Collaborating with SharePoint 2010

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agenda

- Introduction
- SharePoint Shared Service
- Tier 1 Examples
- Tier 2 Discussion
- Support for Service
- Question & Answer
questions for you

• How do you currently share information in your department?
• How do you collaborate within your department? Outside your department?
• Are there business processes in your department that could be streamlined to increase efficiency and production?
“The typical information worker now spends up to one-quarter of his or her day searching for the right information to complete a given task” (NetworkWorld.com)
“The average office worker spends 28 hours a week – or nearly 1500 hours a year – writing emails, searching for information and attempting to “collaborate” internally”
(The Sydney Morning Herald online)
what is SharePoint?

• SharePoint IS
  – A collaborative tool
    • Easy or Complex as Needed
  – Helps groups of people share information & work together
    • Coordinate projects, calendars & schedules
    • Discuss ideas & review docs
    • Share information inside/outside departments
shared service definition

- Shared service across Urbana, Chicago, Springfield & UA
- Shared support model
- Community of expertise
Goals

1. Improve collaboration between campuses.
2. Create better efficiencies for business processes.
3. Get more and save money.
who is using it?

- 40 Site Collections migrated to SP2010 on November 5, 2012
- 76 Current Site Collections (Production)
- Almost 700 GB of data
service specifications

• Scalable
• Multi-tiered environment
• Governance
  – Appropriate Use
  – Access & Security
  – Service Availability
  – Backups & Retention
  – Feature Availability
TIER 2

- Business Connectivity Services
- InfoPath® Form Services
- Access Services
- External Lists
- Workflow
- SharePoint Designer
- Visual Studio
- API Enhancements
- REST/ATOM/RSS/AJAX/Silverlight

TIER 1

- Ribbon UI
- SharePoint Workspace
- SharePoint Mobile
- Office Client and Office Web App Integration
- Standards Support

- Tagging, Tag Cloud, Ratings
- Social Bookmarking
- Blogs and Wikis
- My Sites
- Activity Feeds
- Profiles and Expertise
- Org Browser

- PerformancePoint™ Services
- Microsoft Excel® Services
- Chart Web Part
- Microsoft Visio® Services
- Web Analytics
- Microsoft SQL Server® Integration
- PowerPivot

- Enterprise Content Types
- Metadata and Navigation
- Document Sets
- Multi-stage Disposition
- Audio and Video Content Types
- Remote Blob Storage
- List Enhancements

- Social Relevance
- Phonetic Search
- Navigation
- FAST Integration
- Enhanced Pipeline

TIER 3

- Faster Content Processing
- PerformancePoint™ Services
- Microsoft Excel® Services
- Chart Web Part
- Microsoft Visio® Services
- Web Analytics
- Microsoft SQL Server® Integration
- PowerPivot

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- Phonetic Search
- Navigation
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Tier 1

- Tier One
  - Designed to service general SharePoint needs
  - Services
    1. Collaboration
    2. Office Web Apps
    3. Shared URL
    4. Search
    5. Managed Meta Data Service
    6. Out-of-Box Workflows
    7. Reporting
  - Integrates with SiteMinder (IAM Solution)
  - Timeline
    - First Phase of the Project
  - Free
1. collaboration

- Document management
  - New in 2010: Co-authoring documents and spreadsheets

Libraries

Lists

- Discussion boards, blogs, calendars, wikis...more
Saving & Uploading Documents

• Possible Structures
  • Put files in separate document libraries
    - Separate permissions
  OR
  • Create new folder
    - Separate permissions

• Upload individual files OR
  • Upload multiple documents at a time
    - Use Explorer View
Sensitive & Privileged Documents

- Follow University policies and procedures
- No anonymous users
- Ensure permissions are set correctly
2. **metadata**

- “Data about data”
- Increases usability
- Helps find content in files
  - Users are quickly able to filter lists or libraries
My Top 7 Document Management Tips

1. Use full names in your document name and the date format YYYY-MM-DD for perfect ordering.
2. Standardise your naming conventions – don’t have 3 things that mean the same thing.
3. If you insist on using subfolders, never number them, and never go more than one level deep. You create a system only you can understand.
4. Make your metadata re-usable where possible, (Site Columns, lookups, Content Types, Managed Metadata).
5. ALWAYS put in a strong description when creating libraries and lists so your site remains user friendly.
6. Use versioning on important, dynamic documents.
7. Don’t manage by exception, manage by the rule. Go up a level if it gets to crowded; ie: technical spec, functional spec, test spec ... just make the tag Spec instead.

