



Quick answers to common problems

Microsoft SharePoint 2010 Power User Cookbook

Over 70 advanced recipes for expert End Users to
unlock and apply the value of SharePoint



Dr Adrian Colquhoun

[PACKT] enterprise 
PUBLISHING professional expertise distilled

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BIRMINGHAM - MUMBAI

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When he's not working, you can find Adrian spending time with his family, socializing with friends, fishing, indulging his passion for Rugby League, and generally taking advantage of the great lifestyle and opportunities that Australia has to offer.

I would like to thank my wife Gail, daughter Alice, and son Liam for their continued patience, support, and inspiration through the production of this book. Thanks also to Mark Macrae for drafting the BI chapter and thanks to all my id colleagues (particularly Sam, Jamie, Peter, Alex, Dion, and Tony) for their help in the proof reading and production process. Thanks to Corinne and all my friends in the Brisbane Bayside for keeping me topped up with beer and my feet on the ground throughout the authoring process.

Perhaps one day I will write another book, but not today. It's time to fire up the barbie and then hit the beach!

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Preface

This book is for people who want to "*get things done*" in Microsoft SharePoint Server 2010. You won't find a long and detailed history of the SharePoint product or a comprehensive explanation of every SharePoint feature. Rather, this book is a collection of recipes designed to quickly show you how to achieve common SharePoint tasks. Each recipe has a set of easy-to-follow instructions that first show you "how to do it", followed by an explanation of "why it works".

This is not a "*tell me everything about SharePoint*" book. You can read that for free on the Microsoft websites. Much like driving a car, you don't need to know how the engine works to be able to take the kids to school. This book is not "*SharePoint explained*"; rather this book is "*SharePoint applied*".

Taken individually, each recipe will make you more productive when using SharePoint 2010. The recipes are intended to be read "stand-alone". Feel free to dip in and out of the book as and when you need to know how to perform a particular task.

However, if you read this book as a whole, the simple, intermediate, and advanced recipes that it contains will walk you through a range of collaboration, data integration, business intelligence, electronic form, and workflow scenarios. The recipes will build your SharePoint knowledge to a point where you can "*think SharePoint*", applying the skills you have learnt to solve complex business problems. At the end of the book, I present three "no code" SharePoint applications that show you how to approach this.

This book is written from the perspective of the end user, not the SharePoint product. In creating its recipes, I haven't restricted them along product boundaries. Along with the standard SharePoint recipes that you would expect, you will also find recipes that show you how to use SharePoint Designer and InfoPath Forms Designer when they are needed to get the job done. You will also find a number of recipes that focus on integrating SharePoint 2010 with Office 2010. Some authors would have you buy several books to cover all these topics; I ask you to buy only one.

If you want to be more productive with SharePoint, then this book is for you.

What this book covers

This book is presented in eight chapters and an appendix covering the following areas:

Chapter 1: Getting Started—SharePoint Essential focuses on SharePoint 2010 fundamentals, including creating and using your My Site, tracking colleagues, bookmarking sites, registering for alerts, and using themes to change how SharePoint looks and feels. Recipes are provided that show you how to create columns, lists, content types, and how to secure information on a SharePoint 2010 site.

Chapter 2: Working Together—Using SharePoint to Collaborate explores the tools that allow you to use SharePoint 2010 to work more effectively. It shows you how to create a Team Site and add users to it. You will learn how to create a shared calendar for important events and a shared task list to keep track of your team's tasks. You will see how to manage the calendar and tasks using Outlook 2010. You will learn how to use the site to gather feedback using a discussion forum and how to share PowerPoint slides using a slide library.

Chapter 3: SharePoint as the Data Hub—Storing and Integrating Data is all about storing and integrating data in SharePoint 2010. It covers storing data directly in SharePoint, using custom lists, and so on. It shows you how to include data from an external database using external content types and how to include common terms in the managed metadata store. Important list concepts are covered including creating list views and columns based on metadata.

Chapter 4: SharePoint Document Management Deep Dive explores document management in SharePoint 2010. You will learn how to upload and download documents and use the document management features such as versioning, "check in/check-out", publishing, and content approval. You will see how to take your documents offline using Outlook 2010. You will see how to use content types to store different types of documents in the same document library. You will learn how the new co-authoring features allow multiple authors to work on the same document at the same time.

Chapter 5: Getting the Message Out—Using SharePoint to Communicate focuses on SharePoint 2010's communication features. It explains how to create a blog on your My Site and how to post to that blog from Word 2010. It shows how to create and publish web pages in a publishing site, how to use announcements to communicate important news, and how to use audiences to target your messages to the right people.

Chapter 6: Where's My Stuff?—Finding Things with SharePoint is all about using SharePoint's search facility. It shows how to use basic and advanced searches to find documents, information, and people. It shows how to save your searches as alerts so that you will automatically be notified if the results change.

Chapter 7: Gaining Insights—Using SharePoint for Business Intelligence explains the business intelligence capabilities of SharePoint 2010. It shows you how to create master/detail views of SharePoint data and how to create Key Performance Indicators. The creation of charts is illustrated using the built-in Chart Web Part and the PerformancePoint Dashboard Designer. Reports are created using the Report Builder tool, and Excel Services is used to run spreadsheets directly on the SharePoint server.

