|  |
| --- |
|  |
| SharePoint Disclaimer Add-On User Guide |
| User Manual |
|  |
|  |
| **6/13/2017** |

|  |
| --- |
|  |

This document will provide users with instructions on how to use QIPoint’s SharePoint Disclaimer Add-On™.

Table of Contents

[Introduction 2](#_Toc485126177)

[Requirements 3](#_Toc485126178)

[Supported SharePoint Versions 3](#_Toc485126179)

[User Permissions Required to View the Disclaimer 3](#_Toc485126180)

[User Permissions Required to Manage the Disclaimer Items 3](#_Toc485126181)

[Installation 4](#_Toc485126182)

[Before You Start 4](#_Toc485126183)

[Install 4](#_Toc485126184)

[Uninstall 4](#_Toc485126185)

[Disabling the Disclaimer 4](#_Toc485126186)

[Setup & Configuration 5](#_Toc485126187)

[Activate the Feature 5](#_Toc485126188)

[Getting Started 5](#_Toc485126189)

[Create a Disclaimer List Item 6](#_Toc485126190)

[Reviewing the User Acceptance List 7](#_Toc485126191)

[Creating a Centralized Disclaimer for multiple sites 7](#_Toc485126192)

[Licensing 9](#_Toc485126193)

[Obtaining a License 10](#_Toc485126194)

[Transferring a License 10](#_Toc485126195)

[Technical Support 10](#_Toc485126196)

[My QIPoint Support Portal 10](#_Toc485126197)

[Phone or Email Support 10](#_Toc485126198)

# Introduction

This product “SharePoint Disclaimer” provides a simple disclaimer for a site to prompt users for acceptance before they can view content on the site.

Specifications

# Requirements

## Supported SharePoint Versions

Microsoft SharePoint Server 2016  
Microsoft SharePoint Foundation 2013   
Microsoft SharePoint Server 2013  
Microsoft SharePoint Foundation 2010  
Microsoft SharePoint Server 2010

## User Permissions Required to View the Disclaimer

Users require Read/Visitor Permission Level or greater to be able to Accept or Decline a disclaimer.

## User Permissions Required to Manage the Disclaimer Items

Users require Contribute Permission Level or greater at the Disclaimer List level to be able to create and manage disclaimers.

# Installation

## Before You Start

* If you have not already done so, download the program from [http://www.qipoint.com](mailto:user@mycompany.onmicrosoft.com)
* Extract the contents to a local drive on the Web Front End Server or Application Server.
* You must have the QIPoint Licensing C0mponent Installed in order for this product to function correctly. To check if this component is installed, you need to navigate to Central Administration->System Settings->Manage Farm Solutions and you should see ‘qipoint.sp.licensing’ ‘Globally Deployed’, that will indicate that the Licensing Component is installed.

## Install

1. Run Setup.exe as a computer Administrator
2. If the system requirements are not met, installation will not continue and you will receive a warning message.
3. You must accept the terms of the End User License Agreement to install the application
4. Follow the prompts and complete the installation

## Uninstall

1. Navigate to Central Administration->System Settings->Manage Farm Solutions
2. Retract ‘qipoint.sp15.disclaimer’
3. Once retraction is complete, and Uninstall/Remove ‘qipoint.sp15.disclaimer’
4. The Disclaimer Lists will still be present in the sites that they were installed on, you will need to delete these lists.

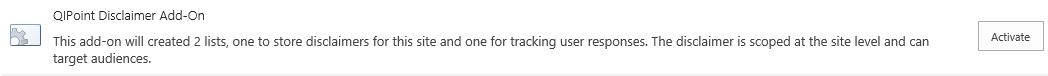
## Disabling the Disclaimer

If you are unable to reach your site because the Disclaimer is continuously prompting you, or having any issues, you need to follow the uninstall steps above.

# Setup & Configuration

## Activate the Feature

1. Navigate to the site collection you wish to add the disclaimer.
2. Go to Site Settings->Site Collection Features.
3. Activate the feature QIPoint Disclaimer Add-On



1. Once activated, the feature will create 2 lists “QIPoint Disclaimer” and “QIPoint User Acceptance” (TIP: You can rename these lists if needed as they are referenced using the List internal name).

## Getting Started

The Disclaimers, by default, are scoped at the site level and must be activated at the site collection level by activating the feature.

