Top Tips for working with SharePoint 2010

Premier have created the following useful and time-saving advanced techniques to make the most out of using SharePoint 2010 for everyday tasks.
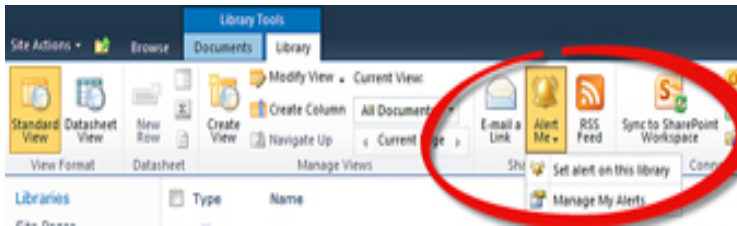
1   SETTING UP ALERTS IN SHAREPOINT

Figure 1 You can use set up alerts to let you know if anything in a library, or a specific document, has been changed.

SharePoint 2010 can be configured to send you an email or an SMS text message whenever things are changed on either a specific item in a library or if anything in a library as a whole changes. This is useful as you don't then have to manually go back and check each SharePoint site for changes. You can set up alerts using the Alert Me button in the Ribbon on any given SharePoint content area.
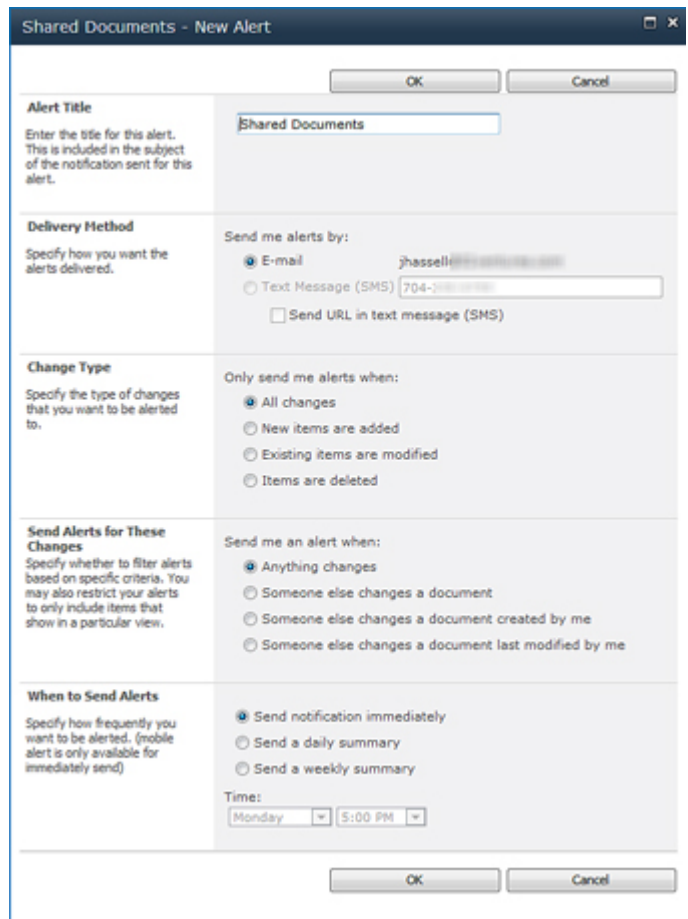
Clicking the "Alert Me" option in the ribbon (shown above) brings up the New Alert window. Here you add a title to the alert, the delivery method, the context of the alert (whether an alert is sent for any change at all, or only if new items are added, if existing items are modified, or if items are deleted), the scope of an alert (if anything changes, if a document changes, if a document you created or last modified changes), and how quickly the alert is sent after a change (you can set up an immediate alert, a daily summary, or a weekly summary, and you can customize the time for this).

The alert then comes directly to you.

Figure 2 Once you set up an alert, you can add information such as the title, whether you prefer email or SMS as the alert vehicle and so on.

