

# Customizing the Social Aspects of SharePoint

Michael Doyle

# About Me

Michael Doyle

SharePoint Architect for Waggener Edstrom Worldwide

Email: [mdoyle@waggeneredstrom.com](mailto:mdoyle@waggeneredstrom.com) or [doyle@techelixir.com](mailto:doyle@techelixir.com)

Twitter: @SharePointNinja

Blog: [www.sharepointninja.com](http://www.sharepointninja.com)

Or [aiimcommunities.org/sharepoint](http://aiimcommunities.org/sharepoint)

# My Sites – The Social Center

- Enables you to harness social computing within your enterprise.
- Presents a new set of challenges both technical and political
- One of the most misunderstood components of SharePoint

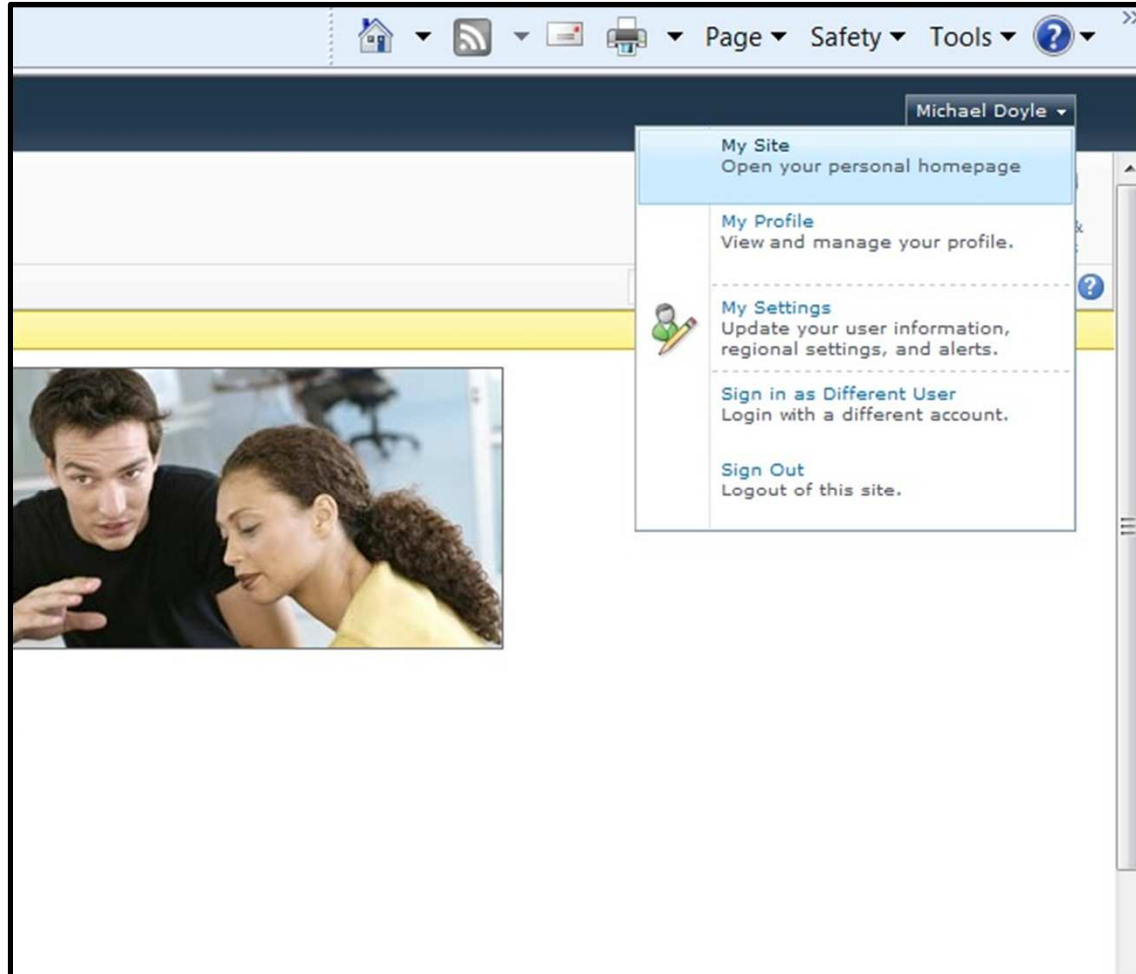
# Increasing My Site Usage

- Make it easier to get to
- Integrate My Site training into new hire training
- Add custom properties that make sense for your organization
- Make People Search easy to get to
- Integrate operationally critical pages into My Sites with personalization pages.
- Use intranet feature stories

# My Site Navigation Options

- Stick with current My Site navigation
- Make My Sites a one-click on home page
- Make the My Site the user's home page
- Integrate My Site pieces into the home page

