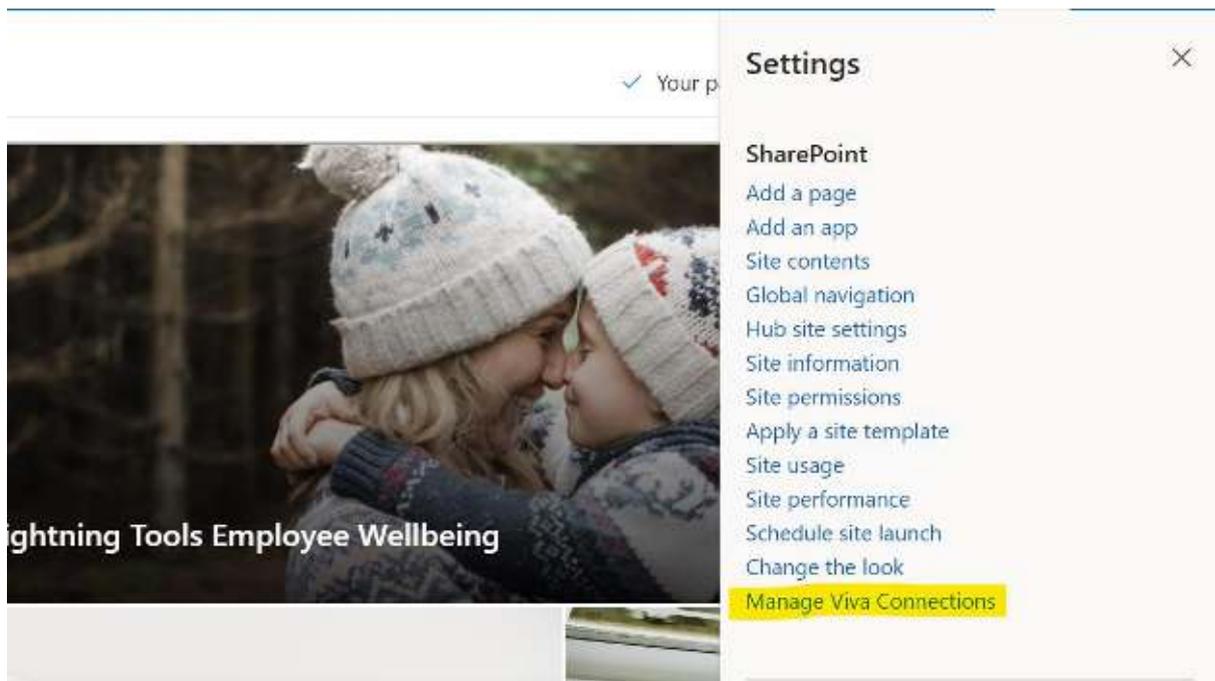
🔵⚪ On

## Social Squared as an Adaptive Card

If you are using a Microsoft Viva Connections enabled SharePoint Home Site, you can use Adaptive Cards to display some information from the local Social Squared instance.

To add the Adaptive Cards:

1. Choose Manage Viva Connections from the Settings menu in your SharePoint Home Site as highlighted below.



2. Choose View Dashboard.

3. Click Edit in the top right-hand corner of the Dashboard Page.
4. Choose the layout, e.g. Desktop or Mobile.
5. Then click Add a Card. You can then choose the Social Squared Adaptive Cards which will be automatically configured for the local source of Social Squared.