

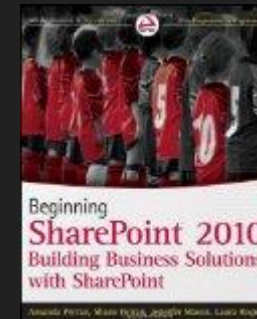
10 No Code Tricks for Making Awesome SharePoint Solutions

Jennifer Mason , Rackspace Hosting

About me...



@jennifermason



What is Adoption?



What's in it for me?

Users want solutions that help them work better. Tell them a story with your data that draws them in.

All About the User!

What would your users say about the solutions within your environment?



“I can find everything I need, without having to dig in multiple places”

“It is easy to find all the content I need to complete my day to day tasks”

“It is easy for me to tell when new content has been added to the site”



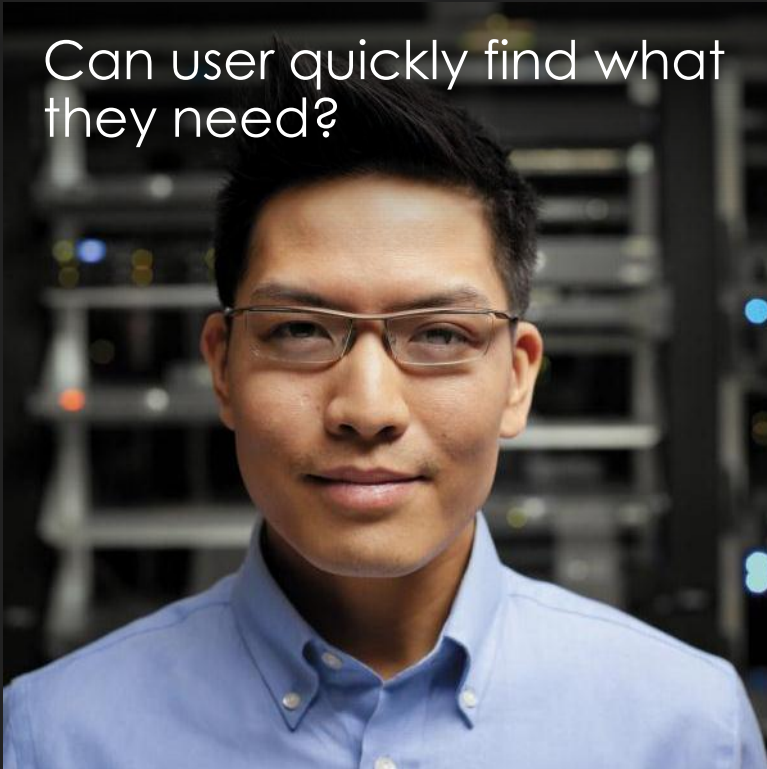
The technology is only one small part of the equation. If you don't understand your users, you can't build adoptive solutions.

Tip #1 - Plan, Plan & Plan More!

- A good SharePoint solutions comes from understanding who your users are and what they need to do.
- Start with the business and worry about the tech last!
- Develop a Process for Building Solutions

Navigation Tips & Tricks

Can user quickly find what they need?

