Microsoft

plain & simple

Microsoft® SharePoint® 2010

Your easy, colorful, SEE-HOW guide to SharePoint!

Johnathan Lightfoot and Chris Beckett

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This book is dedicated to my daughter, Giavrielle Sarahannah Lightfoot.
Do know that this book and all that I do, I do for you.

—Johnathan Lightfoot

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Acknowledgments

First and foremost I want to thank God for the blessings that have been given to me and my family.

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Thank you to the U.S. Navy for taking a young man over 20 years ago and showing me that anything is possible as long as one is willing to work hard and adhere to the core values of honor, courage, and commitment. Go Navy, Beat Army! Also, thank you to all of my past colleagues and business users at Electronic Data Systems, Norwegian Cruise Line, and Hawaiian Telcom—each of you in your own special way helped me to become the person that I am today.

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—Johnathan Lightfoot

9 Organizing People and Work

In this section:

- Creating a Project Schedule with the Project Tasks List
- Scheduling Events with the Calendar List
- Using the Issues List
- Enhancing Communication with the Discussion List
- Synchronizing Project Tasks with Microsoft Project

Microsoft SharePoint 2010 provides a number of list templates that can help you track and manage people and work. A contacts list can help you track contact information for customers or partners. An issues list can help in tracking project risks, support incidents, or change requests for a product or service.

Many of these lists include special features specific to the type of list. A project tasks list can track dependencies between tasks and includes a Gantt view of task schedules. An events list includes a calendar view that can be used to track single or recurring meetings and can even provision a Meeting Workspace automatically.

SharePoint 2010 also has the capability to synchronize project tasks between a plan in Microsoft Project and a project tasks list, making it easier for project managers to get a bird's eye view of an entire project, while team members can focus on just the tasks assigned to them.

In this section we show you how to create and configure SharePoint lists that you can use for tracking people and work. To create lists in SharePoint you need elevated permissions on a site. For the tasks in this section, we assume that you have created or have access to a SharePoint site with the appropriate permissions to create and manage lists. For information about creating sites, see "Creating a SharePoint Site Based on a Template" on page 15.

Creating a Project Schedule with the Project Tasks List

Two core responsibilities of any project manager are to manage a project schedule and coordinate and track tasks across a project team. One of the most popular and universal approaches to handling this work is to use a Gantt chart, which combines a list of tasks with a calendar view.

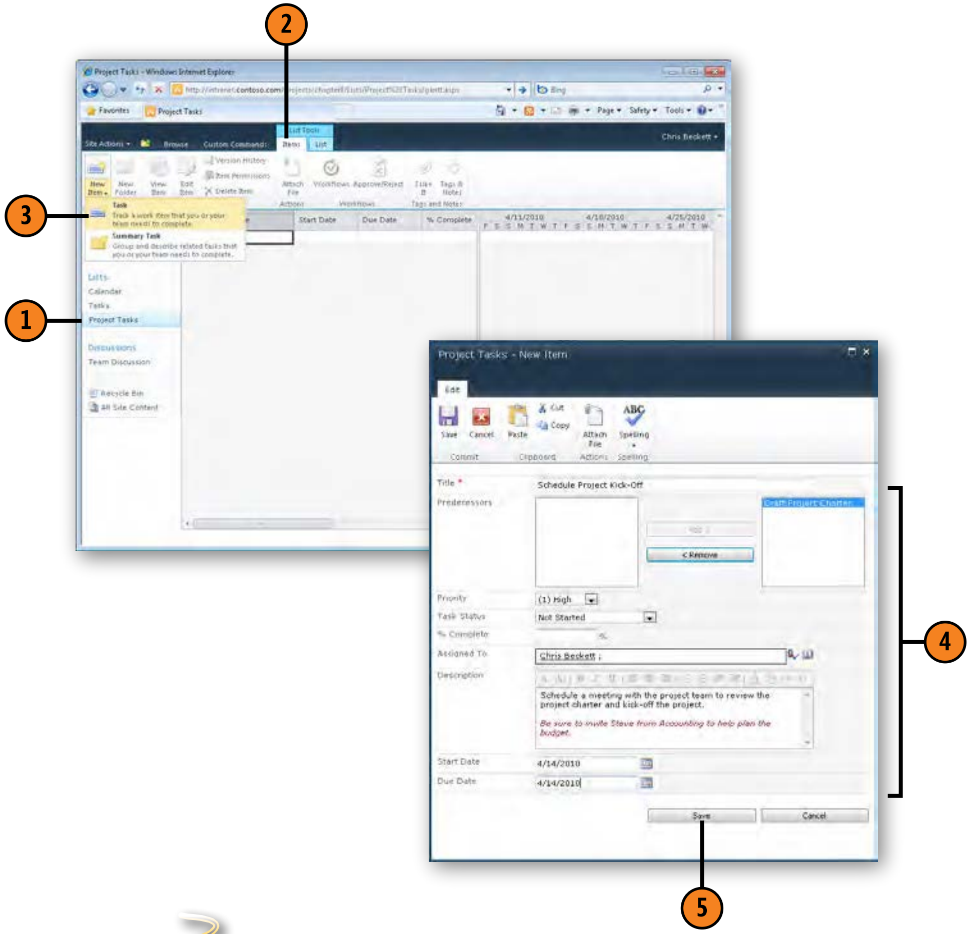
SharePoint 2010 provides a special type of list called Project Tasks that combines the capabilities of a standard task list with a Gantt chart that displays task start and end dates and shows task progress based on the percentage-complete value of the task.