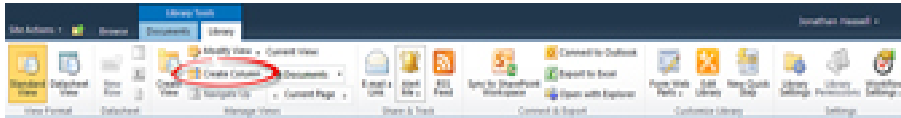## 2   Customise your views and add columns when necessary

Figure 3 Customizing your views within SharePoint

Sometimes, you might want to track more information about items in a library than SharePoint comes pre-configured out of the box to track.

For example, you might want to add a drop-down list that has choices about an item's status that users can select at various points during the lifecycle of that item. It's easy to add these choices to SharePoint list views so that you can work with these statuses. In a document library, for example, select the Library tab from the Library Tools group, and then click Create Column.

You can give the column a name, and then select the type of information this column will contain; in this example, we'll select Choice, which will prompt SharePoint to display a menu of choices. You can then add a user-friendly description of the column, make its completion mandatory and enforce whether more than one item in a library can have the same status, and then you can type each status choice on separate lines in the next box.

Also, you can then select how the choices will be displayed, allow users to write in choices and pick a default value. Finally, you can add this new column to the default view of the site so that it becomes immediately visible to users. Now you have a consistent set of choices to track additional information.

When you upload a document to this library with the new column's presence enforced, after upload you get a window asking you to choose from the selections you defined when creating the column. That choice, after you confirm it by clicking OK, is then populated in SharePoint's database and displayed in the column in the default view. You can change it by editing the item's properties.
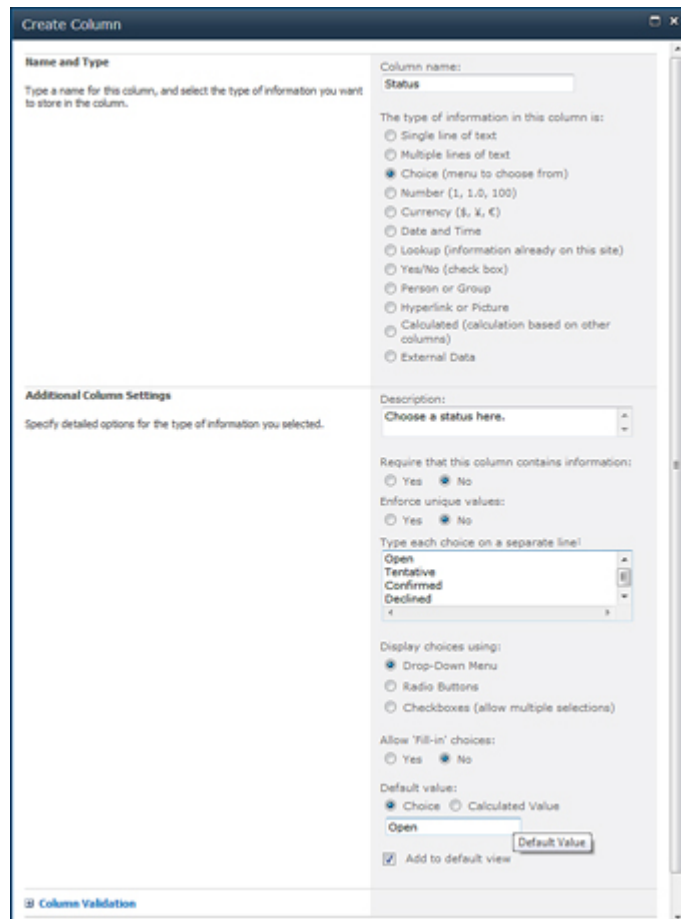
If you are working on a Microsoft Office 2010 document in a library, and choose to save it back to the library, you'll also be

Figure 4 You can add a drop-down list that has choices about an item's status.

prompted for the status within the individual Office application. In other words, all of the ways you interact with documents will now have that new column selection required.

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3. Edit lists with Microsoft Excel in a familiar datasheet-style view.

