

Microsoft® SharePoint Products & Technologies

SharePoint Products and Technologies provide you enterprise-scale capabilities to meet business-critical needs such as managing content and business processes, simplifying how people find and share information across boundaries, and enabling better informed decisions. Using the combined collaboration features of Windows SharePoint Services and Office SharePoint Server 2007 your organizations can enable their users to create, manage, and easily build their own SharePoint sites, and enable these sites to be discovered throughout the organization.

Tips & Tricks

Microsoft Windows SharePoint Services 3.0

Microsoft Office SharePoint Server 2007

Work More Effectively with Others

Site Templates – Windows SharePoint Services provides pre-built SharePoint site templates with which you can quickly and easily create a professional site or workspace for collaborating with colleagues. In addition to the team sites, meeting workspaces, and document workspaces available in previous versions, WSS 3.0 also includes new templates for creating Wikis and Blogs. On the portal home page, click the Site Actions button. Click Create Site.

Create a Wiki – A wiki site can be quickly set up to enable a group to brainstorm ideas, collaborate on a team design, build an encyclopedia of knowledge, or just gather daily information in a format that's easy to create and modify. On the portal home page, click the Site Actions button. Click Create Site. In the Select a template field, click the Collaboration tab and select Wiki Site.

Create a Blog – A blog (short for weblog) consists of frequent short comments, called posts. The posts are displayed in order, starting with the most recent comment, with the blogger's name and the date attached. On the portal home page, click the Site Actions button. Click Create Site. In the Select a template field, click the Collaboration tab and select Blog.

Post to a Blog from Microsoft Office Word 2007 – You can now publish blogs directly from Office Word 2007. You can configure Office Word 2007 to link directly to your blog site, and use the rich Word experience to create blogs with images, tables, and advanced text formatting features. In Word 2007, click the Microsoft Office Button. Click Publish. Click Blog.

Slide Libraries – You can use new SharePoint Slide Libraries to provide a centralized, server-based storage area for all your personal or team presentations. With a Slide Library, if you or your teammates have created a presentation and you need to use one or two existing slides, it is easy to find and insert this content into your presentation without ever leaving Office PowerPoint 2007. You can also choose to link slides in your current presentation to the server version of that slide within the slide library. If the server version of that slide changes, you are automatically prompted to update your slides. When finished, you can publish your new presentation to a Slide Library directly from Office PowerPoint 2007.

Now other people can repurpose your content for their own work. On the Slides tab, in the Slides group, in the Add Slide list, click Reuse Slides. In the Reuse Slides pane, click Open a Slide Library.

Offline Document Libraries – You can keep synchronized copies of SharePoint document libraries and lists within your Outlook folders, making it easy to organize and browse documents in these folders, just as you would any e-mail. You can work on these documents within their respective applications in Office Outlook 2007 at any time, even when you are offline. When you are back online, you can easily synchronize your changes with the server version. From a shared document library, click Actions on the Shared Documents toolbar, then click Connect to Outlook.

Microsoft Office Groove 2007 SharePoint Files Tool – In some ways, Office Groove 2007 functions as an extension of SharePoint Server 2007. The SharePoint Files tool offers all the capabilities of the Groove Files tool with the added benefit of integration with SharePoint document libraries. You can easily check out documents from a document library into your Groove workspace, collaborate on and iterate those documents among your project team, and then publish them back to the document library when you have finished. You can access and update the information in your workspaces whether or not you are connected to the network.

Improve Business Insight

Enterprise Search – The newest generation of Search functionality in Office SharePoint Server 2007 provides an intuitive and flexible user interface, improved relevance, and the ability to search unstructured and structured information such as databases and line-of-business applications. Search in Office SharePoint Server 2007 also delivers the ability to search for people, based on their knowledge and other factors (such as membership SharePoint-based audiences). Portal users can maintain information about themselves on their profile pages in their personal sites. This information can be indexed by Office SharePoint Server 2007 and used in queries.

Offline Task Lists – Task lists created on an Office SharePoint Server 2007 site can be connected to Outlook 2007 so that they can be viewed and managed alongside your other tasks. Like OneNote tasks, SharePoint tasks are visible in your To-Do Bar. In the SharePoint task list, click the Actions button, then click Connect to Outlook.