Create a Project Task List

1. Click More Options on the Site Actions menu.
2. In the Create dialog box, do either of the following:
   - Click List and/or Tracking in the Filter By list.
   - Type **Project Tasks** in the search box, and click the search icon.
3. Click Project Tasks.
4. Type a name for your list.
5. Click Create.

Add a Project Task

1. Browse to the Project Tasks list. (See “Create a Project Task List” on page 128.)
2. Click the Items tab under List Tools on the ribbon.
3. Choose Task from the New Item menu.
4. Enter task information.
5. Click Save.



Tip

If a task does not appear in the Gantt chart area of the Project Tasks view, the task start date and end dates have not yet been scheduled. For a task to appear on the Gantt chart, it must have an assigned date range.

Tip

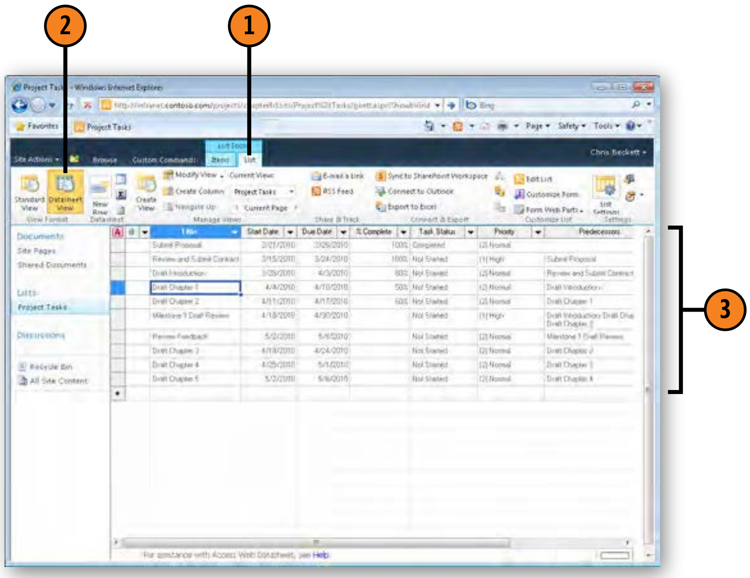
Predecessor tasks tie the completion of one task to the completion of a previous task. The Gantt chart displays lines with terminating arrows to show dependencies between tasks.

Try This!

A Summary Task allows you to group and manage related tasks in a folder. Try creating a Summary Task from the New Item menu, opening the Summary Task folder, and then adding tasks to the summary task.

Update Multiple Tasks with the Datasheet

1. Click the List tab under List Tools on the ribbon.
2. Click Datasheet View.
3. Click a cell to edit the value. Repeat this step to change the values of additional cells. Changes are saved automatically when you finish editing a cell.



Tip

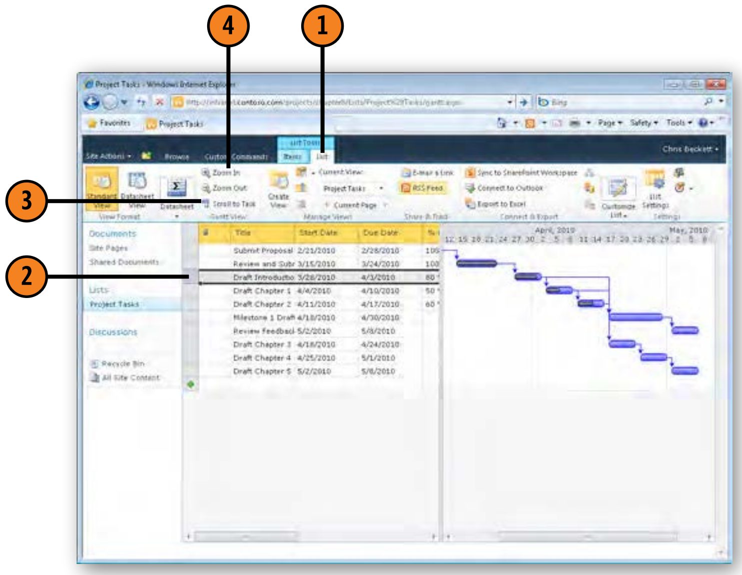
The Standard view for a project tasks list splits the content display area between a datasheet and a Gantt chart, which are separated by a slider. Using the Datasheet view allows you to hide the Gantt chart to provide more room for editing task items.