# OTB My Site Navigation



- My Site
- My Profile
- My Settings
- Sign in as Different User
- Sign Out

# Hiding the Welcome button

```
v4.master
WE > All Files > _catalogs > masterpage > v4.master > Advanced Editor
235         </div>
236     </asp:ContentPlaceHolder>
237     <SharePoint:PageStateActionButton id="PageStateActionButton" runat="server" />
238 </SharePoint:SPRibbonPeripheralContent>
239 <SharePoint:SPRibbonPeripheralContent
240     runat="server"
241     Location="TabRowRight"
242     ID="RibbonTabRowRight"
243     CssClass="s4-trc-container s4-notdlg">
244 <SharePoint:DelegateControl runat="server" ID="GlobalDelegate0" ControlId="GlobalDelegate0">
245 <a href="#" tabindex="-1" style="display:none"></a><a href="#" tabindex="-1" style="display:none"></a>
246 <div class="s4-trc-container-menu">
247     <div>
248         <wssuc:Welcome id="IdWelcome" runat="server" EnableViewState="false">
249     </wssuc:Welcome>
250     <wssuc:MUISelector ID="IdMuiSelector" runat="server"/>
251     </div>
252 </div>
253 <SharePoint:DelegateControl ControlId="GlobalSiteLink2" ID="GlobalDelegate2">
254 <span>
255     <span class="s4-devdashboard">
256         <Sharepoint:DeveloperDashboardLauncher
257             ID="DeveloperDashboardLauncher"
258             NavigateUrl="javascript:ToggleDeveloperDashboard()"
259             runat="server"
260             ImageUrl="/_layouts/images/fgimg.png">
```

Add  
Visible="false"

# Navigation Levels

The screenshot shows a SharePoint profile page for Michael Doyle. At the top, there is a navigation bar with tabs for 'My Network', 'My Content', 'My Profile', and 'Find People'. A red arrow points from the 'Find People' tab to the label 'Top Level'. Below the navigation bar, there is a 'Site Actions' section with a dropdown menu set to 'Everyone'. The main content area features a profile card for Michael Doyle, including a photo, name, title 'SharePoint Architect', contact information, and a bio. A red arrow points from the 'Find People' tab to the profile card, labeled 'Sub Level'. Below the profile card is a horizontal menu with tabs: 'Documents', 'Overview', 'Organization', 'Content', 'Tags and Notes', 'Colleagues', and 'Memberships'. The 'Organization' tab is selected. Below this menu, there are several sections: 'Ask Me About' with topics like kayaking and SharePoint; 'Recent Activities' with a list of actions; 'My Organization Charts' showing a hierarchy with Michael Doyle as a member; and 'In Common with You' with a list of shared items.

Top Level

Sub Level

# Top Level Navigation

- From the site settings at the My Site's host site collection level choose **Top Link Bar**



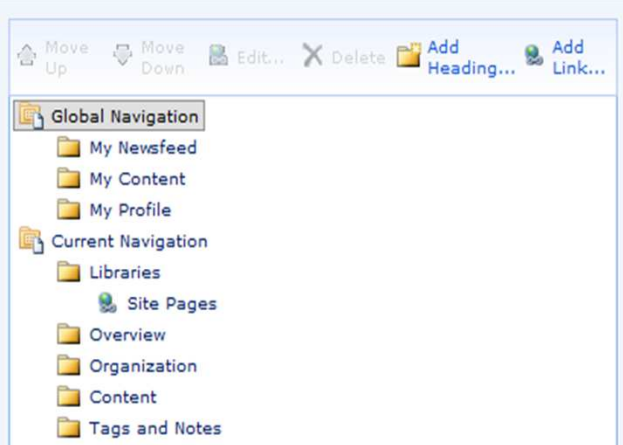
- Under the User Profile service application in the personalization sites area.  
Note: Audience based links.

# My Sites Sub Navigation

- Via the quick launch
- Or appending `_layouts/AreaNavigationSettings.aspx` to My Sites top level directory.

**Navigation Editing and Sorting**

Use this section to reorder and modify the navigation items under this site. You can create, delete and edit navigation links and headings. You can also move navigation items under headings and choose to display or hide pages and subsites.



The screenshot shows a web interface for managing navigation. On the left, there is a text box with instructions. On the right, there is a toolbar with icons for Move Up, Move Down, Edit, Delete, Add Heading, and Add Link. Below the toolbar is a tree view of navigation items:

- Global Navigation
  - My Newsfeed
  - My Content
  - My Profile
- Current Navigation
  - Libraries
    - Site Pages
  - Overview
  - Organization
  - Content
  - Tags and Notes

# Quick Launch Settings



# Sub Navigation considerations

- Phase in Tags and Notes
- Consider the redundancy of organization chart
- Value of memberships (shows SharePoint site memberships and Outlook distribution lists)
- Value of colleagues

# Personalization Site Creation

**Create**

Browse From: **Installed Items** > Office.com

Filter By: **All Categories** >

- Blank & Custom
- Collaboration
- Content & Data
- Enterprise
- Search
- Tracking
- Web Databases

Title	Type
Contacts Web Database	
Decision Meeting Workspace	
Document Center	
Document Workspace	
Enterprise Search Center	
Enterprise Wiki	
FAST Search Center	
Group Work Site	
Issues Web Database	
Microsoft Project Workspace	
Multipage Meeting Workspace	
<b>Personalization Site</b>	
Projects Web Database	
Publishing Site	
Publishing Site with Workflow	
Records Center	

Search Installed Items

**Assets Web Database**

Type: Site  
Categories: Tracking, Content & Data

Create an assets database to keep track of assets, including asset details and owners.