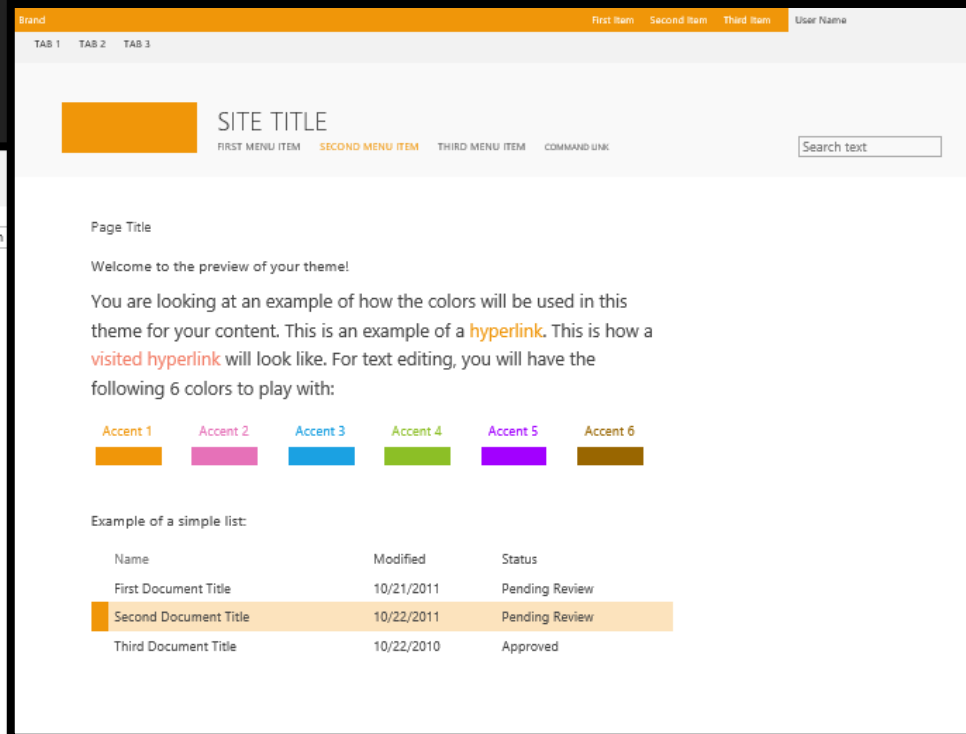
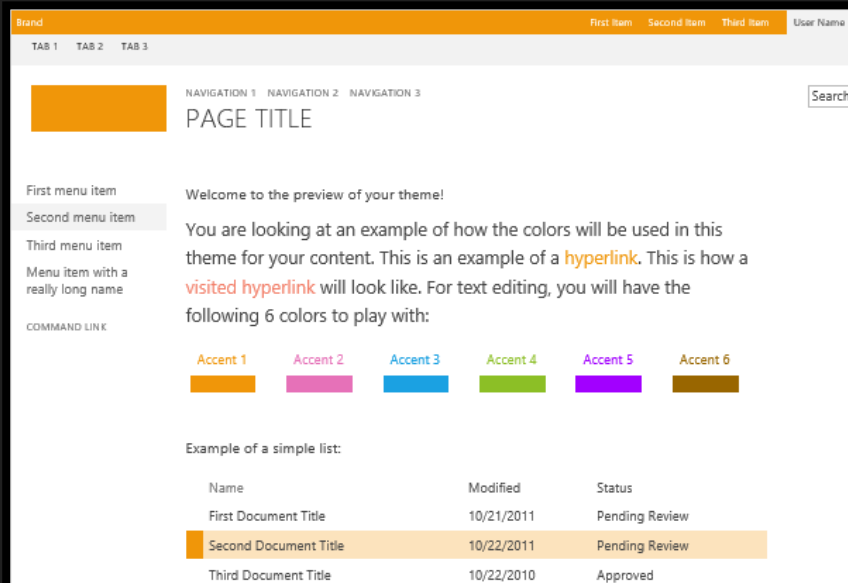


- Seattle & Oslo Styles
- Promoted Links List

How quickly can users find data when they need it when they have no idea where to start?



Tip #2- Seattle vs Oslo



Start over

Drop an image here

CHANGE REMOVE

Colors



Site layout

Seattle

Fonts

Segoe UI Light
Segoe UI

Tip #3- Promoted Links

Home

Each of the links below opens a sample dashboard page. The dashboards are created using only OOTB tools available in the browser, SPD, Excel, InfoPath or Visio.



