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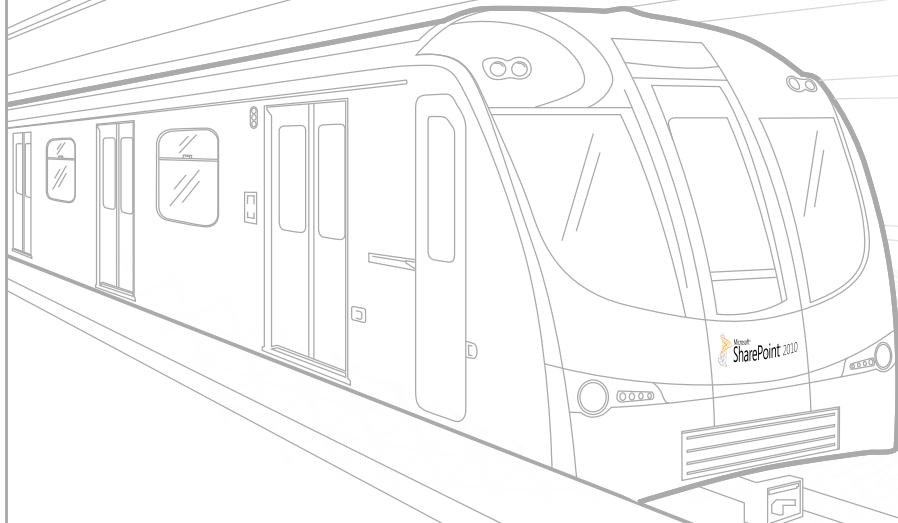
Your Stop for SharePoint Tips and Tricks

Find And Be Found: 7 Ways To Make The Most Of Your My Site

1. Build your reputation: Add "Ask Me About" items to your user profile. Your colleagues find you when they search for items in your list. See Use your My Site to ask and answer questions on www.office.com.

2. Encourage your colleagues to fill out and update their profiles to make your My Sites a community resource: Tap the collective knowledge of the organization! See Build a My Site profile to help people find you on www.office.com.

3. Add colleagues so you can keep track of their activities: get notified when they tag content, update their profiles, change their status, or update relevant documents. See Add new colleagues and manage your colleague list on www.office.com.

4. Share timely comments with colleagues by writing on their My Site Note Boards. Set your user profile so that you get an email when someone writes on your Note Board. See Use tags and notes to share information with colleagues on www.office.com.

5. Tag documents for easy locating in your My Site or on others' My Sites. Discover keywords your colleagues are using to tag similar content. See Use tags and notes to share information with colleagues on www.office.com.

6. Add your Tags and Notes tool as a Favorite in your browser so you can tag any Web page. See Use tags and notes to share information with colleagues on www.office.com.

7. Search for topics and find the experts. Type in search terms and find the people in your organization who know about their related topics. See Build a My Site profile to help people find you on www.office.com.

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Go with the Workflows: 5 Things You Need To Know About Built-In Workflows

1. Three built-in workflows, Approval, Collect Feedback, and Collect Signatures, cover up to 80% of your needs, with no coding or even SharePoint Designer required.

2. These built-in workflows are designed to save you time and effort, and to bring consistency and efficiency to chores that you perform on a regular basis.

3. Each workflows is flexible, enables routing and e-mailing to specific people, can assign different tasks, and are easy to monitor and control.

4. If necessary, it's easy to enhance these Built-In Workflows in SharePoint Designer, you don't have to start all over again.

5. Aditional help is available here: http://office.microsoft.com/en-us/sharepoint-server-help/CH010372671.aspx.

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Minding Your SharePoint Manners: SharePoint Do's & Don'ts

Do's

1. Use and create views to make lists easier. See Create, modify, or delete a view on www.office.com.

2. Make your sites usable, navigation, home page, and content. See SharePoint pages introduction I on www.office.com.

3. Take SharePoint content offline with Outlook and Workspace See Synchronize SharePoint 2010 content with Outlook 2010 on www.office.com.

4. Use Windows Explorer to upload multiple files and folders

5. Use Alerts to stay updated with SharePoint content. See Create an Alert on www.office.com.

6. Coauthor a single document, note, or presentation. See Document Collaboration and Co-authoring on www.office,com.

7. Fill out your My Site profile

Don'ts

1. Check out documents before collaborating with others

2. Create new SharePoint sites when you already have others

3. Don't add individual users to site (use groups)

4. Upload confidential information without locking down permissions

5. Send attached files in email (use SharePoint)

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Tag You're It! 5 Things You Need To Know About Tagging Your Content

1. Classify your content: when you use the Managed Metadata Service & hierarchical structured taxonomies you can classify content and in a very rich and structured way.

2. Find content via classification: content in document libraries and lists that have been tagged using Managed Metadata columns make the content easier to find.

3. Simplify finding content in large repositories: document libraries and lists can hold thousands of items which most people group together using folders. Finding exactly what you're looking for can be tricky using a hunt technique. The Managed Metadata Navigation enables users to select terms within a taxonomy to find content that has been tagged with specific terms in the taxonomy regardless of the folder they are in.

