KEVIN O'NEILL

SHAREPOINT 2010 POWER USER GUIDE

Kevin O'Neill

SharePoint 2010 is a complex system that has many gadgets and functionality associated with it. As SharePoint 2010 is starting to be used more – the subject matter is becoming more technical and complex. Therefore, many users just need to use SharePoint 2010 for their daily jobs and thus this powerusers guide does that. It peels away the pure technical details and shows one step by step many key features and functionality for the casual SharePoint 2010 user. The following document was created using a local SharePoint Foundation version – as well as a SharePoint Enterprise edition.

Overview of Users

SharePoint has several user bases which are worthy of an overview – these include:

Business Owner/Champion – this is typically the individual(s) in the organization whom make the decisions on what is needed for the business. They may suggest new features and functionality which should be implemented. They also will champion SharePoint as a platform in the various business meeting settings they partake in.

Power User/Site Owner – this is typically an individual(s) whom maintain a section of a SharePoint site and subsites on a daily basis. They are responsible for content creation and updates as well as layout and permissions to the site they manage.

Site Collection Administrator – this is an individual(s) whom are responsible for the whole site and subsites. A site collection administrator has responsibility for additional features and functionality which usually involve customizations.

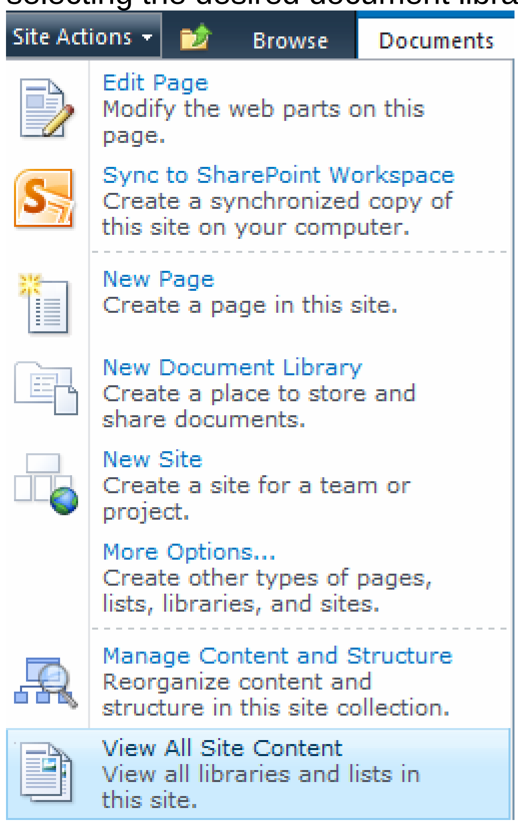
System Administrator – this is an individual(s) whom typically are responsible for the servers themselves and usually are in charge of backups of data and server maintenance.

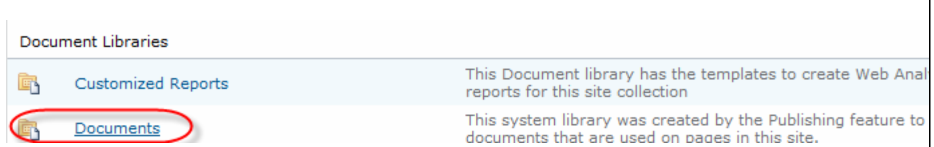
Developer – this is an individual(s) whom typically write the code that encompasses custom features and functionality which are beyond out of the box techniques that are needed and asked for.

How to Add a Folder

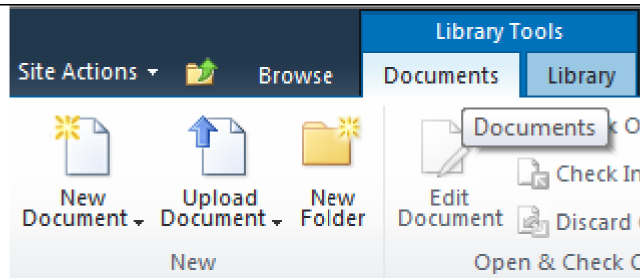
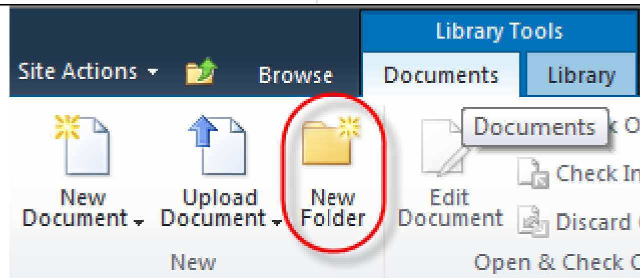
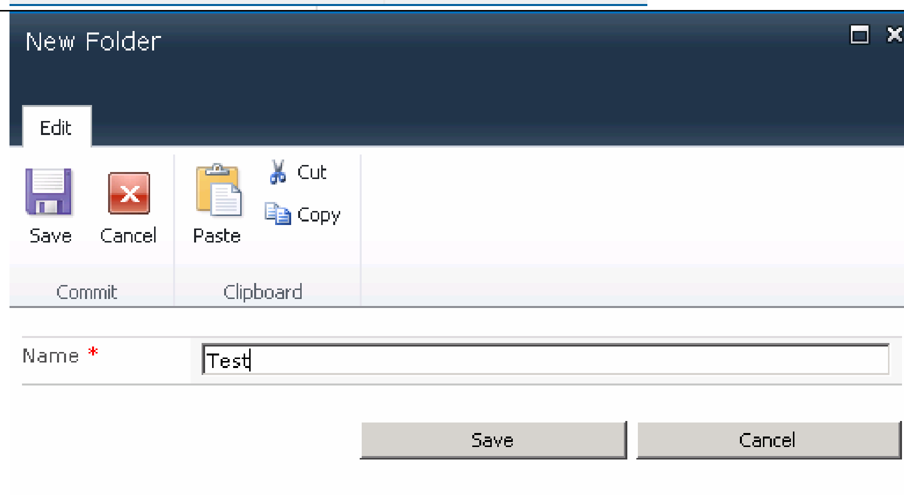
Follow the steps below to add a new folder to a document library.

Folders can be nested – meaning one can have one folder inside another.

<table>
<tr>
<td>1.Navigate to the administrative side of the document library. This example shown requires a user have contribute access or greater.</td>
<td>Typically this is done by selecting Site Actions -> View All Site Content – then
selecting the desired document library see examples below:


Then in this case I've selected Documents


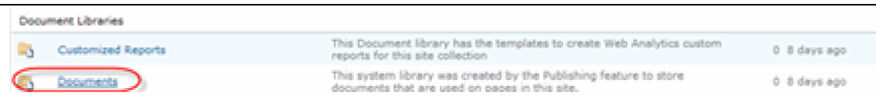
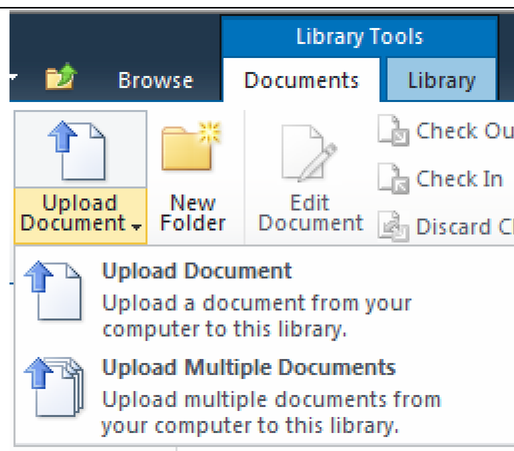
</td>
</tr>
</table>

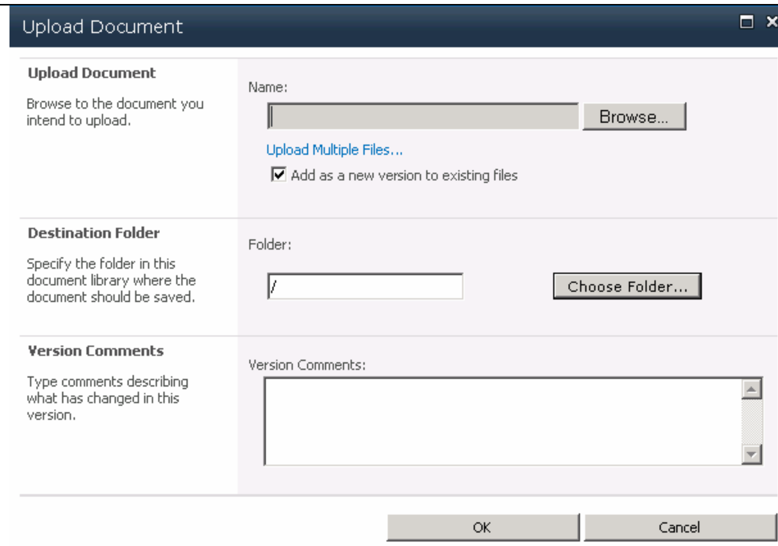
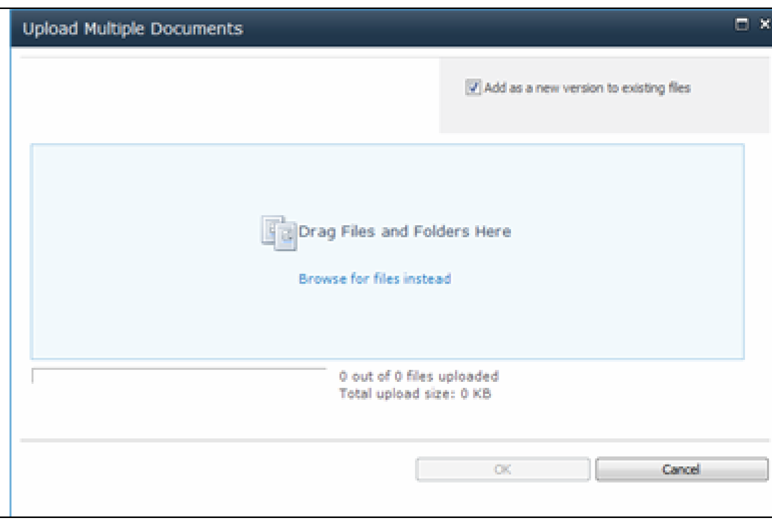
<table>
<tr>
<td>2. In the ribbon under Library Tools click the Documents tab</td>
<td>
</td>
</tr>
<tr>
<td>3. From the ribbon, select the "New Folder" option.</td>
<td>
</td>
</tr>
<tr>
<td>4. Enter a name and click on the Save button.</td>
<td>

The folder is created as named</td>
</tr>
</table>

How to Add Documents

Follow the steps below to add new documents to a document library.

1. From the site where the document library is located click Site Actions -> View all Site Content then under Document Libraries click on the desired name of the document library on the page to which content should be added.	
2. To upload a document or documents, click on in the Ribbon from Library Tools -> Documents -> Upload Document and select to Upload Document or Upload Multiple Documents.	

<table>
<tr>
<td>3. Upload Document: Click on the Browse button to find the desired document, much like you would attach a document to an email and then click OK.</td>
<td>
</td>
</tr>
<tr>
<td>4. Upload Multiple Documents: Drag the documents from the local PC or file share into the box that says 'Drag Files and Folders Here' Click OK.</td>
<td>
</td>
</tr>
</table>

NOTE: Documents must be located in an accessible location, such as a user's pc or a network file share or server. Also it is a good idea to not display more than 5000 items in a folder.

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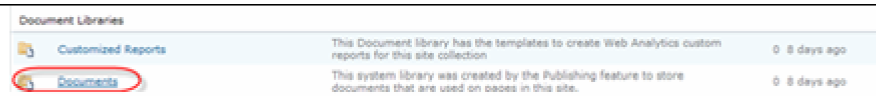
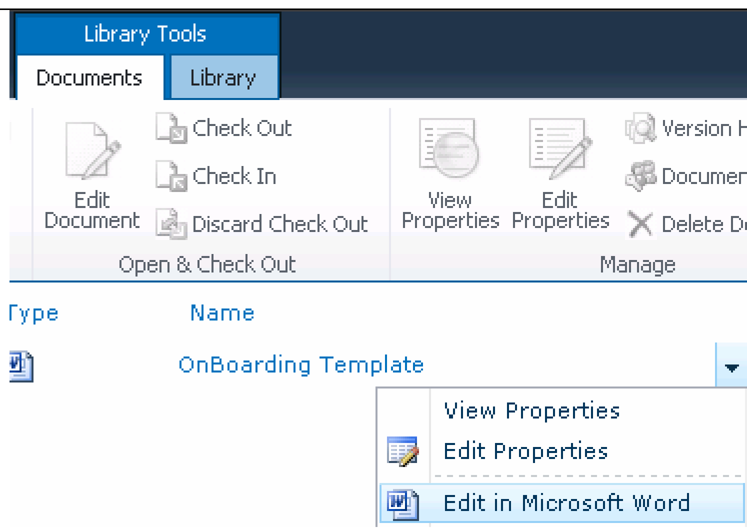
How to Modify Existing Documents

Follow the steps below to modify documents in a document library. These steps can also be used to change the name of a folder.

<table>
<tr>
<td>1. From the site where the document library is located click Site Actions -> View all Site Content then under Document Libraries click on the desired name of the document library on the page to which content should be modified.</td>
<td>
</td>
</tr>
<tr>
<td>2. From the Documents or Library view hover the mouse over the desired document. Click on the drop-down arrow that appears to the right of the document.

From the menu, select the “Edit in Microsoft Office <application>” option.

This option will change depending on the Office application that is</td>
<td>
</td>
</tr>
</table>

related to the document. The document will open in the correct application. Make any necessary changes and click the save button. Changes will be saved to the site.	

NOTE: If a user simply clicks on a document, the document will open and the user will be able to make changes, but the changes will not be saved to the site. When a user opens a document by simply clicking on the document, they open a Read-Only copy of the document. They can save their changes to their desktop, file share or network server but the changes will not be saved into the document library for others to see.

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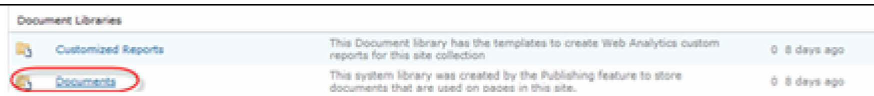
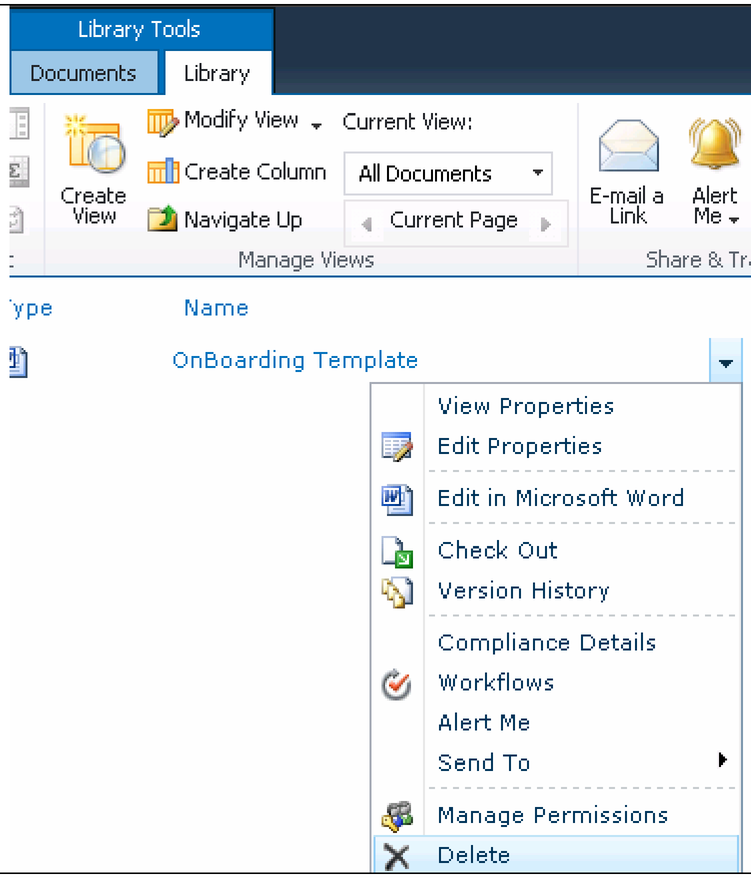
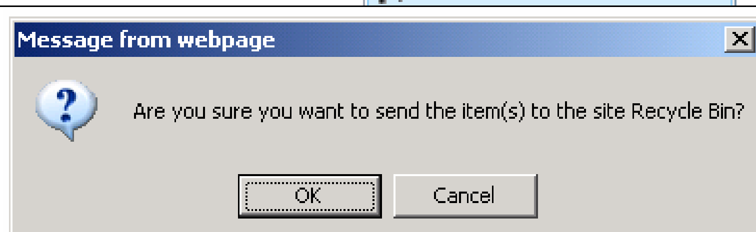
How to Delete Documents

Follow the steps below to delete a document from the document library.

These steps can also be used to delete a folder. NOTE: If a folder is deleted, everything under the folder will also be deleted.

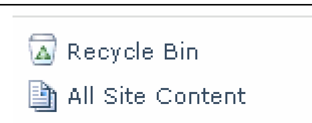
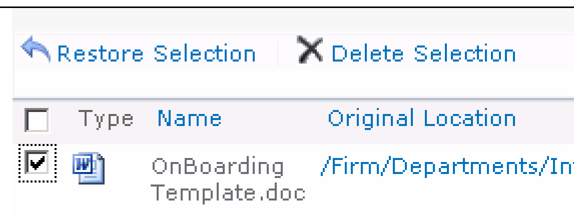
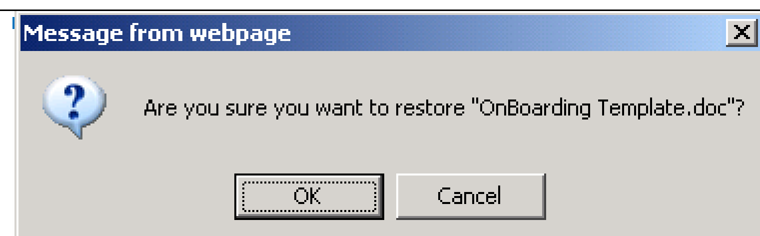
1. From the site where the document library is located click Site Actions -> View All Site Content then under Document Libraries click on the desired name of the document library on the page to which content should be deleted.	
2. From the Documents or Library view, hover the mouse over the desired document.	
3. Click on the drop-down arrow that appears to the right of the document.	

<table>
<tr>
<td>4. From the drop-down list, select the Delete option.</td>
<td>
</td>
</tr>
<tr>
<td>5. A pop-up will appear to verify that the document should be deleted. Click OK if the document should be deleted.</td>
<td>
</td>
</tr>
<tr>
<td>6. The document will be deleted from the system.</td>
<td></td>
</tr>
</table>

Recycle Bin

If a document or folder is deleted from the document library by accident, the user by default has 30 days to recover the document. This is done by using the Recycle Bin option on the site.

To recover a deleted document or folder, follow the steps below.

1. Click on the “Recycle Bin” link that is located in the left hand column of the site.	
2. Find the document or folder in the list.	
3. Mark the document by placing a check in the box next to the document.	
4. Click the “Restore Selection” option.	
5. A pop-up dialog box will be displayed. Click on the OK button if the correct document has been selected and should be restored.	

File and URL Administrative Notes

• Document URL Length

The maximum length of a URL for a file is 260 characters. This includes the folder structure above the file. Thus a folder name and a file name cannot be more than 128 characters. It should be noted that in SharePoint if a file or folder has a space – it will be shown with a %20 in the URL.

If a file is attempted to be uploaded that has a combined URL that is too long an error will be displayed:

"The specified file or folder name is too long. The URL path for all files and folders must be 260 characters or less (and no more 128 characters for any single file or folder name in the URL). Please type a shorter file or folder name."

• Allowed Document Types

The following document types are commonly allowed to be added to a Document Library.

- Microsoft Word (.doc)
- Microsoft Excel (.xls)
- Microsoft PowerPoint (.ppt)
- Microsoft Project (.mmp)
- Microsoft Visio (.vsd)
- Adobe Acrobat (.pdf)
- Text (.txt)
- Rich-Text document (.rtf)

- Images (.jpg, .gif, .bmp)
- HTML page (.htm, .html)
- URL

- Special Characters/Restricted Characters

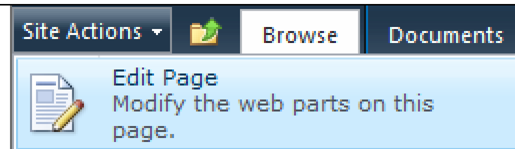
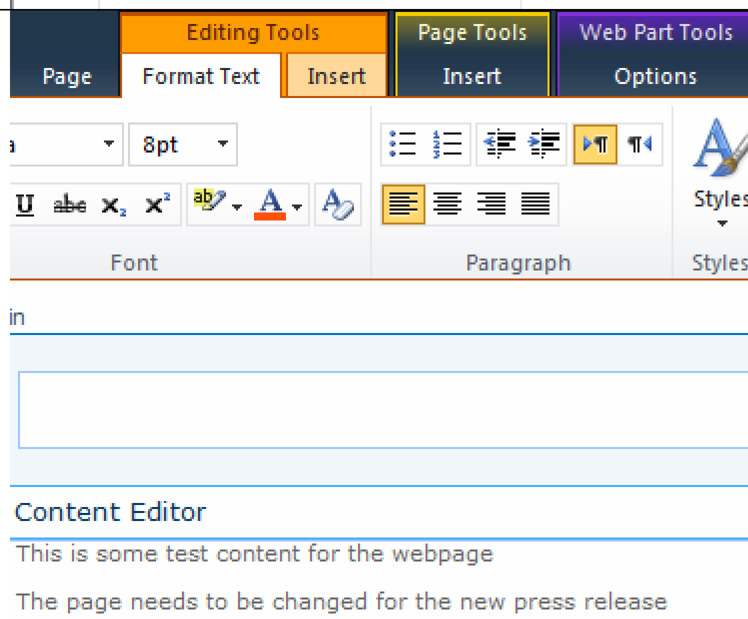
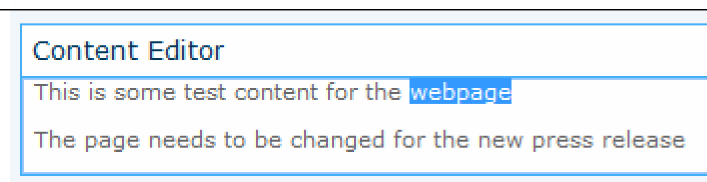
The following characters cannot be used when naming folders or files (<document name>.extension).

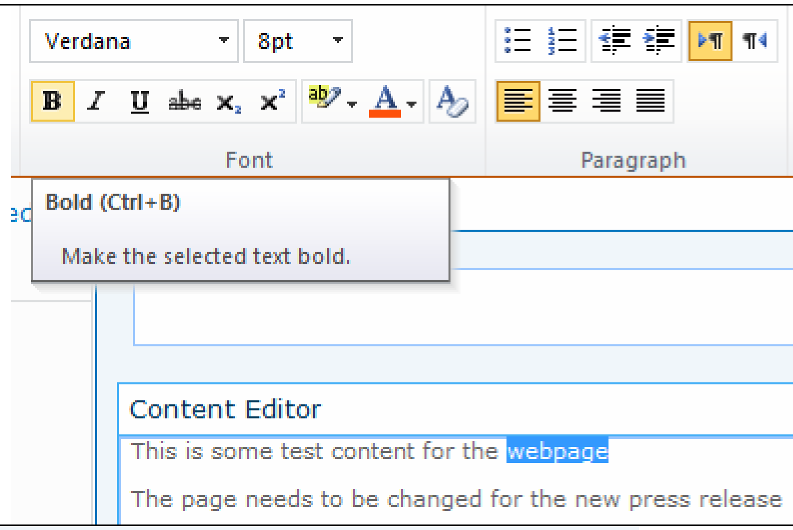
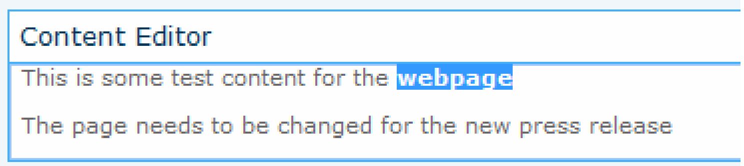
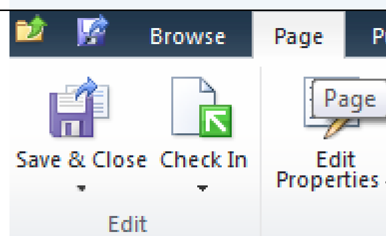
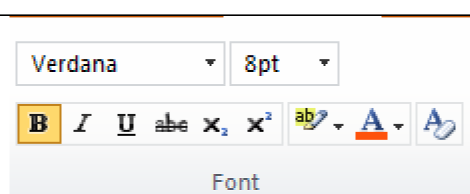
- / - forward slash
- \ - back slash
- : - colon
- * - asterisks
- ? – question mark
- " – double quotes
- < - less than
- > - greater than
- | - pipe
- # - pound
- <TAB>
- { - left bracket
- } – right bracket
- % - percentage
- ~ - tilde
- & - ampersand

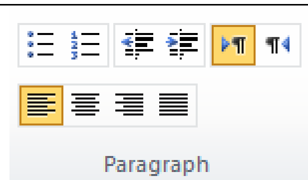
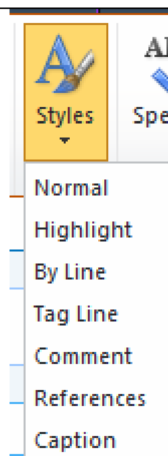
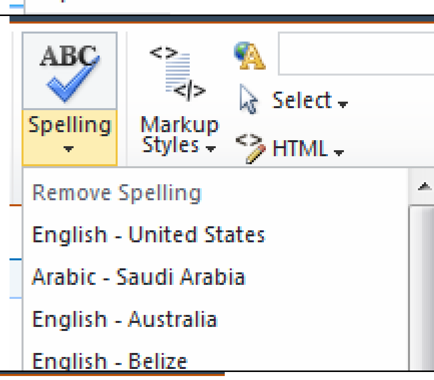
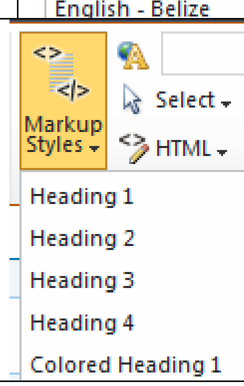
PERSONAL NOTES:

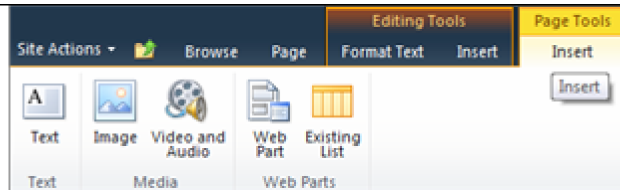
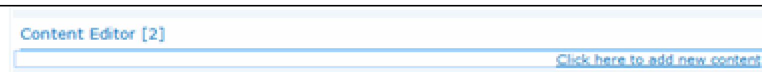
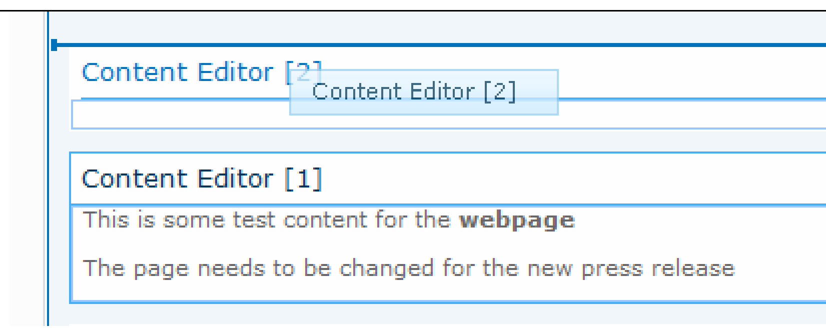
Content Editing

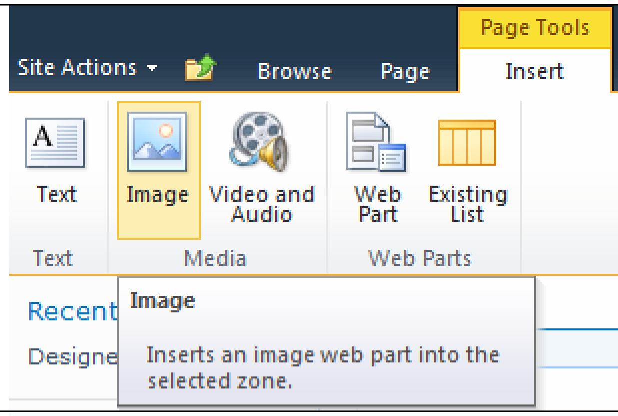
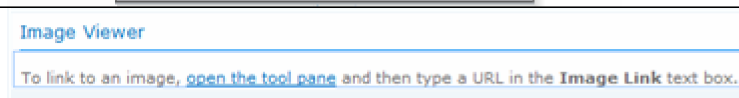
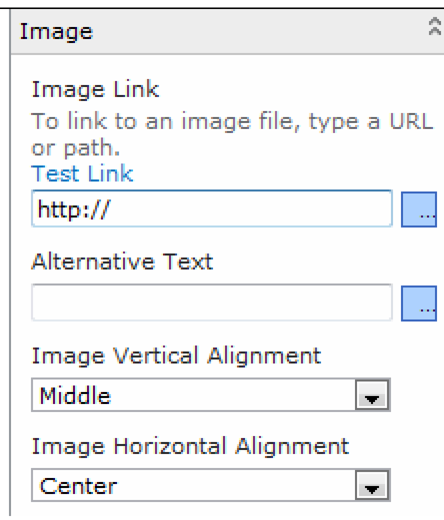
Follow the steps below to edit existing content on the site or team site you manage or add content to.

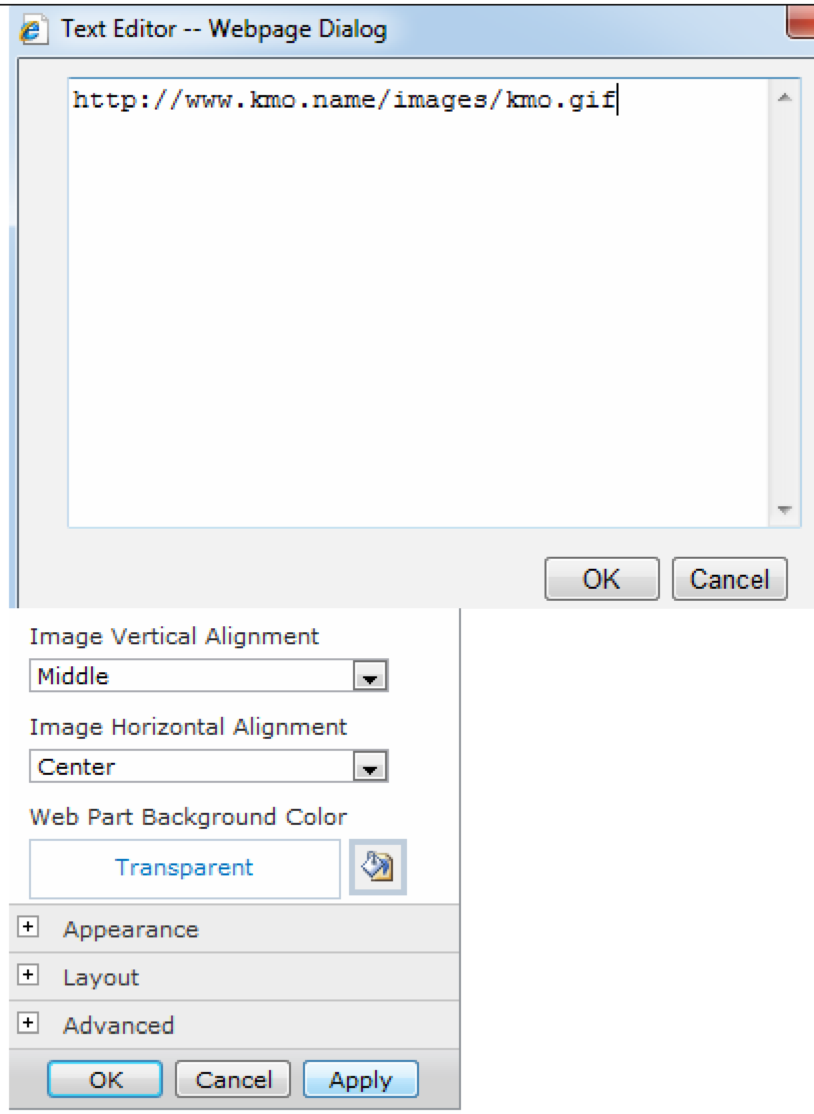
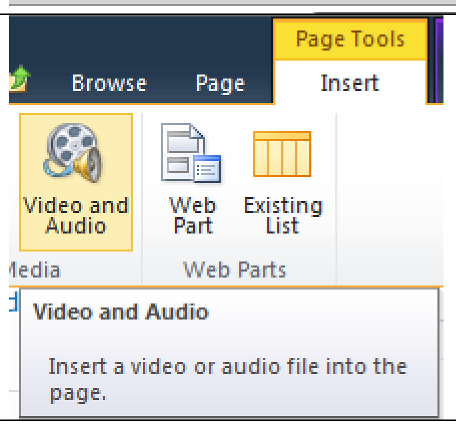
1. From the page that content is to be edited select Site Actions -> Edit Page.	
2. Likely a Content Editor web part will house the content that needs changed. Therefore place the cursor in the text block that needs changed or highlight the area that needs changed and make the desired edit(s) as you would while using any text editor.	
3. In the example here the text webpage has been highlighted.	