Information obtained from http://veroniquepalmer.com/2011/06/14/what-is-metadata-and-why-must-i-use-it/
3. web apps

- Enables users to
  - View
  - Share
  - Work on documents without having client installed
4. shared URL

- intranet.uillinois.edu/
  - Departments
  - Sites
  - Projects
    - [name]
5. search

- Basic Search

- Search Center (Advanced)

https://intranet.uillinois.edu/search/Pages/default.aspx
-Site Level OR All Sites OR People

Helpful Search Tips: http://www.endusersharepoint.com/EUSP2010/2010/07/05/my-favorite-sharepoint-2010-search-features-include
6. out-of-the-box workflows

- Manage and track tasks within a process
- Provide a record of the process
- Non-technical users
- InfoPath forms are easily published
- No compiled coding
- Stored in database
Site Collection Administrators will have access
- Administration tool
  - Manage permissions/users
  - Run reports on frequently used web parts
  - Create dashboards
  - Move content/cleaning up lists
  - Free training available
OR
- Use SharePoint built-in reporting
examples

Advance Illinois (AI)
End Point Management with SCCM
Speech & Hearing Science Department
CITES
custom look

Greetings Earthlings!

We are trying to understand your species by studying your social unit called the Foundation Relations Advisory Committee. No invasive procedures will be used during the course of our research. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look. We will be monitoring the patterns of your behavior silently in the background. Thank you.

For more information, contact Susan Restad at restad@uif.uillinois.edu
## SCCM: client push status

<table>
<thead>
<tr>
<th>Request Date</th>
<th>Resource Name</th>
<th>Latest Attempt (UTC)</th>
<th>Last Error</th>
<th>Number of Retries</th>
<th>Push Site</th>
<th>Status</th>
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<tbody>
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<td>2/27/2013 9:51 AM</td>
<td>AA-AEWINTER</td>
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<td>5</td>
<td>CM1</td>
<td>Retry</td>
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<td>2/27/2013 3:53 PM</td>
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<td>Retry</td>
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<td>25</td>
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<td>3</td>
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<td>AACC-CKP8961</td>
<td>2/13/2013 5:54 PM</td>
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<td>AACC-HG17LM1</td>
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### SCCM: apps status

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<th>App Name</th>
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<th>Active</th>
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<th>Notes</th>
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<td>Reader 11.0.0.379</td>
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<td>No</td>
<td>Yes</td>
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<td>Active</td>
<td>Yes</td>
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<td>Yes</td>
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<td>Shockwave Player 11.6.8.628</td>
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<tr>
<td>UIUC Beckman Acrobat Pro XI</td>
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<tr>
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<td>No</td>
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<td>(Need K2 and C++ for x64 machines) Disabled product updates,</td>
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<td>Disabled registration, Disabled all adobe online services based</td>
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<td>workflows and entry points, Remove all previous versions of</td>
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<td>Acrobat, Install silently and suppress reboot, Removed Desktop</td>
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<td>shortcuts, Disabled Viewing of BDI with Ads for Adobe PDF.</td>
</tr>
<tr>
<td>UIUC-DRS K2 Client</td>
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<td></td>
<td></td>
<td>Sharing Requested</td>
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<tr>
<td>UIUC-DRS K2 Client</td>
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<td>No</td>
<td></td>
<td></td>
<td>Sharing Requested</td>
</tr>
<tr>
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<td>Active</td>
<td>Yes</td>
<td>No</td>
<td></td>
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<td>Suppressed EULA</td>
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<td>Made Reader the default PDF Removed all version of Reader</td>
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<td>Enabled Optimization</td>
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<td>Enabled Caching of installer Enabled Silent Install</td>
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<td></td>
<td>Suppressed reboot</td>
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<td>Removed Desktop Shortcut</td>
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<td>Protected View On for All files Disabled product updates</td>
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<td></td>
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<td></td>
<td>Disabled Purchase Adobe Acrobat Disabled Digital Editions</td>
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<td></td>
<td></td>
<td></td>
<td>Disabled Product Improvement Program</td>
</tr>
</tbody>
</table>
SCCM: discussion board

For more information, contact Lynn Min at lynnmin@illinois.edu
Welcome to internal website for the Voice Research Lab, Dr. Aaron M. Johnson, PI.