4. Refine search results: most search results yield a vast number of results. Users can find exactly what they are looking for when they can pivot the search results. SharePoint search automatically adds a search refinement to the results page displaying the terms used in the result set enabling users to refine and filter to get exactly what they are looking for.

5. Tag content regardless of the language of the user: taxonomies can be localized so that users can tag & search for content using terms localized to their default language, but regardless of the language it was tagged in.

Looking Good! Three ways to make your site compelling with videos, images, and links

1. You don't need to be an administrator, designer, or developer to make add links, images, and videos to your site!

2. Use the ribbon to add images, videos and links to your site. It's as easy as adding images and links in Microsoft Word or PowerPoint!

3. Use the Media Web Part to include full media controls for your videos automatically!

See http://www.point8020.com/SharePointExpressTopTip.aspx for a demo of adding images, videos and links to a SharePoint Site!

A Shoe That Fits: 5 Templates and What they can do for you

1. Choose a Team Site to manage your team or ongoing projects

2. Choose a Meeting Workspace to manage meetings with agendas, presentations, and attendees

3. Choose an Enterprise Wiki to create a centralized knowledge repository where everyone can contribute and update its content

4. Choose a Group Work Site to track and manage shared resources, events, and people

5. Choose a Contacts Web Database to manage customers with highly customized forms, queries, and reports in Access 2010

Learn more about these templates and others at:
http://office.microsoft.com/en-us/sharepoint-server-help/a-previewof-the-sharepoint-server-2010-site-templates-HA101907564.aspx#_Toc265154586

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No Trespassing: 5 Things You Need To Know About Managing Permissions

1. Stick to site permissions, especially when still learning SharePoint. Don't start breaking inheritance and avoid document level permissions like the plague.

2. If you do break inheritance on a list or library level, add yourself as a full control user first or you risk locking yourself out of your own library.

3. Once you've created your site – do permissions last. Build with your planning and structure in mind, then add content and then assign permissions.

4. Generally it is better to create departmental sites with unique permissions. Creating them with inherited permissions can be very tricky to change later. If you're still new to SharePoint, create site with unique permissions only.

5. Watch out when creating sites with unique permissions, the Visitors group defaults to the parent site. Make sure you click "Create New Group" at the Visitors group or you will give people access to your site without realising it. When click that option, it will automatically create the correct Visitors group.

Remember to plan, plan, plan!

Become A Meeting Master: 3 Ways To Manage Meetings Effectively

1. Add the Meeting Workspace command to either the Quick Action Toolbar or the Ribbon. – Unlike in Outlook 2007 the Meeting Workspace button no longer appears of the Ribbon. Refer to http://support.microsoft.com/kb/2312523 for instructions to add the button to Outlook 2010

2. Reduce email clutter. In the body of your Meeting Invitation tell participants that the Meeting Workspace will have Meeting Artifacts (Agenda, documents, presentations, etc.).

3. Control Agenda Items. You can enable Content Approval for items added to a meeting's agenda. This will help avoid having items on the agenda that do not belong.

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TEAMWORK: 7 Steps to Project Collaboration Success

1. Create a standardized project site template with relevant information & documents pre-loaded.▫
   http://office.microsoft.com/en-us/sharepoint-designer-help/save-a-sharepoint-site-as-a-template-HA101782501.aspx?CTT=1

2. Connect commonly used lists such as calendars, discussion board, project tasks to Outlook for convenient access.▫
   http://office.microsoft.com/en-us/sharepoint-foundation-help/synchronize-sharepoint-2010-content-with-outlook-2010-HA101881295.aspx?CTT=1

3. Synchronize Project 2010 schedule to project tasks list on your project site to allow team members to update their tasks without needing Microsoft Project. http://spgur.us/nOOuWe

4. Automate common project processes such as expense reimbursement or change control with built-in SharePoint workflows.
   http://technet.microsoft.com/en-us/sharepoint/ff819861

5. Visually represent key project metrics such as schedule and budget with chart web parts.▫
   http://office.microsoft.com/en-us/sharepoint-server-help/create-a-chart-by-using-the-chart-web-part-HA101889211.aspx?CTT=5&origin=HA101889216

6. Synchronize Excel spreadsheets with SharePoint lists to better collaborate on financial data. http://spgur.us/bej2Xy

7. Utilize mobile devices to access your project site

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Power to the people: 3 ways to use publishing to your advantage

1. You can easily change the page layout on a publishing page by using the 'page layout' option menu on the ribbon when editing a page.

2. Enable the Publishing feature on a team site for added functionality and new components. To get a complete list of what enabling this feature does see this article: http://technet.microsoft.com/en-us/library/ff628963.aspx

3. Use the Content Query web part as a great way to aggregate data from your site collection. For more information on this see this blog post by the Microsoft ECM team: http://blogs.msdn.com/b/ecm/archive/2010/05/14/what-s-new-with-the-content-query-web-part.aspx

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Better together: 5 ways to increase productivity with SharePoint and Office

1. Use Office Web Apps to always have your documents at your fingertips.

2. Change the way you author and collaborate on documents by choosing from the full spectrum of document collaboration. (http://office.microsoft.com/en-us/sharepoint-server-help/document-collaboration-and-co-authoring-HA101812148.aspx)

3. Access and control SharePoint 2010 settings in Office 2010.

4. Broadcast a PowerPoint presentation directly without any meeting software

5. See contextual My Site data using the Outlook Social Connector. See a live feed of a user's interaction with SharePoint content in the mail preview pane.