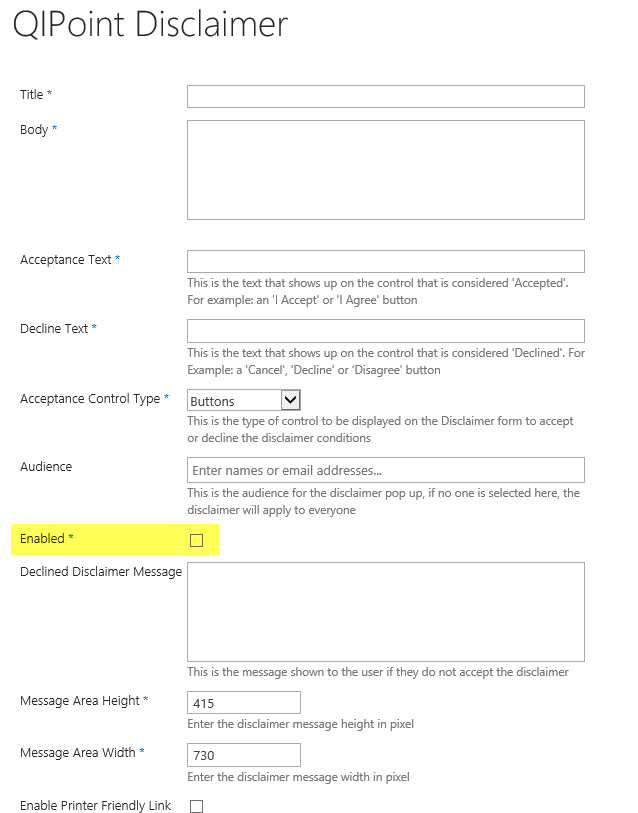
If you need to have a single Disclaimer for all sites and site collections, you will need to configure the centralized path to store the Disclaimer User List (see below).

Only one Disclaimer can be active at one time, if multiple Disclaimers are set to active, only the first Disclaimer in the SharePoint List “QIPoint Disclaimers” will be used for prompting the users.

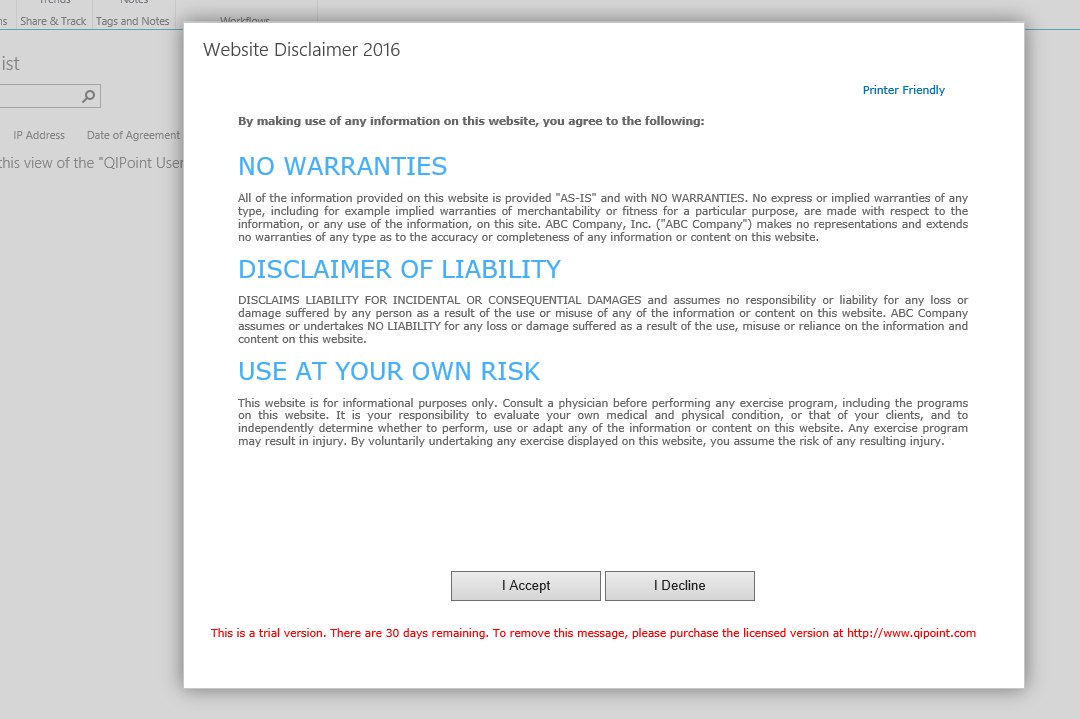
Once a Disclaimer List Item is created in the “QIPoint Disclaimers” list and set to active, users who have not yet ‘Accepted’ the Disclaimer will be prompted to do so before they can view any content on the site.