This site is the location for all lab-related documents, announcements, workflows, calendars, etc. If you are new to the lab, see the Training page.

Use the "Quick Launch" links on the left to access the different resources on the site.

Image of 3 neuromuscular junctions from a rat thyroarytenoid muscle.

Blue = peripheral axon
Green = Myelinating and terminal Schwann cells
Yellow = synaptotagmin on the membrane of the nerve terminal

https://intranet.uiuc.edu/sites/voicelab/SitePages/Home.aspx
Speech & Hearing Science: projects
Speech & Hearing Science: blog lab notebook

For more information, contact Aaron Johnson at amj3@illinois.edu
CITES: project mgmt level
CITES: project level

For more information, contact Troy Gagne at tgagne@illinois.edu
SharePoint Shared Service

TIER 2
• Tier Two
  – Designed for Data Source Integration & Business Intelligence Needs
  – Services:
    • Tier One plus SharePoint Designer
    • Business Connectivity Services, Performance Point
    • Excel Services, Customized Workflows
    • Application Lifecycle Management
  – Cost Determined Based on Needs
customized workflows

• Allows for the extra step to make the end users’ interface seamless
• Most/all of this has to be done through the SharePoint Designer or Visio
• Depending on technical skill either a GUI or a development platform like visual studio can be used
• Most commonly these customized workflows are slight modifications of the already existing workflows
customizing a workflow from Designer

• There are three different kinds of workflows:
  – List workflow
  – Re-useable workflow
  – Site Workflow
built around the business process

- The first step with any workflow is to plan out what the key automations that are required
  - Often this is the reason people build their workflows in Visio
- Workflows can be exported from Visio into SharePoint Designer
about the demo

• In order to demonstrate the power of SharePoint, let's walk through a quick mock up of a workflow

• This demo will demonstrate three different components:
  – Info path forms
  – Custom workflow
  – Connection to external sources
what we want the workflow to do

- We want to make a custom form that creates a new list item
- We then want the workflow to be auto initiated upon the creation of a new item
- The workflow will:
  - Log the start of the workflow
  - Ask the manger of the creator if they are allowed to start this workflow
  - Wait for approval and then check with an external source to make sure they are on the approved list
  - Then take the information in the form and add it to a document library and check it out so it no longer can be modified
behind the scenes magic

• In order to speed up the presentation I have created the InfoPath form before hand
• It only has 4 fields:
  – Your Name (auto filled for you) – Pulling from a rest service and using the form load even in InfoPath designer
  – Did you enjoy the presentation (set this part as the default)
  – What was your favorite part (dropdown list)
  – What more you would like to see (preset to more awesome demos)
<table>
<thead>
<tr>
<th>Name:</th>
<th>![Input Field]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did you enjoyed the ITPF Presentation</td>
<td>true</td>
</tr>
<tr>
<td>What part was most interesting to you?</td>
<td>Tier II</td>
</tr>
<tr>
<td>What would you like to see more of?</td>
<td>![Input Field]</td>
</tr>
</tbody>
</table>

InfoPath form
demo
the possibilities are endless

- 75-80% of all customizations will not require any programming language
- The remaining 20-25% will make the user experience very "un-SharePoint" or allow for completely seamless access to all of your data sources in one list library
- There are resources out there that can cut down on the ‘leg work’ for internal developers
support for service

• Enterprise-wide
  – https://web.uillinios.edu/sharepoint

• Chicago
  – ACCC support coming soon!
  – https://accc.uic.edu/service/sharepoint
For more information on the SharePoint Shared Service and to download this presentation:

http://web.uillinois.edu/sharepoint