Think Outside The Inbox: 3 Keys To Blogging Your Way Out Of Email

1. Establish why you're blogging, set some ground rules about what to communicate, and stick with them. Sample rule for a team blog for exchanging ideas: Don't post urgent communications.

2. Make sure readers have permission to comment. Be ready to break permissions inheritance and let a broader audience contribute. See Roadmap: Grant permissions for a site on www.office.com.

3. Set up a daily or weekly alert for posts and comments, to tell you about new content, but not too often. See Create an alert or subscribe to an RSS feed on office.com.

   Bonus: Use Word or Live Writer to write posts. Makes posting much easier! See Video: Use Word 2010 to post to a SharePoint blog on www.office.com.

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Organizational Studies: 5 Tips to Manage Content in SharePoint 2010

1. Use content types when the content element and its' metadata need to be used in more than one site collection

2. Use the content hub to syndicate commonly used content types throughout your deployment

3. Use the content organizer to route content to automatically route content to the right location

4. Collaboratively build your taxonomies through the Managed Metadata Service

5. Align Advanced Search in your Search site to query across one or more metadata trees for better recall and precision

Free Your Data, And The Rest Will Follow: 5 Ways To Gain Deeper Insights With Duet Enterprise

1. Save time, increase productivity: use Duet Enterprise to incorporate SAP data into your SharePoint site

2. Collaborate effectively: with tools provided by Duet Enterprise you can create your own collaboration workspace

3. Make better decisions: have all necessary data at your fingertips, in one place, through the familiar interface

4. Start using almost immediately: implementing Duet Enterprise is quick and relatively easy. Your IT department can do it in a matter of weeks.

5. Drive growth: Flexibility of Duet Enterprise allows you to build custom solutions to quickly respond to business demands. Ask you IT director to look into Duet Enterprise and start driving growth today.

For more information please visit: www.duet.com

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Make Your Data Come Alive: 3 Creative Ways To Visualize Your Data

1. Make the Chart web part your friend and chart List, Library, BCS and other types of data using just the browser.
   Video Resource: http://www.sharepoint-videos.com/sp10use-the-chart-web-part-to-visualize-data-from-excel-spreadsheet/

2. Use Excel Services to publish your existing Charts and Graphs from your Excel spreadsheets to your intranet. Article Resource regarding Excel Services: http://technet.microsoft.com/en-us/library/ee424401.aspx

3. Conditionally format your data using XSLT List and Data View web parts – using SharePoint Designer 2010.
   Video Resource: http://www.sharepoint-videos.com/sp10xslt-list-view-web-parts-and-conditional-formatting/

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Put The Share In SharePoint: 5 Ways To Optimize Your Shared Spaces

1. Who owns this place? Add the Contact Details webpart to your team site so people know who to provide feedback to. See Add, move, minimize, or delete a Web Part from a page on www.office.com.

2. What should we do next? Create a survey to get structured feedback. See Create a Survey on www.office.com.

3. Work together: The Excel web application allows you to simultaneously edit the same spreadsheet. See Use Excel Web App in a SharePoint Library on www.office.com.

4. Take it with you on the go. Use Outlook to view & update SharePoint calendars, tasks, contacts and discussions – even when offline. See Synchronize SharePoint 2010 content with Outlook 2010 on www.office.com.

5. Stay on the same page: OneNote enables you to automatically synchronize your team notes and brainstorm with others. See Share notebooks in OneNote 2010 on office.com.

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You CAN Take it With You: 3 Ways to access your content on the go

1. Go where the internet can't follow: Sync with SharePoint Workspace so that you can access and edit your SharePoint content from Airplanes and Faraday Cages. See Synchronize content with SharePoint Workspace on www.office.com.

2. SharePoint always at your fingertips: Read, Edit, and Share documents and lists from your Smartphone. See Use a mobile device to work with SharePoint Online sites on www.office.com.

3. From any browser on any computer: Use Office 365 and SharePoint Online so that employees can access documents from anywhere, anytime. See Access your business documents from anywhere on www.office.com.

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Submit! Extending SharePoint Using InfoPath Forms

1. Quickly customize list forms using the InfoPath button found on the ribbon. Once the form is opened in InfoPath you can customize the layout and behavior of the form.

2. Add validation functionality as a way to help ensure data consistency of lists.

3. Use the Rules Manager to populate fields based on values selected in drop down lists.

4. When publishing forms to SharePoint forms libraries promote any fields which may be useful when implementing workflows.

5. When forms will be used in many libraries publish them as a content type and then add to your lists.

   For more information on InfoPath Forms please visit:
   http://office.microsoft.com/en-us/infopath/infopath-2010-features-and-benefits-HA101806949.aspx

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