Tip

The Datasheet view includes a progress bar in the lower-right corner that shows activity when the datasheet is saving information to the server. On slower network connections you might receive a warning when you leave the Datasheet view if changes are still being saved.

Zoom the Gantt View

1. Click the List tab under List Tools on the ribbon.
2. Select a task row by clicking the row header column.
3. Click Scroll To Task.
4. Select either of the following to adjust the Gantt chart's scale:
   - Zoom In to show a smaller time increment on the scale
   - Zoom Out to show a larger time increment on the scale



Tip

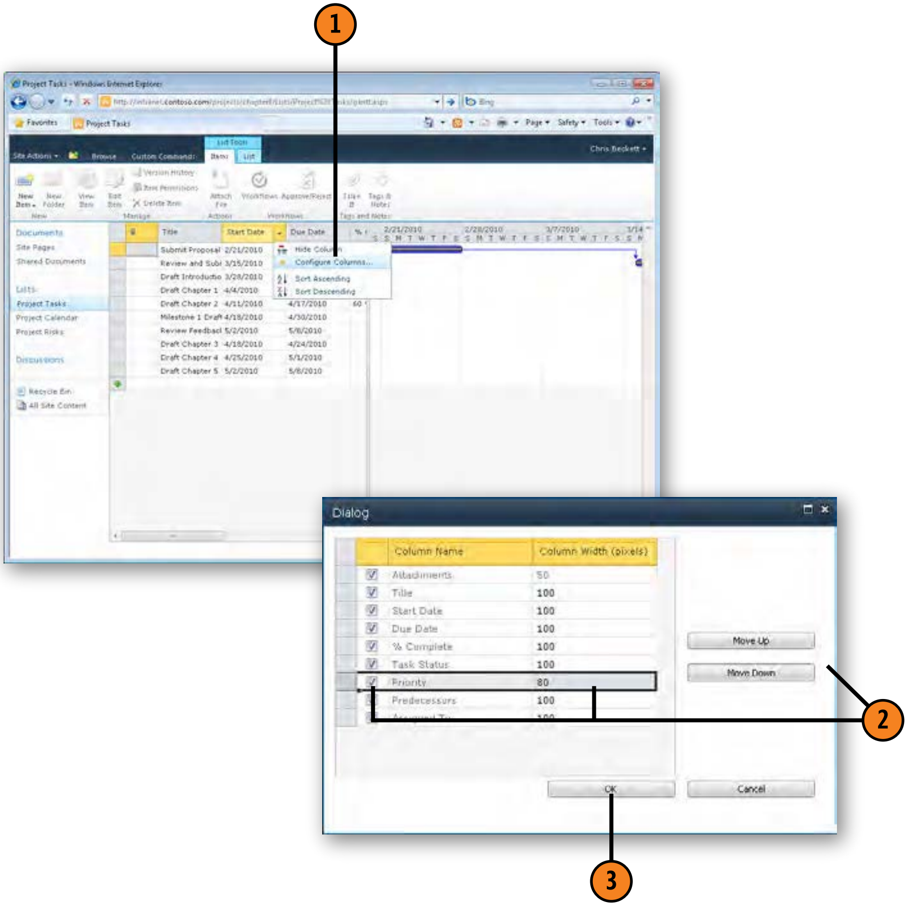
The Scroll To Task command brings a selected task into the Gantt chart view area.

Try This!

Drag the slider to the left or right to increase or decrease the display area of the Gantt chart.

Configure Task Columns

1. Choose Configure Columns from any column menu
2. In the Configure Columns dialog box, you can perform any of the following steps:
   - Hide or display a column by selecting or clearing the check box next to the column name.
   - Move a column up or down in the display order by selecting the column and clicking Move Up or Move Down.
   - Change the display width of a column by updating the column width value
3. Click OK to save and apply your changes.