A Personal Experience

Audience Targeting

Filtered Views

Well Defined Pages



Tip #4- Audience Targeting

The screenshot shows an Office 365 site interface. At the top, there's an orange navigation bar with 'Office 365' on the left and links to 'Outlook', 'Calendar', 'People', 'Yammer', 'OneDrive', 'Sites', 'Admin', and a user profile 'Jennifer Ann'. Below this is a grey bar with 'BROWSE' and 'PAGE' tabs, and a search bar labeled 'Search this site'. The main content area has a title 'Simple Dashboards' with a folder icon. Below the title is a 'Home' section with a paragraph: 'Each of the links below opens a sample dashboard page. The dashboards are created using only OOTB tools available in the browser, SPD, Excel, InfoPath or Visio.' Underneath this paragraph are four icons: 'Task Dashboard' (a clipboard), 'Document Dashboard' (a folder), 'Project Dashboard' (a folder), and 'Visio Example' (a Visio logo). A red arrow points to a 'Reminder!' message below these icons. The message states: 'This is a reminder message that only shows up for people who are site owners. Please remember you are a site owner and are responsible for the content within.' On the right side of the page, there's a logo for 'Jennifer Ann Mason' with the tagline 'solutions for the business' and a Twitter handle '@jennifermason'.

Office 365

Outlook Calendar People Yammer OneDrive Sites ... Admin Jennifer Ann

BROWSE PAGE

SHARE FOLLOW EDIT

Simple Dashboards

Search this site

Home

Each of the links below opens a sample dashboard page. The dashboards are created using only OOTB tools available in the browser, SPD, Excel, InfoPath or Visio.

Task Dashboard Document Dashboard Project Dashboard Visio Example

Reminder!

This is a reminder message that only shows up for people who are site owners. Please remember you are a site owner and are responsible for the content within.

Jennifer Ann Mason
solutions for the business

@jennifermason

Tip #5- Filtered Views

○ [Me]

○ [Today]

Office 365 Outlook Calendar People Yammer OneDrive Sites ... Admin Jennifer Ann

BROWSE PAGE SHARE FOLLOW EDIT

My Active Tasks

✓	☑	Task Name	Due Date	Assigned To
	<input type="checkbox"/>	Task One	... January 20	Jennifer Ann
	<input type="checkbox"/>	Task Two	... January 25	Jennifer Ann
	<input type="checkbox"/>	Task Three	... January 23	Jennifer Ann
	<input type="checkbox"/>	Task Four	... 6 days ago	Jennifer Ann
	<input type="checkbox"/>	Task Eight	... April 23	Jennifer Ann
	<input type="checkbox"/>	Task Nine	... 6 days ago	Jennifer Ann

Tasks Grouped by Phase

✓	☑	Task Name	Start Date	Due Date	Assigned To	Project	Associated Project Phase
▸ Associated Project Phase : Phase 1: Requirements (2)							
▸ Associated Project Phase : Phase 2: Design (6)							
▸ Associated Project Phase : Phase 3: Development (2)							

Overdue Tasks

Edit	Task Name	Due Date	Assigned To	% Complete
	Task One	1/20/2014	Jennifer Ann	0 %
	Task Three	1/23/2014	Jennifer Ann	0 %
	Task Two	1/25/2014	Jennifer Ann	0 %
	Task Eight	4/23/2014	Jennifer Ann	0 %
	Task Four	4/24/2014	Jennifer Ann	0 %
	Task Nine	4/24/2014	Jennifer Ann	0 %
	Task Ten	4/26/2014		0 %
	Task Five	4/28/2014		0 %

Tasks Due this Week

✓	☑	Task Name	Due Date	Assigned To	% Complete
	<input type="checkbox"/>	Task Six	... Tomorrow		45 %

Tip #6- Use Pages & Connected Web Parts to build Dashboards

Office 365

OutlookCalendarPeopleYammerOneDriveSitesAdminJennifer Ann

SHAREFOLLOWSYNCEEDIT

Search this site

Project Dashboard

Select a Project

Select	Title
	Project Eight
	Project Five
	Project Four
	Project Nine
	Project One
	Project Seven
	Project Six
	Project Ten
	Project Three
	Project Two

Project Summary

Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem.

Project Manager:

Jennifer Ann
SharePoint Evangelist, Shar...