You probably have several spreadsheets and may be here is contact information, or a list of dates or

a summary of various projects and their statuses. No matter what it is, if you are using Microsoft Excel 2010, there is a really simple way to export that data out of Excel and into a SharePoint list, where you can then edit it natively within the SharePoint Web experience, either in standard view or in datasheet view.
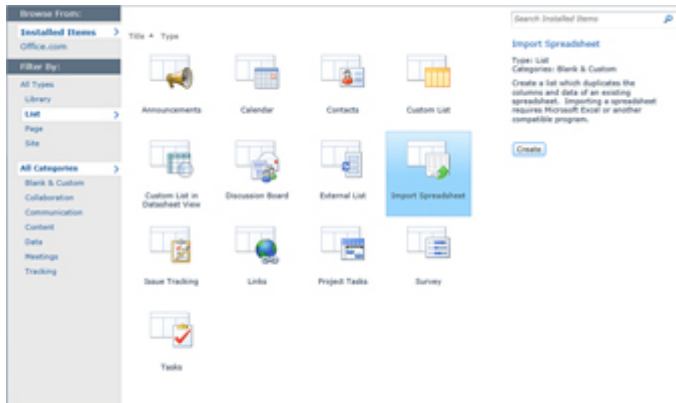
From within SharePoint, select More Options from the Site Actions menu, and then from the List section, click Import Spreadsheet, and then click the Create button.

Figure 5 There's a way to turn Excel 2010 data into a SharePoint list.

Type in a new name for this list and a plain-English description of this spreadsheet if you wish, and then browse to where the spreadsheet is located in your file system by clicking the Browse button and selecting the file. Once you are finished, click the Import button.

In the background, Excel will open the file and the Import to Windows SharePoint Services list will appear. You can select the range of cells for your list, and then click the
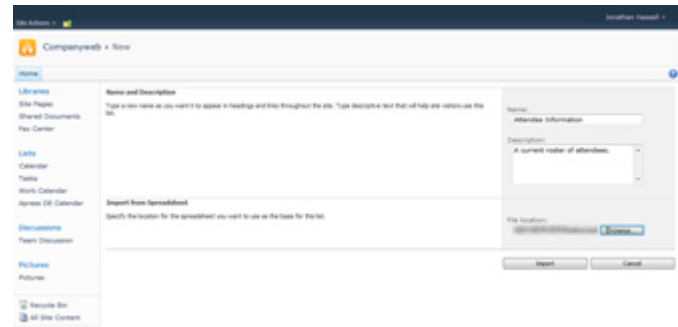
Import button in that dialog box.

Figure 6 You can type in a new name for the Excel data you're bringing into SharePoint, along with a description.

You'll be returned to the SharePoint window and you'll find your list, directly imported into the SharePoint database. You can then adjust the view and change the order of the columns, their names and more from the List tab in the List Tools group; just click List Settings to the far right of the window.
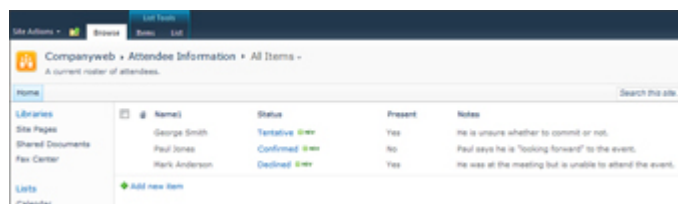

Figure 7 Once your list is exported, here's what it looks like in SharePoint**.**

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4. Use the Explorer view when doing more than simple file maintenance

If you are uploading a big group of files to SharePoint, it can be cumbersome to try to fit them all into the drag-and-drop window. Or maybe you want to copy a lot of files out of SharePoint onto, say, a thumb drive for transport. Luckily there's a way to make your SharePoint site's document libraries appear just like any other disk in your file system.
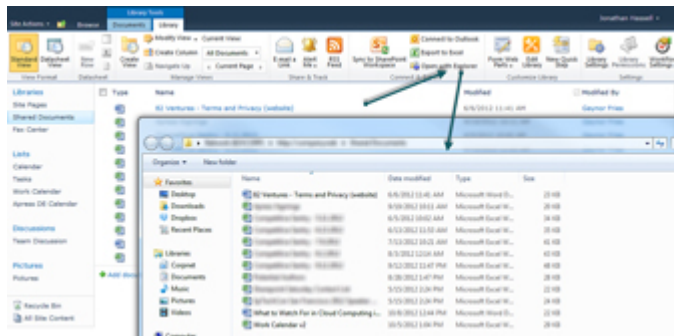

Figure 8 You can use make SharePoint look like any other disk in your file system, with an Explorer view.