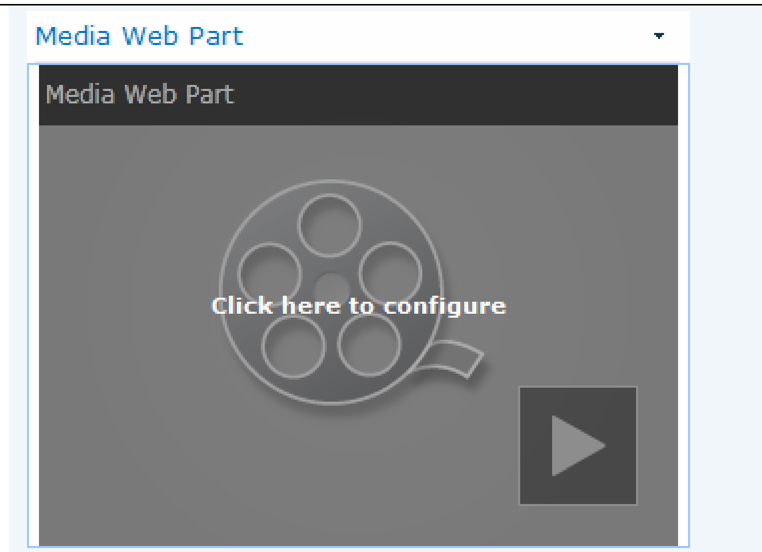
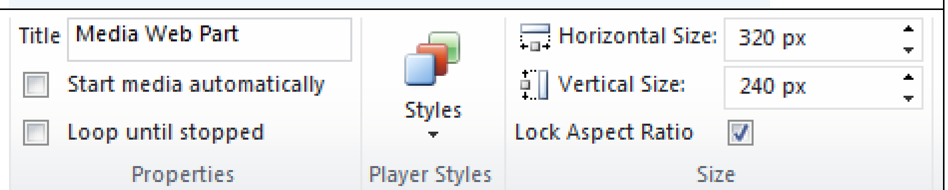
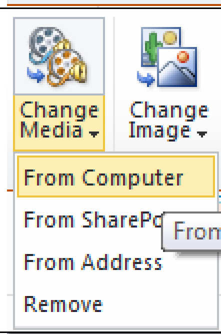
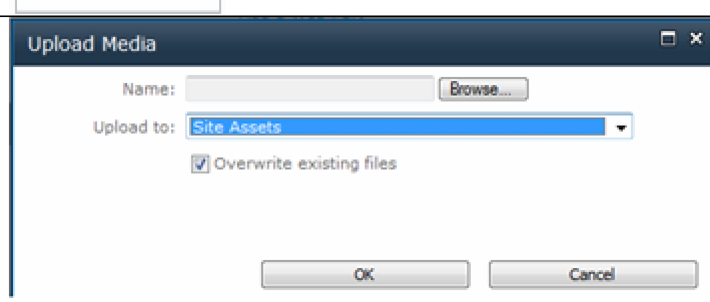
4. In the Font menu the Bold is then selected and using the live preview the text is shown right away bolded.	
5. On the right the text is now bolded.	
6. If this were the only change to be made to the page an editor would then select the Page tab then Save and Close – which would then essentially publish the page.	
7. If further edits to the page were so desired other font elements from the Font menu could be selected.	

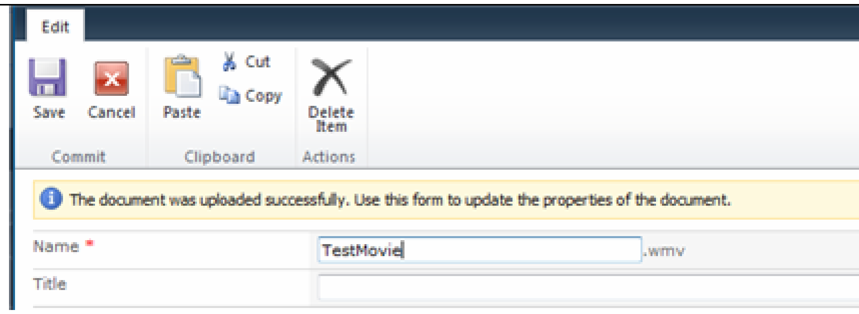
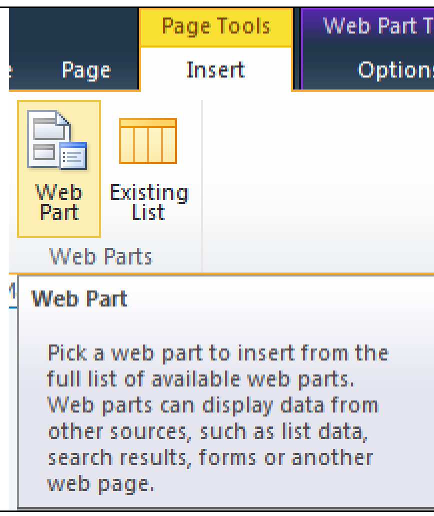
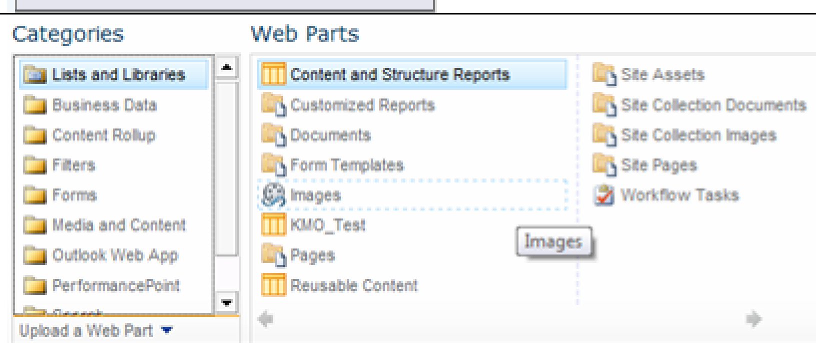
<table>
<tr>
<td>8. Additionally other edits to the page could be done by using the Paragraph menu.</td>
<td>
</td>
</tr>
<tr>
<td>9. Selecting the Styles menu allows for content font Styles to be set.</td>
<td>
</td>
</tr>
<tr>
<td>10. To spell check a page select the Spelling selection and the language that the content is written in.</td>
<td>
</td>
</tr>
<tr>
<td>11. To add a desired markup select the Markup Styles selection then the desired selection.</td>
<td>
</td>
</tr>
</table>

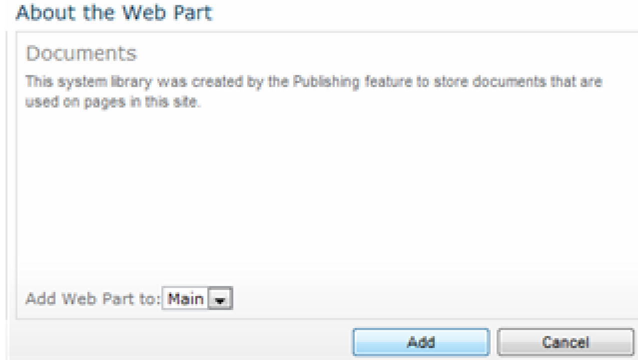
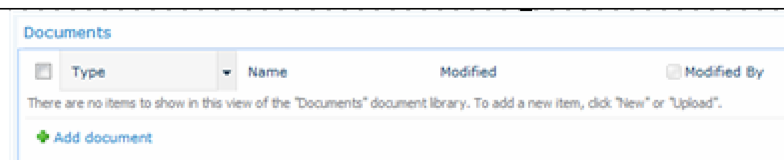
• Page Tools/Web Parts 12. To add new sections or media type content select from the Page Tools tab -> Insert.	
13. To add a new Text block to a page select that option. The Content Editor will appear on the page – to add content click the link that says 'Click here to add new content'.	
14. To move the text editor to a different location on the page simply select the editor and move it to the desired area. This same process can be followed for any of the Page Tools set.	

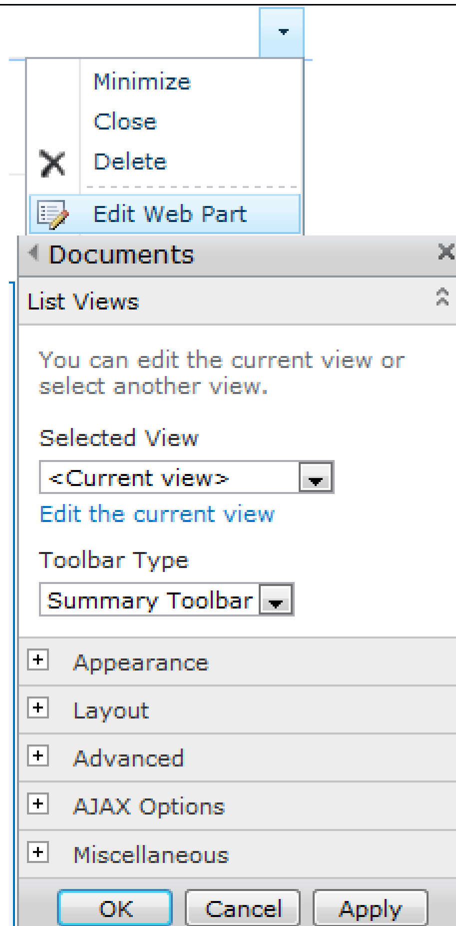
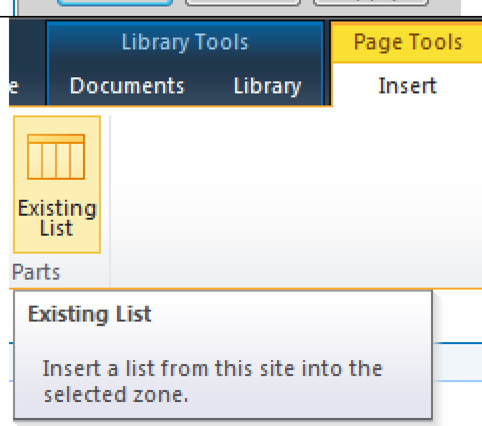
15. To add an image select from the Page Tools tab -> Insert -> Image.	
16. The part is added to the page as an Image Viewer object.	
17. In the Image web part box that appears to the right click the … of the http:// item and enter in the URL of where the desired image is located and click OK. It is then recommended to click the Test Link link to make sure the image is typed correctly. Enter in other Alternative Text and select desired Alignments before clicking Apply -> OK.	

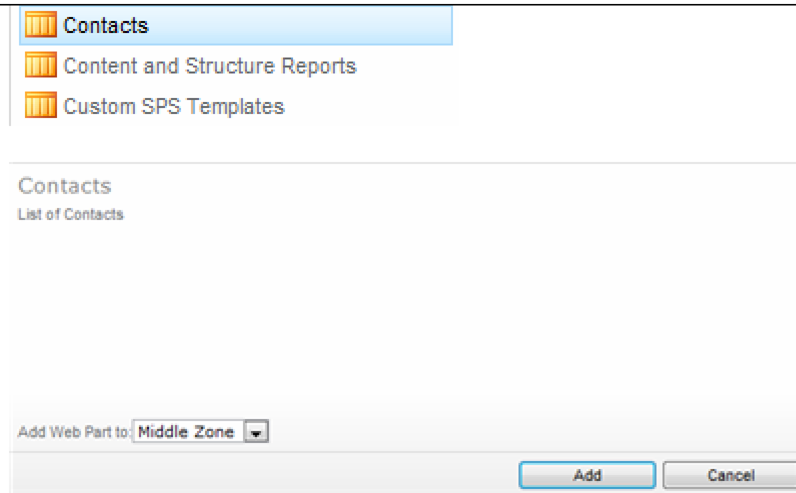
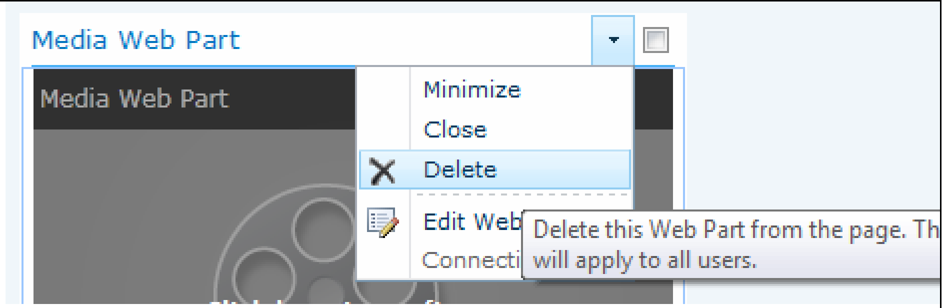
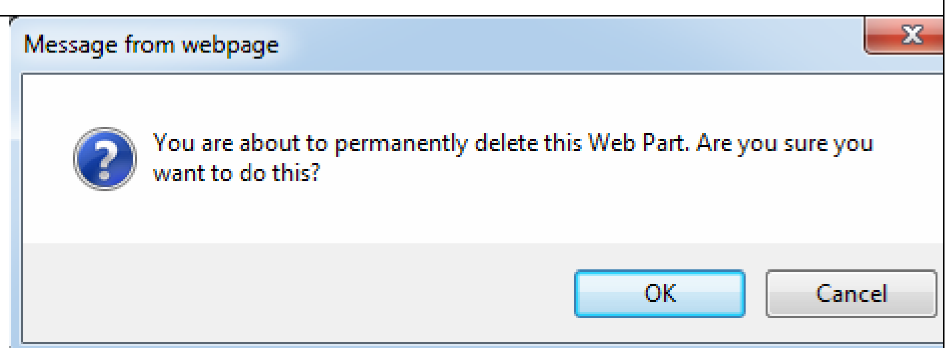
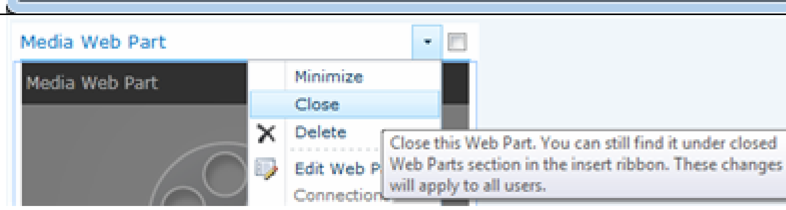
<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>18. To add a media item select from the Page Tools tab -> Insert -> Video and Audio.</td>
<td>
</td>
</tr>
</table>

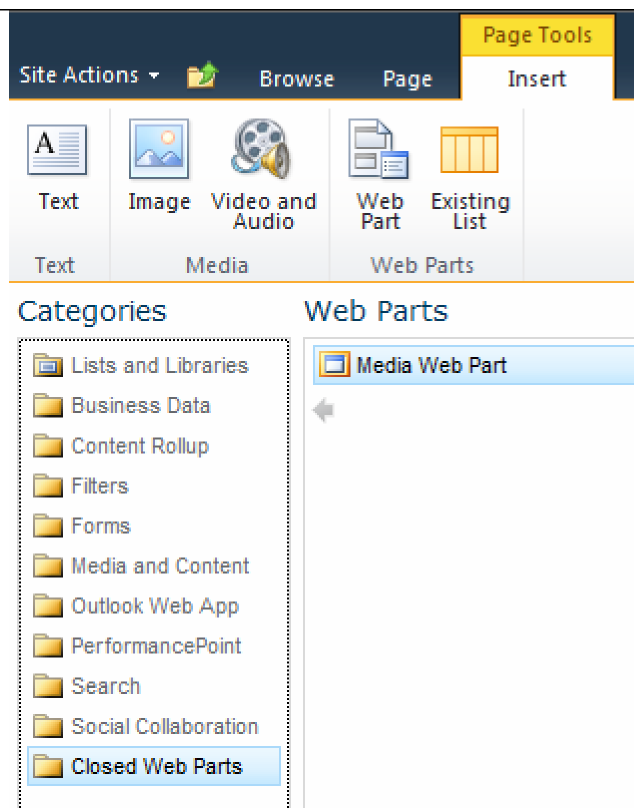
19. The Media Web Part is added. Where it says 'Click here to continue' do so. NOTE: This is a Silverlight Control.	
20. Select the desired Properties, Player Styles and Size.	
21. Select the Change Media selection then select where the desired media is located.	
22. In this example From Computer was selected – and thus selecting Browse then selecting the media to be uploaded and where it is to be uploaded should be followed and click OK when	

<table>
<tr><td>done.</td><td></td></tr>
<tr><td>23. If the media item is uploaded with success a message as shown is displayed and at this point one can add a Title for the media item and then click Save.</td><td>
</td></tr>
<tr><td>24. To add a web part item select from the Page Tools tab -> Insert -> Web Part.</td><td>
</td></tr>
<tr><td>25. Select from the Categories menu on the left hand side then from Web Parts on the right hand side the desired selection.</td><td>
</td></tr>
</table>

26. On the far right hand side a short description of the web part is given and if so desired where it says Add Web Part to – make a selection which in most cases will be Main which is the center of the page. Click Add to add the web part to your page.	
27. The web part is added to the page.	
28. Common attributes of web parts are the following:	Appearance – the title bar and height and width of the web part Layout - how the webpart is positioned on the page. Advanced – how the user interface will be displayed. Under Appearance there are several items of interest: Title – the title of the webpart that is displayed. Height and Width – the actual height and width in pixels of the webpart. Chrome State – if selected this indicates if the web part is displayed minimized or maximized. Chrome Type (Title and Border) – the default is that there is not a title bar or border, or a title only, border only and title and border. Under Advanced there are several of interest: Allow close – allows for the ability to have users close or not close the web part – if a check box is checked or not. Allow editing in Personal View – if checked only site owners and designers can customize the web part.

	Title URL – Adding a URL makes that URL a clickable item that users will goto when clicked. Help URL – If a URL is added then a help button is depicted. Title Icon Image URL – Allows if a URL is added for an image to be displayed in the title bar.
29. To change the properties of the added web part click in the upper right of the web part the drop down arrow and select Edit Web Part. On the right hand side make any adjustments then click Apply -> OK.	
30. To add a list item select from the Page Tools tab -> Insert -> Existing List.	

<table>
<tr><td>31. Select the already existing list from the left hand side Web Part menu. Then on the right hand menu in the About the Web Part select the Add button and the list is added to the page.</td><td></td></tr>
<tr><td>32. If a web part is added accidently it can easily be deleted. Assuming one is in edit mode select the web part properties and click Delete.</td><td></td></tr>
<tr><td>33. Click OK when prompted</td><td></td></tr>
<tr><td>34. Another option to be aware of is if a web part holds information that is sometimes needed (for example a</td><td></td></tr>
</table>

<table>
<tr>
<td>message for new yearly benefits or a holiday message) – the web part and its information can be closed from view for all users, assuming one is in edit mode select the properties of the web part and select Close. The web part is then closed.</td>
<td></td>
</tr>
<tr>
<td>35. To re- add the web part to the page at a later time – from edit mode select the Page Tools tab -> Insert -> Closed Web Parts. On the right hand side select the we part that was previously closed then on the right hand side select Add.</td>
<td>


</td>
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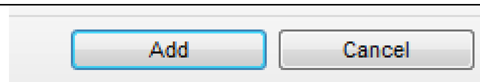
	

NOTE: It is not recommended to have too many closed web-part on a said page as resources in loading the closed web parts will be utilized which may slow page optimization.

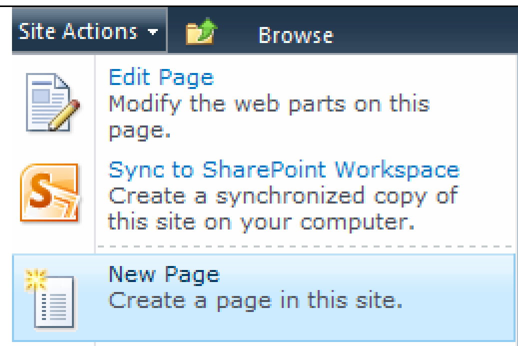
Follow the steps below to create new pages on a SharePoint site. The New Page section covers how to create a single web page. The New Site section covers how to create a whole new site which thus can have web pages off of the main sites page which are typically all interrelated by subject matter.

<table>
<tr>
<td>

- New Page

1. Navigate to the site where a page is needed to be added. NOTE: To add a new page to a site a user needs designer level access or better. Select Site Actions -> New Pages

</td>
<td>



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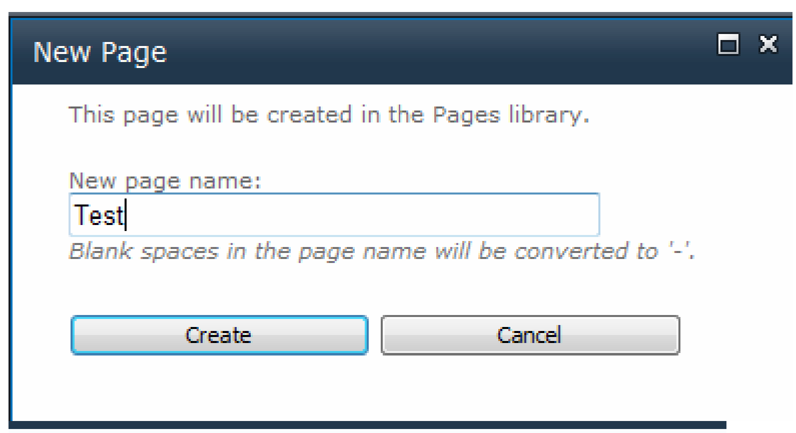
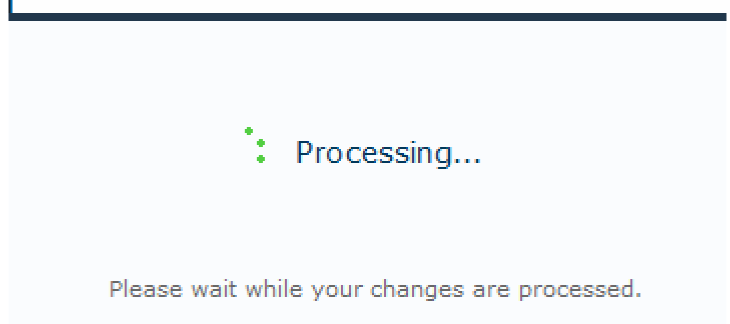
<td>

2. Under New page name: Enter in a desired name in this case here I have entered in Test. Click Create after naming the page.

</td>
<td>

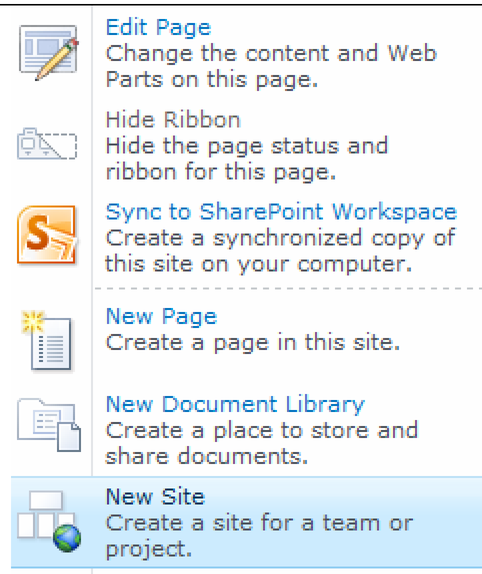
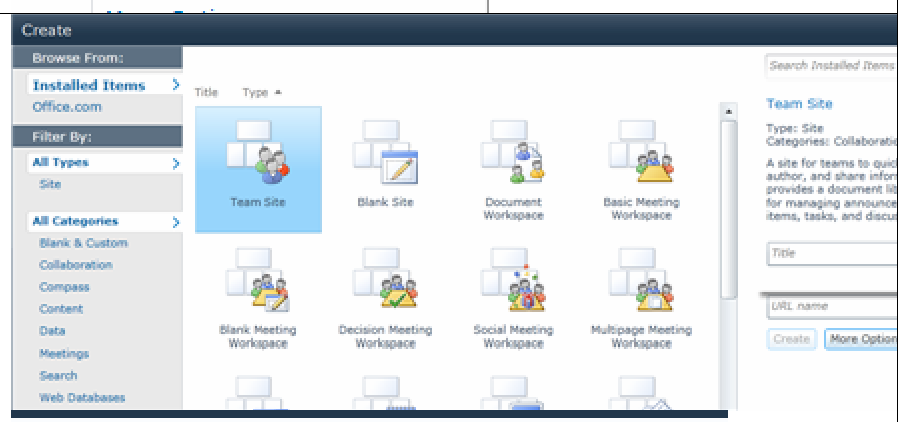
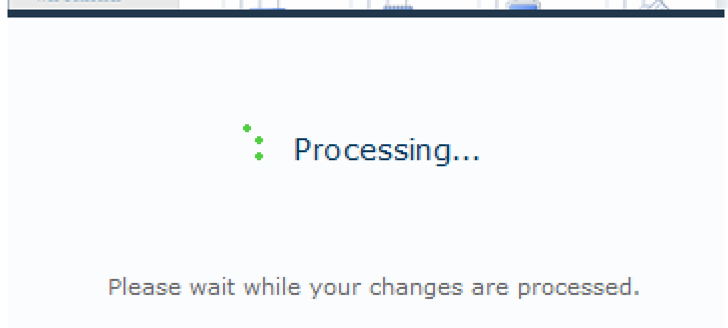




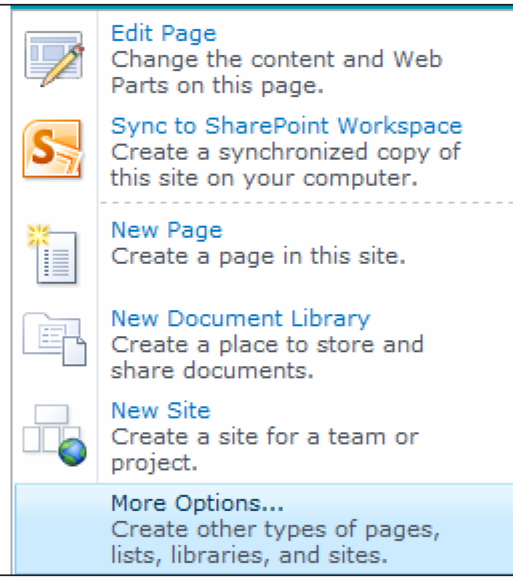
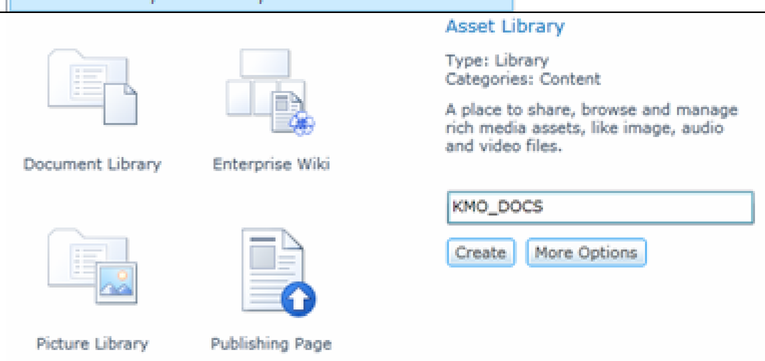
</td>
</tr>
</table>

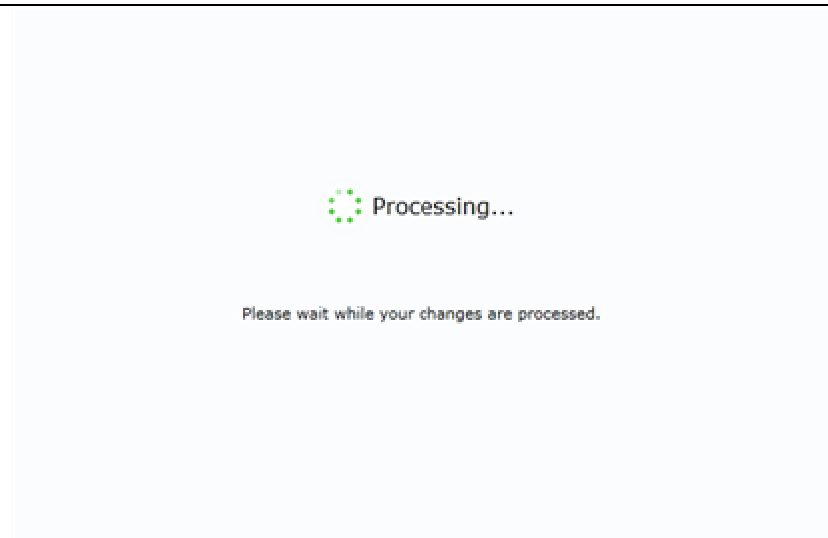
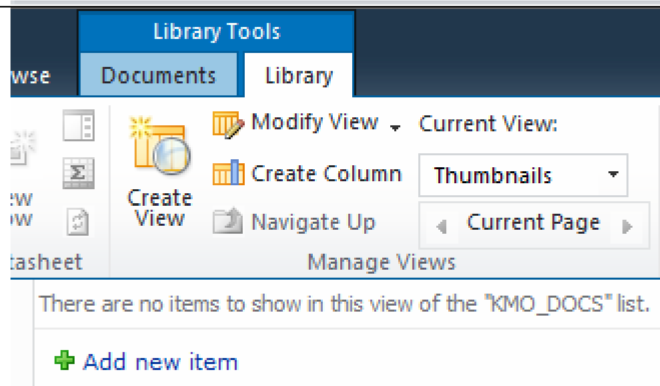
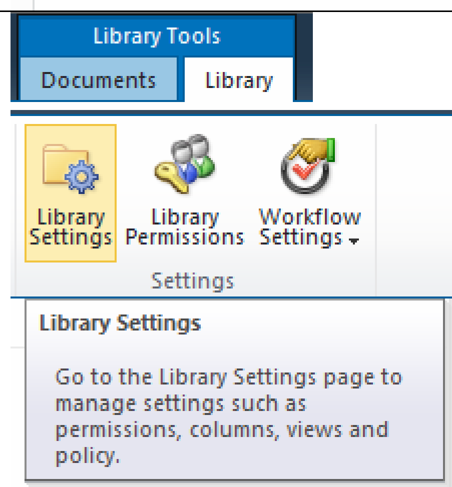
<table>
<tr>
<td>3. The page is created and the content entry screen will look as such.

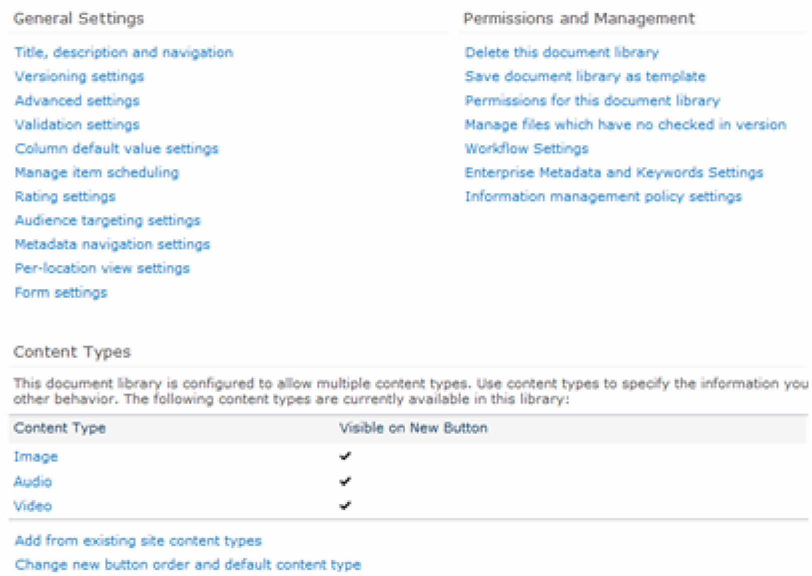
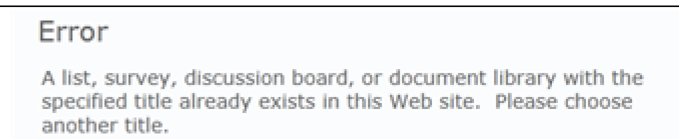
At this point adding new content can be added following the information presented in the Content Editing section.</td>
<td>
</td>
</tr>
</table>

• New Site 1. In this section creating a whole new site is presented – thus to start click Site Actions -> New Site	
2. Select the desired installed template. Enter in a Title and URL name and then Click Create. In this example here a Team Site type has been selected. NOTE: That each template that is available has a description that when selected is shown on the right hand side – so thus selecting the template for the deemed purpose is a	

reality.	
3. At this point adding new content can be added following the information presented in the Content Editing section.	