Scheduling Events with the Calendar List

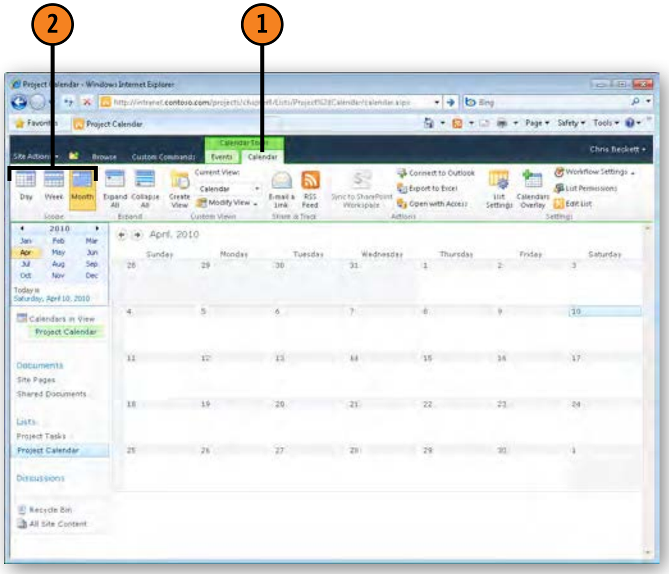
A SharePoint 2010 calendar list provides a convenient way for everyone on a project team to keep track of important milestones, project meetings, and other events. A calendar list provides daily, weekly, and monthly views and provides many features similar to the calendar in Microsoft Outlook. Calendar lists can even be connected to Outlook and viewed side by side or overlaid with other calendars.

Create a Calendar List

1. Click More Options on the Site Actions menu.
2. In the Create dialog box, do either of the following:
   - Click List and/or Tracking in the Filter By list.
   - Type **Calendar** in the search box, and click the search icon
3. Click Calendar.
4. Type a name for your list.
5. Click Create.

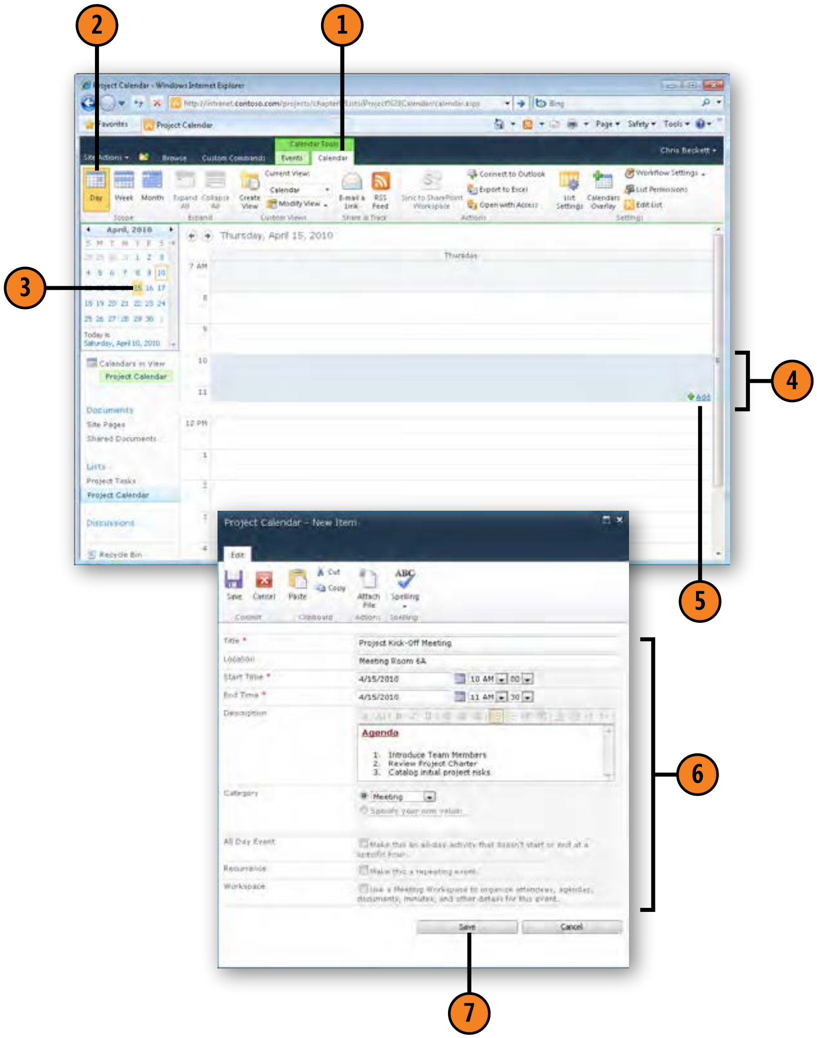
Switch Calendar Views

1. Click the Calendar tab under Calendar Tools on the ribbon.
2. In the Scope group, do any of the following to change the scope of the calendar view:
   - Click Day to see events for a single day.
   - Click Week to see events for an entire week.
   - Click Month to see events for a calendar month.



Schedule a Meeting

1. Click the Calendar tab under Calendar Tools on the ribbon.
2. Click Day.
3. Select the date of the meeting from the mini-calendar.
4. On the Day view, drag from the start time to the end time to set the duration of the meeting.
5. Click Add.
6. Enter your meeting details.
7. Click Save to add the meeting to the calendar.



Tip

The Description field supports rich-text formatting. You can use the formatting toolbar to format titles and create bulleted and numbered lists.