Chapter 8: Automating Business Processes—Recipes for Electronic Forms and Workflows examines SharePoint's electronic forms and workflow capabilities. Recipes are included that provide a deep dive into InfoPath 2010 and the electronic forms technology included in SharePoint Server. You will learn how to use the Collect Feedback workflow to receive feedback on a document that you have authored. You will see how to create custom workflows using Microsoft Visio 2010 and SharePoint Designer 2010. You will learn how to view a workflow's current execution status, its execution history, and how to start SharePoint 2010 workflows directly from inside a Word 2010 document.

Appendix: Joining the Dots—Creating Composite Applications draws together all the recipes presented early in the book to create three "no code" SharePoint 2010 applications. These simple Human Resources, Customer Relationship Management, and Project Management solutions build upon and reinforce the concepts presented earlier in the book. The purpose of this chapter is to teach you how to "*think SharePoint*", applying the knowledge and tools you have gained to solve real business problems in the future.

What you need for this book

To follow all the recipes in this book, you will need the following software:

- ▶ SharePoint 2010 Enterprise Edition
- ▶ Outlook 2010
- ▶ SharePoint Designer 2010
- ▶ InfoPath Forms Designer 2010
- ▶ Word 2010
- ▶ Excel 2010
- ▶ Visio Premium 2010
- ▶ Internet Explorer 7 or higher

You will need to have access to a "My Site" and will need various SharePoint 2010 permission levels from Reader up to Site Administrator. If you have another version of SharePoint 2010 (Foundation, Standard) or lower access permissions you will still find many of the recipes in the book useful. Details of the software and permissions levels that you require and the SharePoint versions that it will work with are included in each recipe.

SharePoint 2010 is both an application and a development platform. It allows for extensive post-installation customization and development. The recipes in this book have been tested and verified on a vanilla SharePoint 2010 Enterprise Edition installation. It is possible that your installation may look or behave differently depending on the amount of customization that has been applied.

If you don't have access to SharePoint 2010 Enterprise Edition but would like to try all the recipes in this book, Microsoft has a 180-days' evaluation version that you can download and install. However, SharePoint is a heavyweight server product, so make sure your machine can meet the hardware prerequisites before you do. Find the evaluation download at <http://technet.microsoft.com/en-us/evalcenter/ee388573.aspx>.

During the production of this book, Microsoft released Office 365, including the latest version of their SharePoint Online offering. All the recipes in this book have been tested against the Office 365 E4 service plan.

SharePoint Designer is a free download located at <http://www.microsoft.com/downloads/en/details.aspx?FamilyID=d88a1505-849b-4587-b854-a7054ee28d66>.

Who this book is for

This book is for people who want to "*get things done*" in SharePoint 2010. It doesn't matter if you consider yourself a SharePoint user, project manager, business analyst, trainer, administrator, or developer; if you need to work with SharePoint 2010, then this book is for you.

Unfortunately, many SharePoint "experts" never take the time to learn SharePoint 2010 as the user sees it. They simply fail to understand what the product can do, and end up either constantly selling their customers short or reinventing the wheel.

Conventions

In this book, you will find a number of styles of text that distinguish between different kinds of information. Here are some examples of these styles, and an explanation of their meaning.

New terms and **important words** are shown in bold. Words that you see on the screen, in menus, or dialog boxes for example, appear in the text like this: "Open the **Site Actions** menu and select the **More Options** menu option".



Warnings or important notes appear in a box like this.



Tips and tricks appear like this.

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1

Getting Started— SharePoint Essentials

In this chapter, we will cover:

- ▶ Creating a SharePoint list
- ▶ Creating a site column
- ▶ Creating a content type
- ▶ Creating and accessing my My Site
- ▶ Updating my user profile
- ▶ Tracking colleagues using my My Site
- ▶ Viewing the SharePoint sites I am a member of
- ▶ Tagging a SharePoint page so I can find it again later
- ▶ Reviewing the tags and notes other users have posted on a SharePoint page
- ▶ Adding an alert to a SharePoint page
- ▶ Managing my alerts in SharePoint
- ▶ Determining my permissions in a SharePoint site
- ▶ Checking another user's permissions in a SharePoint site
- ▶ Applying unique permissions to a SharePoint list

Introduction

The recipes in this chapter cover SharePoint fundamentals essential for every SharePoint user.

The first three recipes of this chapter will introduce you to some of the fundamental building blocks of SharePoint: **lists**, **site columns**, and **content types**. Pay particular attention to content types. As your knowledge of SharePoint grows, you will come to realize that these are key to unlocking all the magic that SharePoint has to offer.

SharePoint 2010 Server provides the ability to give each user his/her own individual **My Site**. This site contains a wealth of tools for sharing information, tagging content, and tracking other users. Think of your My Site as the hub of your workings within SharePoint, it is your LinkedIn or Facebook site in the enterprise. The next six recipes in this chapter will show you how use your My Site effectively.

SharePoint makes it very easy to create websites where you can collaborate and share information. But keeping track of changes across hundreds of sites can be a challenge. Thankfully SharePoint allows you to register for **alerts** so that you can be notified when there is something new or updated that you should look at. Recipes are included that show you how to create new alerts and how to manage the alerts you already have.

The final three recipes tackle SharePoint 2010 security, introducing **permissions**, **permission levels**, and the **security trimmed user interface** from a practical business perspective.