Excel Services – Office Excel 2007, combined with Excel Services, a new technology in Office SharePoint Server 2007, provides significant improvements for sharing data with greater security. With Excel Services, you can render a spreadsheet dynamically in HTML for browser-based viewing. You can permit others to view the entire spreadsheet or only parts of it. Providing universal access to spreadsheet information in a browser helps you share data more easily and securely. External users such as customers and business partners can access and interact with your data without the ability to see formulae, macros, or other confidential business logic that might be contained in a spreadsheet. Excel Services can be used only with Excel 2007 files that are stored in a SharePoint document library. Open the file, click the Microsoft Office Button, click Publish, and then select Excel Services. Click Excel Services Options to define which parts of your spreadsheet to publish.

Excel Services (Parameters) – Spreadsheet authors can optionally name specific cells so they can be used as *parameters*. Parameters are single cells in which Microsoft Office Excel Web Access users can enter their own values. To name specific cells, click the Formulas tab. In the Defined Names group, click Define Name. Review and Manage Content.

Document Versioning – You can compare different versions of a *shared* document provided you've enabled versioning on your SharePoint document library. You can compare the latest version against the last major or minor version or any specific version in the history. In your Office 2007 application, click the Review tab. In the Compare group, click Compare.

Start a Workflow – To start a workflow, click the drop-down list for your document within your document workspace or document library, and then click Workflows. Select the desired workflow, and then click Start.

Participate in a Workflow – Integration with familiar client applications such as Office Outlook 2007 simplifies the workflow experience for users. For example, you can be notified of the workflow in progress via e-mail. At the top of your email Click Edit This Task to open the Approval dialog box. From here, you can open the workflow document and then approve or reject it, adding your comments if necessary.

Track a Workflow – You can track the workflow progress and view the completion information in the shared document library or document workspace. Click Workflows from the document drop-down menu within your document workspace or document library.

Information Rights and Policy – You can use Office SharePoint Server 2007's customized document management policies to enable item-level access rights, retention periods, expiration actions, and document-auditing settings. In a document library, click **Settings**→**Document Library Settings**. Under Permissions and Management, click Information management policy settings.

Advanced SharePoint Site Tips & Tricks

Automating Business Processes

1. **Form Libraries and InfoPath Forms** – One of the most common and essential feature requirements in enterprise Web Applications is the ability to accommodate forms-based business processes. To create an InfoPath form library Click Site Actions → Create → Form Library → Fill out the information → Create. Create an InfoPath Form and publish the Form Template to the newly created Form Library.
2. **Creating Form Workflows** - By using SharePoint in conjunction with Office InfoPath Forms Services, connecting an InfoPath form to an automated workflow becomes very easy and offers great business solutions. In the Form Library, click Settings → Form Library Settings → Workflow Settings → Fill in the appropriate options for the Form Library Workflows.

Personalizing Users' Experience

3. **Creating User Groups** – SharePoint enables users to create customized User Groups in order to help manage and organize different aspects of each SharePoint Site. To create a group: Click Site Actions → Site Settings → People and Groups → New → New Group → Name the Group and Give Permissions → Create. Once the group has been created, users have to be added to each group. Click New → Add Users
4. **Customizing WebParts** – In SharePoint there are many out-of-the-box webparts that can be used as is or customized to enhance the functionality of each site. Webparts can also be downloaded online or custom built to satisfy many business needs. Click Site Actions → Edit Page → Add a Web Part or Modify Shared Web Part
5. **Audience Targeting** – Being able to customize a webpart so that users only see documents that pertain to them can help cut down on time they spend searching for relevant data. Audience Targeting is successfully implemented by creating user groups and customizing webparts so that the content shown is dynamically filtered depending of what group a user belongs to. To use Audience Targeting from document library: Add a new Content Query WebPart → Edit the WebPart to apply Audience Filtering. In a Document Library, click Settings → Document Library Settings → Audience Targeting Settings → Enable Audience Targeting → OK. Insert the Target Audience Column into the Document Library View → Click the drop down arrow next the document you wish to target to a specific group → Edit Properties → type in the Group Name into the Target Audience Field → OK. Once finished, go back to the main page and view the Content Query WebPart showing only documents that are targeted to you.