Project Documents

Name	Modified
SPTechCon_BuildingBusinessSolutions_Boston13 ...	January 21
SPTechCon_SimpleDashboards_Boston13 ...	January 21

Project Tasks

Task Name
Task One
Task Two
Task Three
Task Four
Task Five
Task Six
Task Seven
Task Eight
Task Nine
Task Ten

Office 365

OutlookCalendarPeopleYammerOneDriveSitesAdminJennifer Ann

SHAREFOLLOWSYNCEEDIT

Search this site

My Active Tasks

Task Name	Due Date	Assigned To
<input checked="" type="checkbox"/> Task One	January 20	Jennifer Ann
<input type="checkbox"/> Task Two	January 25	Jennifer Ann
<input type="checkbox"/> Task Three	January 23	Jennifer Ann
<input type="checkbox"/> Task Four	6 days ago	Jennifer Ann
<input type="checkbox"/> Task Eight	April 23	Jennifer Ann
<input type="checkbox"/> Task Nine	6 days ago	Jennifer Ann

Tasks Grouped by Phase

Associated Project Phase : Phase 1: Requirements (2)						
Associated Project Phase : Phase 2: Design (6)						
Associated Project Phase : Phase 3: Development (2)						

Overdue Tasks

Task Name	Due Date	Assigned To	% Complete
Task One	1/20/2014	Jennifer Ann	0 %
Task Three	1/23/2014	Jennifer Ann	0 %
Task Two	1/25/2014	Jennifer Ann	0 %
Task Eight	4/23/2014	Jennifer Ann	0 %
Task Four	4/24/2014	Jennifer Ann	0 %
Task Nine	4/24/2014	Jennifer Ann	0 %
Task Ten	4/26/2014	Jennifer Ann	0 %
Task Five	4/28/2014	Jennifer Ann	0 %

Tasks Due this Week

Task Name	Due Date	Assigned To	% Complete
Task Six	Tomorrow	Jennifer Ann	45 %

Social Interaction

Share

Follow

Rankings & Likes



Tip #7- Sharing Content

Share 'Simple Dashboards'

✕

🔒 Only shared with you

Invite people

Shared with

Enter names, email addresses, or 'Everyone'.

Include a personal message with this invitation (Optional).

HIDE OPTIONS

☒ Send an email invitation

Select a group or permission level

Demo Dashboard Members [Edit]

▼

Share

Cancel

Outlook Calendar People

Remove User Permissions

Check Permissions

Permission Levels

Access Request Settings

Site Collection Administrators

Modify

Check

Manage

Access Requests Settings

✕

Access Requests Settings

Choose who can request access or invite others to this site.

☒ Allow members to share the site and individual files and folders.

☒ Allow members to invite others to the site members group, Demo Dashboard Members. This setting must be enabled to let members share the site.

☒ Allow access requests

Send all requests for access to the following e-mail address:

someone@example.com

OK

Cancel

Tip #8- Follow Important Content

Office 365 Outlook Calendar People Yammer

BROWSE


Search everything

My Documents


Followed Documents

Shared with Me

Docs I'm following




IT_ToolSet_Boston13
<https://jennifer.sharepoint.com/sites/Team/Shar...>
Stop following




SPTechCon Schedule
<https://jennifer.sharepoint.com/sites/Team/Sha...>
Stop following


Suggested documents to follow




ExecutiveCommitteeMeeting
<https://.../Shared Documents/ExecutiveCommitteeMeeting.v...>
Follow




RequestApprovalProcess
<https://.../Shared Documents/RequestApprovalProcess.vdw>
Follow



The SharePoint 2013 Information Workers To...
https://.../Shared Documents/IT_ToolSet_Boston13.pptx
Follow



Using Out of the Box Web Parts
https://.../Simple Dashboards_SPSPRedmond.pptx
Follow



SPTechCon_SimpleDashboards_Boston13
https://.../SPTechCon_SimpleDashboards_Boston13.pdf
Follow

SHOW MORE

Admin Jennifer Ann

SHARE FOLLOW SYNC

Tip #9- Ratings & Likes

Settings ▸ Rating Settings

Rating settings

Specify whether or not items in this list can be rated.