• More Options 1. In this section creating other types of assets is reviewed – this includes document libraries, lists etc.	
2. On the left hand side in this example Document Library was selected. KMO_DOCS was placed in the name field and then the Create button was selected.	

<table>
<tr>
<td>3. The result is processed.</td>
<td>
</td>
</tr>
<tr>
<td>4. The document library is created and displayed and thus items can be added to the library by clicking the Add new item link.</td>
<td>
</td>
</tr>
<tr>
<td>5. If changes to the Library settings are desired to be made from the Library Tools select Library then in the far right hand corner select Library Settings</td>
<td>
</td>
</tr>
</table>

<table>
<tr>
<td>6. Here a user can perform many useful operations such as changing the name of the document library under the Title, description and navigation link, deleting the document library and setting the permissions for the document library amongst other items</td>
<td>
</td>
</tr>
<tr>
<td>7. Other options in More Options can be created as desired. Note: Do not name different asset types with the same name – thus creating a list and a document library with the same name will result in errors being thrown.</td>
<td>
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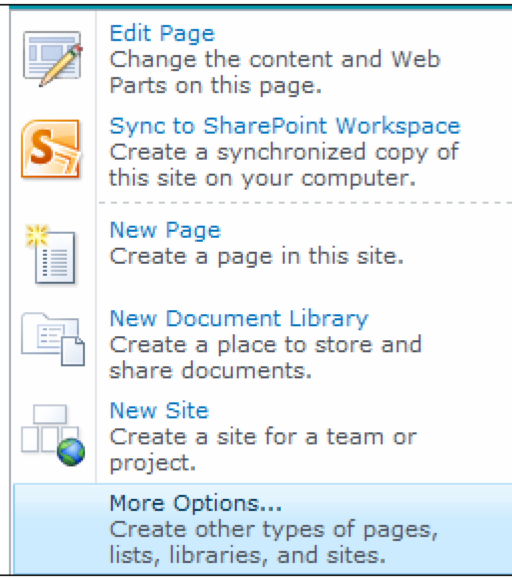
- Lists

8. In this section creating lists and libraries is reviewed. To create a list select Site Actions -> More Options.

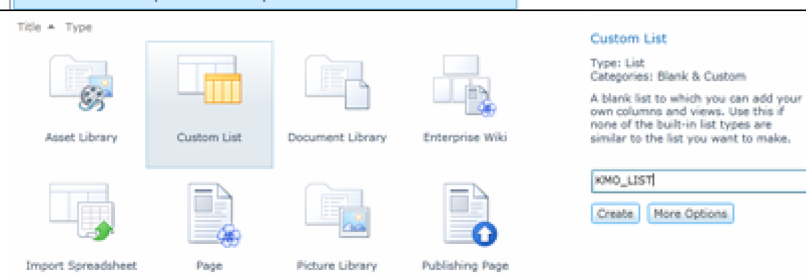
</td><td>



</td></tr>
<tr><td>

9. Select Custom List and on the right hand side name the list – in this case it's been named KMO_LIST. Click Create when done.

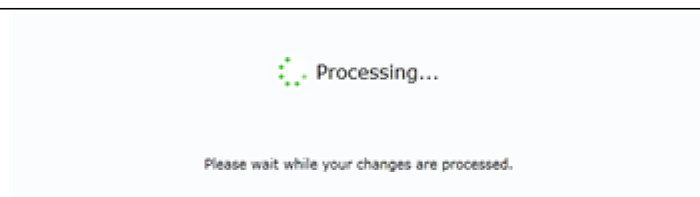
</td><td>



</td></tr>
<tr><td>

10. The request is processed.

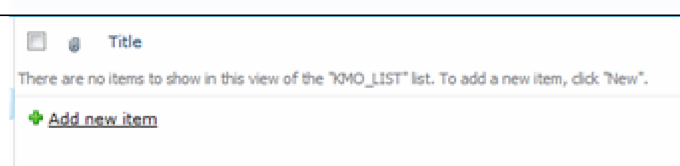
</td><td>



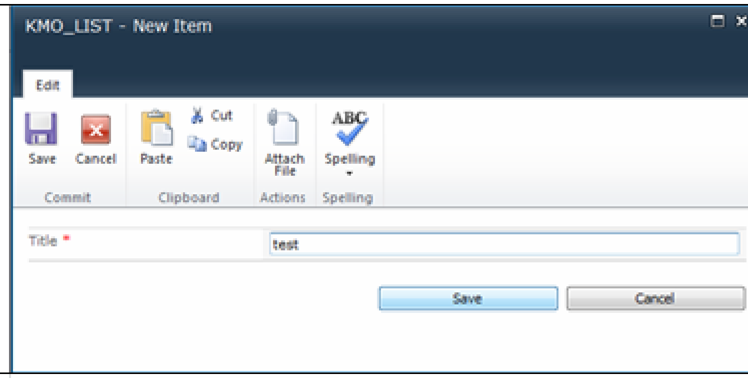
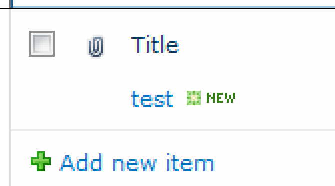
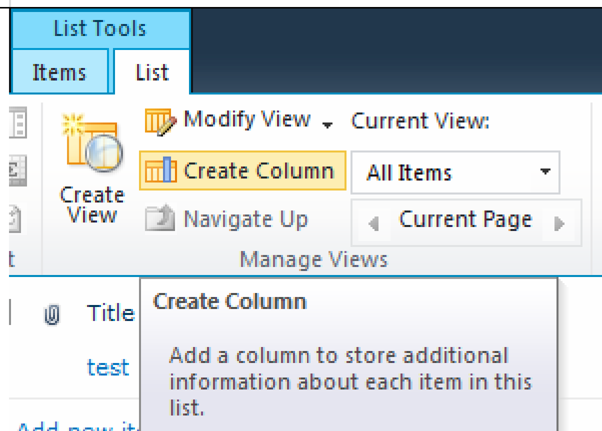
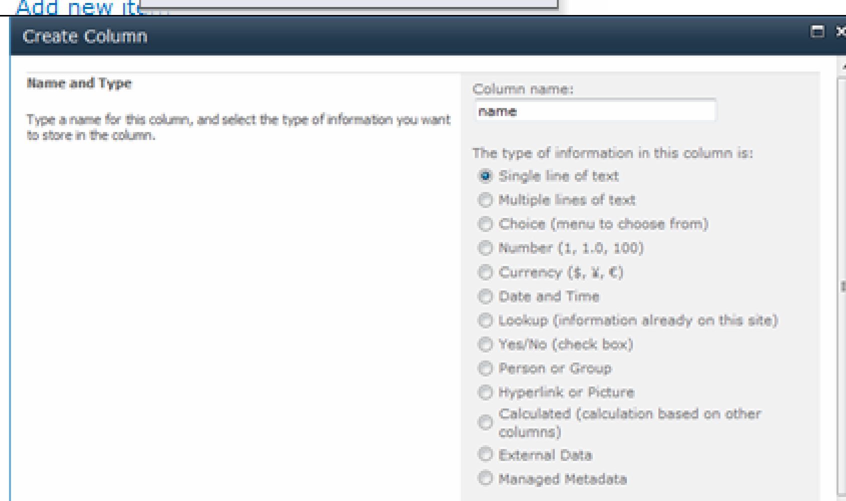
</td></tr>
<tr><td>

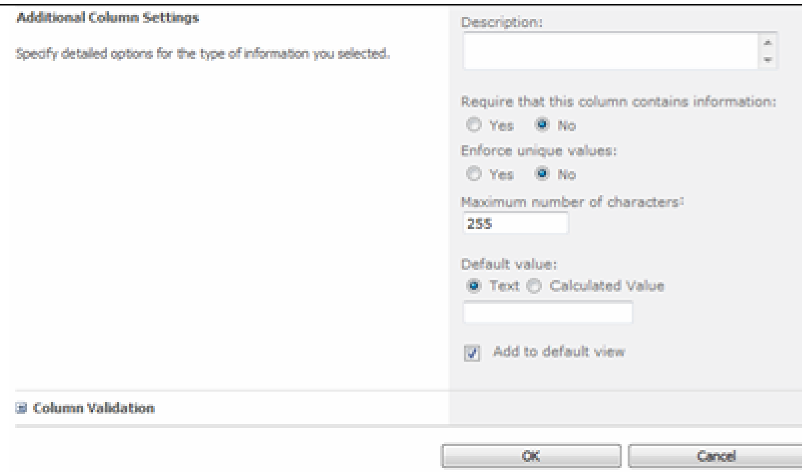
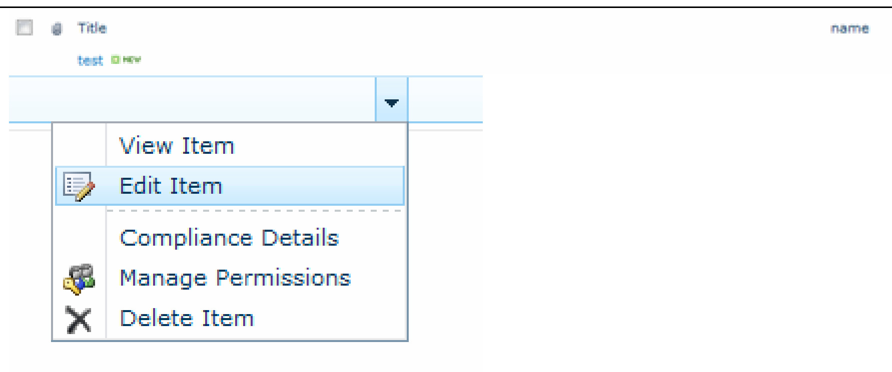
11. The list shell is shown and to add items to the list one should select Add new item

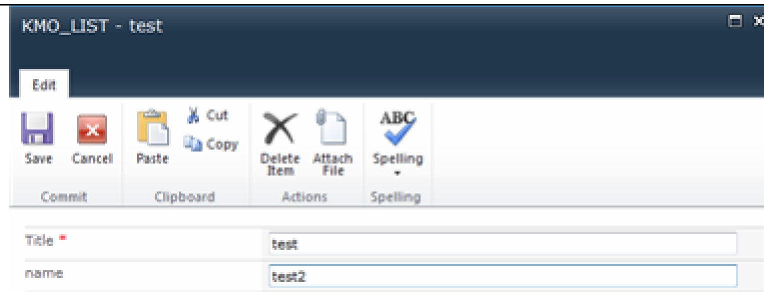
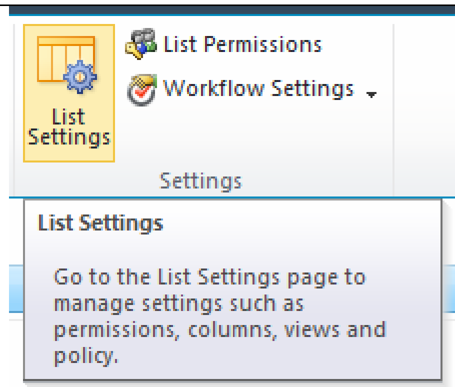
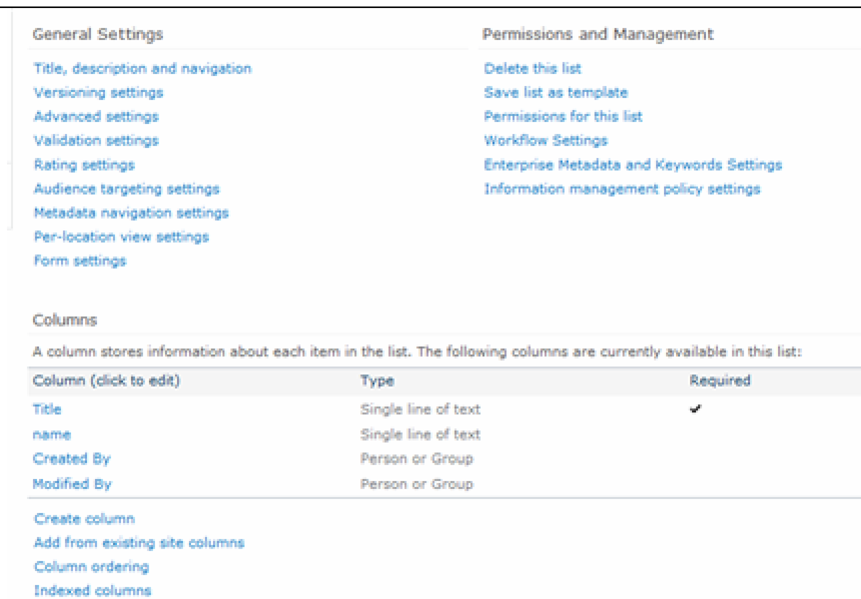
</td><td>

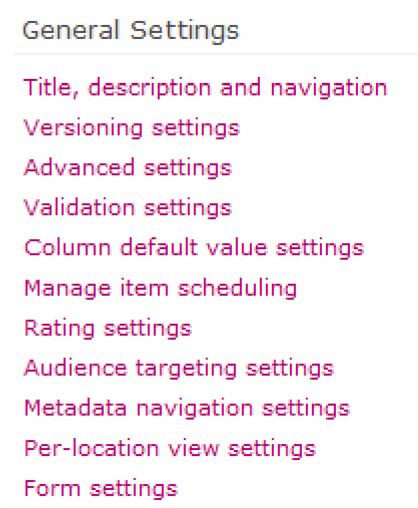


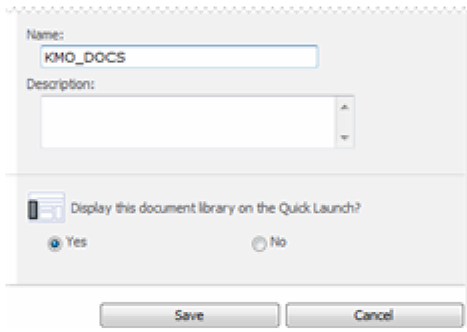
</td></tr>
</table>

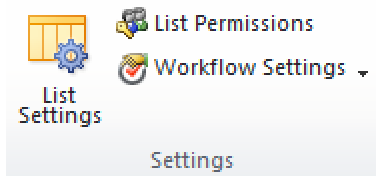
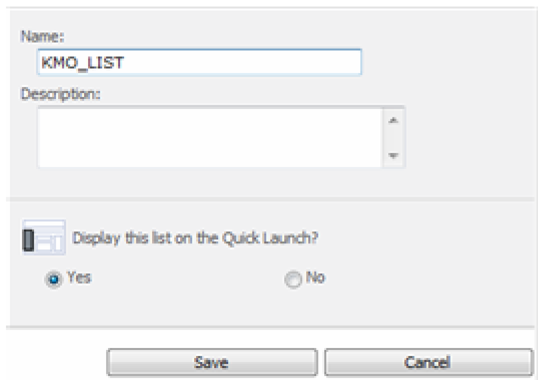
12. One can then enter in the content of the list then select the Save button	
13. The item(s) are then displayed.	
14. If additional data is to be stored in the list – a user can select from the List Tools tab -> list -> Create Column	
15. A user would then select the name of the column in this example; it has been called name and the type of information to collect. They would then scroll down	

16. Additional Column Settings which include if the information is required, allows for unique values, maximum number of characters, a default value as well as if the column should be added to the default view should be entered and selected. A user would click OK when done entering in the desired information.	
17. The column is then displayed in the list. If content is desired to be entered into the existing item – that item should be selected and the Edit Item selected. Content can then be entered into the new column and saved.	

<table>
<tr>
<td></td>
<td>
</td>
</tr>
<tr>
<td>18. If changes to the List settings are desired to be made in the far right hand corner of the screen in the Settings options select List Settings.</td>
<td>
</td>
</tr>
<tr>
<td>19. Here a user can perform many useful operations such as deleting the list, setting the permissions for the list as well as create columns and change the order display of existing columns.</td>
<td>
</td>
</tr>
</table>

20. Those items under General Settings are explained here:	 Title, description and navigation – this is used to change the display name and can be used to add a description as well as decide if a link appears on the quick launch bar. Versioning settings - this is used to turn off and on content approval, set versions of items as well as set if one has to check out items before editing. Advanced settings – this section has several miscellaneous settings that can be utilized which include those for content types, item level permissions, e-mail notifications, attachments, folders, searching and datasheets. Rating settings – used to enabled/disable the five star rating system available. Audience targeting settings – allows for the ability for content to be targeted to a said user base. Metadata navigation settings – allows for keywords from a list to be used in the navigation tree view. Per-location view settings – allows for the setting of which Views can be displayed for a folder or content type. Form settings – used for InfoPath if utilized on the list or document library.

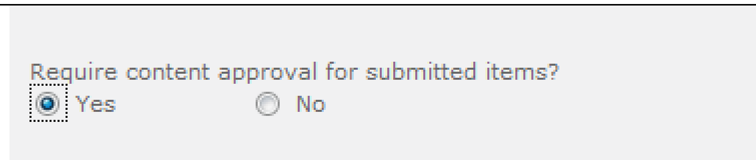
21. The title, description and navigation is an important and useful item and deserves a description. In this example, we will assume that the previously created KMO_DOCS library needs changed so from Library Tools -> Library -> under Settings select Library Settings. Click under General Settings the Title, description and navigation link. In the Name field – place the cursor in that field and make the desired changes, then if desired add a description text and select whether to add the link to the quick launch or not then select Save.	 

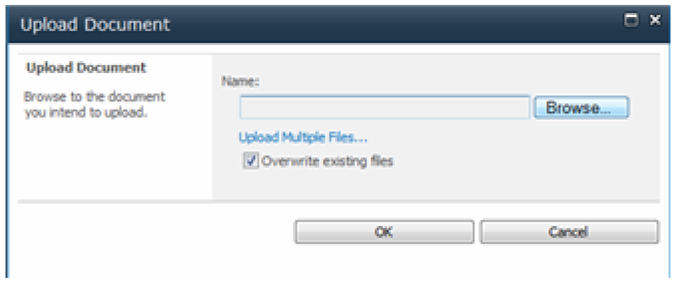
22. For a list item the same process would be followed thus in this example, we will assume that the previously created KMO_LIST needs changed so from List Tools -> List -> under Settings select List Settings. Click under General Settings the Title, description and navigation link. In the Name field – place the cursor in that field and make the desired changes, then if desired add a description text and select whether to add the link to the quick launch or not then select Save.	 

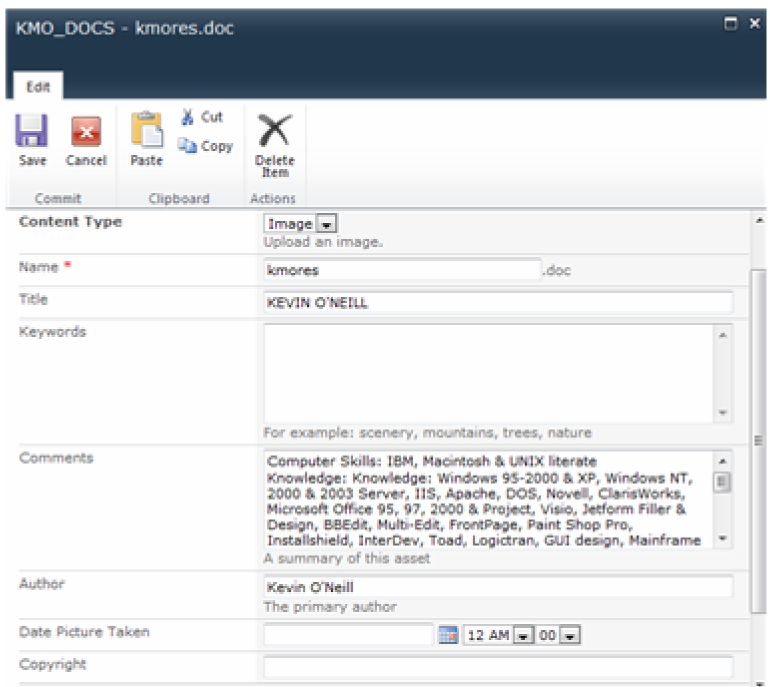
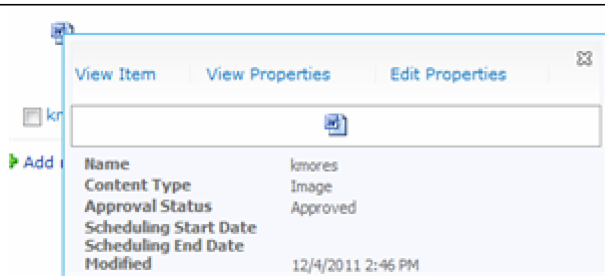
Note: A list or library has two names, the name in the URL and the display name. When either item is initially created the name entered is what will be used as the URL name. In this case the document library is for examples sake KMO_DOCS – so the URL would be: http://myservername/sites/KMO_DOCS/Forms/AllItems.aspx if the name of the document library was changed to KMO_DOCS2 – the display name would be KMO_DOCS2 but the URL would remain with the KMO_DOCS in the name.

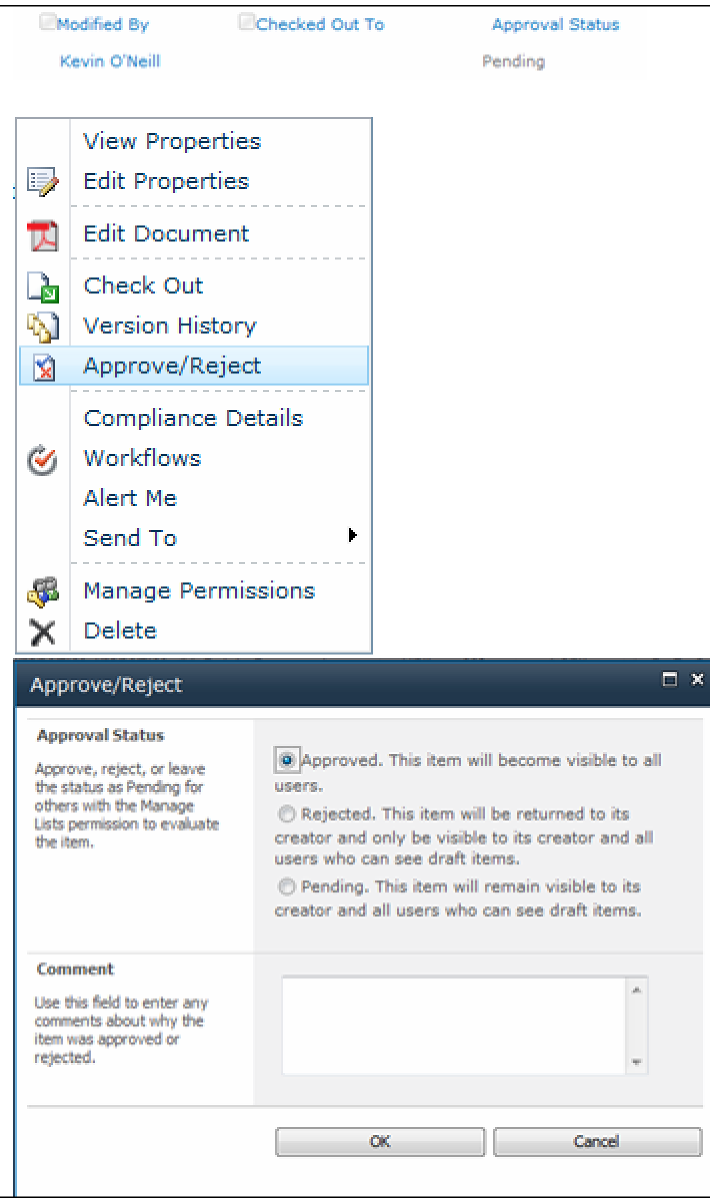
- Content Approval

23. In this section the notion of content approval for a list or document is reviewed. In this case – the manual process for content approval is described. This can also be accomplished via a workflow. The first step is to turn content approval on in the desired list or document library. Thus, in this example, from the KMO_DOCS document library select from the Library tools -> Library tab under Settings the Library Settings selection then under General Settings select Versioning Settings and under Content

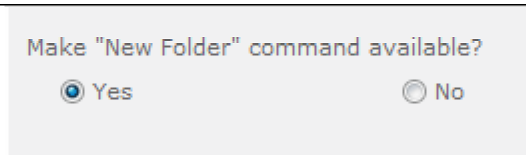


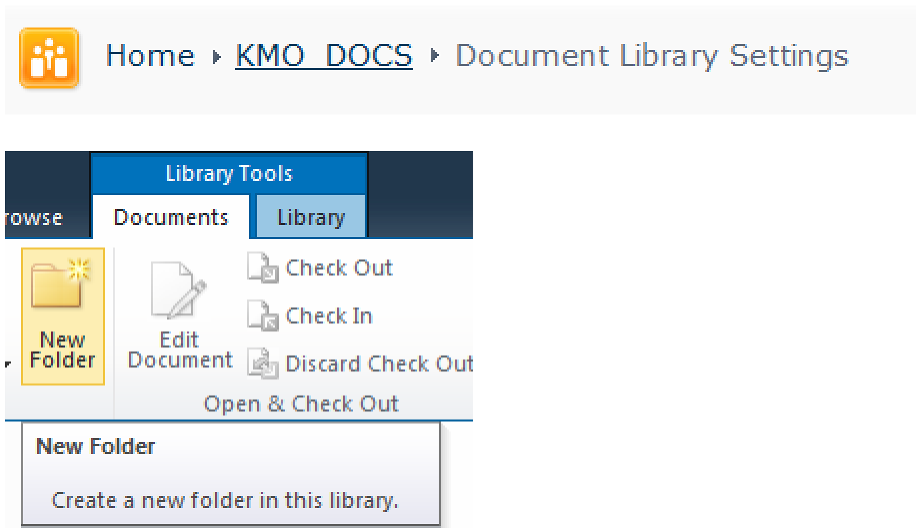
<table>
<tr><td>approval select Yes and click OK.</td><td></td></tr>
<tr><td>24. In this case maneuver to the document library and click Add new item. Browse out to add the desired item select it and click OK. If prompted for Metadata enter it in and click Save.</td><td>


</td></tr>
<tr><td>25. The document is displayed in the library – at this point hover over the document to see its properties. In this case since</td><td>
</td></tr>
</table>

the uploader has admin access – the Approval Status is Approved.	
26. If approval is required an individual with Approver rights would have to view the properties of the item and select to Approve/reject it. Additionally in the document library view the item would appear with an Approval Status of Pending. Once the approver hovers over the document and selects Approve/Reject then selects Approved and OK would the document be available for all users to see the document.	

NOTE: With content approval turned on – only two groups of users can see the document. The person who created or uploaded it and any user whom has Approver rights (by default includes those in the site owners group and those with designer rights)

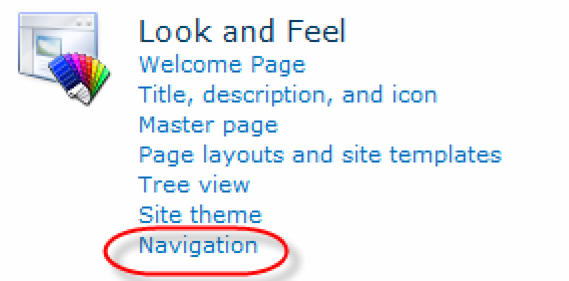
• Folders and Make “New Folder” 27. In this section the notion of lists and libraries being divided into folders similar to that of windows explorer is reviewed. Thus, in this example, from the KMO_DOCS document library select from the Library tools -> Library tab under Settings the Library Settings selection then under General Settings select Advanced settings and under Folders select Yes and click OK.	

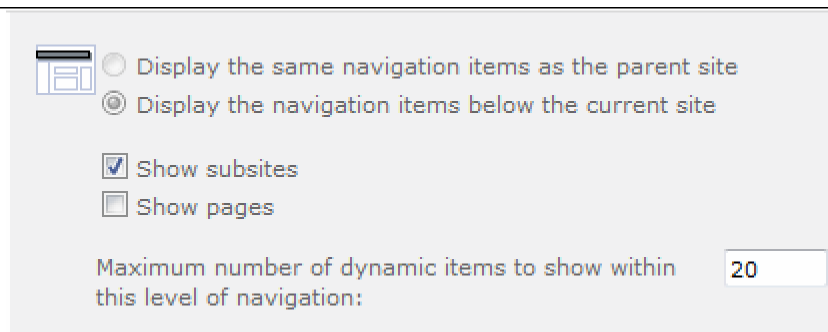
28. From the breadcrumb – select the document library in this case it's KMO_DOCS then from the Library Tools tab -> Documents -> the New Folder option should now be available if it wasn't previously.	

NOTE: This option can be utilized with Calendars, Discussions, Surveys or Wikis.

Navigation Items

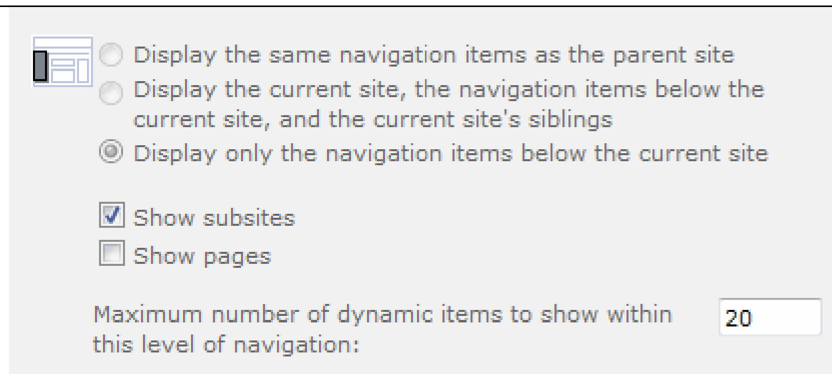
Navigation is of vital importance to the sites that one creates in SharePoint – in SharePoint 2010 several customization items are available. The navigation available is different depending if the site is created via a published or non-published site template.