We will learn how to create more building blocks, such as **sites** and **document libraries**, in later chapters. But enough of the introductory waffle. Let's get started!

Creating a SharePoint list

SharePoint is built around lists. If you want to store things in SharePoint, then you will need to know how to create the different types of list. This recipe shows you how.

Getting ready

This recipe works for:

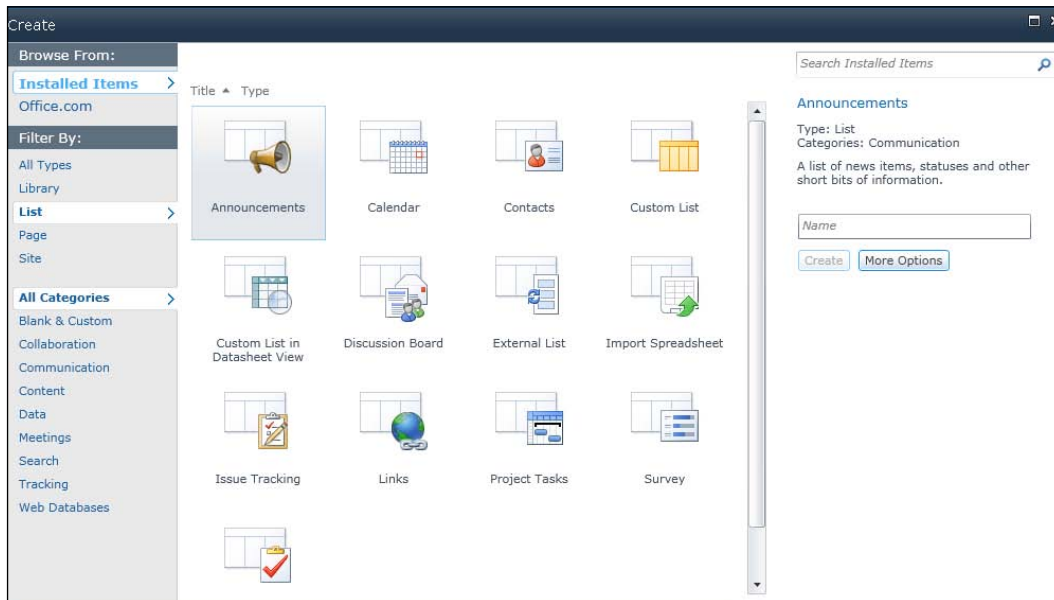
- ▶ SharePoint 2010 Foundation
- ▶ SharePoint 2010 Standard Edition
- ▶ SharePoint 2010 Enterprise Edition
- ▶ SharePoint 2010 Online (Office 365 Edition)

You require either the **Design** or the **Full Control** permission level to create a new SharePoint list.

The choice of lists that you have available is determined by the SharePoint version you have. SharePoint 2010 Standard and Enterprise editions add more lists to those already available in SharePoint 2010 Foundation.

How to do it...

1. Open the **Site Actions** menu and select the **More Options** menu option.
2. SharePoint will now show all the different types of content you can create. Filter your view by clicking on **List** on the left side of the window.
3. Choose the type of list that you want to create. Enter the name of the list and then click on the **Create** button.



4. The new list will be created and displayed. You can now add items to your list, continue to customize it, or connect it to your office applications as you wish.

How it works...

SharePoint stores information in lists, in fact almost everything in SharePoint is stored in lists. Document libraries (for storing documents), media libraries (for audio and video files), and form libraries (for storing InfoPath forms) are all just special types of lists. Lists are a fundamental building block in SharePoint.

This recipe shows you how to create a list. You need to tell SharePoint the template (meaning the type of list) that you want to create and provide some basic properties (such as the name of the list). SharePoint will then do the rest, adding the columns, views, and configuring the list as required.

Once your list has been created, you can start adding data or customize it further. There are many options and variations for doing this, which are covered in later recipes throughout this book.

There are many different list templates available. Each template provides different columns, views, and other functionality designed to support its particular function. I have listed some of the common ones in the next section.

There's more...

SharePoint Foundation provides a core set of list templates, and the Standard and Enterprise versions of SharePoint add a whole lot more. The choice of lists that you will be able to create depends on which site you are in and which features have been activated. However, some of the more commonly encountered lists are as follows:

List	Description
Announcements	A list of news items, statuses, and other short bits of information.
Calendar	A calendar of upcoming meetings, deadlines, or other events. Calendar information can be synchronized with Microsoft Outlook or other compatible programs.
Contacts	A list of people your team works with, like customers or partners. Contacts lists can synchronize with Microsoft Outlook or other compatible programs.
Custom List	A blank list to which you can add your own columns and views. Use this if none of the built-in list types are similar to the list you want to make.
Custom List in Datasheet View	A blank list which is displayed as a spreadsheet in order to allow easy data entry. You can add your own columns and views. This list requires a compatible datasheet ActiveX control such as the one provided in Microsoft Office.
Discussion Board	A place to have newsgroup-style discussions. Discussion boards make it easy to manage discussion threads and can be configured to require approval for all posts.
External List	An external list to view the data in an External Content Type.
Import Spreadsheet	A list which duplicates the columns and data of an existing Spreadsheet. Importing a spreadsheet requires Microsoft Excel or another compatible program.
Issue Tracking	A list of issues or problems associated with a project or item. You can assign, prioritize, and track the status of issues.