When you enable ratings, two fields are added to the content types available for this list and a rating control is added to the default view of the list or library. You can choose either "Likes" or "Star Ratings" as the way content is rated.

Allow items in this list to be rated?

☒ Yes

☐ No

Which voting/rating experience you would like to enable for this list?

☒ Likes

☐ Star Ratings

Documents by Type

✓	📄	Name	Modified	Modified By	Rating (0-5)
---	---	------	----------	-------------	--------------

📄 Type : (9)

📄	A Traditional Cadence	...	January 21	Jennifer Ann	★★★★☆ 1
📄	Examples	...	January 21	Jennifer Ann	☆☆☆☆☆ 0

SharePoint Apps

Filter Apps by
Category

Apps vary in cost from
\$0 to \$x per User

Create your own apps
to deploy to your
internal store or the
Office Marketplace.

Marketing Team ▸ Add Apps ▸

USA \$ ▾ English (United States) ▾ ?

Find an app 🔍

SharePoint Store

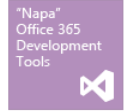



Price
All
Free

Categories
All
Communication
Content Management
Customer + Contact Management
Education
File Converters + Viewers
Financial Management
Human Resources + Recruiting
Public-facing Websites
IT/Admin

Featured Apps

Documents shared with me
Mavention Profile Completeness
Correspondence Tracker
TimeOFF Pro

Most Relevant Highest Rating Most Downloaded Lowest Price Name Newest

 "Napa" Office 365 Development Tools ★★★★★ Free	 Location Finder ★★★★★ Free	 OneBit Survey Master ★★★★★ Free	 Poll App ★★★★★ Free
--	---	--	--

Utilize Apps from
within the SharePoint
Store for common
tasks and scenarios.



Before you develop
anything from
scratch you need to
know first what is
already available in
the marketplace.

Tip #10- Use Apps to

Simple Dashboards ▸ Add Apps ▸











USA \$ ▾ English (United States) ▾ ?

SharePoint Store

Price: All, Free

Categories: All, Communication, Content Management, Customer + Contact Management, Education, File Converters + Viewers, Financial Management, Human Resources + Recruiting, Public-facing Websites, IT/Admin, Jobs, Lifestyle and Fun, Look & Feel, News + Weather, Printing + Faxing, Productivity

Most Relevant Highest Rating Most Downloaded Lowest Price Name Newest

 SP2 Corporate Jet Schedule ★★★★★ \$29.99	 SP2 Power Search ★★★★★ \$24.99	 SP2 Feedback ★★★★★ \$24.99	 SP2 Grid Search ★★★★★ \$299.99
 SP2 Acronyms ★★★★★ \$19.99	 SP2 Job Listings ★★★★★ \$9.99	 SP2 Site Owner Contact Form ★★★★★ \$29.99	 SP2 Company Dictionary ★★★★★ \$24.99
 SP2 Daily Menu ★★★★★ \$14.99	 CAML Query Tester by SP2 ★★★★★ Free		


Simple Dashboards ▸ Add Apps ▸

USA \$ ▾ English (United States) ▾ ?

SP2 Job Listings

from SP2

Developer SP2 Job Listings EDIT

 Developer

Home Documents Apps in Testing Samples Developer Center Recent SP2JobListings Site Contents

SP2 Current Job Listings
Check out the latest jobs available. Apply now!
SharePoint Architect ★
Headquarters
12/29/2012

SharePoint Consultant
Headquarters
12/29/2012

Petroleum Engineer
Field
12/29/2012

\$9.99
for just me ▾


BUY IT

TRY IT Free for 5 people for 15 days.

By acquiring this app you agree to its [permissions](#).

VERSION 1.0.0.1
RATING ★★★★★ (0)
RELEASE DATE January, 2013
CATEGORY Human Resources + Recruiting, Jobs
SUPPORT [App Website](#)

MORE ACTIONS ▾



[Details](#) [Reviews](#)

DESCRIPTION
Easily add job listings to your SharePoint portal.

Keep in Touch!

- Twitter: @jennifermason
- www.jenniferannmason.com
- Jennifer.Mason@Rackspace.com