Try This!

You can also schedule recurring meetings. Try creating a status meeting that recurs every week for five weeks by selecting Make This A Repeating Event when you create a calendar item.

Using the Issues List

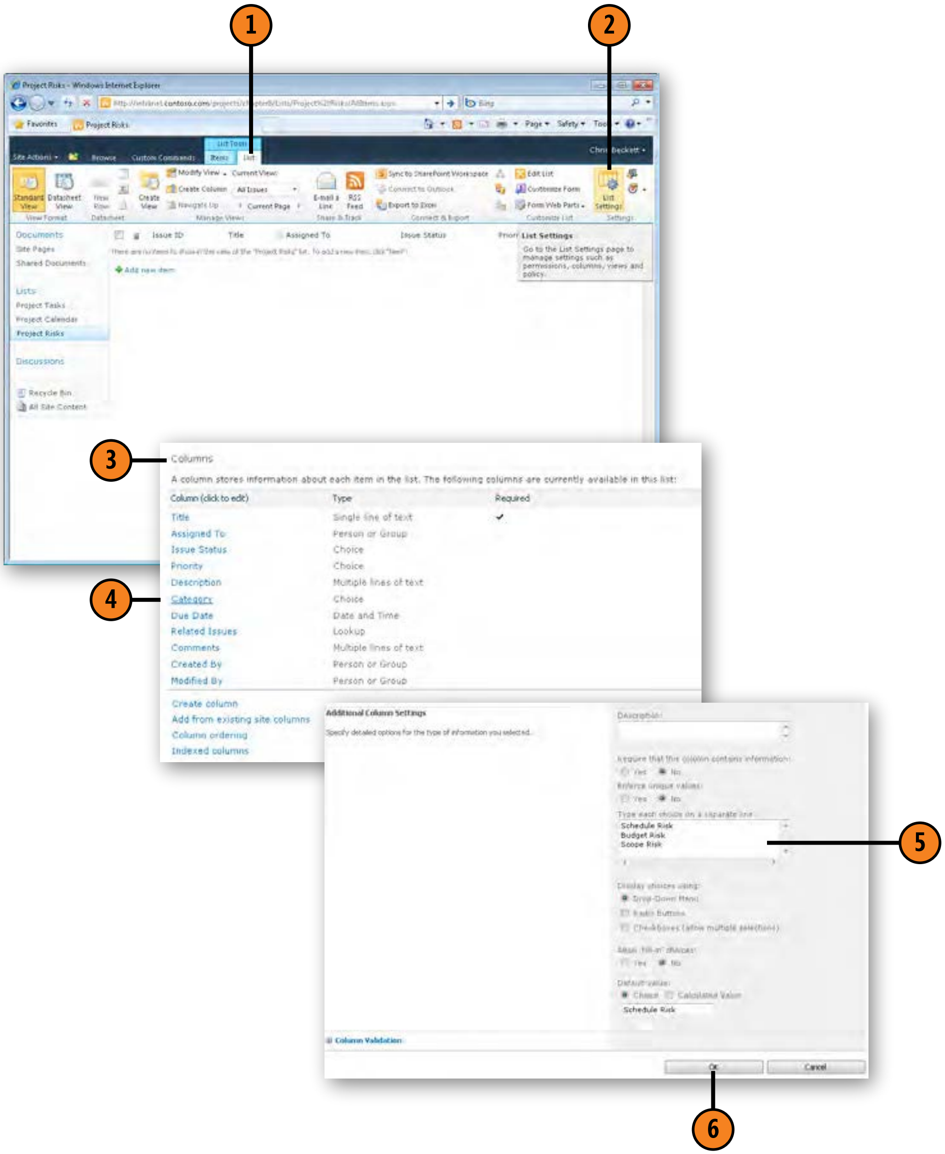
An issues list is a great tool that can be used for tracking many types of issues, including software defects, customer support calls, and project risks. Issue lists also let you track related issues and can be used to track activity through an append-only comments field.

Create an Issues List

1. Click More Options on the Site Actions menu.
2. In the Create dialog box, do either of the following:
   - Click List and/or Tracking in the Filter By list.
   - Type **Issue Tracking** in the search box, and click the search icon
3. Click Issue Tracking.
4. Type a name for your list.
5. Click Create.

Configure Issue Categories

1. Click the List tab under List Tools on the ribbon.
2. Click List Settings.
3. Scroll down the List Settings page to locate the Columns section.
4. Click the Category column to display column settings.
5. Update the choice list to include the categories you want to track.
6. Click OK to save your updated categories.



Tip

When you edit the category choices, the first item in the list becomes the default value for the column. Update this value if it is not the appropriate default.

Try This!

Any choice for a column in a list can be customized by using the procedure described in this task. Try repeating the steps in this task to also customize the choices for the Issue Status and Priority columns.