Advanced SharePoint Site Tips & Tricks

Managing and Implementing Enterprise Compliance Policies

6. **Define a Policy** – Records management capabilities in SharePoint give records managers the ability to set up a records repository according to the organization's file plan. In a document library, click Settings → Document Library Settings → Information Management Policy Settings → Define a policy → OK
7. **Auditing Policies** – Auditing policies can be turned on to log all activity against a record library, and administrators have the ability to see reports on the usage. In the Auditing section, click Enable Auditing.
8. **Expiration Policies** – The system also provides the ability to specify an action when the expiration date is reached. The action either disposes the record or starts a workflow that can allow the records manager to take action such as moving this record to a long-term archive. In the Expiration section, click Enable Expiration

Application Integration

9. **Microsoft Office Groove 2007 SharePoint Files Tool** – In some ways, Office Groove 2007 functions as an extension of SharePoint. The SharePoint Files tool offers all the capabilities of the Groove Files tool with the added benefit of integration with SharePoint document libraries. You can easily check out documents from a document library into your Groove workspace, collaborate on and iterate those documents among your project team, and then publish them back to the document library when you have finished. You can access and update the information in your workspaces whether or not you are connected to the network.
10. **Groove Launchbar** – The first thing you see when you start Office Groove 2007 is the Groove Launchbar. This easy-to-use tool helps you manage and organize all your Groove activities, including creating new workspaces, inviting others to workspaces, sending messages, monitoring workspace and contact activity, and setting your personal Groove preferences.
11. **Groove Files Tool** – You can use the Files tool to work collaboratively with your teammates on almost any type of computer file. Everybody in your workspace has access to those folders and files.
12. **Groove Discussion Tool** – The Groove Discussion tool helps teams engage in a detailed exchange of ideas in context of the work they are doing in the workspace.
13. **Excel Services** – Office Excel 2007, combined with Excel Services, a new technology in SharePoint, provides significant improvements for sharing data with greater security. With Excel Services, you can render a spreadsheet dynamically in HTML for browser-based viewing. You

Advanced SharePoint Site Tips & Tricks

can permit others to view the entire spreadsheet or only parts of it. Providing universal access to spreadsheet information in a browser helps you share data more easily and securely. External users such as customers and business partners can access and interact with your data without the ability to see formulae, macros, or other confidential business logic that might be contained in a spreadsheet. Excel Services can be used only with Excel 2007 files that are stored in a SharePoint document library. Open the file and click the Microsoft Office Button → Publish → Excel Services → Excel Services Options to define which parts of your spreadsheet to publish.

14. **Excel Services (Parameters)** – Spreadsheet authors can optionally name specific cells so they can be used as parameters. Parameters are single cells in which Microsoft Office Excel Web Access users can enter their own values. To name specific cells, click the Formulas tab → Define Name.

Exchanging Thoughts, Ideas, and Knowledge

15. **Create a Wiki** – A wiki site can be quickly set up to enable a group to brainstorm ideas, collaborate on a team design, build an encyclopedia of knowledge, or just gather daily information in a format that's easy to create and modify. On the portal home page, click the Site Actions → Create Site → click the Collaboration tab → Select Wiki Site.
16. **Edit a Wiki** – To edit a Wiki, click the Edit button on the Wiki entry you wish to change or update and edit the existing text. You can hyperlink to another Wiki page or create a new Wiki page by enclosing the page name in double brackets. [[]]
17. **Create a Blog** – A blog (short for weblog) consists of frequent short comments, called posts. The posts are displayed in order, starting with the most recent comment, with the blogger's name and the date attached. On the portal home page, click Site Actions → Create Site → click the Collaboration tab → select Blog.
18. **Post to a Blog from Microsoft Office Word 2007** – You can now publish blogs directly from Office Word 2007. You can configure Office Word 2007 to link directly to your blog site, and use the rich Word experience to create blogs with images, tables, and advanced text formatting features. In Word 2007, click the Microsoft Office Button → Publish → Blog

Social Networking

19. **My Site** – My Site is a great place to start learning and working with SharePoint! It is a personal site that gives you a centralized location to manage and store your documents, content, links, and contacts. By Default, your My Site includes two parts: a personal site called My Home and a public profile page called My Profile. Click My Site at the top right hand corner.
20. **Social Networking WebParts** – My Site serves as a point of contact for other users in your organization to find information about you, your skills and interests. The Colleagues Web Part helps you to keep track of events, such as whether your colleagues are in the office, in meetings, or on the telephone.