List	Description
Links	A list of web pages or other resources.
Project Tasks	A place for team or personal tasks. Project tasks lists provide a Gantt Chart view and can be opened by Microsoft Project or other compatible programs.
Survey	A list of questions that you would like to have people answer. Surveys allow you to quickly create questions and view graphical summaries of the responses.
Tasks	A place for team or personal tasks.

You can use this recipe to experiment with the different types of lists that you can create and get to know their functionality.

"Roll your own"—creating custom lists

If none of the SharePoint lists described earlier meets your needs, you are more than welcome to create your own. SharePoint gives you the custom list template as a basic starting point. Once you have created a custom list, you can add whatever columns, views, and custom settings you need to achieve the purpose that you have in mind. Refer to *Creating a custom list* in Chapter 3 for more details.

Lists to show external data

Before SharePoint 2010, SharePoint lists were limited to just displaying and updating data found within SharePoint. However, SharePoint 2010 introduced the concept of **External Lists**. SharePoint 2010 can now take data from an external source (such as database) and show it to users as a SharePoint list. The users can edit that information and the update will get written back to the database, all without a single line of code or a developer in site. The recipe *Creating an external list* in Chapter 3 shows you how to do so.

How much data can your store in a list

One of the problems with earlier versions of SharePoint was that it was easy to store too much data in a list, making the whole thing slow down. In IT speak, SharePoint lists "didn't scale well". Thankfully, SharePoint 2010 has resolved those issues and you can now store far more information in a SharePoint list than you ever really should.

The magic numbers for reference are:

- ▶ Up to 30,000,000 items in a list (or documents in a document library)
- ▶ Up to 400,000 major versions of a document
- ▶ Up to 1,000 different security scopes (custom permissions)
- ▶ 8K bytes per list item (7,744 bytes reserved for custom columns)

The number of columns that you can add to a list depends on the type of columns that you add, as different columns take up different amounts of space. Column widths range from 4 to 40 bytes, and there are rules about how many of the same kind of columns you can add to a list. You can find a full list of these rules at <http://technet.microsoft.com/en-us/library/cc262787.aspx#Column>.

For all practical scenarios, if your SharePoint list usage is anywhere approaching these limits, then you are probably doing something wrong and I suggest you give a good SharePoint architect a call for help!

See also

- ▶ *Adding a slide library to share PowerPoint slides, Chapter 2*
- ▶ *Creating a SharePoint contact list and connecting it to Outlook 2010, Chapter 2*
- ▶ *Creating a custom list, Chapter 3*
- ▶ *Creating an external list, Chapter 3*

Creating a site column

We can add custom columns to our SharePoint lists. However, having to recreate the same column over and over again quickly becomes a pain. Site columns, which are shared between all the sites in your site collection, are the answer.

Getting ready

This recipe works for:

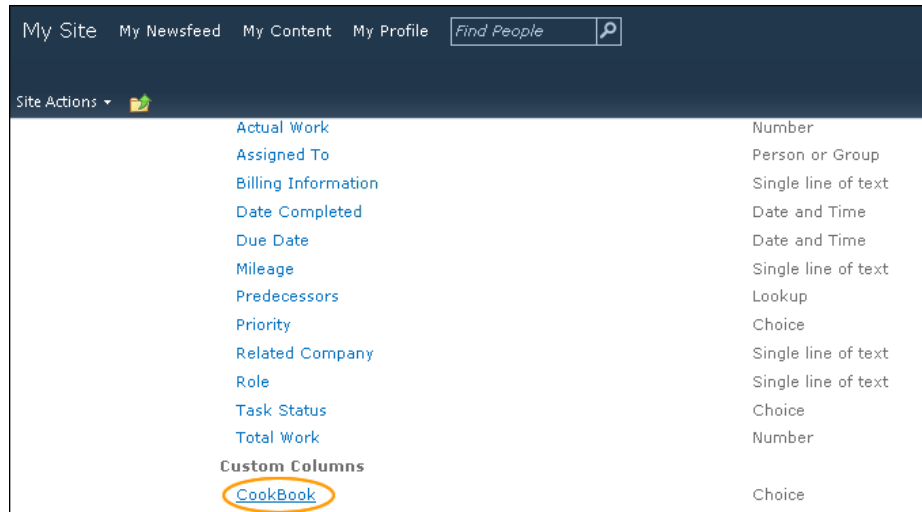
- ▶ SharePoint 2010 Foundation
- ▶ SharePoint 2010 Standard Edition
- ▶ SharePoint 2010 Enterprise Edition
- ▶ SharePoint 2010 Online (Office 365 Edition)

You require either the **Design** or **Full Control** permission level to create a site column.

How to do it...

1. In the top-level site of your site collection, open the **Site Actions** menu and select the **Site Settings** option.
2. From the **Site Settings** page, select the **Site Columns** link from the **Galleries** heading.
3. The **Site Columns** page is displayed. Existing site columns are listed on this page. To create a new site column, click on the **Create** link at the top of the page.

4. Enter a name for your site column, select its data type, and click on **OK**.
5. Your new column is created and added to the list of site columns.



How it works...