<table>
<tr>
<td>1. If the site was created as a published site, to add a new tab or link go to Site Actions -> Site Settings -> under Look and Feel click Navigation.</td>
<td>


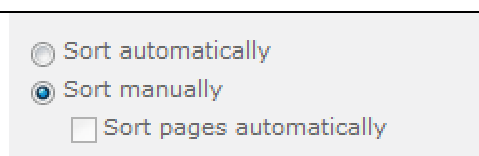
</td>
</tr>
<tr>
<td>2. Global navigation if where a user sets how the top level navigation should appear. The global navigation bar appears on every page of the site across the top. Thus, in this case the ‘Display the same navigation items as the parent site’ displays the navigation items the same as the root site. Thus, this indicates the</td>
<td>


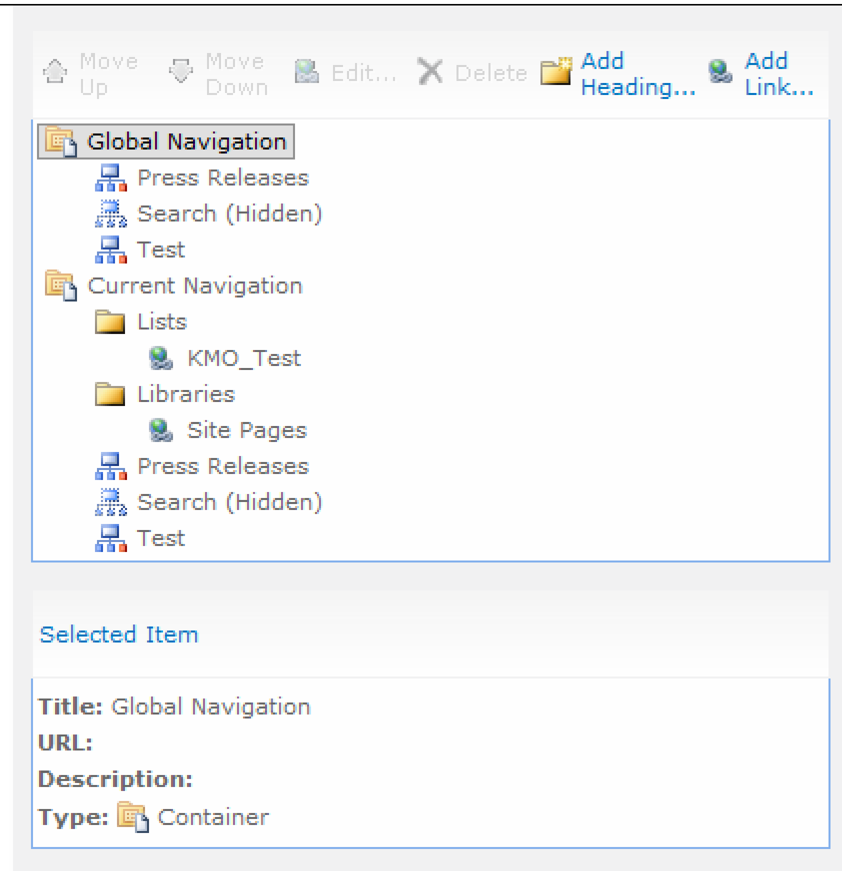
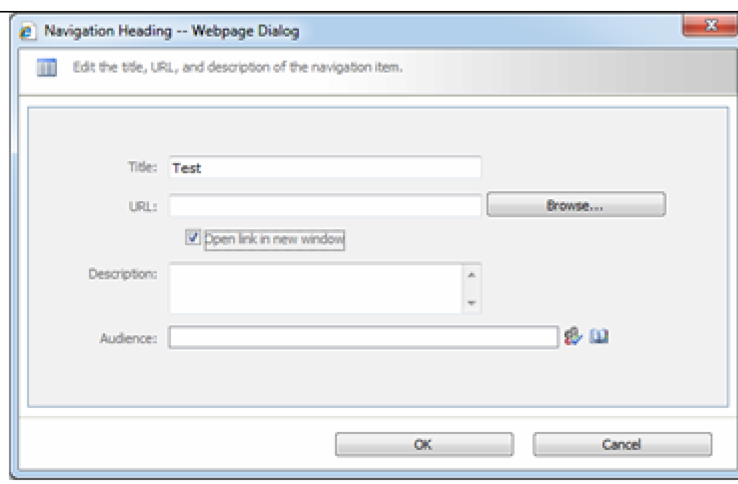
</td>
</tr>
</table>

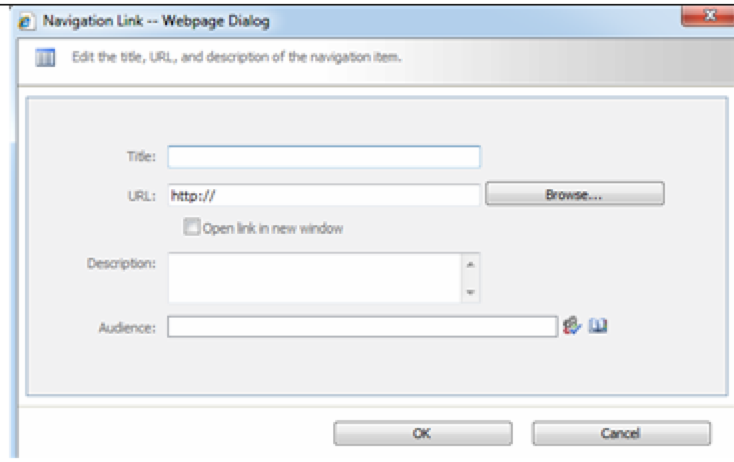
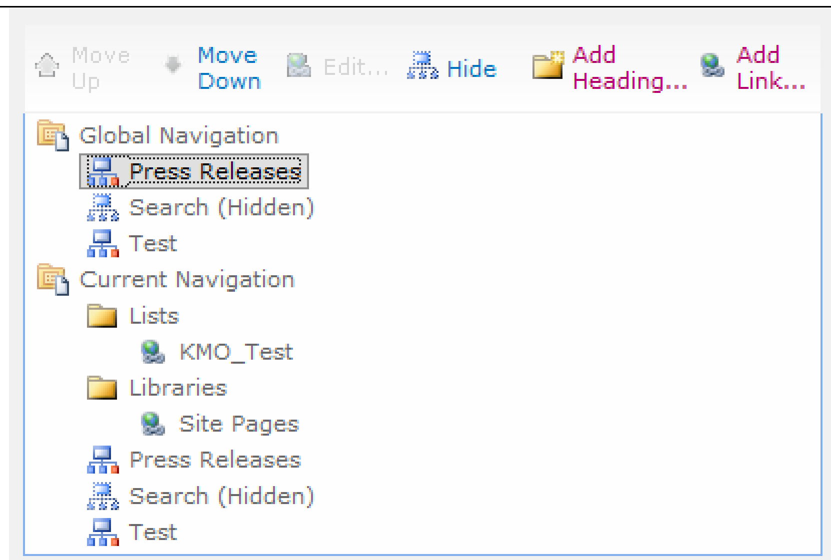
default setting for sites that are not top-level sites. This indicates that the site should use (inherit) the global navigation items that the parent site uses. The 'Display the navigation items below the current site' displays the navigation items that appear from the site one is on downward. Thus, it indicates that the site's global navigation items should be populated by items below the site. The 'Show subsites' and 'Show pages' are the checkbox options so one has the option of turning them both on and off. The maximum number of	

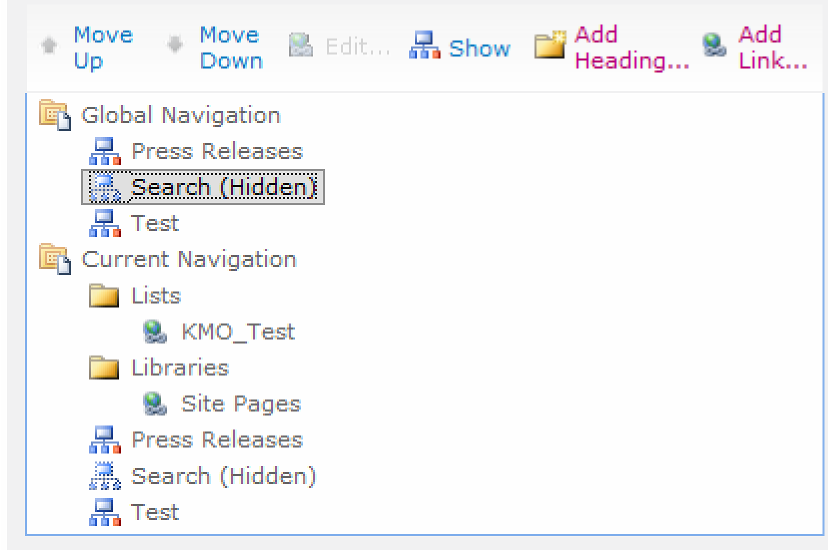
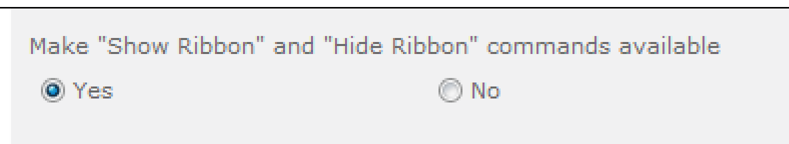
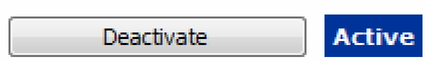
dynamic items to show within this level of navigation is essentially how many items will be displayed in the navigation.	
3. Current Navigation is the navigation that is essentially on the current site one has accessed. Thus as with global navigation the ‘Display the same navigation items as the parent site’ displays the navigation items the same as the root site. It specifies that the current navigation does not inherit parent site navigation by default. For a given site, selecting this option usually	

causes the data source to start with the current site’s immediate parent site, or one level up in the site hierarchy. The ‘Display the current site, the navigation items below the current site, and the current site’s siblings’ displays those items by indicating that the data source starts with the current site’s immediate parent site, or exactly one level up in the site hierarchy. It includes the current site and the site’s siblings, but trims out children of the sibling nodes. The ‘Display the navigation items below the current	

site' displays the navigation items that appear from the site one is on downward. The 'Show subsites' and 'Show pages' are the checkbox options so one has the option of turning them both on and off. The maximum number of dynamic items to show within this level of navigation is essentially how many items will be displayed in the navigation.	
4. Sorting - has several options.	

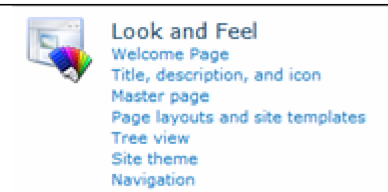
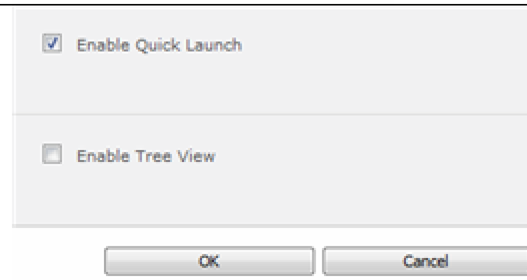
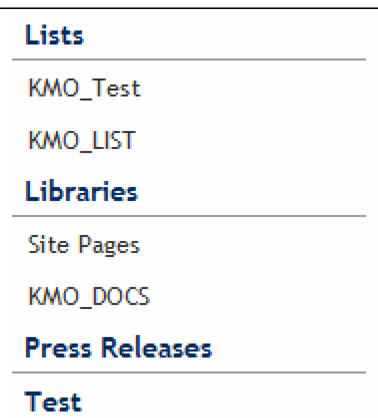
<table>
<tr>
<td>5. Navigation Editing and Sorting – in this area one can configure how they want their navigation to display.</td>
<td>
</td>
</tr>
<tr>
<td>6. Clicking Add Heading allows one to enter in a desired information piece, URL, description and audience to target the heading to.</td>
<td>
</td>
</tr>
</table>

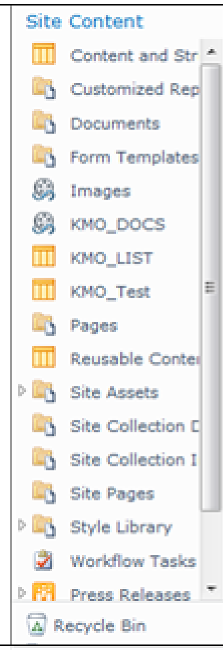
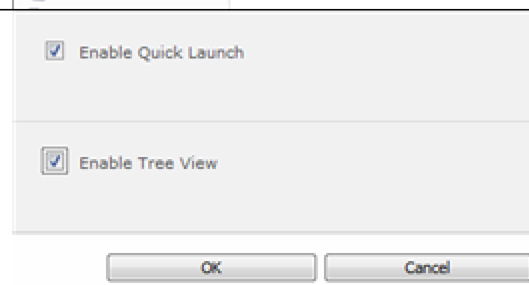
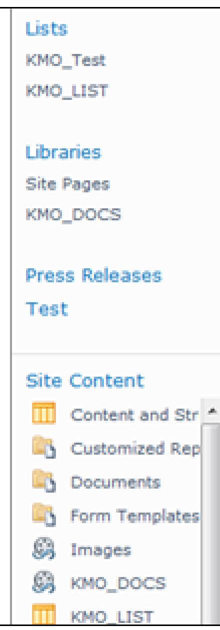
<table>
<tr>
<td>7. Clicking Add Link allows one to enter in a desired information piece, URL, description and audience to target the link to. Typically Links appear under desired headings.</td>
<td>
</td>
</tr>
<tr>
<td>8. Selecting an item allows one to select Move Down so the item appears down in the navigation – or clicking Hide – hides that information heading/link.</td>
<td>
</td>
</tr>
</table>

<table>
<tr>
<td>9. To unhide an item that was previously hidden select it and choose Show. Additionally the item can be moved by selecting the Move Up or Move Down actions.</td>
<td>
</td>
</tr>
<tr>
<td>10. Show and Hide Ribbon – this essentially turns off and on the feature set of the ribbon.</td>
<td>
</td>
</tr>
<tr>
<td>11. Note the Show and Hide Ribbon only works when the publishing feature is activated – this can be verified by going to Site Actions -> Site Settings -> under Site Actions -> Manage Site Features -> SharePoint Server Publishing is Active.</td>
<td>
</td>
</tr>
</table>

Navigation Panel Views (Tree View)

On the default left hand navigation – there are three views – quick launch, tree view and both quick launch and tree view.

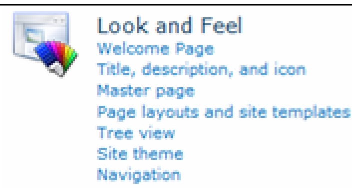
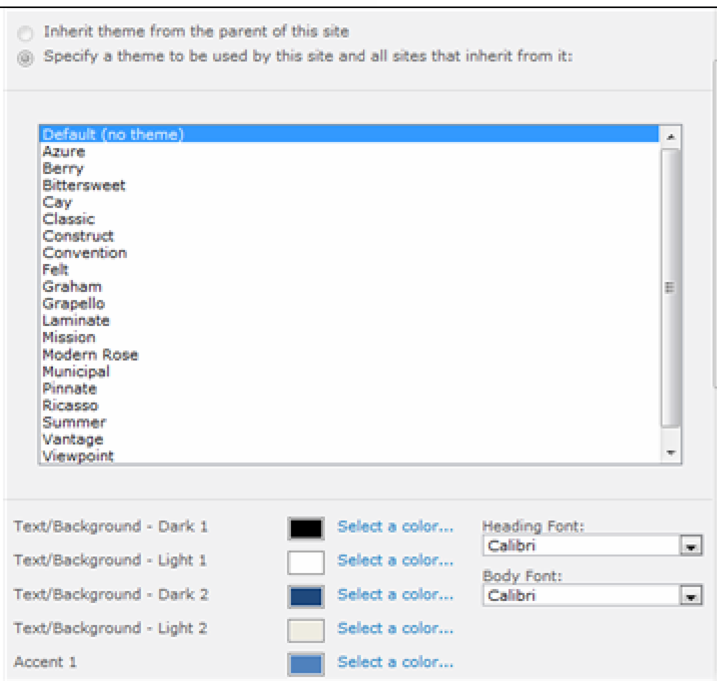
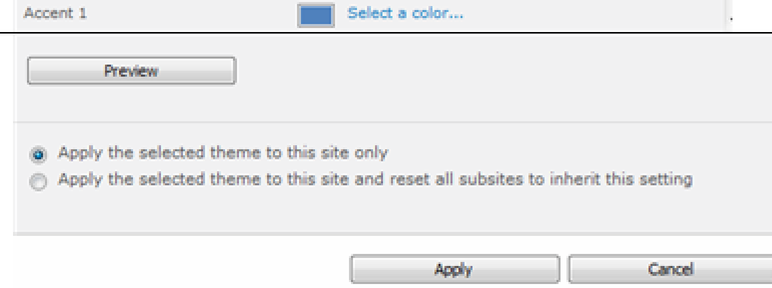
<table>
<tr><td>1. To set the desired panel view from Site Actions -> Site Settings under Look and Feel click Tree view</td><td>
</td></tr>
<tr><td>2. To display items that make up the navigation of the site – on the left hand side click Enable Quick Launch and click OK</td><td>
</td></tr>
<tr><td>3. Going back to one's home page with the Quick Launch enabled – the links will appear as such – in this case my lists, libraries and pages are displayed.</td><td>
</td></tr>
</table>

4. With just the Enable Tree View selected under Site Actions -> Site Settings – the left navigation is depicted as such:	
5. With both Enable Quick Launch and Enable Tree View selected under Site Actions -> Site Settings more content is displayed.	
6. The left navigation is depicted as such:	

Site Theme

One can control the fonts, colors and theme that are displayed across a site and subsite.

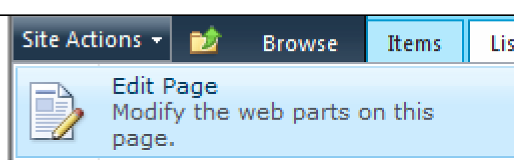
To set the desired theme, follow the steps below:

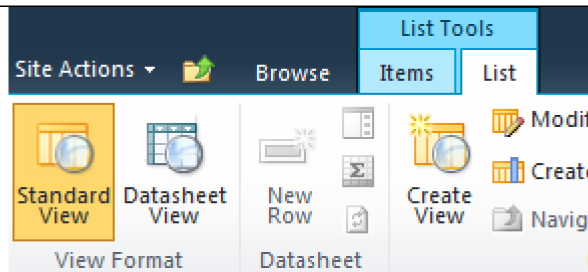
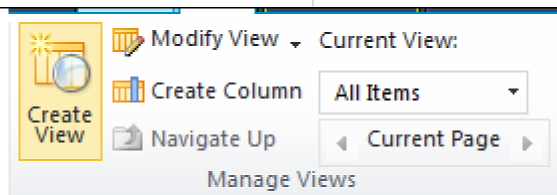
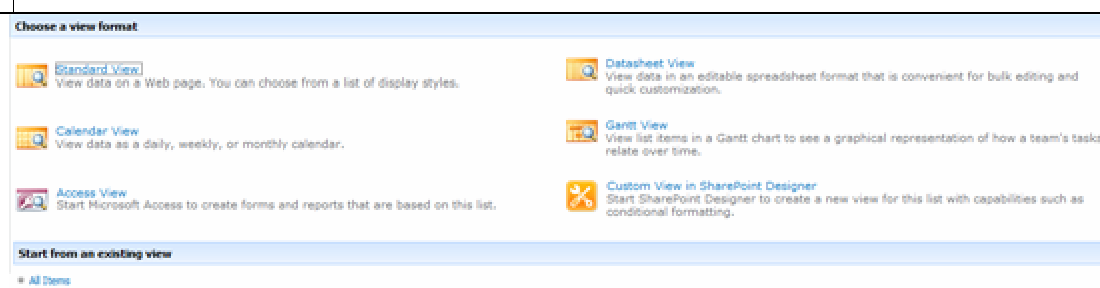
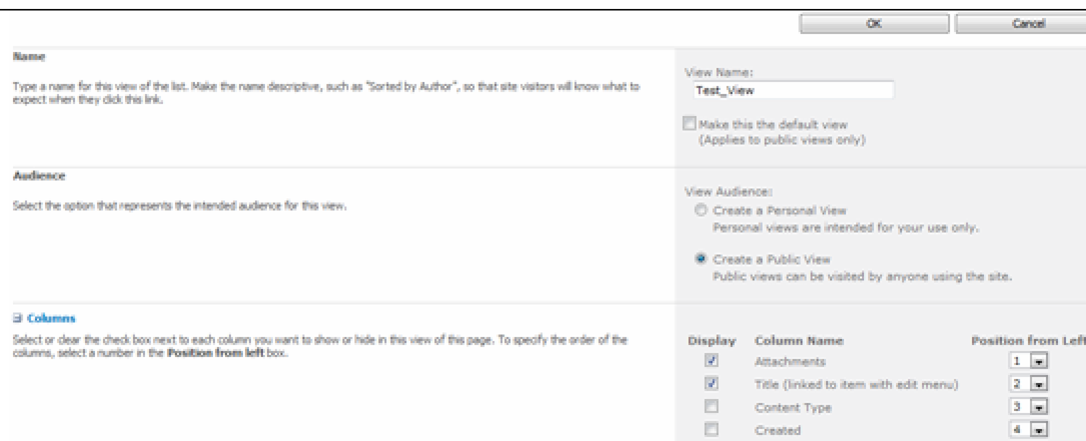
1. From Site Actions -> Site Settings under Look and Feel click Site Theme.	
2. Select 'Inherit theme from the parent of this site' – if the theme used on the top level site should also be used for the current site. Otherwise select 'Specify a theme to be used by this site and all sites that inherit from it' if the theme and attributes selected will be used by the current site and all site underneath it – in the tree. Select the desired color and font.	
3. Select the preview button to see the site as it will look given the current attributes selected. After previewing the page – click either 'Apply the selected theme to this site only' or 'Apply the selected	

theme to this site and reset all subsites to inherit this setting' and click Apply. To cancel the full operation click the Cancel button.	

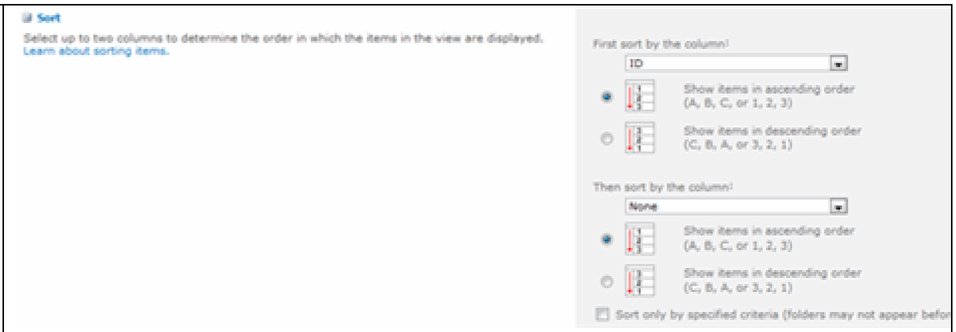
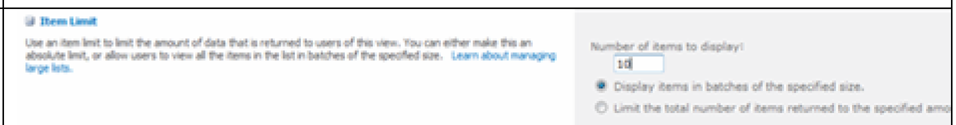
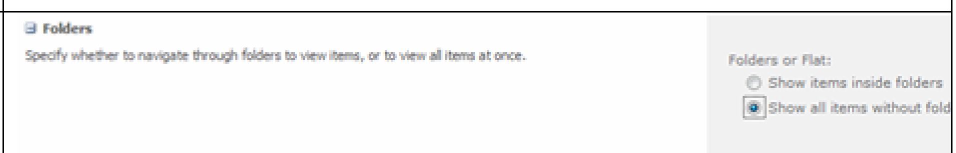
SharePoint Views

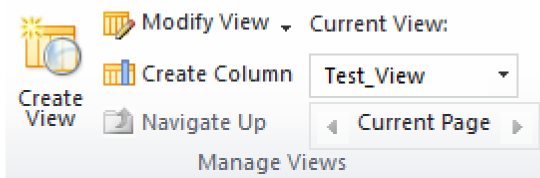
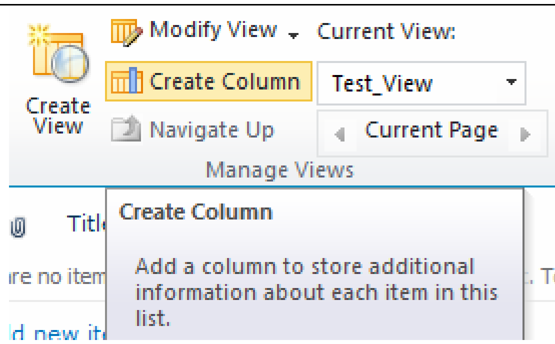
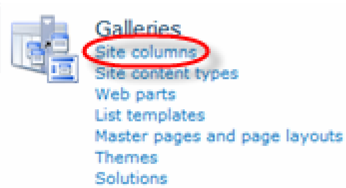
Views are a useful way to organize and group information that is needed to be viewed in a certain customized way. Views have several features which should be described:
Columns – the basic building block of a view – columns represent the data stored or the data calculated to be displayed.
Sort – is the make-up of how the data should be displayed. Typically two columns can be used – and usually users want data sorted by data or by an alphabetic nature.
Filter – is used usually as a way for a user to filter down the exact data they want displayed – examples include current date or the current user of the site thus typing in [Today] or [Me] as the column values respectively would display such data.
Inline Editing – When checked allows a user to select an edit button to edit that row –of data – however this option is only available if the view is set to a default view.
Tabular View – This allows for the checkboxes in each row to be shown or hidden
Group By – Allows for the columns to be grouped so one can expand or collapse them as needed.
Totals – Columns that are numeric in nature can be totaled.
Style – Views can be changed by applying in-line styles to them.
Folders: Folders or Flat – List with folders can be shown with folders or flattened to show all of the data inside the folders.
Item Limit – A limit can be placed on how many items are displayed in a views result return set.
Mobile – a view can be turned off or on for mobile viewing.

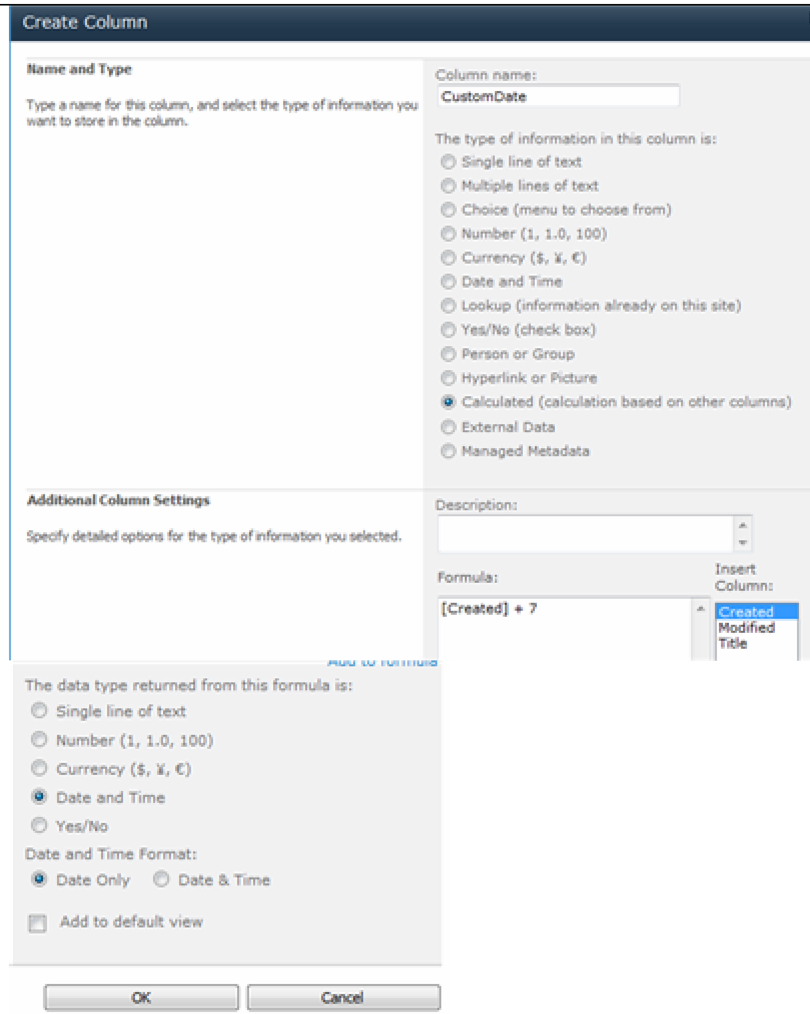
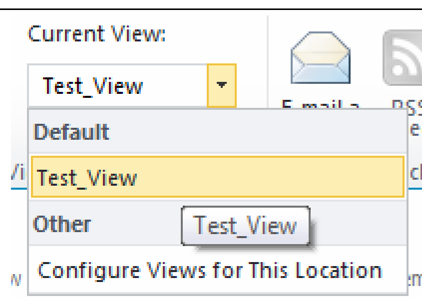
1. Maneuver to the pages content where a view of data is desired – usually	

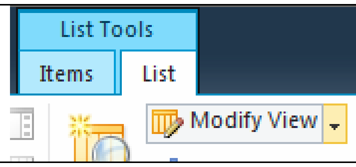
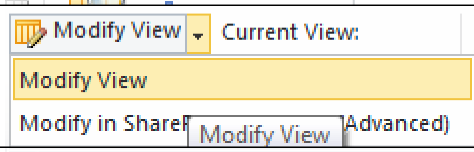
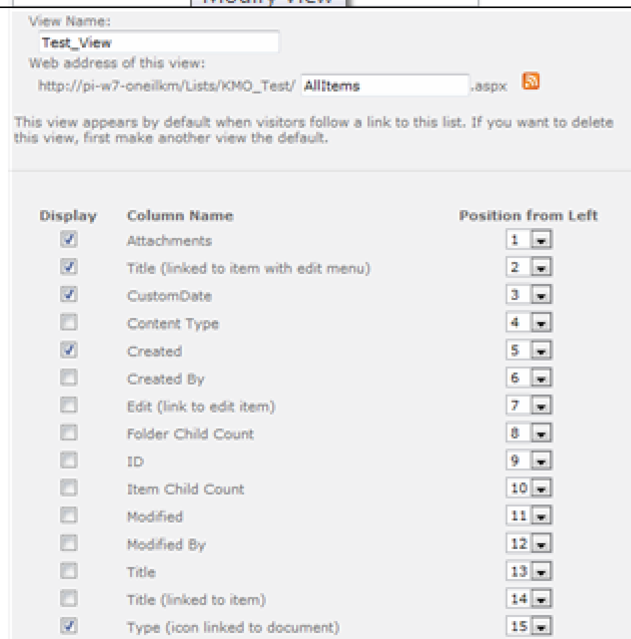
<table>
<tr><td>this is a list or a document repository. Select Site Actions -> Edit Page.</td><td></td></tr>
<tr><td>2. Select in the List Tools tab the List option.</td><td>
</td></tr>
<tr><td>3. In the Manage Views selection select Create View</td><td>
</td></tr>
<tr><td>4. Choose a view format.</td><td>
</td></tr>
<tr><td>5. In this example – the Standard View was selected. Where it says View Name: - the view needs to be</td><td>
</td></tr>
</table>

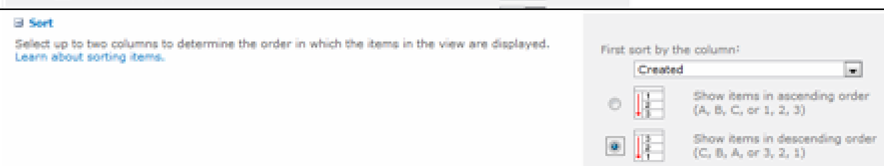
named in this case it was called Test_View. The columns desired for the view to be displayed need to be checked as well as the order that the columns should appear in the view need selected.	

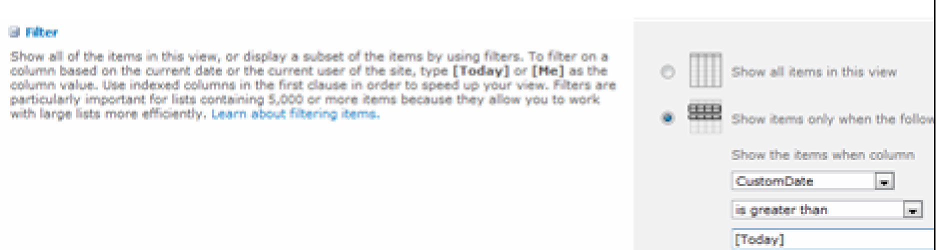
6. In the Sort field select from the drop down menu the desired field that the view should use to sort on.	
7. Scroll down and expand the Item Limit selection and set the Number of items to display: to the desired amount – in this case I set it to 10 from the default of 30.	
8. Expand the Folders selection and select Show all items without folders. This allows for the documents from all folders to be shown.	
9. Click OK once all desired items are selected.	