Enhancing Communication with the Discussion List

A discussion list provides the ability to track an initial request or comment, as well as all the replies to that post. This type of tracking is referred to as a *threaded conversation* or a *discussion*.

You can use multiple discussion lists to support the features of a typical forum, or you can customize a discussion list with a category column to track all discussions related to a specific topic.

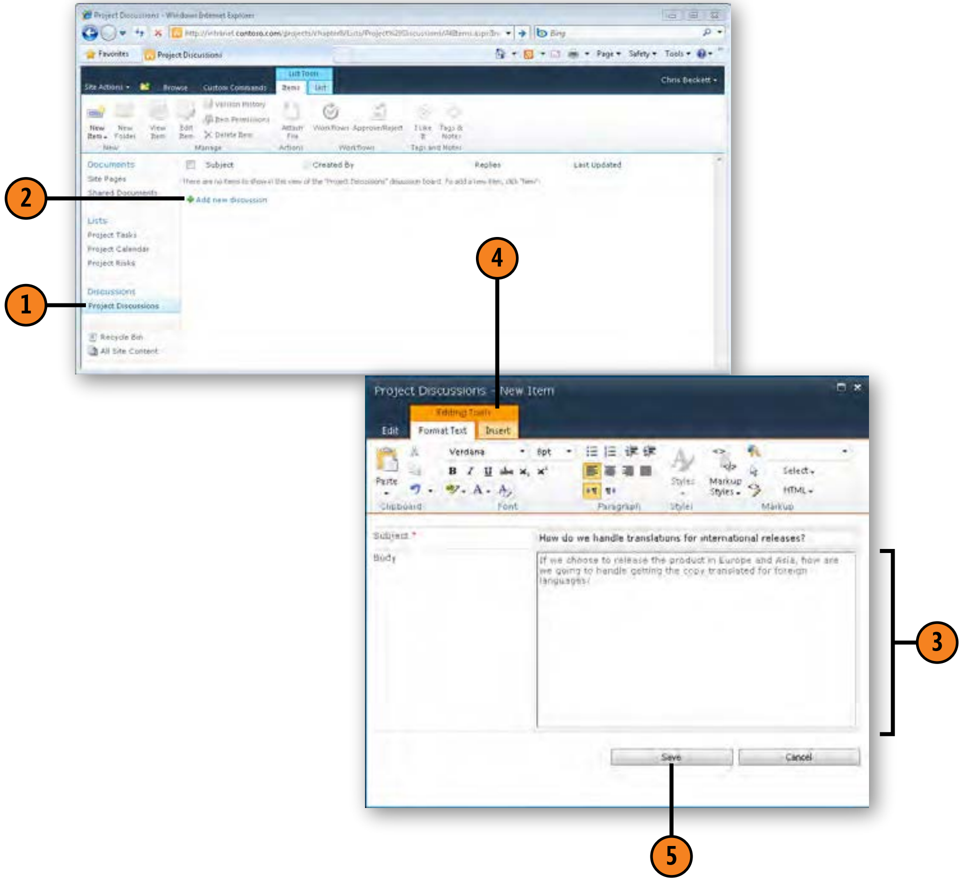
Discussion lists can also be connected to Outlook and used to archive e-mail. The contents of e-mail messages are converted to posts, and messages that share the same subject line are automatically added as replies to the original post.

Create a Discussion List

1. Click More Options on the Site Actions menu.
2. In the Create dialog box, do either of the following:
   - Click List and/or Collaboration in the Filter By list.
   - Type **Discussion Board** in the search box, and click the search icon.
3. Click Discussion Board.
4. Type a name for your list.
5. Click Create.