SharePoint lists are made up of different columns. These columns can be defined locally (on each list as they are needed) or as site columns, which can be shared by lists throughout the site collection.

If you think that you will need a column more than once, then you should once consider creating it as a site column rather than just adding it to your list directly.

Site columns are particularly useful for columns that contain lookup data or a set of choices (for example, your company's departments or its locations). Using site columns helps you get more consistency in the information that you store within SharePoint.

Site columns are a necessary first step to creating content types, as described in the next recipe.

See also

- ▶ *Creating a content type*
- ▶ *Creating a list column based on a term set, Chapter 3*
- ▶ *Creating an external content type, Chapter 3*

Creating a content type

This recipe shows you how to create a content type. Content types are a powerful way to model real world objects in SharePoint.

Getting ready

This recipe works for:

- ▶ SharePoint 2010 Foundation
- ▶ SharePoint 2010 Standard Edition
- ▶ SharePoint 2010 Enterprise Edition
- ▶ SharePoint 2010 Online (Office 365 Edition)

You require either the **Design** or **Full Control** permission level to create a content type.

You will need one or more site columns to add to your content type as you create it. If you need instructions on how to create a site column, then please refer to *Creating a site column* recipe.

How to do it...

1. In the top-level site of your site collection, open the **Site Actions** menu and select the **Site Settings** option.
2. From the **Site Settings** page, select **Site content types** link from the **Galleries** heading.
3. The **Site Content Types** page is displayed. To create a new content type, click on the **Create** link.
4. Give the content type a **Name**, **Description**, and **Parent Content Type** (to inherit from). You can add the content type to an existing group or create a new group for this content type as you wish.
5. Click on the **OK** button to create the content type.

Name:

Description:

Parent Content Type:
 Select parent content type from:

Parent Content Type:

Description:
 Create a new basic page.

Put this site content type into:

☒ Existing group:

☐ New group:

6. Your new content type will be created and displayed in the list of available content types.

How it works...

SharePoint lists and libraries have a fairly major shortcoming: every item must have the same columns applied. Imagine a real-world scenario, such as the account department of your organization. They might want to store many different types of documents, such as invoices, purchase orders, bills received, credit notes, and so on. The different documents need different columns (or **metadata**) associated with them. For an invoice, customer amount and due date might be important. A purchase order might record a purchase order number, supplier name, expected delivery date, and payment terms. How can we store all these different types of documents in the same document library? Content types are the answer.

Content types allow us to define the document template and metadata columns for a particular type of document. In our accounts department scenario, we would create a content type for "invoice" and another content type (with different columns and template) for "purchase order". Once we have created the content types, we could add them to our accounts department document library. Now rather than creating a new document, SharePoint will provide us with the ability to create a new invoice or new purchase order in the library. The recipe *Using content types to store different types of documents in the same document library* in *Chapter 4* describes how to do this.

Content types are built up in a hierarchy. The content types you create must extend either a built-in type (such as document) or a custom type that you have previously created.

Content types can be defined centrally and shared throughout all the SharePoint sites within the organization. They can have "business rules" information management policies and workflows attached. Wherever the content type is used, a consistent template, metadata, and rules can be applied.

Content types can be used to bring order to the "information chaos" that most organizations experience. Defining and sharing content types for real-world business objects is the key to unlocking all the power of SharePoint. Use them!

See also

- ▶ *Creating a site column*
- ▶ *Using content types to store different types of documents in the same document library, Chapter 4*
- ▶ *Creating an external content type, Chapter 3*

Creating and accessing my My Site

This recipe shows you how to access your My Site. The content of your My Site is created the first time you access it.

Getting ready

This recipe works for:

- ▶ SharePoint 2010 Standard Edition
- ▶ SharePoint 2010 Enterprise Edition
- ▶ SharePoint 2010 Online (Office 365 Edition)

My Sites must be configured and active in the SharePoint installation. You can run this recipe from any SharePoint 2010 site that you have access to.

How to do it...

1. From within any SharePoint site. Click on your name (top right of the page). Select the **My Site** link from the menu that is displayed.
2. You are presented with the generic **My Newsfeed**. Once you have created your My Site and started tracking colleagues, this is the page where you will see their updates.

3. To actually create your own individual My Site (or access it again if you created it earlier), click on the **My Content** link at the top of the page.



There may be a short delay while your My Site is created.

4. Your My Site is created and the **My Content** page is displayed.

How it works...

Your My Site is a special SharePoint site designed especially for you. It is the site where you can store private documents, videos, and other SharePoint content, or where you add content that you want to share with others. You can use your My Site to access and update your **User Profile** (information about yourself), track your colleagues, reference the information that you have tagged on other SharePoint sites, and so on. Think of your My Site as your LinkedIn or Facebook site in the enterprise. Your My Site is the hub of your interaction with the many SharePoint 2010 sites that you will eventually be granted access to. It is also the site where you are likely to have the highest permission levels, so it makes it a great place to try out the other recipes presented in this book.



Some organizations shy away from implementing My Sites because they worry that the functionality might be abused by their staff. To my mind, this is a bit like owning a Ferrari and then leaving it parked in the garage. My Sites are central to SharePoint 2010's communities and collaboration functionality—I strongly recommend that you make use of them.

There's more...