Open a document library within your Web browser (I have found that Internet Explorer works best for this), and, from the Library Tools group, click the Library tab. Then, from the Connect & Export Ribbon group, click Open with Explorer. You may get a security warning you need to acknowledge -- click OK or Yes on this, depending on how your system is configured -- and then you'll get a standard Windows Explorer or File Explorer window just like you're used to. Copy, paste, cut and move to your heart's content from here.

Note that for this to work, you need to either be within your corporation's campus network, have Direct Access enabled or be connected to your company VPN, or be accessing an external version of your SharePoint site. So if you're at home with no VPN and you try to access http://sharepoint (an internal URL your company may have), this Explorer view will not work. Also, some corporate administrators turn this feature off for security and information protection reasons, so check it out first before you depend on it, just to make sure it works in your organization.

5. Overlay multiple calendars in SharePoint to create a master calendar.

Your team can have a master calendar that includes calendar rollup information from calendars that are nestled deeper into the SharePoint site hierarchy. You can overlay up to 10 calendars over one another to create a master calendar, and each calendar is displayed in a different color code. (It's the same as when you link a SharePoint calendar to Outlook and then overlay the two calendars within the Outlook client.).

At the main SharePoint site where you want the master calendar to live, either create a new calendar list from the Site Actions menu, or use an

Figure 9 You can have one 'master' calendar for your entire team.

existing calendar that already is configured at the level you want. On the Calendar tab in the Ribbon, click Calendars Overlay, and then click the New Calendar link to add a new calendar to the overlay view.
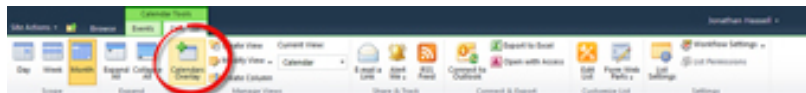
You have to give SharePoint some information about the calendar that you are adding, such as a name and its plain-English description, and you need to have the URL of the site that houses the calendar. This is the link to the site itself, not a link directly to the calendar. After you enter in the web URL and click the Resolve button, SharePoint will use that URL to crawl the site and find the calendar lists and views.

If the site you provided has many calendar lists or views, SharePoint will ask you to choose the ones you want to overlay; just select the box next to Always Show, and when you're done, click OK. Lather, rinse, repeat for each separate website (again, up to 10 individual calendars) that contains calendars you want to overlay, and then click OK. Now you'll see all of those calendars rolled up into one master calendar.
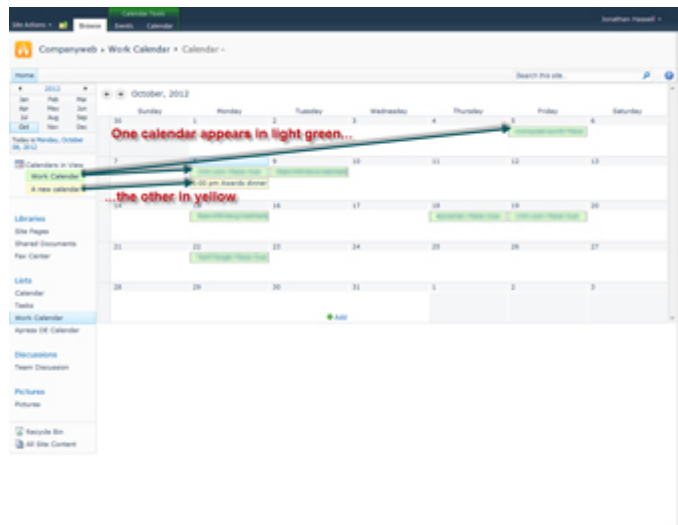
Figure 10 You select up to 10 calendars to roll up into one.