### Create a Disclaimer List Item

1. Navigate to the “QIPoint Disclaimer” list and click to add a New Item.



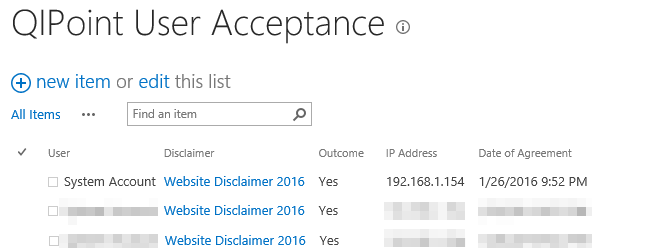
1. Complete the form, once you click OK, if the Disclaimer is ‘Enabled’ you will be prompted to accept the disclaimer or you will not be able to continue. Click Accept.
2. You can customize the message with more control if you modify the source html of the Body above.
3. Below is an example of the prompt you/a user would see:



1. Once the user clicks “Accept” or “Decline” the response will be tracked and stored in the “QIPoint User Acceptance” list.
2. If the user clicks “Decline”, they will see the “Declined Disclaimer Message” (a value stored in the Disclaimer list item).

### Reviewing the User Acceptance List

1. Navigate to the “QIPoint User Acceptance” list to review who has accepted or declined the Disclaimer prompt.
2. User name, IP Address, Disclaimer name and Date will be captured
3. If you delete a user/list item from this list, the user will be prompted again the next time they visit the site.



### Creating a Centralized Disclaimer for multiple sites

1. You can configure a centralized site to manage the Disclaimers and User Acceptance lists

To do this, navigate to the Site you want to setup to use a centralized Disclaimer, such as <http://contoso/sites/it>

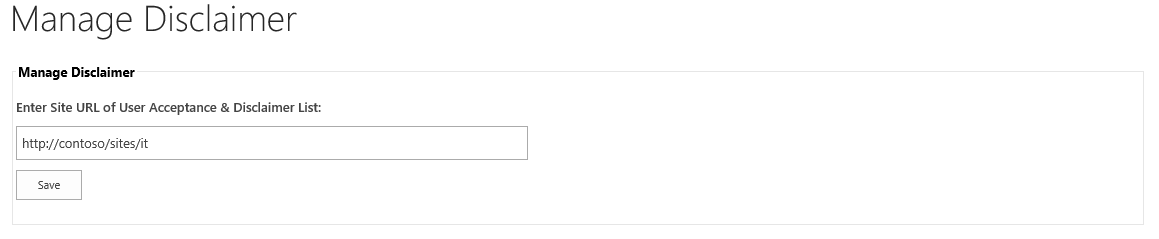
1. Navigate to the Site Settings-> QIPoint Solutions -> Manage SharePoint Disclaimer



1. You will see a textbox to enter the site URL of the site that will host the Disclaimer. For example, <http://contoso/sites/it>

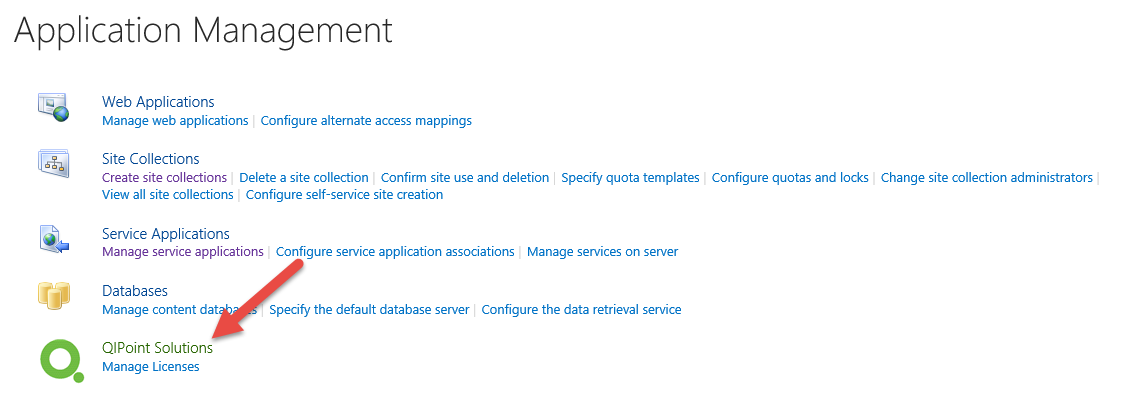
IMPORTANT: For the tool to function, the Feature “QIPoint Disclaimer Add-On” must also be activated at the ‘central’ site, in this example <http://contoso/sites/it>.