If you know the URL where the My Sites have been created in your SharePoint installation, then you can access your My Site directly without needing to first visit another SharePoint site. The address might be something similar to `http://my.sp2010cookbook/default.aspx`. Access your My Site using this recipe and then have a look at the address displayed in your web browser to see what format has been used in your system.

See also

- ▶ *Updating my user profile*
- ▶ *Tracking colleagues using my My Site*
- ▶ *Viewing the SharePoint sites I am a member of*
- ▶ *Tagging a SharePoint page so I can find it again later*
- ▶ *Creating a blog in my My Site, Chapter 5*

Updating my user profile

This recipe shows you how to update your user profile using your My Site.

Getting ready

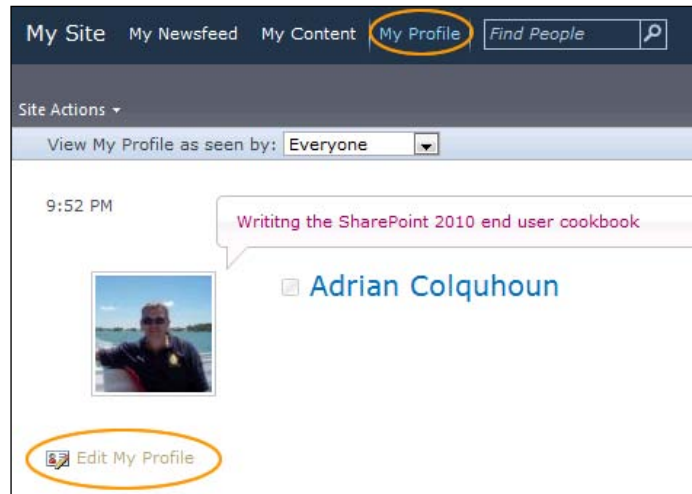
This recipe works for:

- ▶ SharePoint 2010 Standard Edition
- ▶ SharePoint 2010 Enterprise Edition
- ▶ SharePoint 2010 Online (Office 365 Edition)

My Sites must be configured and active in your SharePoint installation.

How to do it...

1. Open your My Site (refer to *Creating and accessing my My Site* recipe for instructions).
2. Select the **My Profile** link.
3. Select the **Edit My Profile** link.



4. Make the changes you require in your profile.
5. Click on the **Save & Close** button to save your changes.

How it works...

SharePoint 2010 stores information about users in their user profiles. It uses this information in news feeds, people searches, and audiences (to target information to particular groups of SharePoint users).

Your user profile is shown in your My Site. This is the place where you can view your profile as others would see it and make changes to the values stored in your user profile properties.

Depending on how your administrator has configured SharePoint, you won't be able to change all the properties that you see. Some information will be read only and may show information that has been imported from other external systems, such as your organization's Active Directory (where organizations commonly store user information). The properties you can see and change will have been preconfigured by your administrator and you may have different properties depending on your role in the organization (SharePoint allows administrators to create different "types" of profiles).

There's more...

One of the first things that you should do after you have created your My Site is to complete your user profile. This will allow co-workers to locate your skills, connect to you, and start to call on your (I have no doubt undervalued) experience. As soon as your profile is complete, you will start showing up in SharePoint's people search.

Who knows, you may get invited to work on the exciting new "Project X" or requested to meet a client or attend a conference in some beautiful exotic location. Keep your profile up-to-date if you want to maximize your opportunities.



Resist the temptation to upload inappropriate pictures or comments in your profile. Your colleagues (particularly your superiors) are unlikely to see the funny side. Remember that SharePoint is a set of tools to help you *work* better together. Save all the other stuff for your Facebook site.

See also

- ▶ *Creating and accessing my My Site*
- ▶ *Reviewing the tags and notes other users have posted on a SharePoint page*
- ▶ *Tagging a SharePoint page so I can find it again later*
- ▶ *Viewing the SharePoint sites I am a member of*
- ▶ *Tracking colleagues using my My Site*
- ▶ *Creating a new document in your My Site, Chapter 4*
- ▶ *Finding experts using a people search, Chapter 6*

Tracking colleagues using my My Site

Before SharePoint, knowing who was doing what in an organization was really difficult. Now SharePoint can keep track of your colleagues automatically. This recipe shows you how.

Getting ready

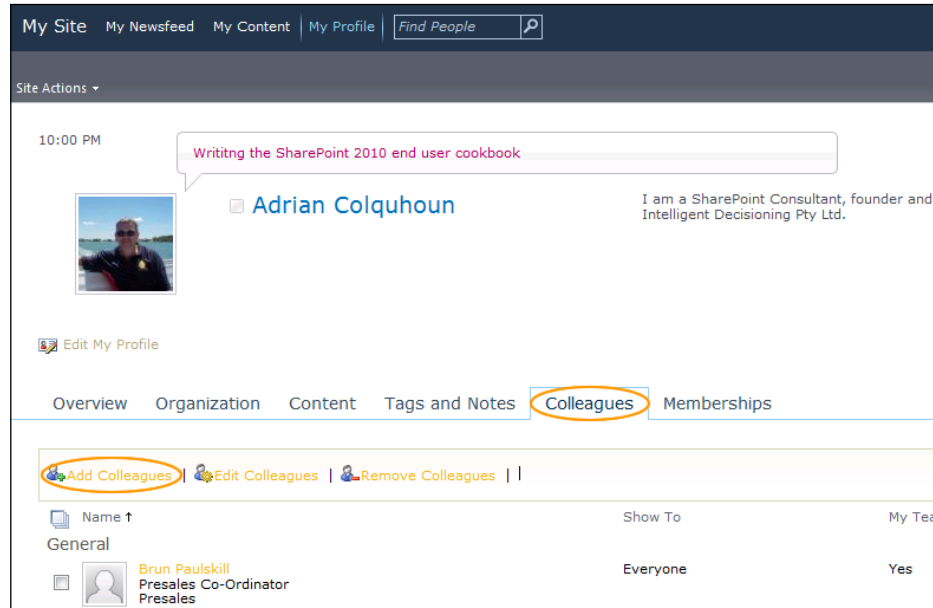
This recipe requires your My Site. The recipe works for:

- ▶ SharePoint 2010 Standard Edition
- ▶ SharePoint 2010 Enterprise Edition
- ▶ SharePoint 2010 Online (Office 365 Edition)

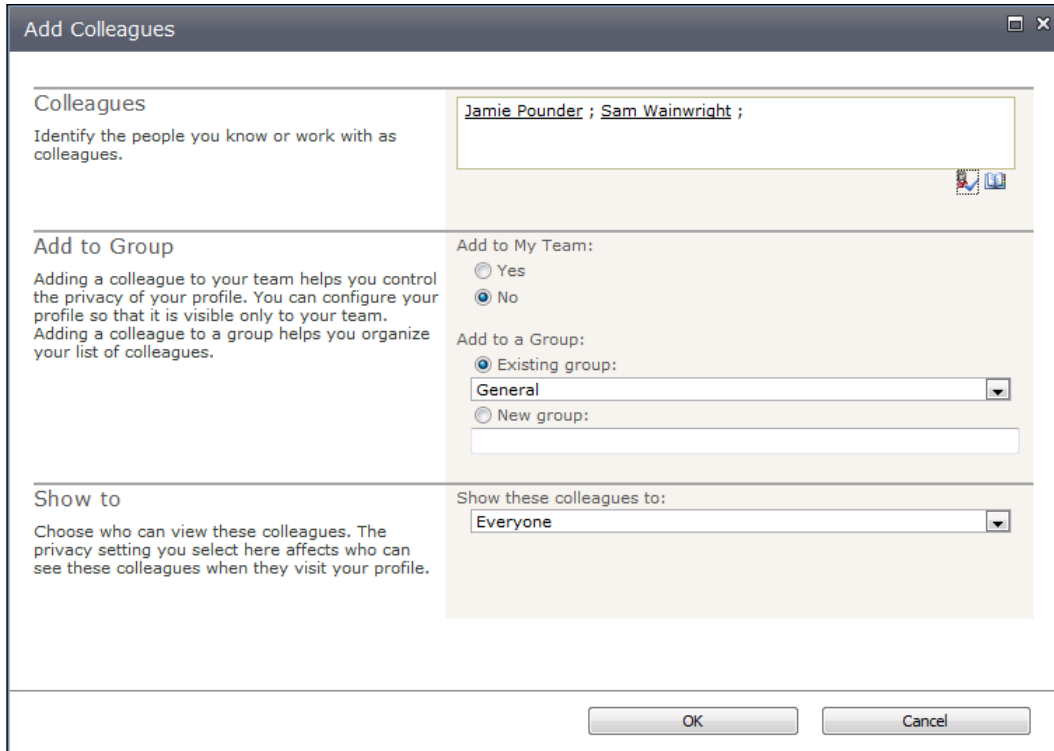
My Site must be configured and active in the SharePoint installation.

How to do it...

1. Open your My Site and navigate to the **My Profile** page.
2. Select the **Colleagues** tab.
3. Click on the **Add Colleagues** link.



4. In the dialog displayed, enter the names of the colleagues you wish to add. You can choose if you want to add them to **My Team** and organize them into different groups. Adding colleagues to your team allows them to see more information from your user profile.
5. When you have added all the colleagues that you need, click on the **OK** button.



The dialog box is titled "Add Colleagues" and contains three main sections on the left: "Colleagues", "Add to Group", and "Show to".

- Colleagues:** Includes the instruction "Identify the people you know or work with as colleagues." and a text input field containing "Jamie Pounder ; Sam Wainwright ;".
- Add to Group:** Includes instructions about privacy and organization. It has two sub-sections:
 - Add to My Team:** With radio buttons for "Yes" and "No", where "No" is selected.
 - Add to a Group:** With radio buttons for "Existing group:" and "New group:". The "Existing group:" option is selected, and a dropdown menu below it shows "General".
- Show to:** Includes the instruction "Choose who can view these colleagues. The privacy setting you select here affects who can see these colleagues when they visit your profile." and a dropdown menu set to "Everyone".

At the bottom right, there are "OK" and "Cancel" buttons.

6. Your new colleague is now shown on your **Colleagues** tab and you can view their My Site by clicking on their name.

10:00 PM

Writing the SharePoint 2010 end user cookbook

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[Edit My Profile](#)

Overview Organization Content Tags and Notes **Colleagues** Memberships

[Add Colleagues](#) | [Edit Colleagues](#) | [Remove Colleagues](#) |

Name ↑	Show To	My Team
General		
Brun Paulskill Presales Co-Ordinator Presales	Everyone	Yes
Jamie Pounder Research and Development Co-Ordinator R&D	Everyone	Yes
Sam Wainwright ICT Co-Ordinator ICT	Everyone	No

How it works...