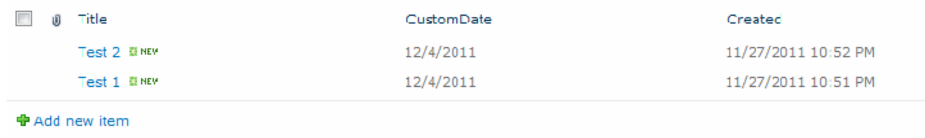
• Custom Column View	This view example shows how to add a column using a built-in variable. In this case, the view displays the item based on its age.
1. In the Manage Views toolbox under Current View: select the view previously created.	
2. Select Create Column. Note: Unless one is at the root of the full site (example http://yourwebserver.domain.com) then this column will be ad-hoc meaning it will only be available at the actual site it was created in. If a column is to be used site-wide a user should go to the root of the full site and select Site Actions -> Site Settings then under Galleries select Site	 For a column to be used across the entire site and subsites:  

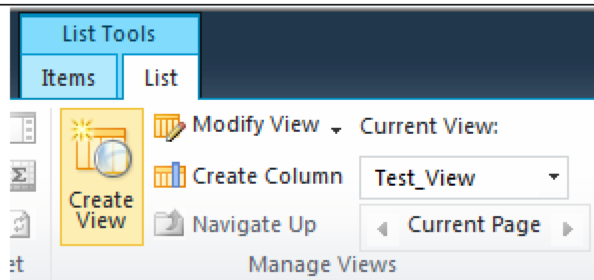
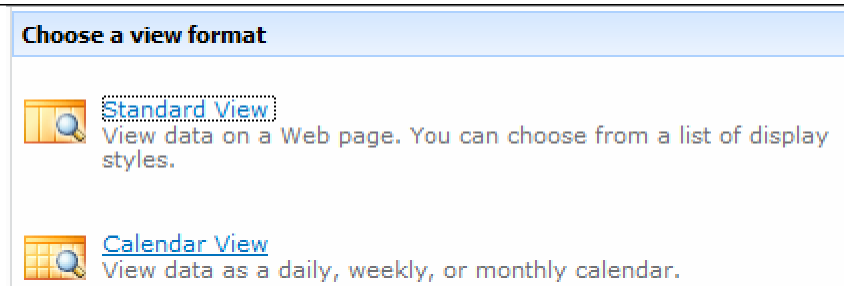
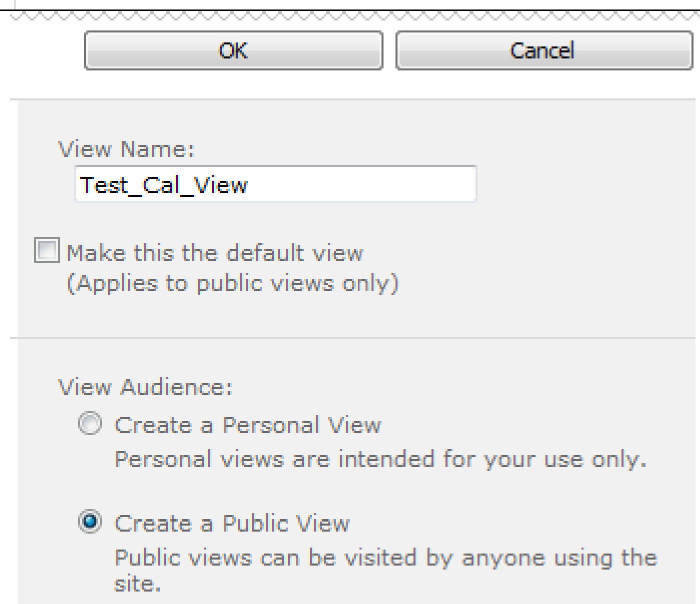
columns then Create	
3. In the Column name: enter in CustomDate and select under 'The type of information in this column is:' the Calculated (calculation based on other columns) In the Formula field enter in [Created] + 7 Under 'The data type returned from this formula is:' select Date and Time Uncheck 'Add to default view' then select OK	
4. Verify under the Current View that the desired view is selected. In this case here – I have selected the Test_View.	

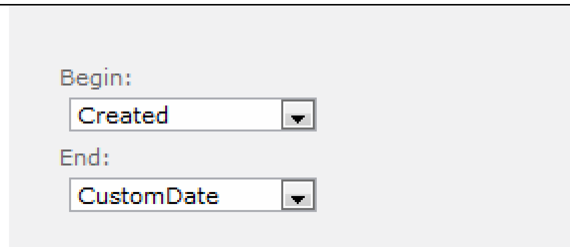
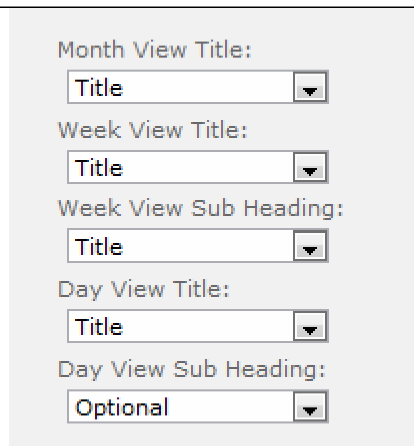
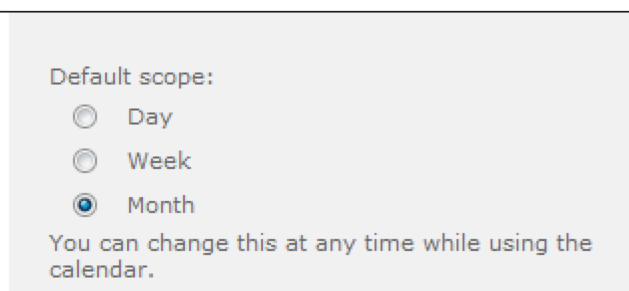
<table>
<tr><td>5. In the List Tools tab select List</td><td>
</td></tr>
<tr><td>6. Select Modify View -> Modify View</td><td>
</td></tr>
<tr><td>7. Check the custom column previously created in this case it's called CustomDate. Also check the columns Created and Type.</td><td>
</td></tr>
<tr><td>8. In the Sort option select the Created field and the descending order option.

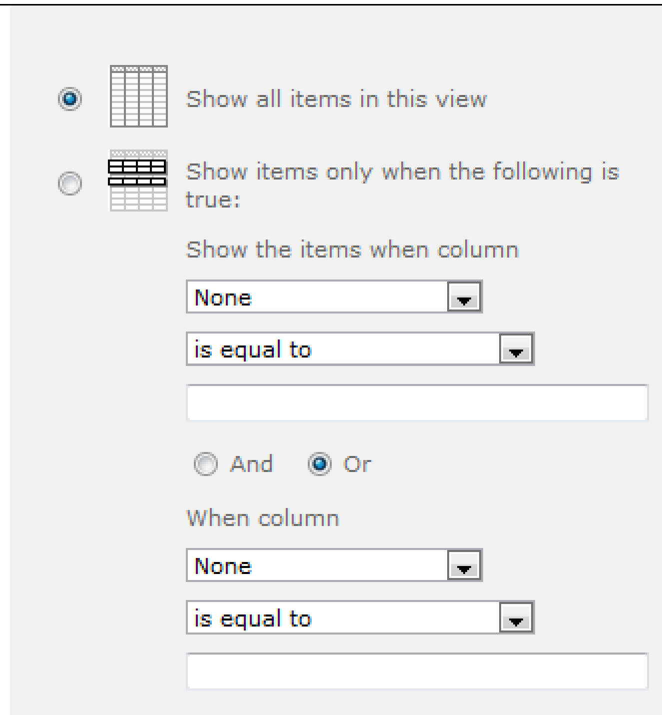
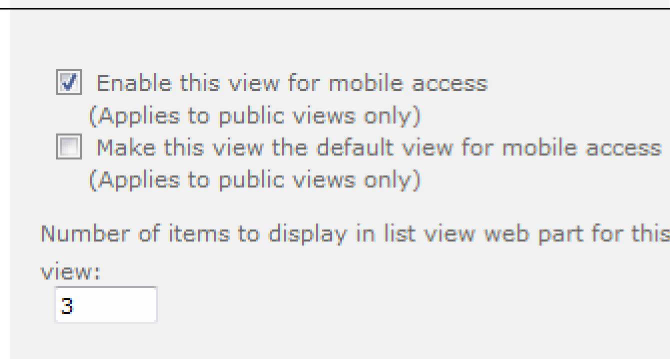
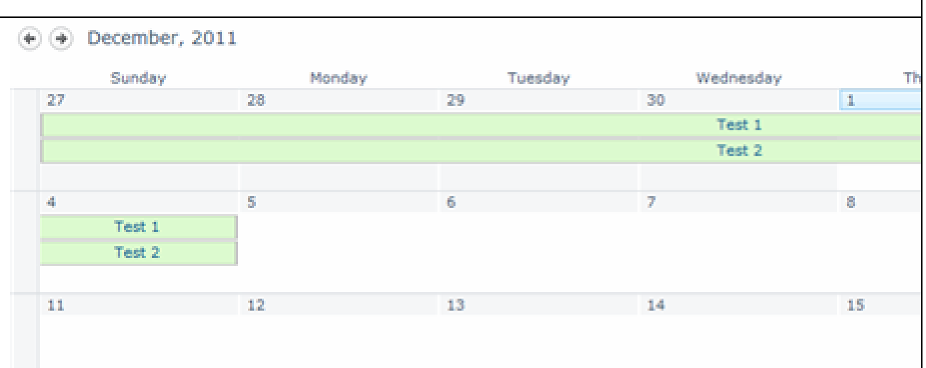
In the Filter section select the CustomDate field and select 'is greater than' and enter in [Today]</td><td>

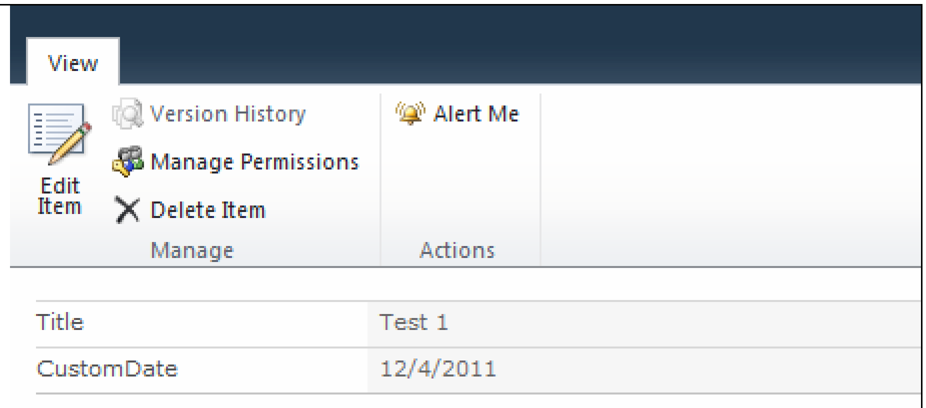
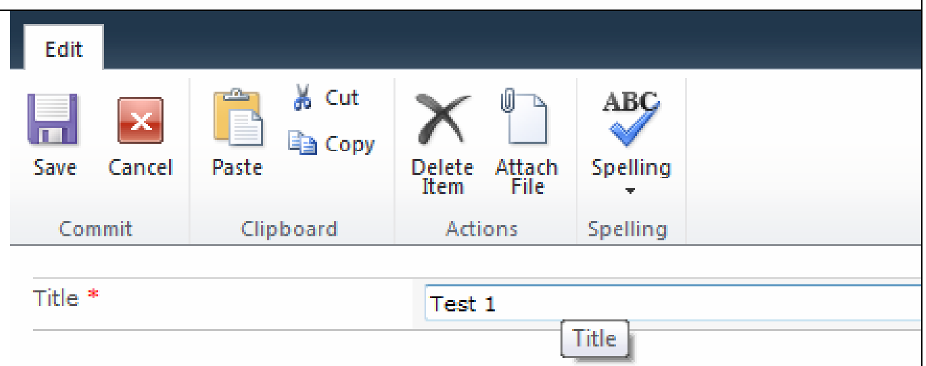

</td></tr>
</table>

Click OK so the view is saved.	
9. The active view will then be shown and in this example it is the Custom Column View.	

• Calendar View	This view example shows how to add a calendar view so that items of value can be placed into a useful calendar.
1. Once on the page where a calendar view is desired select from the List Tools tab -> List -> Create View.	
2. Under Choose a view format select Calendar View.	
3. Under the View name: - enter in a name in this case its Test_Cal_View and select under View Audience, the desired audience.	

4. Under Time Interval select the desired Begin and End item columns to be utilized in this case here I've used Created and CustomDate from the previous view example.	
5. Under Calendar Columns select the columns that will displayed in the view. In this case I've made it easy and selected the display field to be the title. NOTE: the title field is required.	
6. Select the default scope.	

<table>
<tr><td>7. Select the desired Filter</td><td>
</td></tr>
<tr><td>8. Select the desired Mobile options and how many items to display in this view – the default is 3.</td><td>
</td></tr>
<tr><td>9. Click OK when done and the view is saved</td><td></td></tr>
<tr><td>10. The view is then displayed in a calendar format.</td><td>
</td></tr>
</table>

11. Selecting an item shows the data and if so desired the item can be edited by clicking Edit Item.	
12. The edit can be made and then the Save button selected.	

SharePoint Permissions

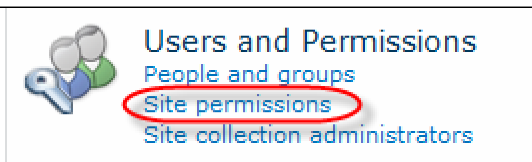
Permissions in SharePoint are a broad topic – the following will be described with the Site Owner mind frame.

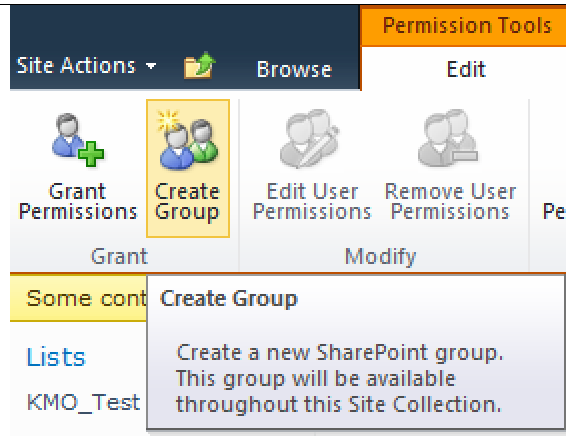
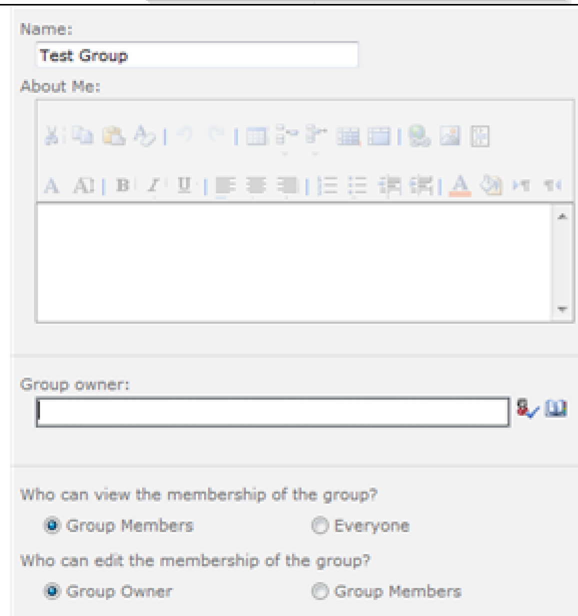
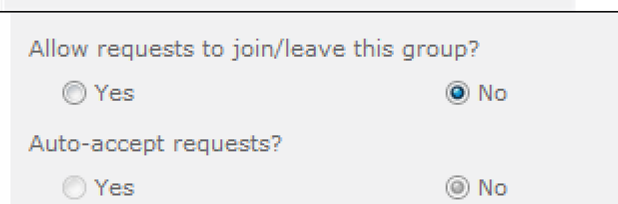
Essentially, the easiest way to handle permissions is by groups. Most firms utilize Active Directory which ties into SharePoint and then administrators add the users to the desired groups that are created. By default a top level site has three groups:

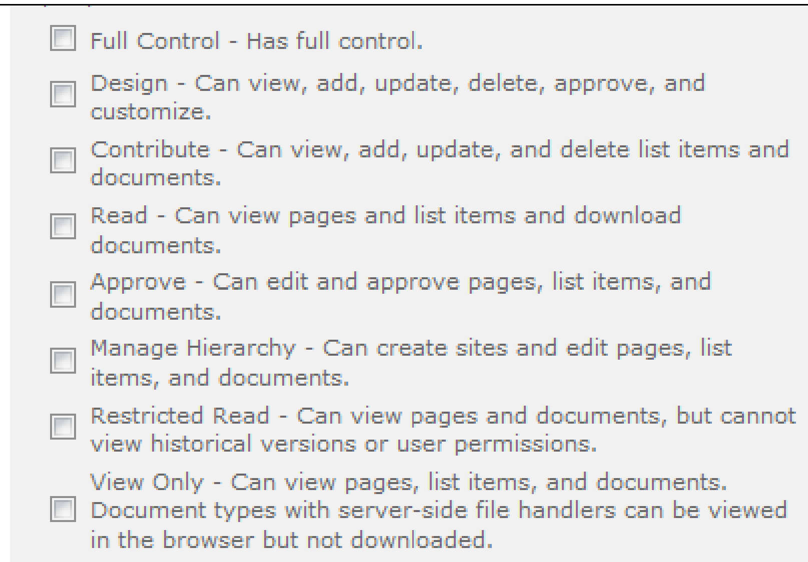
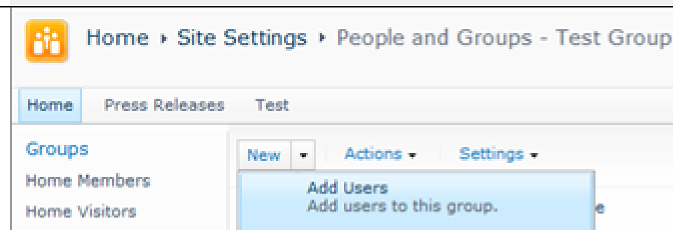
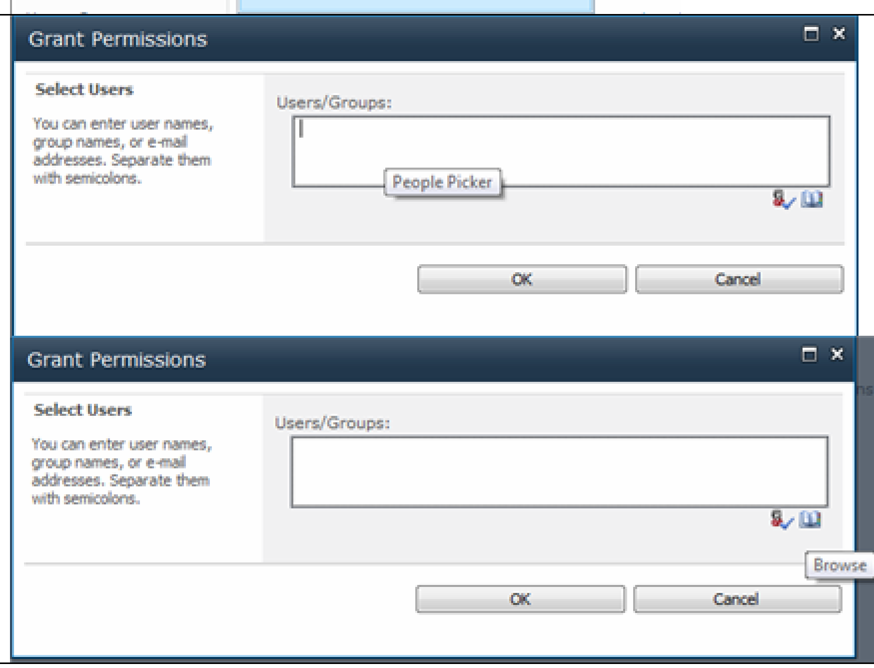
Owners -> whom will have full control of the site

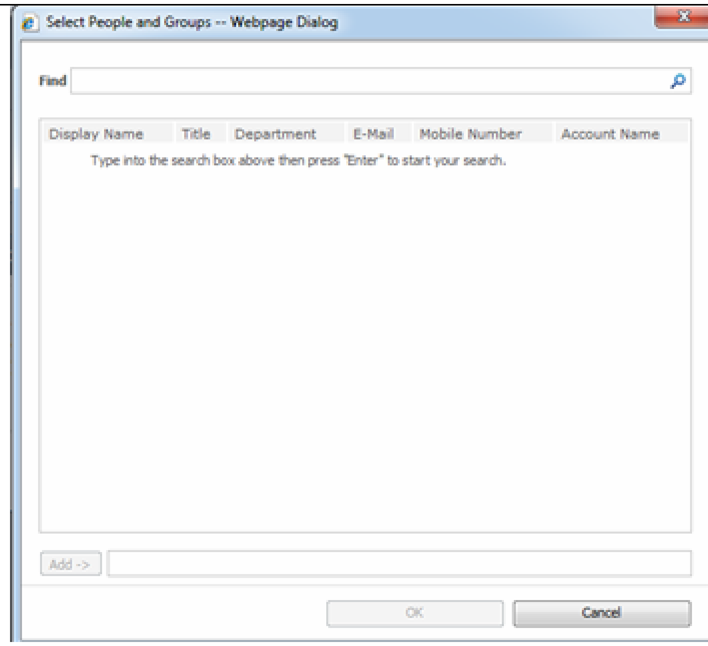
Members -> whom can contribute content to lists and libraries

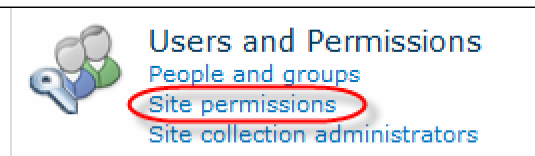
Visitors -> whom have read only access to the site

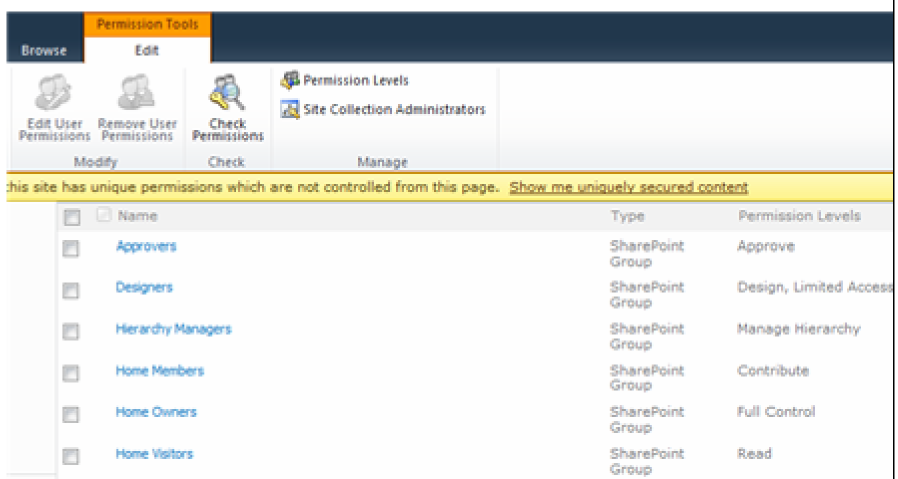
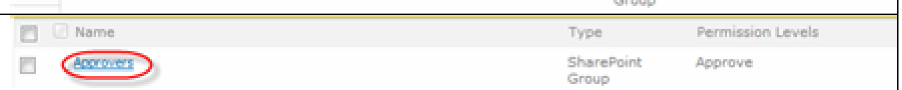
• Create a group	The steps below go over how to create a custom group which then can be populated with users.
1. Maneuver to the site where the group should be created and where you currently are likely an administrator/site owner.	
2. Select Site Actions -> Site Settings and under Users and Permissions select the Site permissions link	

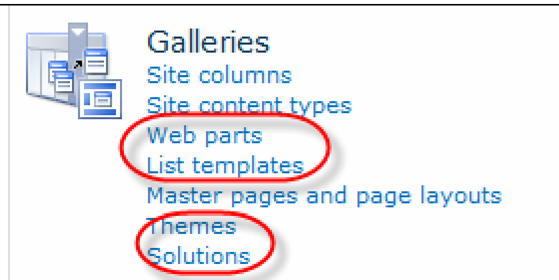
<table>
<tr>
<td>3. On the ribbon menu select Create Group</td>
<td>
</td>
</tr>
<tr>
<td>4. Name the group, enter in a group owner (example domain\user), select who can view the membership of the group and who can edit the membership of the group.</td>
<td>
</td>
</tr>
<tr>
<td>5. Select if users are allowed to join/leave the group and if auto-accept requests are allowed</td>
<td>
</td>
</tr>
</table>

<table>
<tr><td>6. Choose the permission level of the group and click Create</td><td>
</td></tr>
<tr><td>7. The group is created and now additional users can be added by selecting New -> Add Users</td><td>
</td></tr>
<tr><td>8. In the Select Users click the People Picker and either enter in the users by name and click the check mark or click the browse book and select the desired users and click OK.</td><td>
</td></tr>
</table>

9. If the browse book was selected the screen will look as such and entering in a users name after the Find option and clicking the magnifying glass will find the user – then clicking Add – will add the user into the middle pane. Repeat the process for each user whom should be added to the group – when done click OK.	

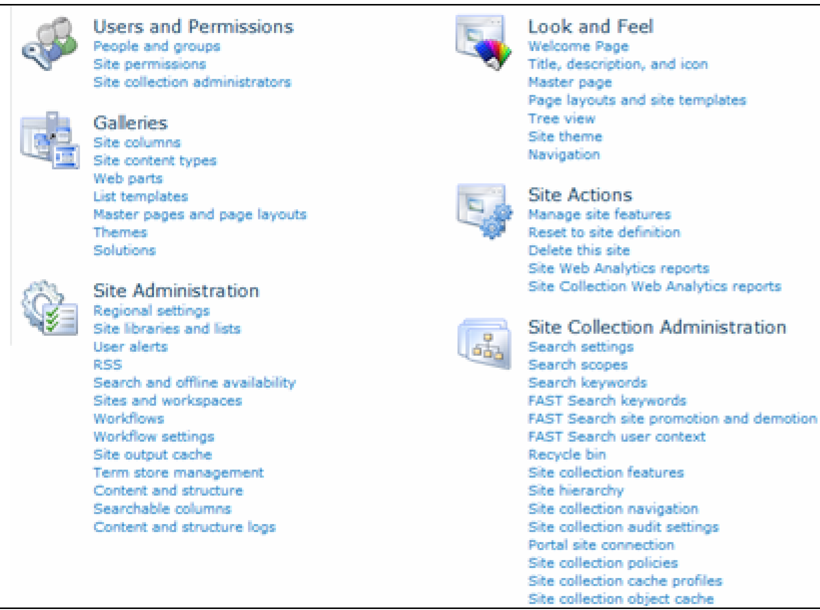
• View permissions of a group	The steps below go over how to view permissions of a group.
1. Sometimes viewing the permissions of a group is needed so it is known what users have access. Thus, maneuver to the site where the permissions should be viewed and where you currently are	

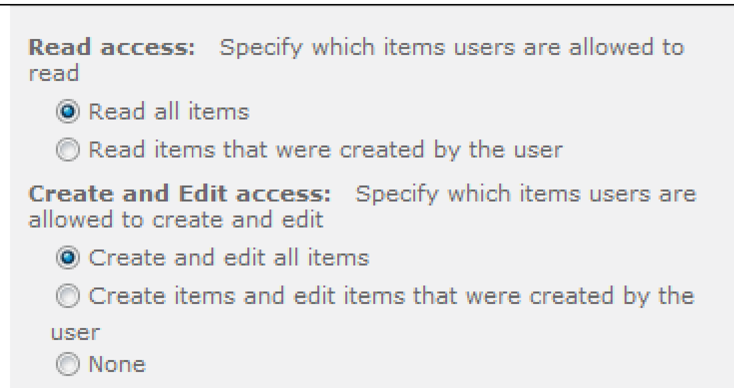
likely an administrator/site owner. Then from Site Actions -> Site Settings under Users and Permissions click Site permissions	
2. The groups for that site are shown.	
3. In this case – the Approvers link was clicked and the users whom are members of that group are displayed.	

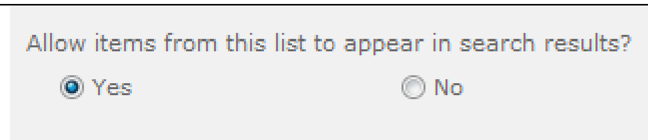
• Site Action areas	A site owner typically will be working in four areas: Site Actions -> Site Settings Site Actions -> Edit Page Site Actions -> New Page, New Document Library, New Site and More Options While in a list or library (Settings -> List or Library Settings)
1. Under Site Actions -> Site Settings a Site Owner likely will see the following options:	
2. If a user is a subsite owner and doesn't have rights to the top level site then while going to Site Actions -> Site Settings they will not have access to the following:	

WEBSITE: HTTP://WWW.KMO.NAME
E-MAIL: ONEILLWEBSITE@VERIZON.NET

3. A Site Collection administrator will have many more options to choose from.

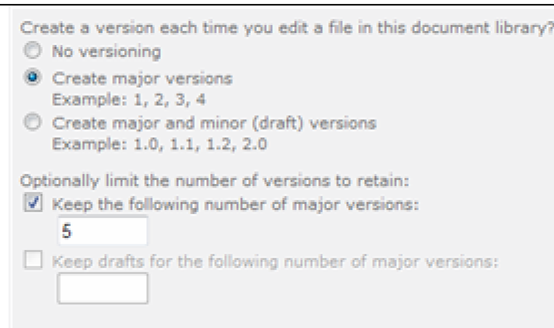


• Item Level Permissions 4. It is possible to set permissions at the item level of announcements, calendars, custom lists, discussion boards, links and surveys and tasks. To set such permissions one would access the list or library settings menu and select the List or Library Settings then Advanced Settings. In the Item-level Permissions one would then check the desired setting. Click OK when done.	

• Search Visibility 5. It is possible to set if items when searched for show up in results. To set this access the list or library settings menu and select the List or Library Settings then Advanced Settings. In the Search one would then check the desired setting. Click OK when done.	

List and Library Versioning

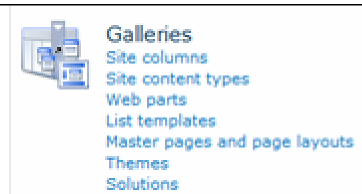
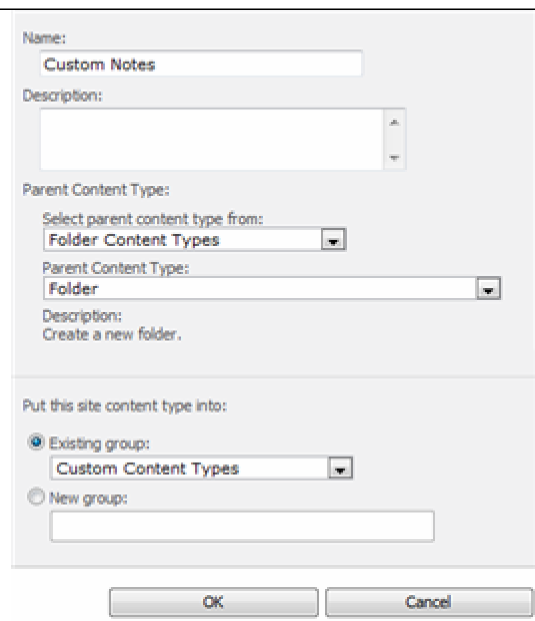
Versioning is mainly used so one can revert back to a previous version of an item/document and view a previous version.