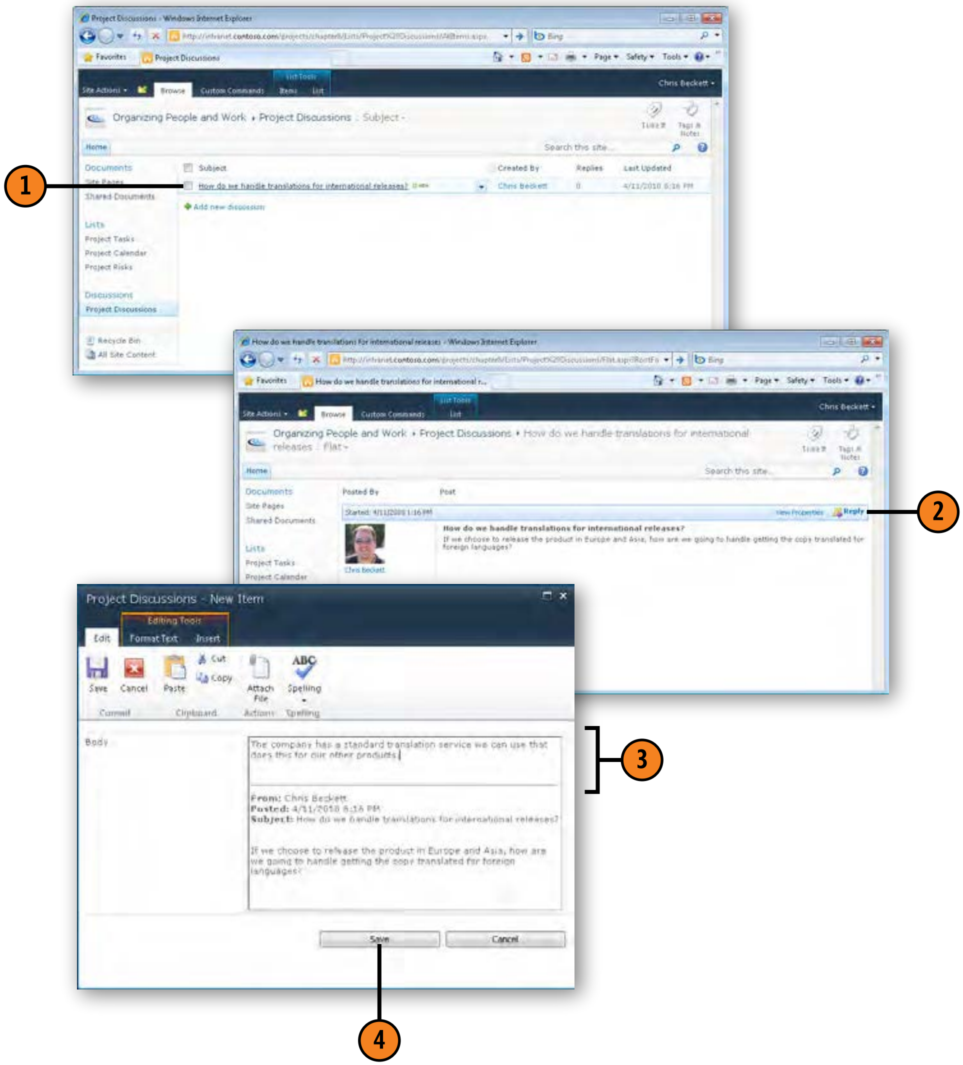
Start a Discussion Thread

1. Select your discussion list in the Quick Launch bar.
2. Click Add New Discussion.
3. Type a title and a body for the discussion item.
4. Use the Editing Tools tab to apply styles or insert objects into the body of your post.
5. Click Save.



Reply to a Discussion Thread

1. Click the Subject link.
2. Click Reply.
3. Add your comments to the body of the item.
4. Click Save.



Synchronizing Project Tasks with Microsoft Project

Microsoft Project is a popular project management application that is part of the extended Microsoft Office family. It provides project managers advanced capabilities for managing and reporting on project schedules, resources, and budgets.

A common challenge of using Microsoft Project is keeping a project plan up to date with the task progress being accomplished across the team.

SharePoint 2010 and Microsoft Project 2010 now provide an integration feature that allows project schedules created in Project to be synchronized with SharePoint project tasks lists. Synchronization is two-way, allowing task progress to be updated in SharePoint and read back to the master Microsoft Project file.

The columns that are synchronized can be customized, allowing only some or all of the project task fields to be included.

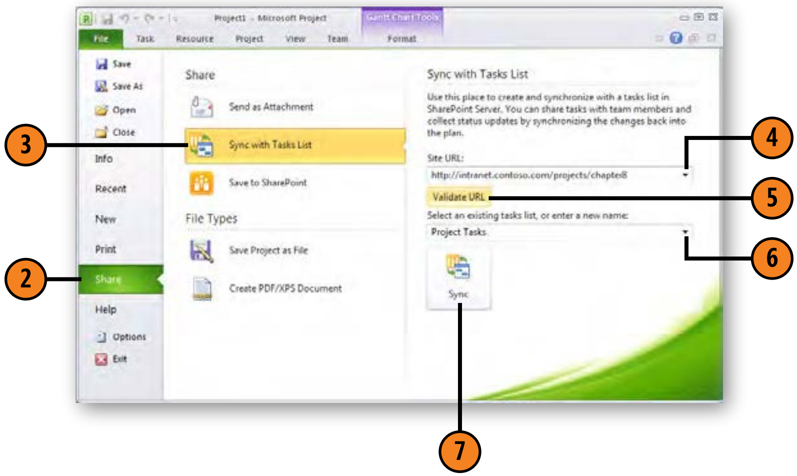
There are a number of limitations concerning the integration to be aware of:

- Tasks in Microsoft Project must be manually scheduled. Auto-scheduled tasks are not supported, and tasks are flagged for manual scheduling whenever a synchronization is performed.
- Tasks in Microsoft Project that contain subtasks are represented as folders in SharePoint 2010 and are referred to as *summary task items*. Summary task items do not automatically roll up progress indicators of tasks contained within them. Summary task progress fields are updated whenever the project tasks list is synchronized with Microsoft Project.