1. The site should now be using the centralized Disclaimer lists.

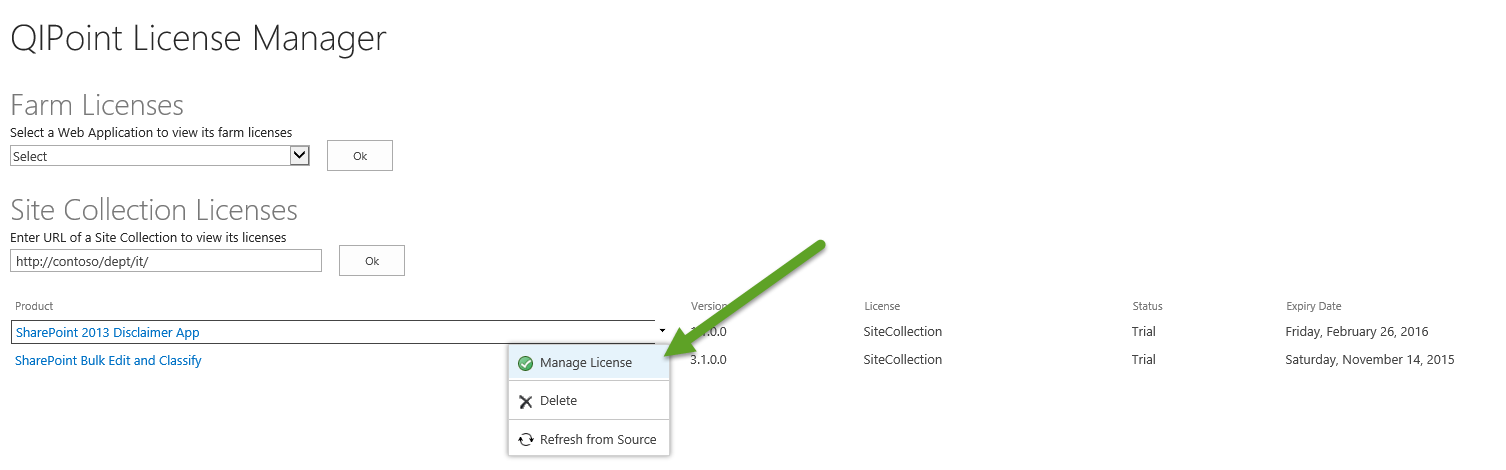


# Licensing

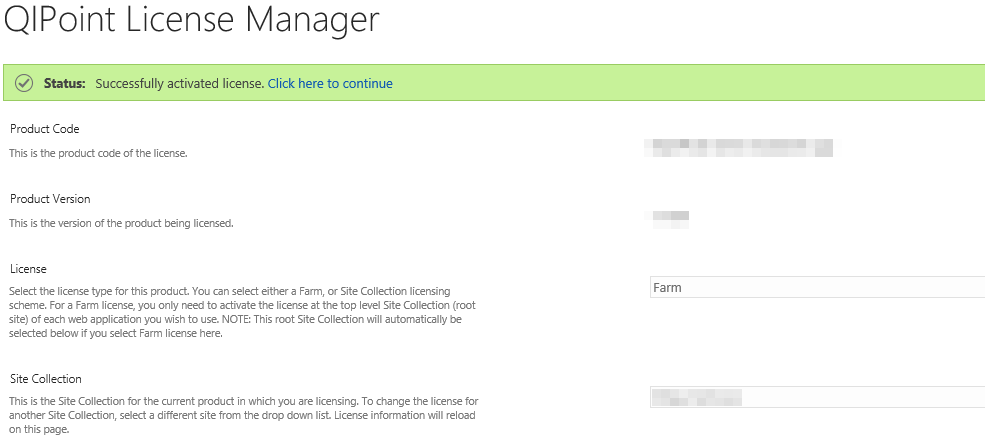
You can manage license by navigating to Central Administration->Application Management->QIPoint Solutions



1. Copy and Paste the site collection URL that is hosting the site where the product is activated. If more than one site is using the product, enter the site URL of any one of the sites.
2. Click OK
3. The license should appear in the list. Click on the drop down to select “Manage License”



1. If you have a Farm license, change the “License” field to “Farm”
2. Copy the Client Key and send it to [sales@qipoint.com](mailto:sales@qipoint.com)
3. We will provide you with the License Activation Key within 1 business day. Once you have obtained the License Key from us, paste it into the “Activation Key” section and click OK.



## Obtaining a License

There are two ways you can purchase a license

1. Online: visit [https://store.qipoint.com/](http://www.qipoint.com)
2. Call us at 1-855-747-6468

You may place your order and receive a license key with a PO# or Credit Card

## Transferring a License

You may need to transfer the license if the machine was lost, re-formatted, or if you would like to assign a license to another user. Contact us to obtain a new license activation key at [support@qipoint.com](mailto:user@live.com).

# Technical Support

## My QIPoint Support Portal

Submit a support ticket at <http://support.qipoint.com>

## Phone or Email Support

Contact us at 1-855-747-6468 or [support@qipoint.com](mailto:support@qipoint.com)