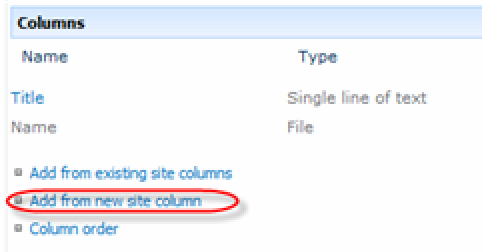
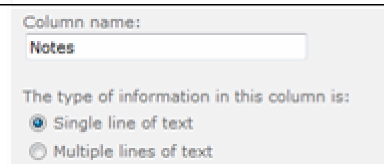
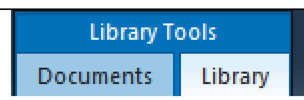
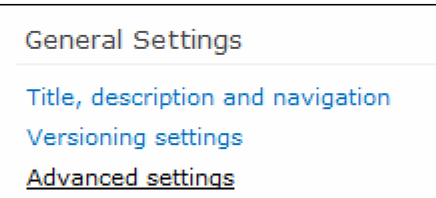
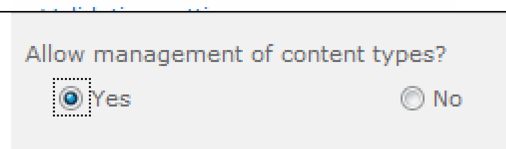
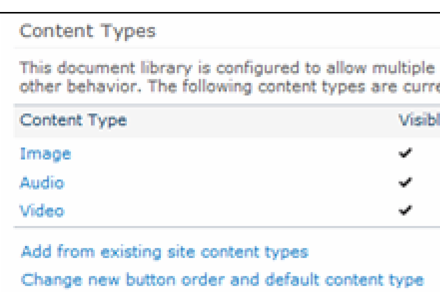
1. The first item one needs to do in regards to versioning is to enable it. Typically it is also a good idea to enter in the number of major versions that get kept. In this example here Create major versions of each document has been selected and 5 major versions will be kept with the notion that after five versions get uploaded the oldest version will be deleted (and not kept) once a sixth version is uploaded.	
2. Additionally, it should be noted that minor versions for draft purposes can be kept by selecting that version and thus	

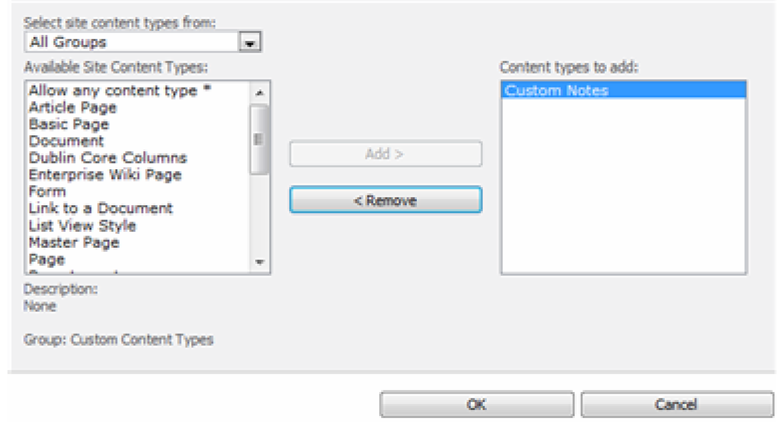
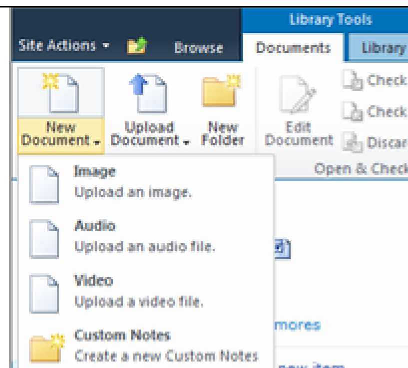
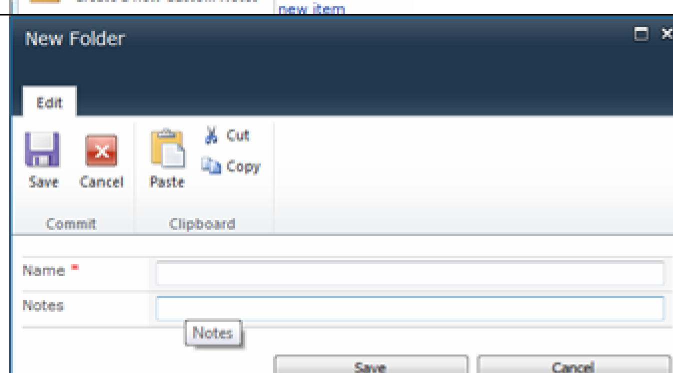
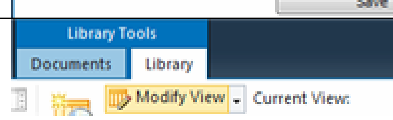
if this is selected then versions ending in .0 are major versions and versions ending with non-zero extensions are minor versions.	

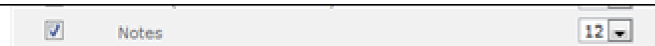
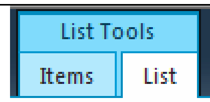
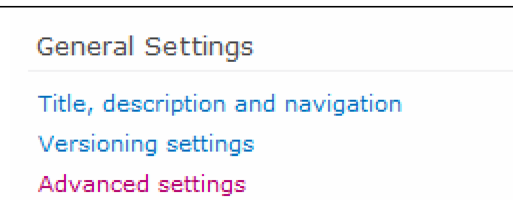
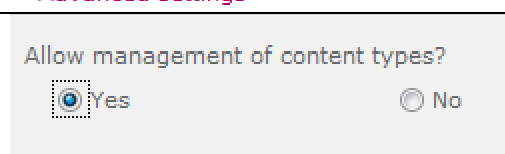
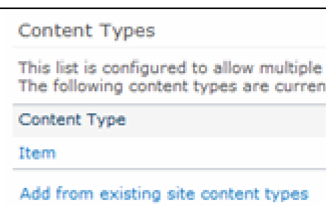
Content Types

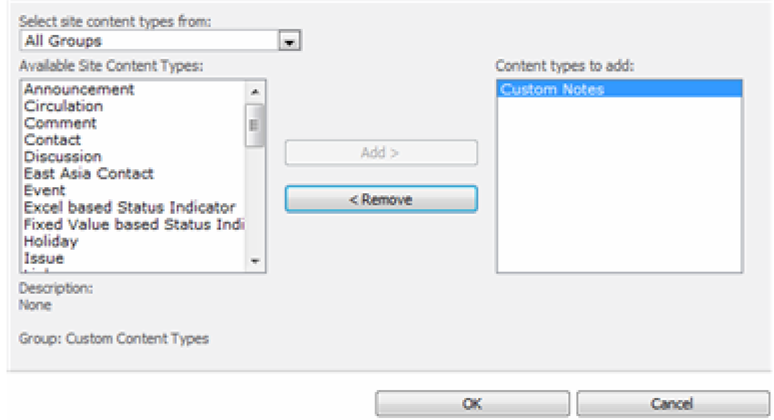
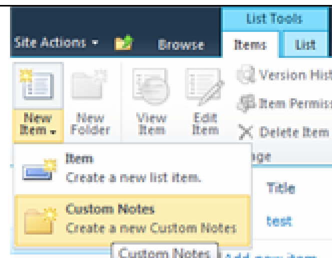
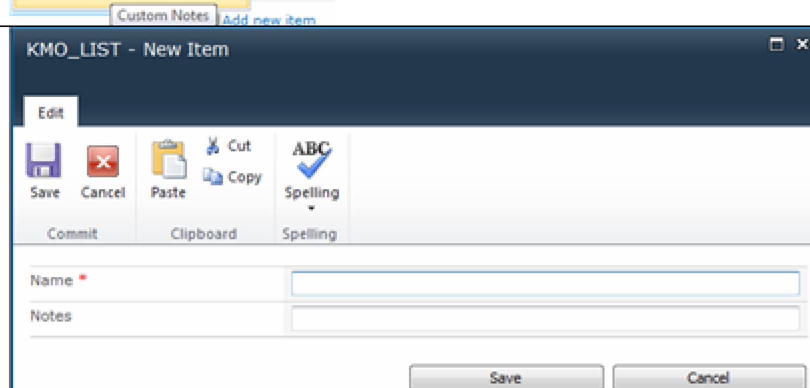
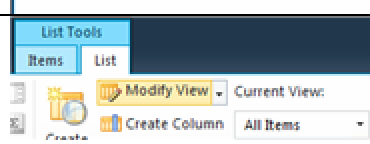
A content type essentially defines the attributes of a list item, a document, or a folder. SharePoint 2010 has several built in content types and site columns that may meet your needs. The below steps show how to best use content types – note there are essentially two kinds of content types – Site content types which are available to the root site and all its parents (subsites) and List content types which are essentially Site content types that are added to a list and then customized just for that lists purpose.

1. To create a custom Site content type – from Site Actions -> Site Settings – under Galleries select Site content type	
2. Click Create and enter in the desired data – in this example I will create a custom content type to be used with Folders so that a notes field is added. In this case I have named the item Custom Notes and selected Folder Content Types as the Parent Content Type and Folder as the second Parent Content Type. The item will be placed into an existing group called Custom	

<table>
<tr><td>Content Types. When done with selections click OK.</td><td></td></tr>
<tr><td>3. On the page that displays under the Columns section click Add from the new site column.</td><td></td></tr>
<tr><td>4. In the new Site Column screen that appears create a Column called Notes which is a Single line of text and click OK.</td><td></td></tr>
<tr><td>5. Now maneuver to the Document Library where the content type will be utilized. From the Library Tools tab select Library -> then Library settings.</td><td></td></tr>
<tr><td>6. Under General Settings select Advanced Settings.</td><td></td></tr>
<tr><td>7. Under Content Types select Yes to Allow management of content types and then click OK.</td><td></td></tr>
<tr><td>8. Under Content Types select Add from existing site content types.</td><td></td></tr>
</table>

9. Select the custom Content Types from the list and click Add – then select OK.	
10. Maneuver to the document library and from Library Tools -> Document – under New Document will now be the Custom Notes Field. Thus select this option.	
11. A New Folder screen appears and now a Notes field is present which can be used to store the custom information for this folder. Enter in the desired information and then click Save.	
12. So that the notes field displays in the default view of the document library select from Library Tools -> Library then select the Modify View selection	

<table>
<tr><td>13. Select under Columns the Notes field and select where it should appear in the view – then click OK.</td><td>
</td></tr>
<tr><td>14. The folder is now displayed with the entered Title and Notes (in this example it is Test)</td><td>
</td></tr>
<tr><td>15. To add the same Custom Content Type to a list – maneuver to that list and select from the List Tools tab – List -> List Settings</td><td>
</td></tr>
<tr><td>16. Under General Settings select Advanced Settings</td><td>
</td></tr>
<tr><td>17. Under Content Types select Yes to Allow management of content types and then click OK.</td><td>
</td></tr>
<tr><td>18. Under Content Types select Add from existing site content types</td><td>
</td></tr>
</table>

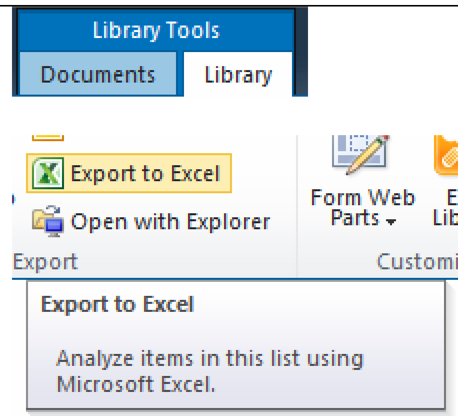
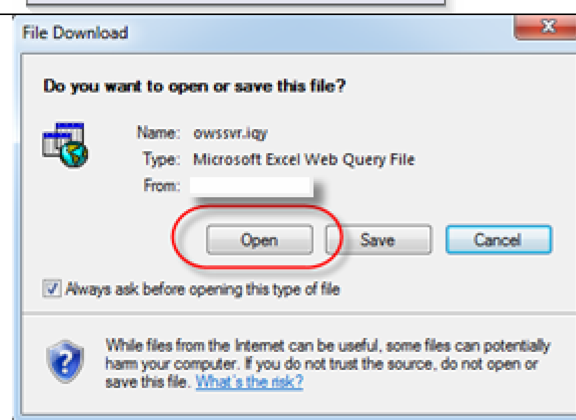
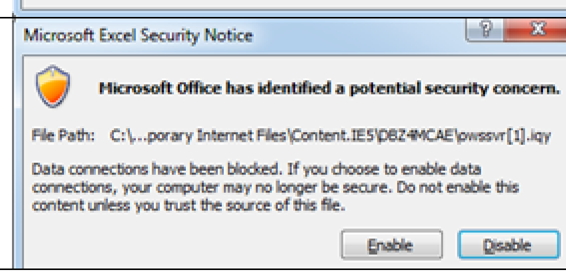
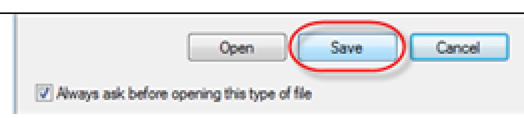
19. Select the custom Content Types from the list and click Add – then select OK.	
20. From List Tools -> Items select New Item and select the Custom Notes	
21. A New Item screen appears and now a Notes field is present which can be used to store the custom information for this list item. Enter in the desired information and then click Save.	
22. So that the notes field displays in the default view of the list select from List Tools -> List then select the Modify View selection	
23. Select under Columns the Notes field and select where it should appear in the view – then click OK.	

24. The list item is now displayed with the entered Title and Notes (in this example it is Test)	
Therefore, this same process can be utilized to create a variety of custom information items.	

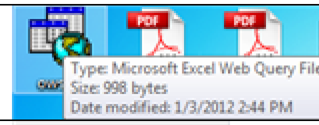
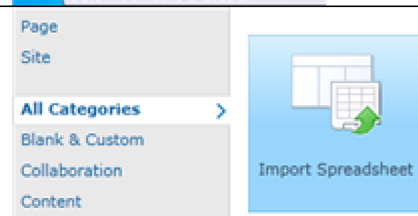
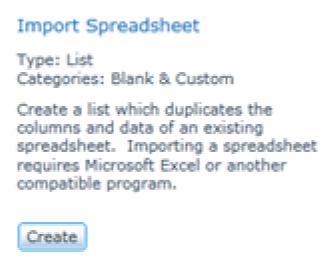
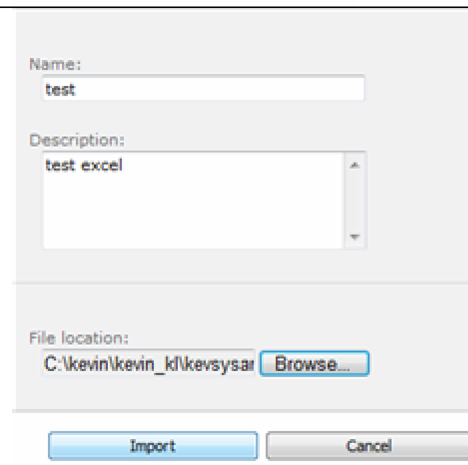
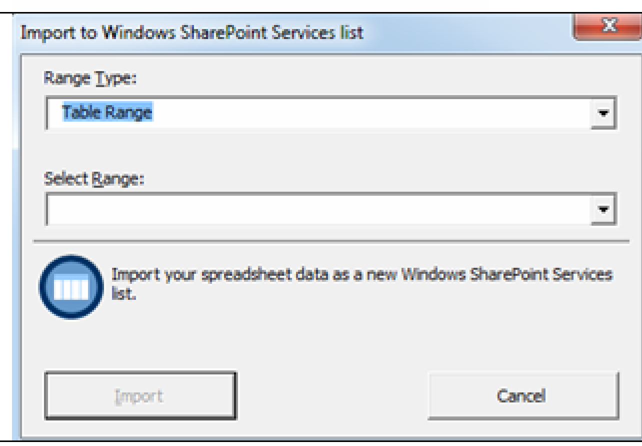
Exporting and Importing using Excel

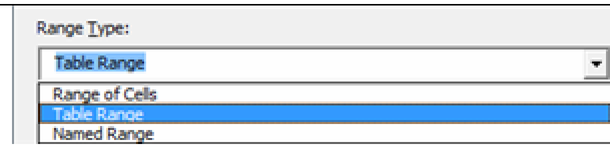
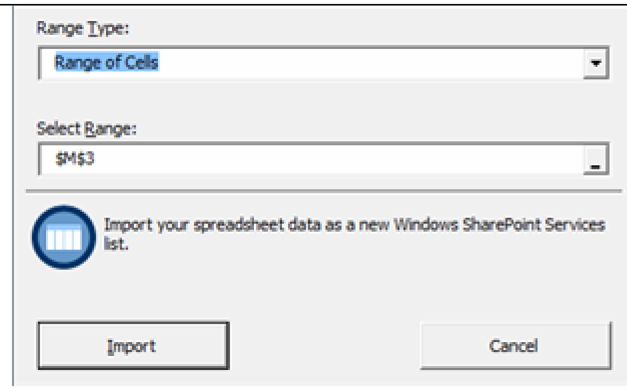
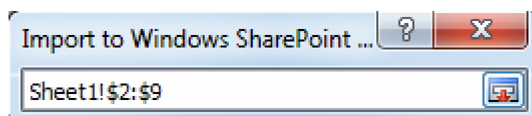
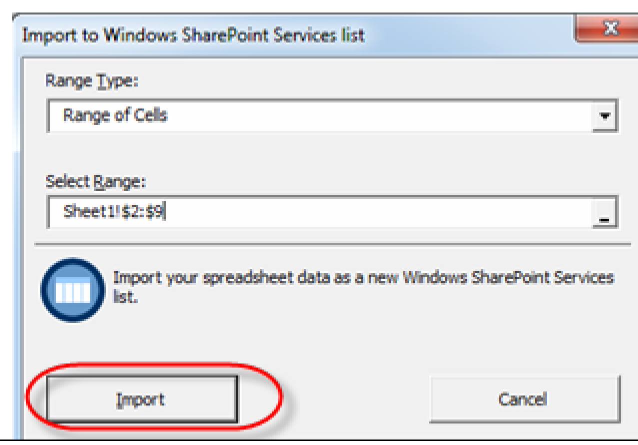
In SharePoint 2010 – users now have the ability to better export and import using tools such as Excel.

To utilize this functionality, follow the steps below.

<table>
<tr><td>1. From a document library select the Library Tools tab – select Library then select Export to Excel.</td><td>
</td></tr>
<tr><td>2. Click the Open button when prompted</td><td>
</td></tr>
<tr><td>3. Click Enable if prompted</td><td>
</td></tr>
<tr><td>4. The data set will open in excel</td><td></td></tr>
<tr><td>5. Optionally – one could instead of Open select Save and save it to their desktop</td><td>
</td></tr>
</table>

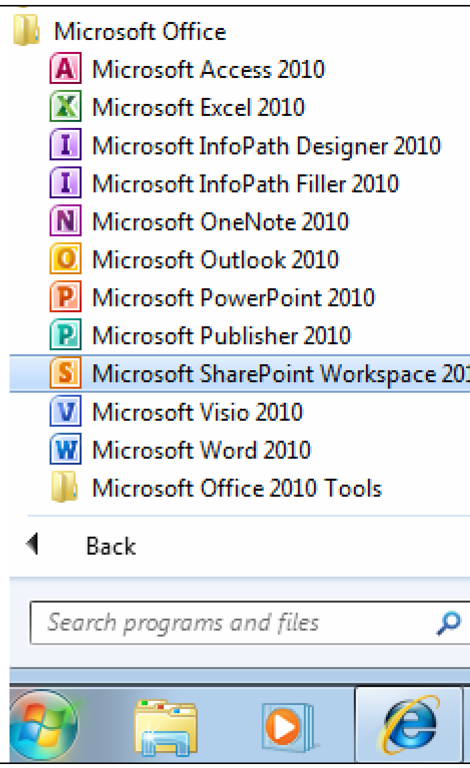
WEBSITE: HTTP://WWW.KMO.NAME
E-MAIL: ONEILLWEBSITE@VERIZON.NET

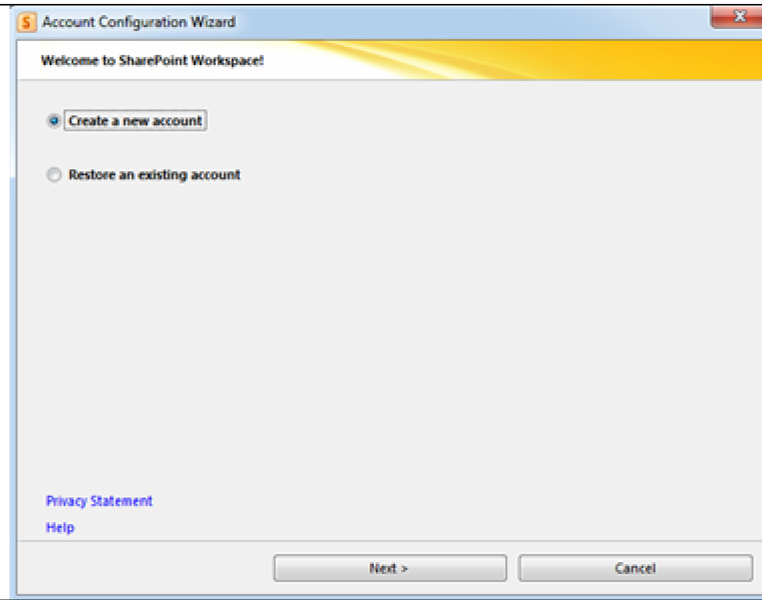
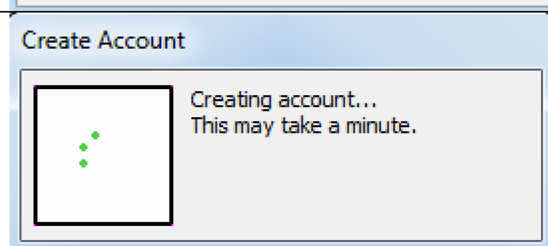
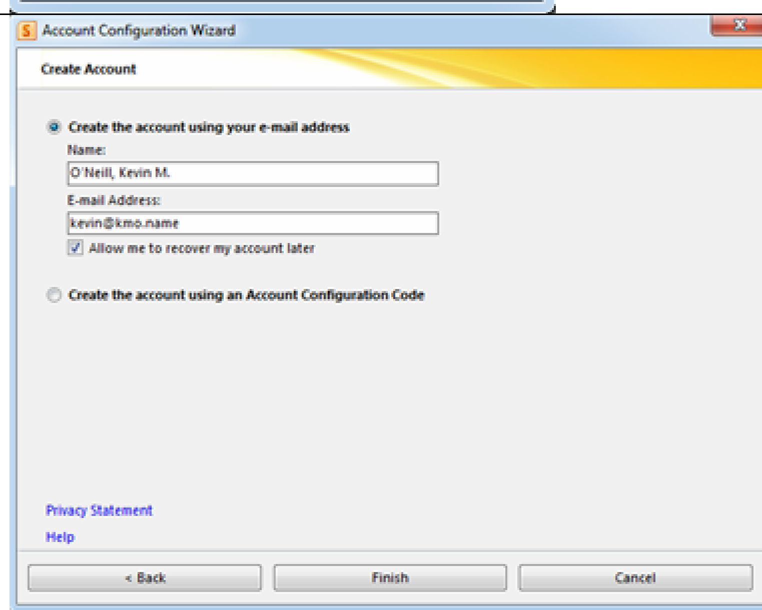
<table>
<tr><td>6. Then open the data file which will connect with SharePoint and open the item</td><td>
</td></tr>
<tr><td>7. If one has Excel installed on the computer – then importing from Excel into SharePoint is an option to do so from Site Actions -> More Options -> select Import SpreadSheet</td><td>
</td></tr>
<tr><td>8. On the right hand side select Create:</td><td>
</td></tr>
<tr><td>9. Name the item, enter in a description then browse out to where the Excel file is located and click Import</td><td>
</td></tr>
<tr><td>10. The Excel document will then open up and display the Import to Windows SharePoint Services list menu:</td><td>
</td></tr>
</table>

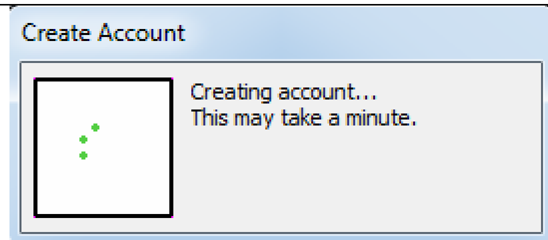
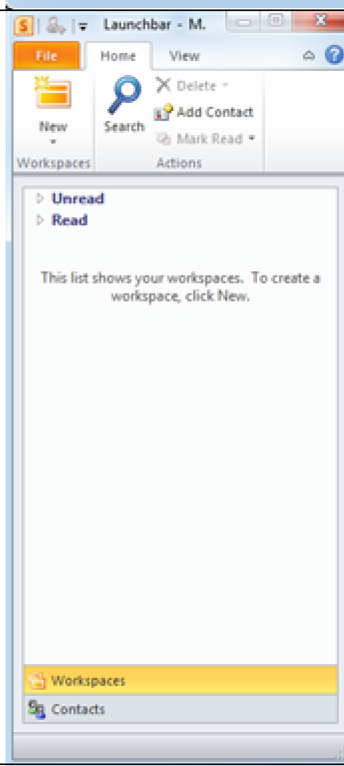
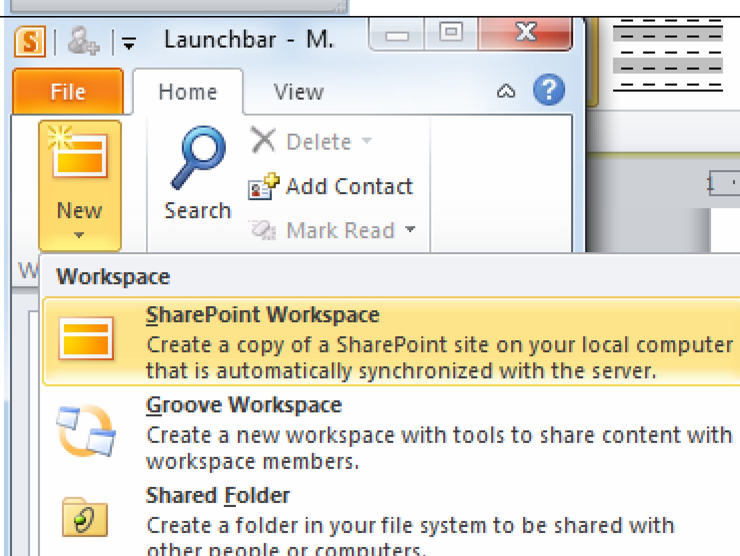
11. In the Range Type one has three options Range of Cells, Table Range or Named Range to choose from:	
12. In this example, I have chosen Range of Cells and then selected the option under Select Range which brings up a selector so one can select the Range of Cells to Import. When done one clicks the  button then selects Import:	  
13. The data will appear in the SharePoint list	

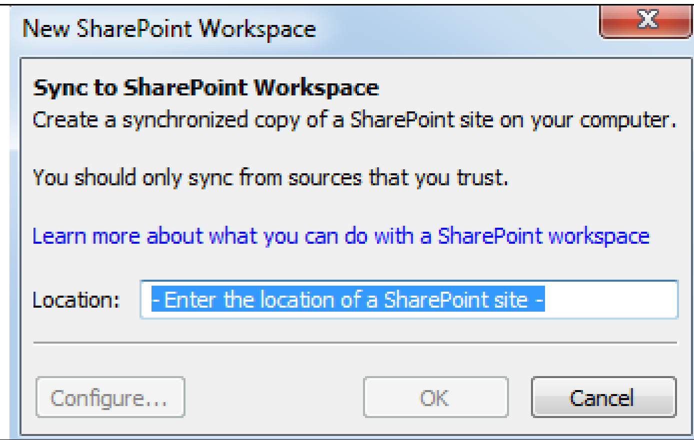
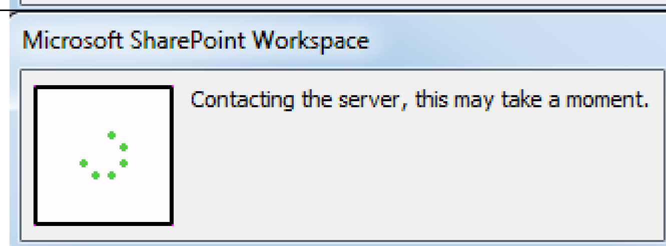
SharePoint Workspace

The SharePoint Workspace is essentially a way for a user to organize and work on their files on a local basis and thus if desired synchronize files with a SharePoint environment. The SharePoint Workspace is available out of the box if a user is running the Office 2010 Professional edition.

1. To access the workspace for the first time from Start -> Microsoft Office -> select Microsoft SharePoint Workspace 2010.	

<table>
<tr>
<td>2. Select from the menu Create a new account and click Next</td>
<td>
</td>
</tr>
<tr>
<td>3. The account is created</td>
<td>
</td>
</tr>
<tr>
<td>4. At the Create Account screen select Create the account using your e-mail address and then enter in the Name: and E-mail Address: fields as desired and check Allow me to recover my account later and then select Finish.</td>
<td>
</td>
</tr>
</table>

5. The Create Account screen is shown.	
6. The Launchbar is displayed.	
7. Select from the File menu -> SharePoint Workspace	