To perform the following tasks, you must have Microsoft Project 2010 installed on your computer.

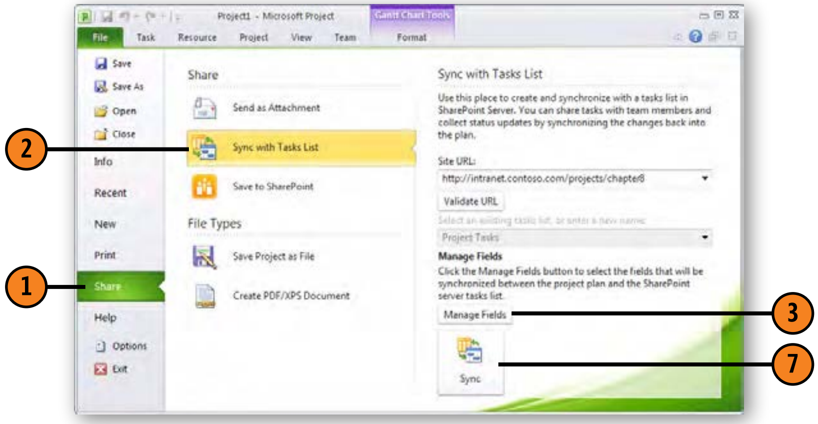
Sync with a Tasks List

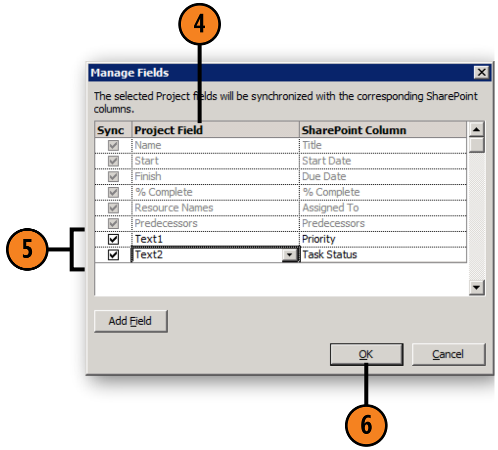
1. Run Microsoft Project 2010.
2. Select Share from the File menu.
3. Click Sync With Tasks List.
4. Enter the URL to the site hosting your project tasks list.
5. Select Validate URL.
6. Select the Project Tasks list to synchronize this project plan with.
7. Click Sync.



Manage Synchronization Fields

1. Select Share from the File menu.
2. Click Sync With Tasks List.
3. Click Manage Fields.
4. Click the Project Field column for any optional synchronization field. Fields that are disabled are required fields and cannot be managed.
5. Select a Project Field to synchronize with. Microsoft Project by default includes a number of Text fields (numbered Text1 through Text30) that can be used to map to columns in the project tasks list.
6. Click OK.
7. Click Sync to refresh the Microsoft Project columns in SharePoint.





Caution

The Save To SharePoint command requires Microsoft Project Server 2010, which is built on SharePoint 2010.

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About the Authors

Johnathan Lightfoot is the President/CEO of TechForce, Inc., a Microsoft partner company, and has been involved with IT for over 20 years. He has worked in various roles, including Help Desk, Level II and III Desktop Support, and Windows and AS-400 Server Administration and Development. Companies he is fortunate to have worked for in the past include Electronic Data Systems, Hawaiian Telcom, and Norwegian Cruise Line (yes, he actually worked on the ships). However, the best experiences he has had were during his nine years serving in the United States Navy.

Johnathan is a Microsoft Certified Trainer (MCT) who specializes in SharePoint 2010, MOSS 2007, WSS 3.0, and Office 2007 and 2010 technologies, along with providing soft skills training for organizations. Due to his background, he is often called upon by federal and state agencies during the rollout phase of SharePoint deployments to provide training (beginner, intermediate, and advanced) and to assist end users, power users, and site administrators with user acceptance, as well as to serve as the translator between end users and IT departments. He is certified as an MCT, MCDST, MCAS 2007, and MCPS (Microsoft Online Services).

Johnathan is from Miami, Florida, originally, but grew up in Mesquite, Texas; he has lived and worked literally around the world. He currently lives in Columbia, Maryland, with his super-terrific wife, Genevievette, and daughter, Giavrielle.

Chris Beckett is a Microsoft Certified SharePoint Master, with 20 years of business solutions expertise; six years of dedicated SharePoint solutions consulting experience; thousands of hours of knowledge acquisition, training, and professional development; and a deep expertise with SharePoint technologies. He is an active SharePoint community participant and writes a SharePoint-focused blog. He is also a frequent speaker at user group and industry events.