SharePoint 2010 allows you to track your team members, colleagues, and subject matter experts through your My Site. When you add a colleague, you can add them to different groups such as **My Team**. Adding colleagues to your team will allow them to access more information from your user profile.

Once you have added a colleague, SharePoint will automatically keep you up-to-date with their activity. This includes the changes that they make to their user profiles, the content that they author, the pages that they tag, and their status message updates. All this information will be displayed on your **My Newsfeed** page when you again access your My Site. SharePoint will also send you e-mails to tell you about important changes and will even suggest colleagues to you based on its analysis of the colleagues you already have, and the people that they have added to their networks.

By tracking colleagues in this way, SharePoint helps you build up strong and effective networks within your organization. You can then leverage these networks to get your work done more effectively.



The track colleagues functionality wasn't invented by Microsoft to help you stalk "that pretty little thing from accounts". Using it for that purpose will almost certainly land you in a lot of trouble. Don't do it!

See also

- ▶ *Creating and accessing my My Site*
- ▶ *Updating my user profile*
- ▶ *Viewing the SharePoint sites I am a member of*
- ▶ *Tagging a SharePoint page so I can find it again later*
- ▶ *Creating a blog in my My Site, Chapter 5*

Viewing the SharePoint sites I am a member of

As the number of SharePoint sites grow, it can be easy to lose track of them. Fortunately, SharePoint keeps tracks of the sites, which you are a member of, automatically. This recipe shows you how to see that list of sites.

Getting ready

This recipe requires your My Site. The recipe works for:

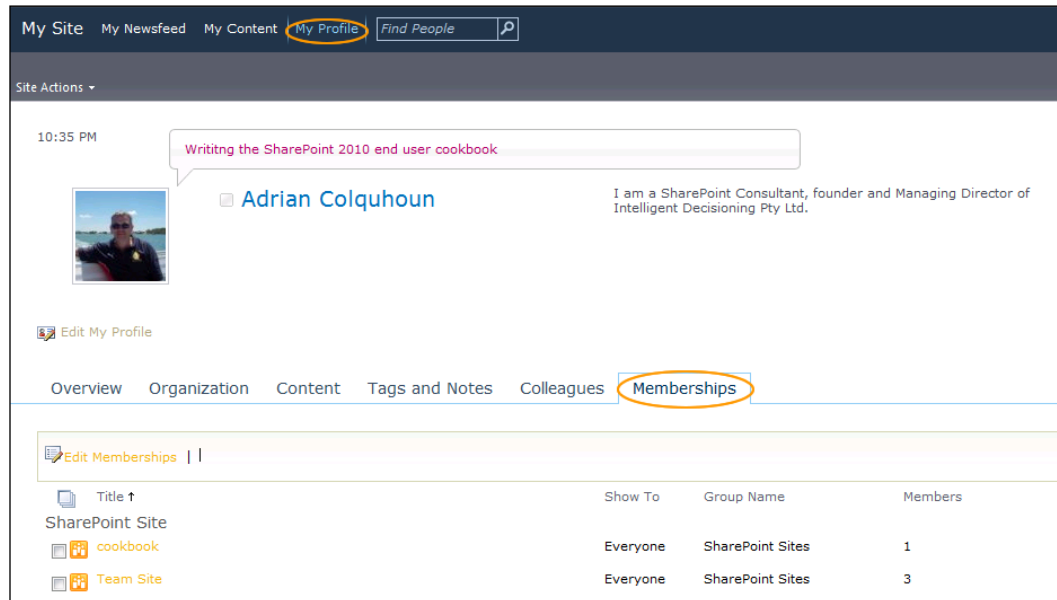
- ▶ SharePoint 2010 Standard Edition
- ▶ SharePoint 2010 Enterprise Edition
- ▶ SharePoint 2010 Online (Office 365 Edition)

My Site must be configured and active in the SharePoint installation.

How to do it...

1. Go to your My Site.
2. Select **My Profile** and then click on the **My Memberships** tab. A link to each site that you have been added to as a member is displayed.

3. You can click on any link to navigate to that site.



How it works...

SharePoint 2010 automatically keeps track of all the sites that you have been explicitly added to as a member (such as the sites that you can contribute to) and gives you a link to them on your membership tab in your My Site. You can use your My Site as your personal navigation hub. From any SharePoint sites, jump into your My Site, check your memberships, and jump back out to where you want to go. You need never be lost in SharePoint again!

Importantly, the memberships tab doesn't show the sites that you only have a read-only access to. If you want to save links to these sites, then tag them as described in the *Tagging a SharePoint page so I can find it again later* recipe. Confusingly, it also doesn't show the sites that you have or the ones which you have full control of. To see those sites, add yourself to the member group of the site.

SharePoint recalculates your memberships using a background timer job, so expect a delay between being added to the site and it showing up in your memberships tab.

See also

- ▶ *Creating and accessing my My Site*
- ▶ *Updating my user profile*
- ▶ *Tracking colleagues using my My Site*