<table>
<tr>
<td>8. Enter in the URL of the desired SharePoint environment site(example http://myfirmintranet.myfirm.com/dept/myteam</td>
<td>
</td>
</tr>
<tr>
<td>9. Click Configure</td>
<td>
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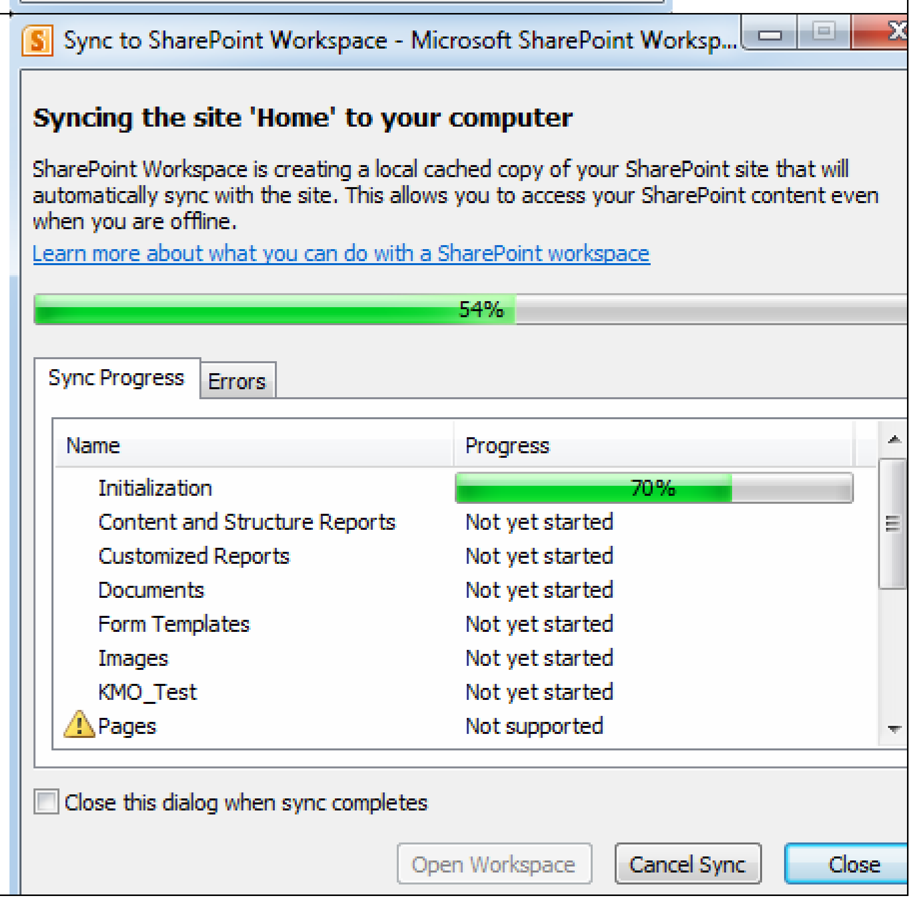
<tr>
<td>10. Click OK so that the desired site is synced to the workspace.</td>
<td>
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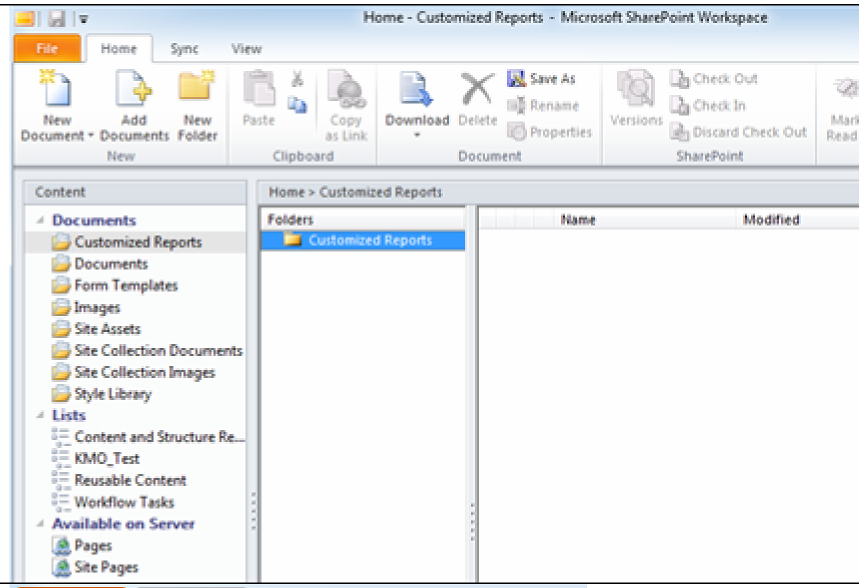
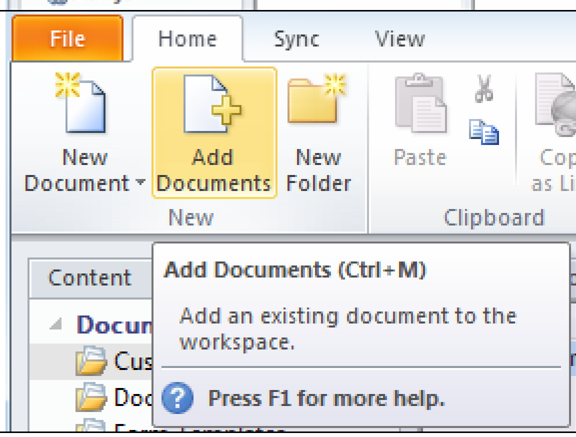
<tr>
<td>11. Select the directory where the files(s) should be synced into.</td>
<td>
</td>
</tr>
<tr>
<td>12. Select File->Add Documents</td>
<td>
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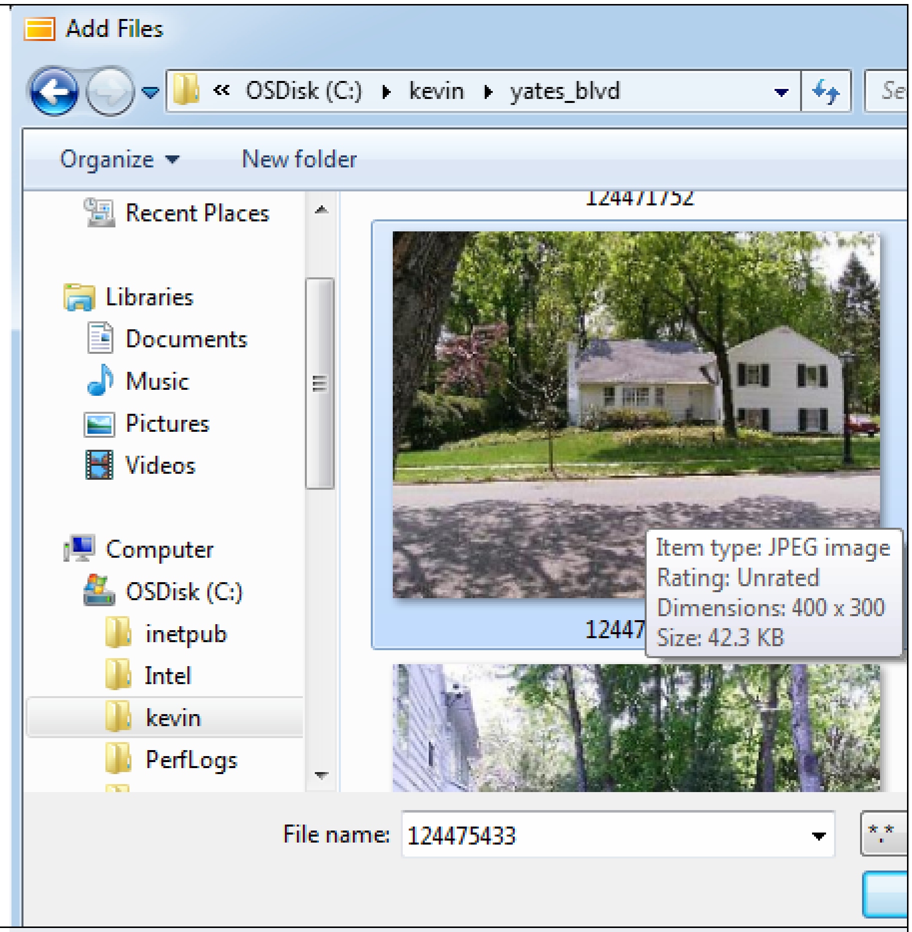
<tr>
<td>13. Browse to the directory of the file that should be synced into the workspace from the SharePoint server and click OK.</td>
<td>
</td>
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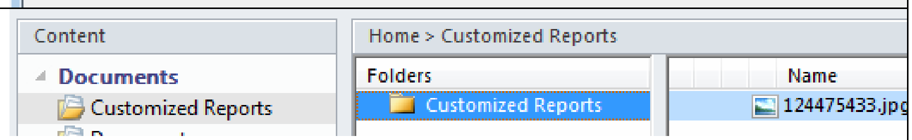
<tr>
<td>14. The file displays in the workspace in the directory chosen.</td>
<td>
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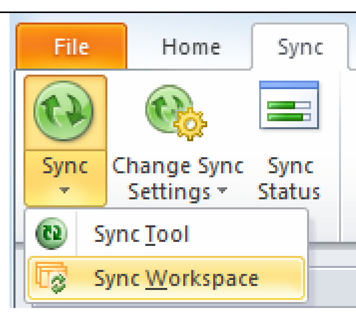
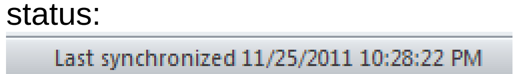
<tr>
<td>15. Select File -> Sync -> Sync Workspace.</td>
<td>

NOTE: Lower right hand side of workspace tells one the status:

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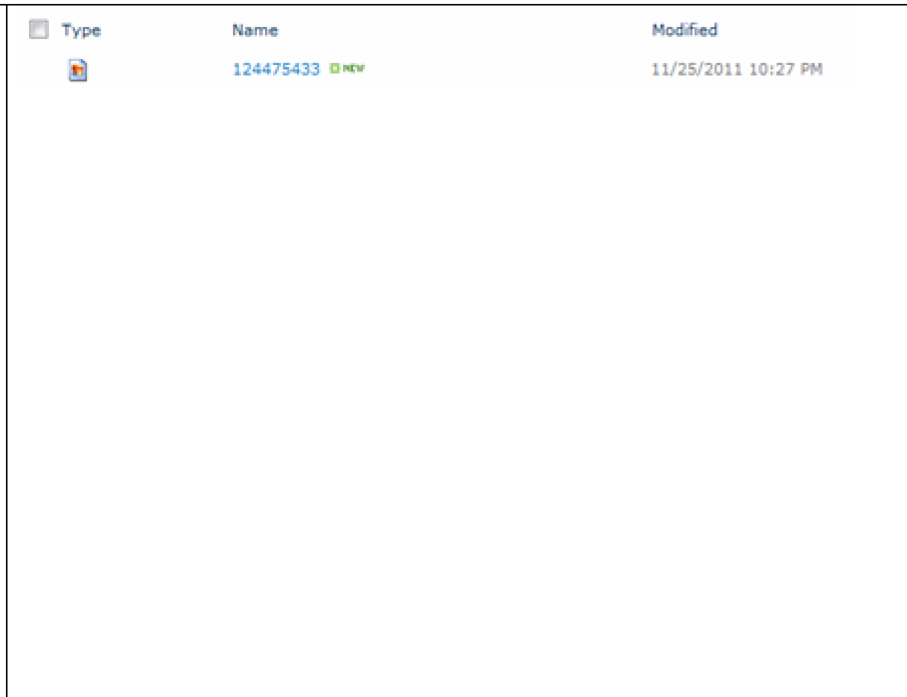
<tr>
<td>16. In this case, it is a good idea to go to the SharePoint site – Access Site Actions -> View All Site Content and in this case I selected Customized Report since that is where I uploaded the item to in my workspace. Note it was uploaded to the SharePoint environment.</td>
<td>
</td>
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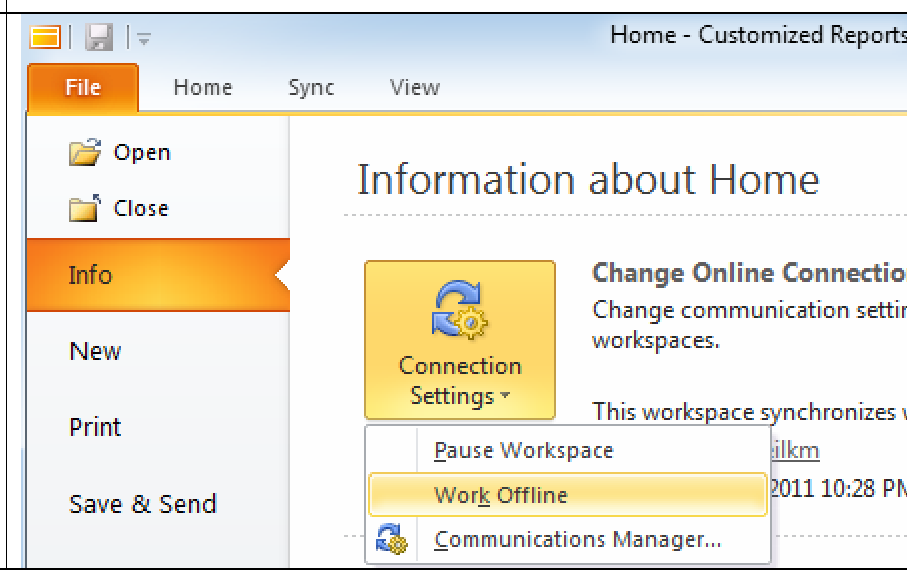
<tr>
<td>17. Once a file is synced into a workspace – if one wants to work on the file while off the network (example at home) then they can select File -> Info select Connection Settings and click Work Offline.</td>
<td>
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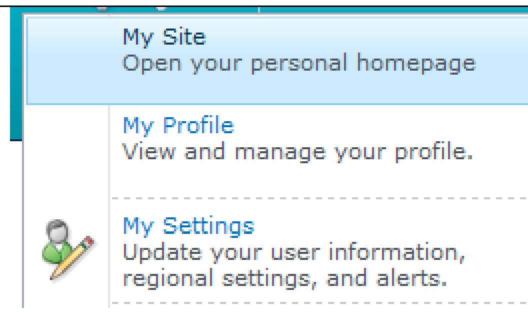
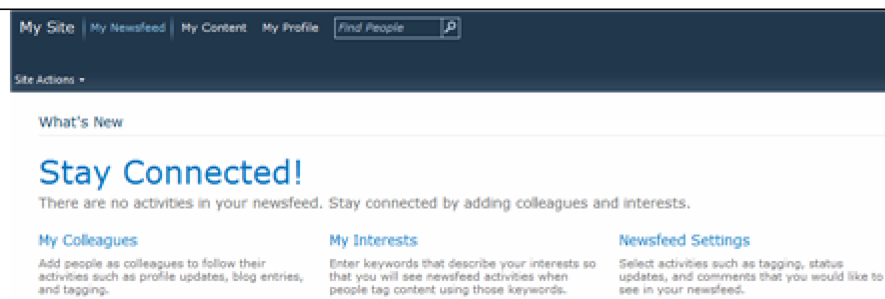
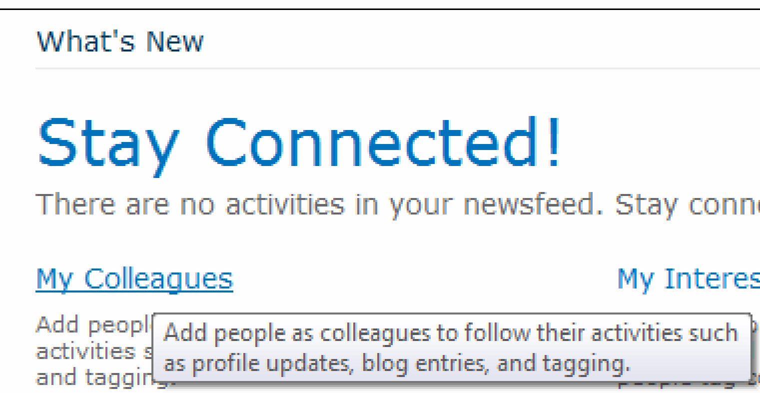
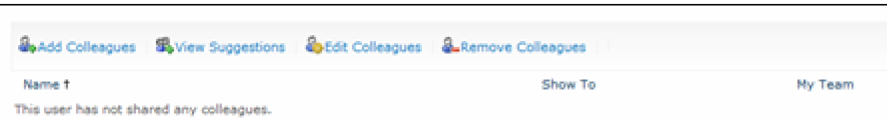
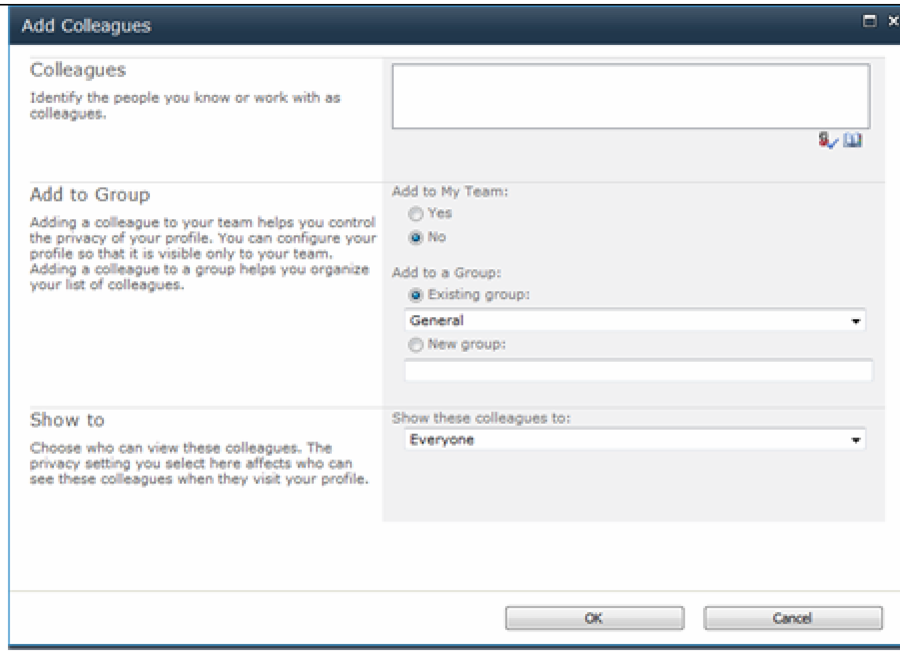
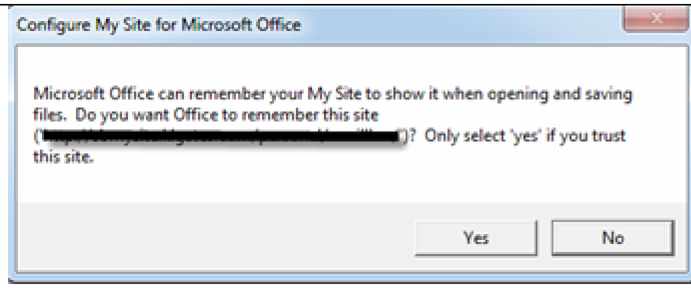
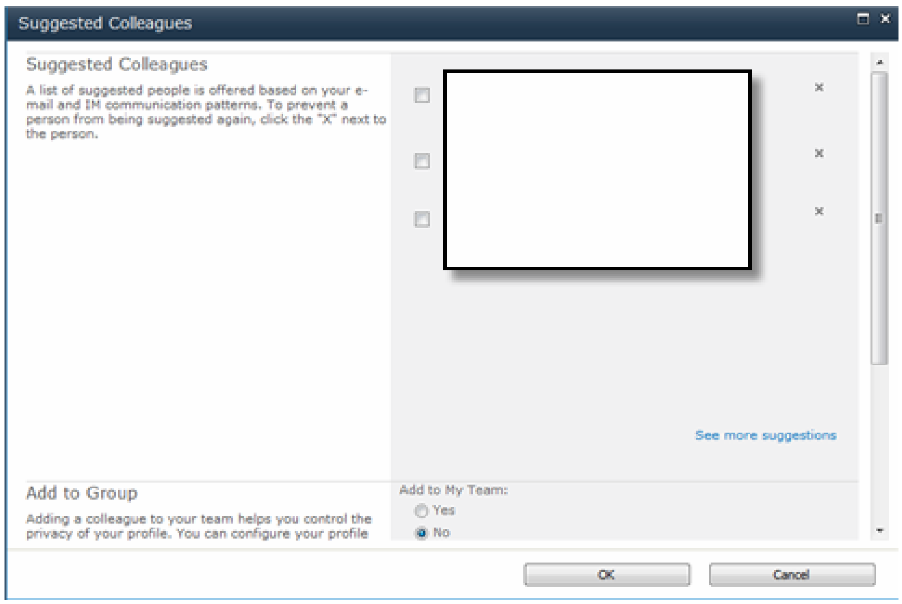
SharePoint mySites

In SharePoint 2010 the notion of mySites allows for a more social experience to users of SharePoint. Users can now update their status, connect with other individuals as well as share content freely amongst other items.

1. If mySites are turned on then from Site Actions -> the following option will be available typically under your login name.	
2. The default page of a My Site will appear as such.	
3. Clicking My Colleagues brings one to a page where they can add and edit those individuals whom they want to follow the activities of.	
4. At the following screen click Add Colleagues	

5. In the Colleagues section – enter in the individual's names whom you wish to follow or click the browse book and find the individuals – click Add then click OK. If the users are members of your team click the proper selection under this option. Additionally in the Add to Group add the users to a desired group or create a new group. Finally, in the Show to - select whom should see the colleagues in your profile. Select OK when done.	

<table>
<tr>
<td>6. Click View Suggestions and if prompted to Configure My Site for Microsoft Office – click Yes. Then the display shows those people whom you most likely have connected with via e-mail and instant messenger. Check those users whom you wish to connect with. If the users are members of your team click the proper selection under this option. Additionally in the Add to Group add the users to a desired group or create a new group. Finally, in the Show to - select whom should see the colleagues in your profile. Select OK when done.</td>
<td>




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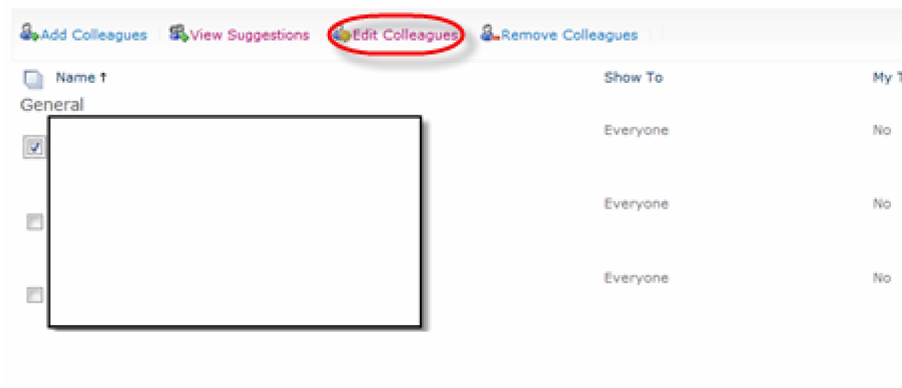
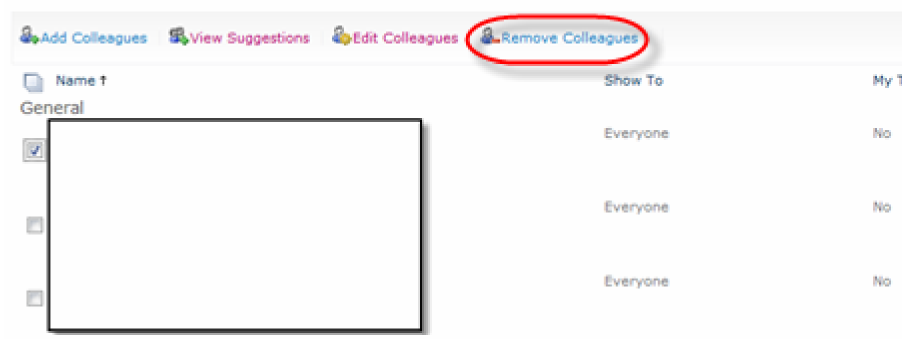
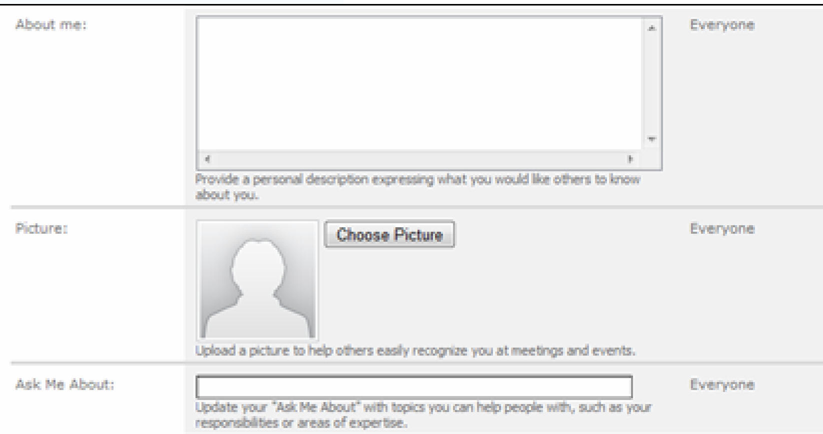
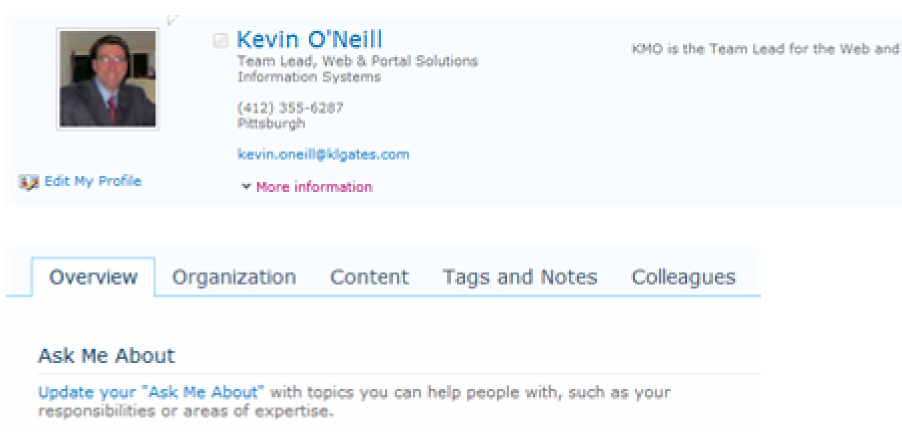
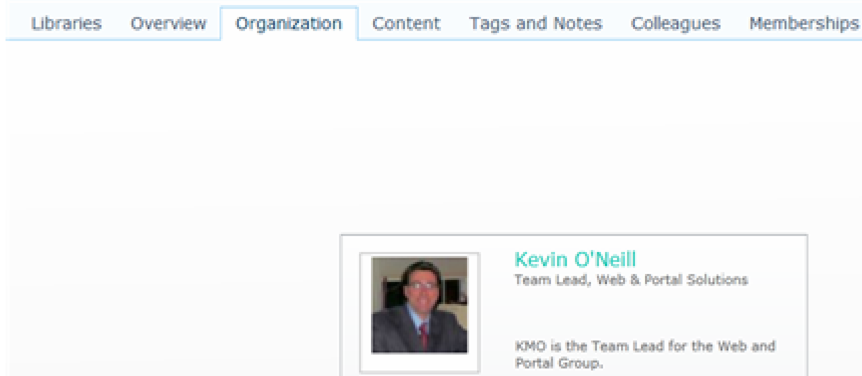
7. Edit Colleagues – on the Colleagues tab first check those individuals whom you want to edit – then click the Edit Colleagues link. Edit the information that displays as desired then click Save and Close.	
8. Remove Colleagues - on the Colleagues tab first check those individuals whom you want to remove – then click the Remove Colleagues link.	
9. Another piece of functionality of value on the My Colleagues is the What's Happening balloon.	
10. Click into the balloon and then enter in your text – in this case "This is a test" was entered. When done hit the	

enter key.	
11. Click the Edit My Profile link to update your profile.	
12. Enter in the desired information into the profile – a sampling of fields is shown here - click Save and Close.	
13. Once completed click the Overview tab to view some of the information entered into the profile. Click the More information link to see the hidden information	

<table>
<tr>
<td>14. Moving left to right across the Organization tab – when selected this displays a Silverlight Control of the relationships to you in the organization. It is based upon whom you select to be on your team as well as how the information is fed into the mySites by the farm administrator(s)</td>
<td>
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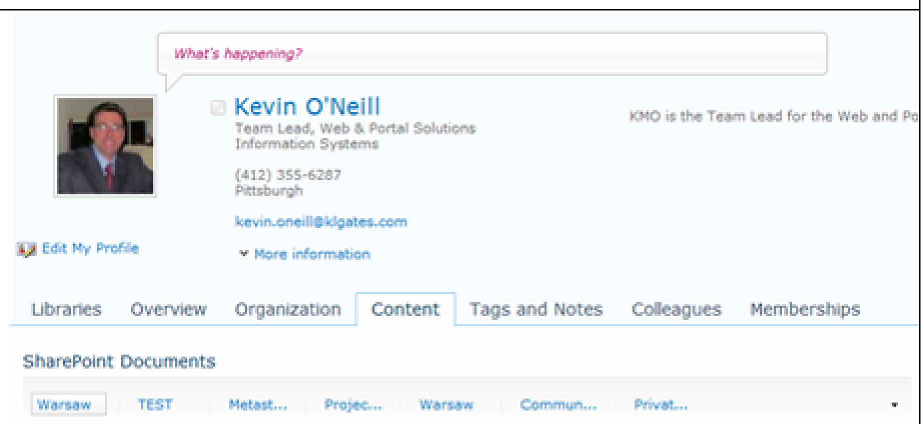
<tr>
<td>15. Clicking the Content tab shows ones SharePoint documents they have uploaded or sites they are associated with.</td>
<td>
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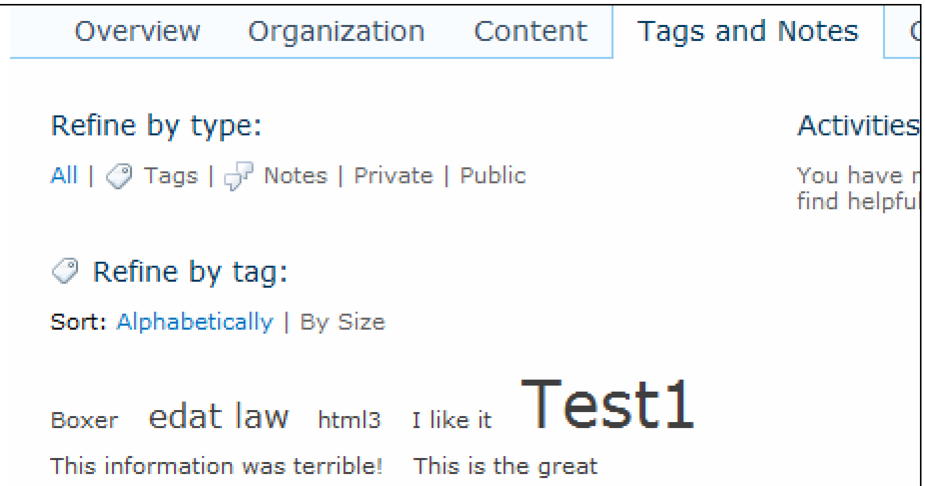
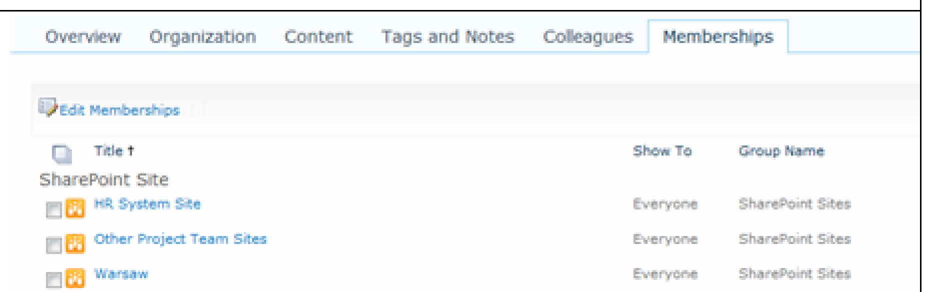
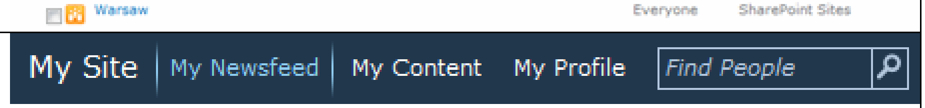
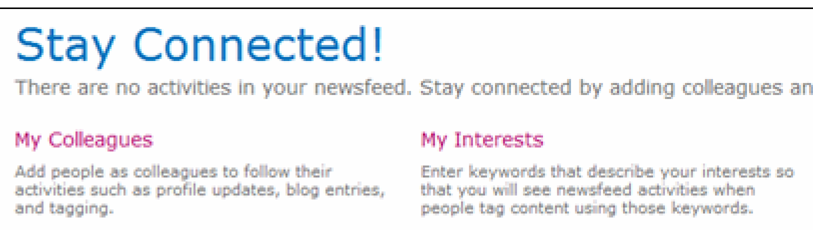
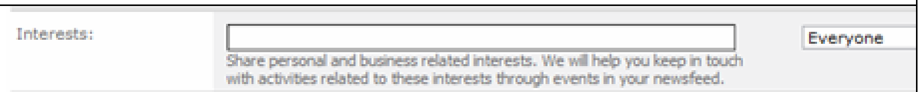
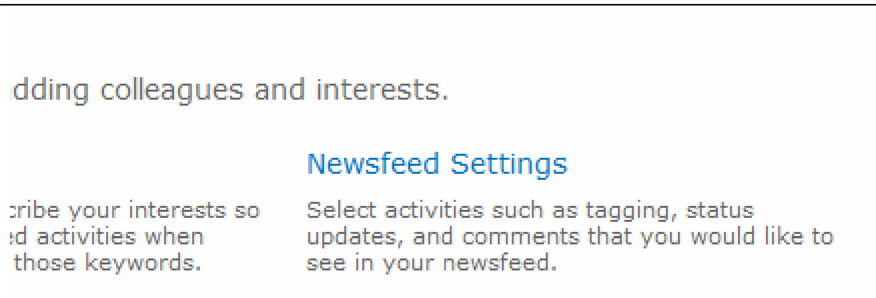
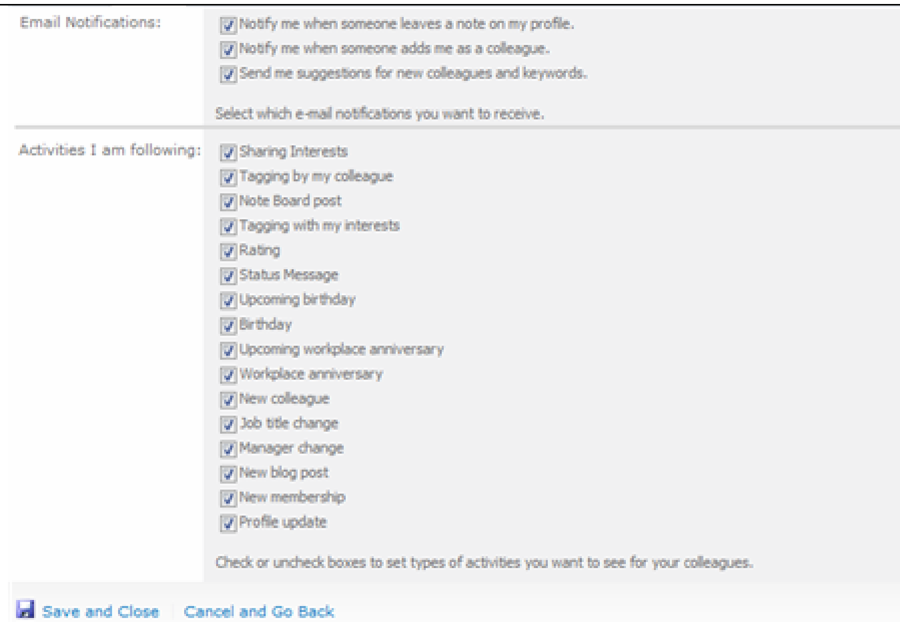
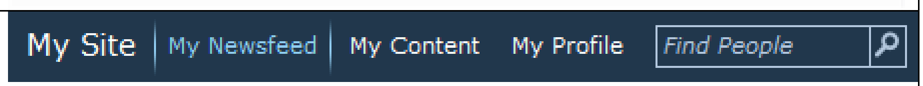
<table>
<tr><td>16. Clicking Tags and Notes shows one the items they have previously tagged within SharePoint itself. The tags are essentially shown in a tag cloud which a user can then click those words of interest and see the items that were tagged with those said keywords.</td><td>
</td></tr>
<tr><td>17. Clicking the Memberships tab shows one the sites they are members of.</td><td>
</td></tr>
<tr><td>18. Clicking on the My Site link on the top navigation brings one back to the default My Site page.</td><td>
</td></tr>
<tr><td>19. Clicking My Interests brings one to a section of their profile where they can enter in their</td><td>
</td></tr>
</table>

interests	
20. At this screen one simply enters in their interests. When done making edits one should select Save and Close.	
21. Clicking on the My Site link on the top navigation brings one back to the default My Site page.	
22. The last section on this page to select is the Newsfeed Settings	

<table>
<tr>
<td>23. On this screen of one’s profile – a user selects how e-mail notifications should be sent and selects the activities they wish to follow by checking and unchecking the selections. When done making edits one should select Save and Close.</td>
<td>
</td>
</tr>
<tr>
<td>24. On the main navigation it should be noted that the Find People search can prove very useful in finding individuals. Simply by typing in the desired term and clicking the magnifying glass result sets are returned.</td>
<td>
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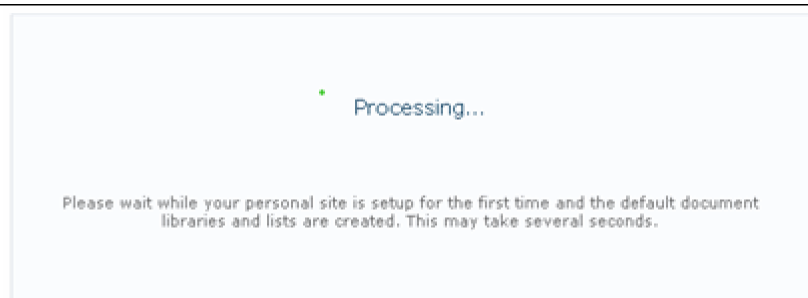
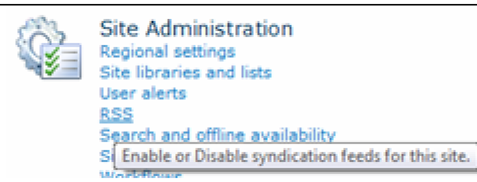
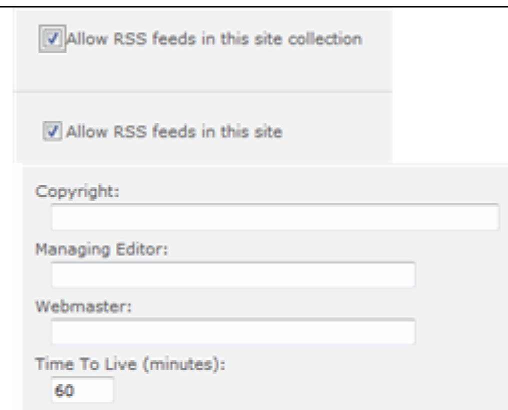
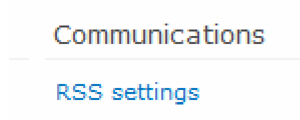
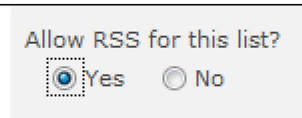
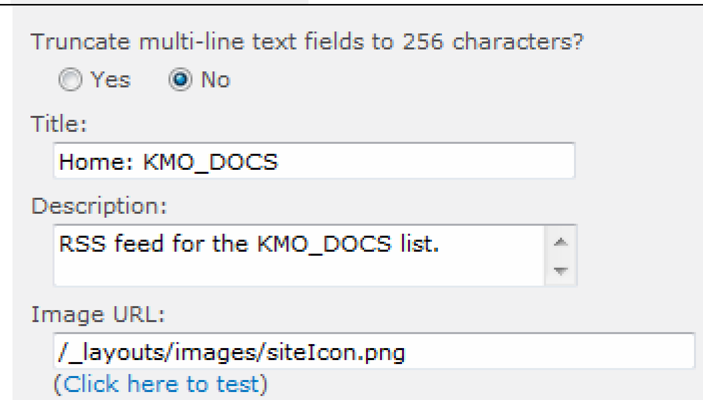
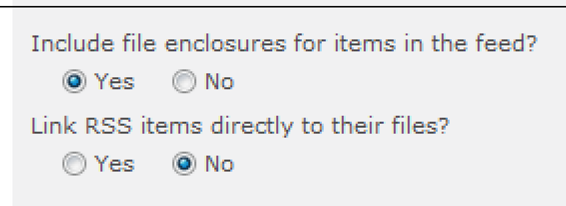
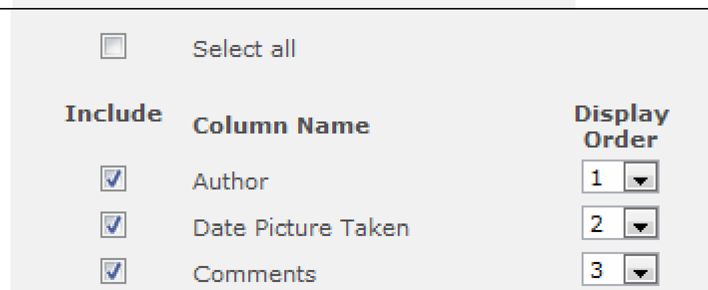
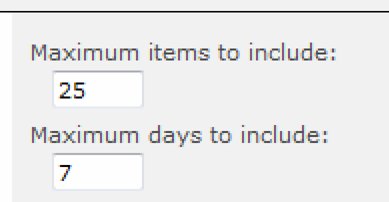
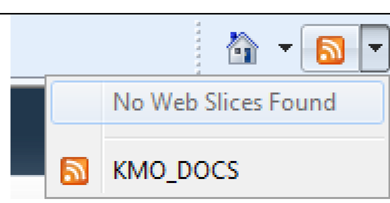
25. On this same navigation bar a user can navigate to their My Site by clicking that link.	
26. Additionally, a user can access their my Newsfeed by clicking that link	
27. A user can access their My Content by clicking that link	
28. Finally, a user can access their My Profile by selecting that link	
29. The first time one accesses their My profile the profile based on one's information may take a minute or two to process.	

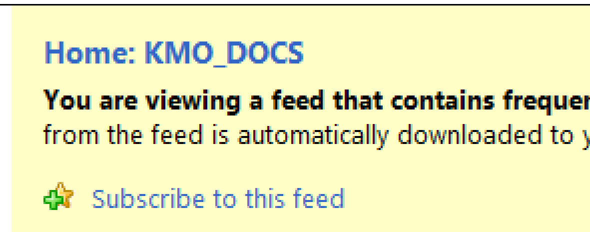
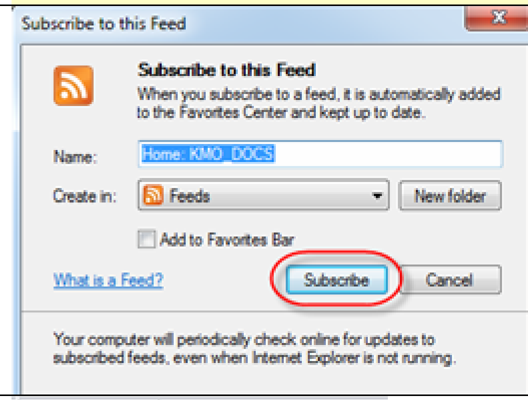
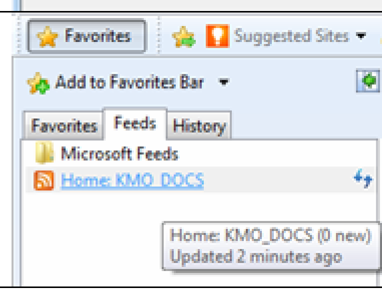
Real Simple Syndication (RSS)

RSS is available in SharePoint 2010 to create RSS feeds for a list and library. This allows one to not only view – but have a mechanism available to distribute news items of value to a targeted audience. One item to note is that the RSS Viewer web part cannot be used to read SharePoint RSS feeds.

In order to set-up RSS follow these steps:

1. From the top level site select Site Actions -> Site Settings -> then select RSS from the Site Administration group	
2. Select and enter in the desired options then click OK. Note that the Copyright, Managing Editor and Webmaster fields may or may not appear in all RSS viewers. Also the Time to Live is the number of minutes that users should be waiting for updates to the RSS feed.	
3. RSS can also be enabled at the list and library level as well – thus access the desired list or library and select list or library settings.	
4. For a list – from the List Tools tab select List -> list Settings then under Communications -> RSS settings.	
5. For a library – from the Library Tools tab select Library then Library Settings then under Communications	

-> RSS settings	
6. In both cases under the List RSS check Yes to Allow RSS for this list.	
7. Under RSS Channel Information enter in the Title and Description of the feed as well as an Image URL if desired.	
8. Select under Document Options – how attachments should be displayed.	
9. Under Columns – select the desired columns to appear in the feed.	
10. Under item limit enter in the Maximum number of items to include and for how many days back should be included.	
11. Click OK when done.	
12. Feeds can be read by any reader – in this case the out of the box RSS reader with Internet Explorer is used so thus while on this page if the RSS item is selected then the feed itself – is	

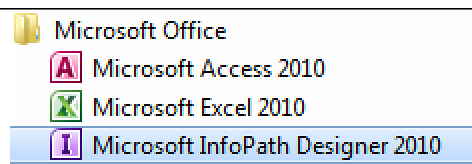
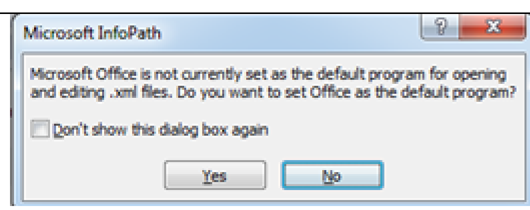
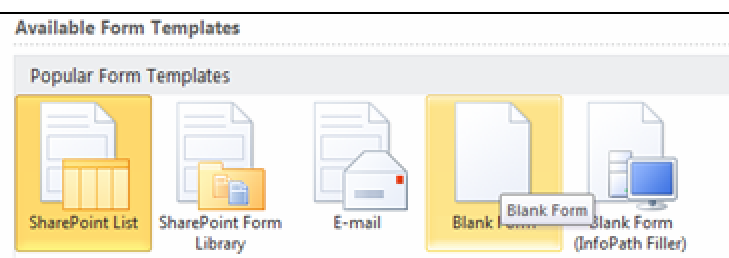
engaged.	
13. Once selected then the feed can be subscribed to by clicking the 'Subscribe to this feed' link.	
14. When prompted select the Subscribe button.	
15. In Internet Explorer 8 by clicking favorites the RSS feed just subscribed to is shown and can be accessed as desired.	

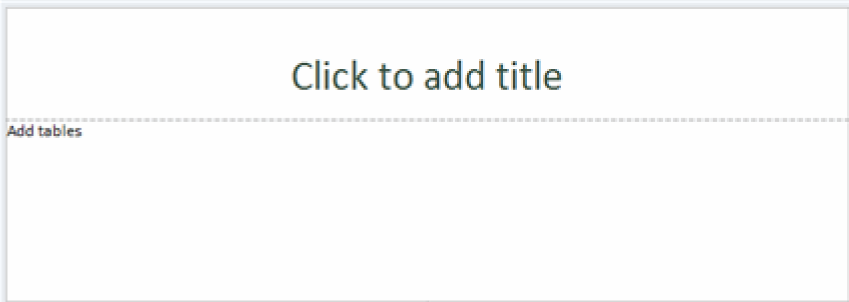
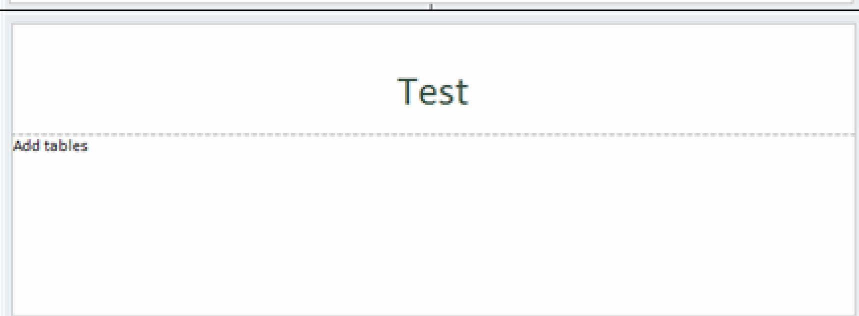
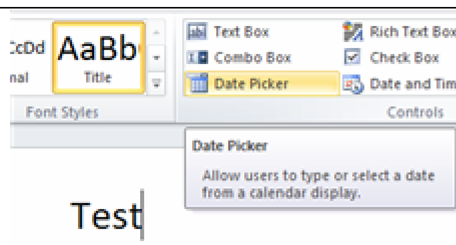
InfoPath

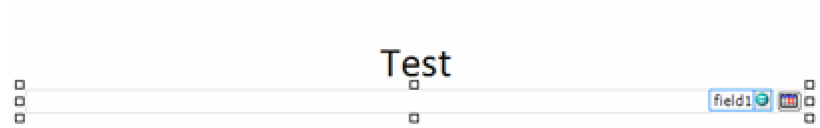
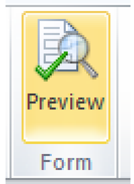
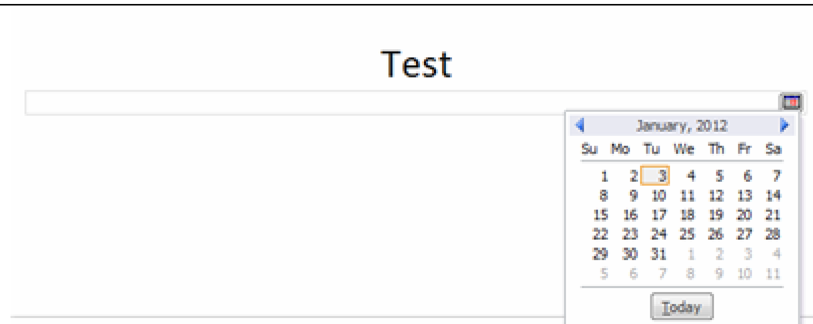
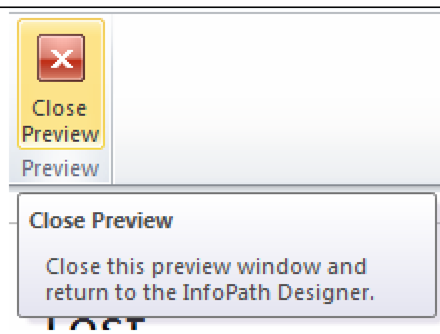
InfoPath

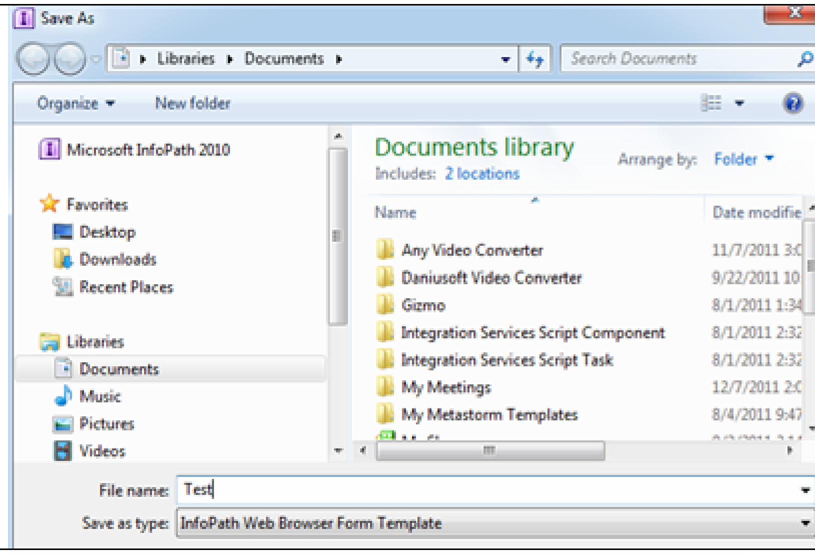
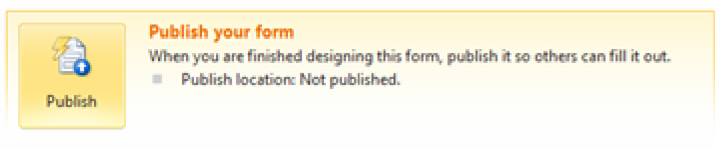
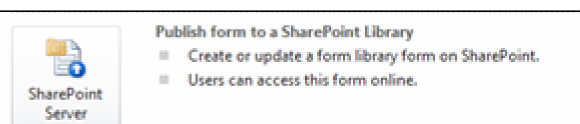
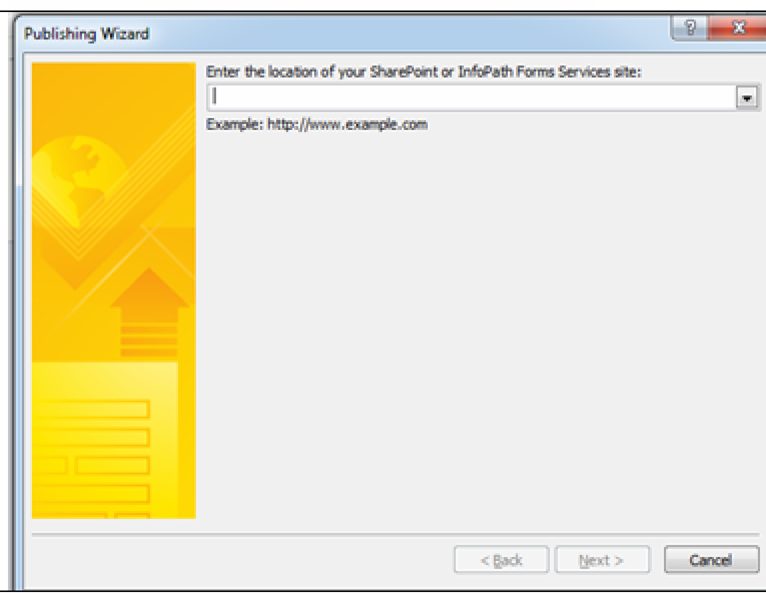
InfoPath is a toolset designed for power users to create forms that users can then fill in. The InfoPath designer tool is available with the Microsoft Professional Office 2010 edition. Also it should be noted when designing forms – so that a client piece of InfoPath (named the Microsoft InfoPath Filler 2010) does not have to be installed on every computer that is to use the form that is created – a web-site version of the form should be created for better architecture and flexibility.

The steps below cover creating a simple InfoPath Form

1. Access the InfoPath Designer 2010 – found from Start -> Microsoft Office -> Microsoft InfoPath Designer 2010	
2. Select No if prompted unless you wish .xml files to open in InfoPath	
3. Under Popular Form Templates double click Blank Forms	

4. The screens middle section will appear as such:	
5. Click to add title and type in "Test"	
6. On the Page Design tab click a selection – in this case Professional – Ricasso was selected.	
7. Select the Home tab – then place the cursor on the title line (where it says Test) – hit enter once then from the toolbox select the Date Picker	

8. The date picker is added to the form	
9. In the Ribbon select the Preview button which is likely on the far right – under the Form group	
10. The form is shown and the control that was added can be selected	
11. On the ribbon select the Close Preview button – under the Preview section	

<table>
<tr><td>12. At this point – select File -> Save As and save and name the form into a directory of your choice</td><td>
</td></tr>
<tr><td>13. To publish the form to SharePoint – from the File tab – select Publish</td><td>
</td></tr>
<tr><td>14. Select SharePoint Server</td><td>
</td></tr>
<tr><td>15. Enter in the name of the SharePoint site and click Next</td><td>
</td></tr>
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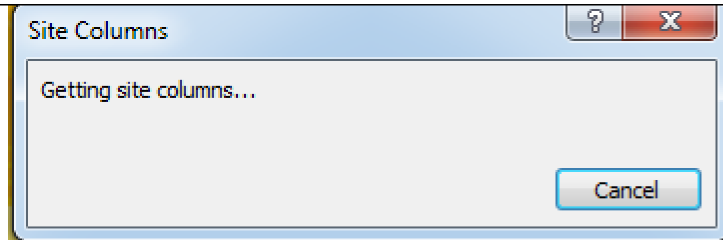
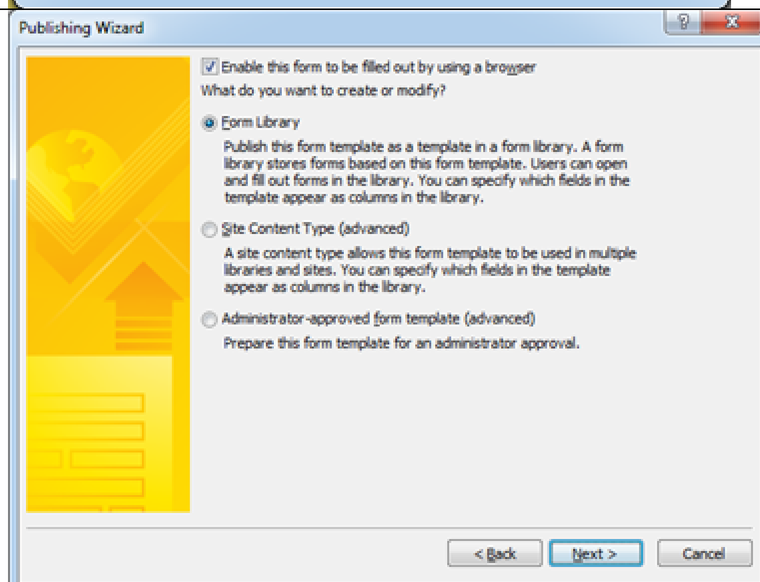
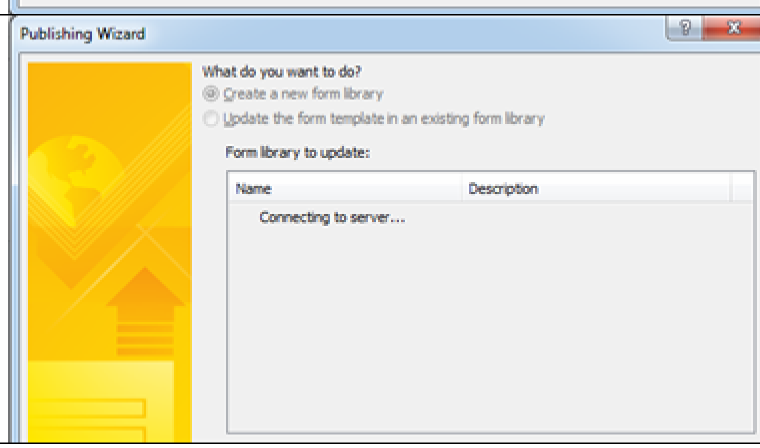
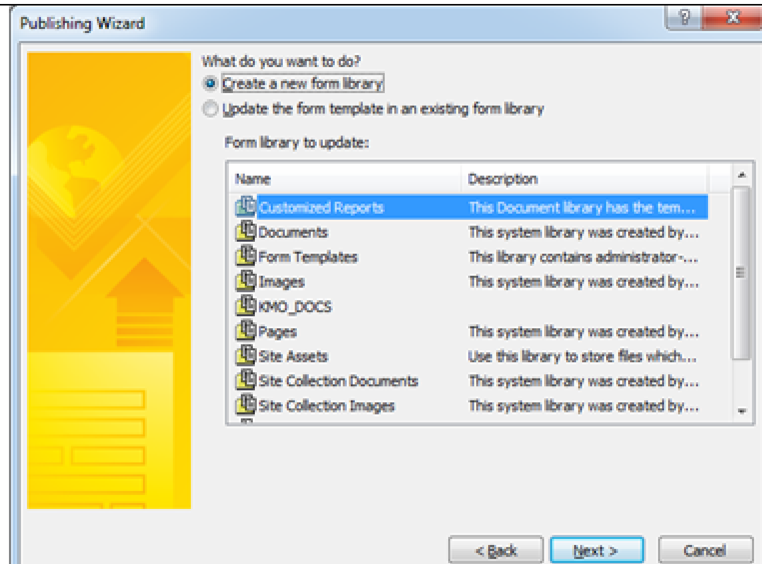
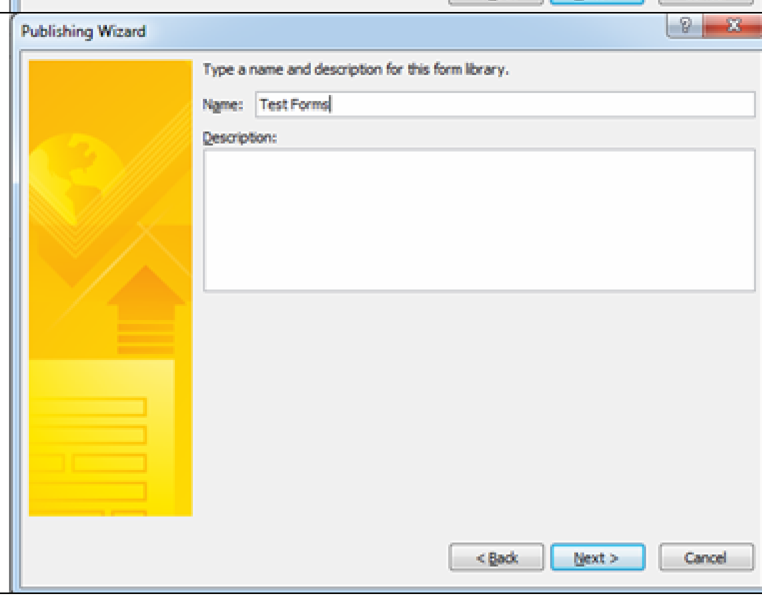
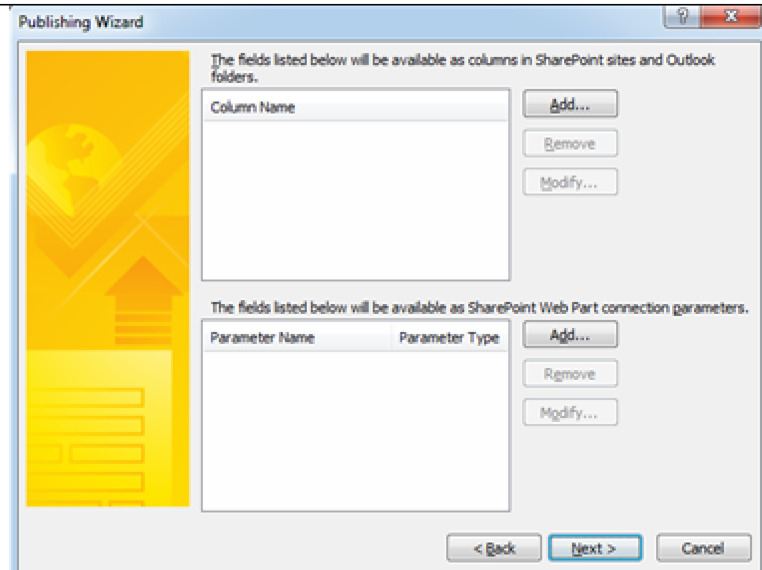
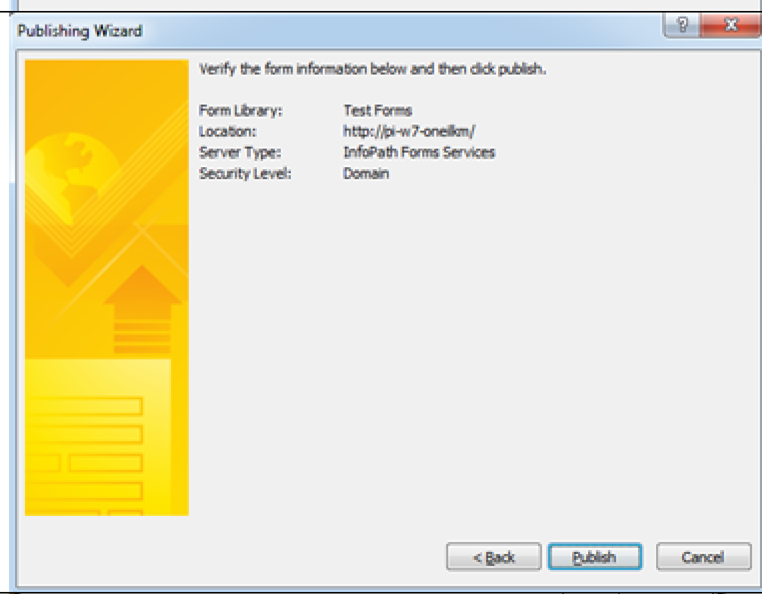
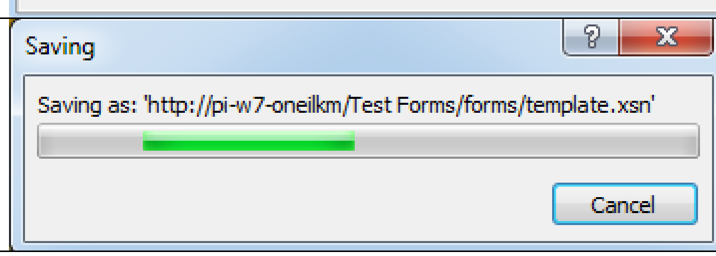
<table>
<tr>
<td>16. A wizard will then run</td>
<td>
</td>
</tr>
<tr>
<td>17. When prompted check “Enable this form to be filled out by using a browser” and select Form Library then select Next</td>
<td>
</td>
</tr>
<tr>
<td>18. The server will be contacted</td>
<td>
</td>
</tr>
</table>

19. In this example "Create a new form library" will be selected – then Next:	
20. A name "Test Forms" was entered and Next selected:	

<table>
<tr><td>21. Select Next as in this example we will not be adding columns or parameters to SharePoint sites and Outlook folders:</td><td>
</td></tr>
<tr><td>22. Verify information – then select Publish:</td><td>
</td></tr>
<tr><td>23. The wizard will run through and create connections as needed</td><td>
</td></tr>
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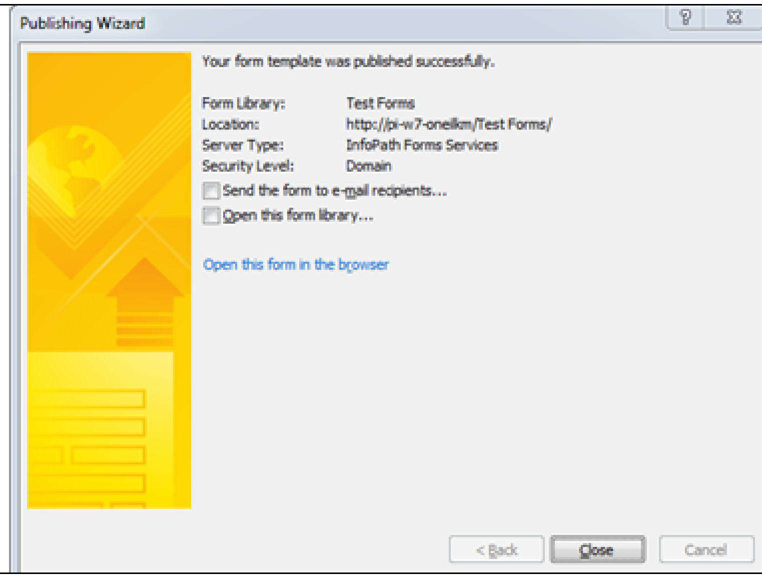
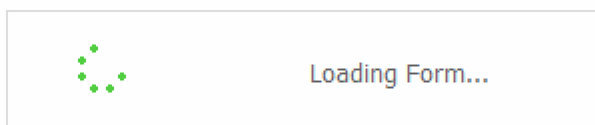
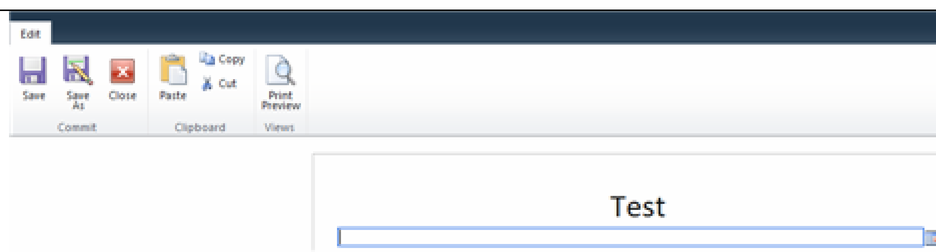
<tr>
<td>24. When completed make the desired selection and click Close when desired:</td>
<td>
</td>
</tr>
<tr>
<td>25. In this example – “Open this form in the browser” was selected</td>
<td>
</td>
</tr>
<tr>
<td>26. The form was then displayed for entering in data:</td>
<td>
</td>
</tr>
</table>