Title:

http://oross2010/<URL name>

URL name:

Create More Options

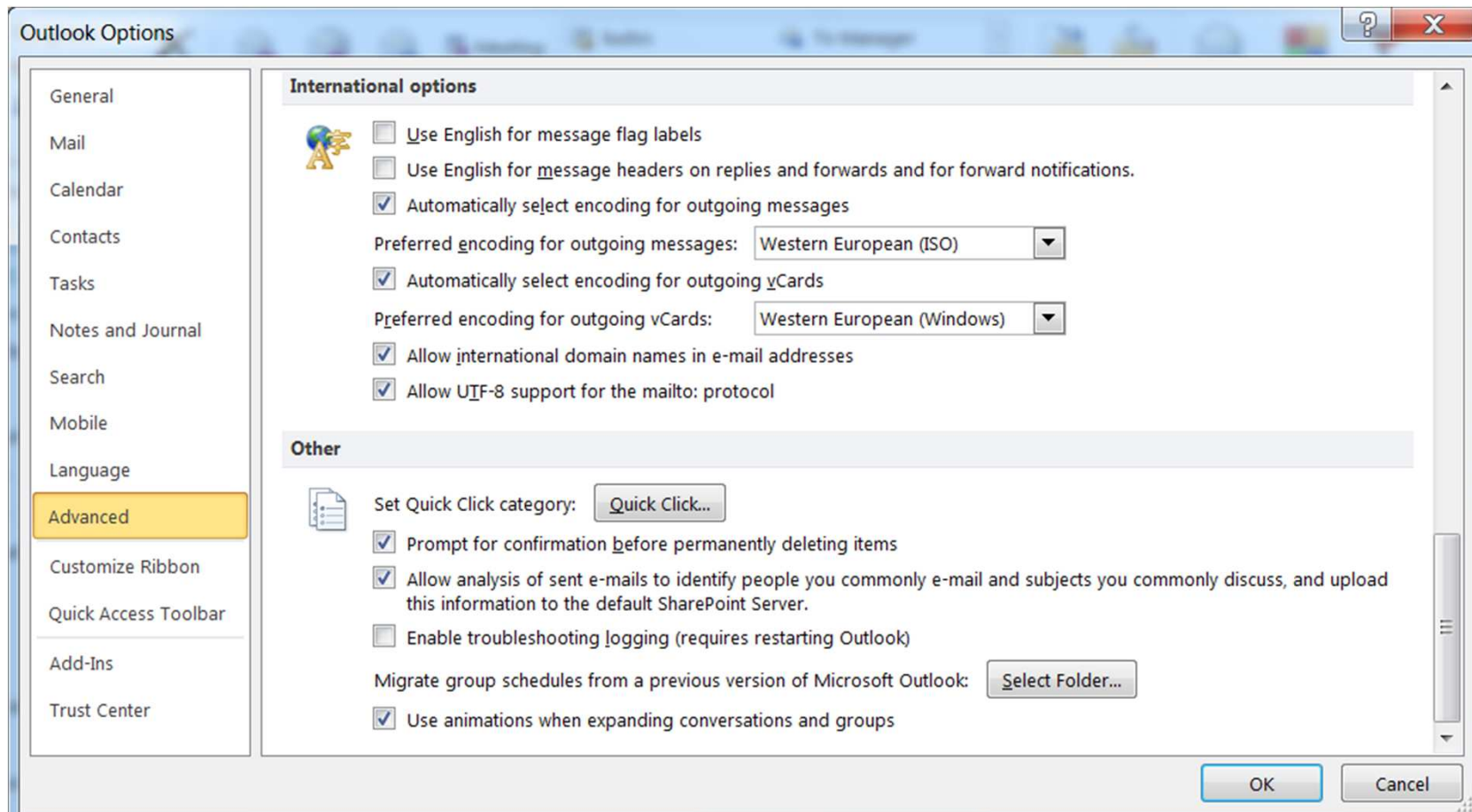
# Add Personalization site link

- In Central Administration navigate to Service Applications-> User Profile Service ->My Site Settings -> Configure Personalization Sites
- Click on New Item
- Add link to site
- Choose audiences if needed

# Personalization Examples

- Human Resources Targeted to different groups (i.e. Regions)
- Manager's Page
- New Hire Page
- Contractor Page

# Colleague and Outlook connection



# Everybody or not Everybody

- Make the decision to allow visibility options early on.
- Controlling visibility is often seen as unnecessary complications and may inhibit My Site adoption.
- If profile fields are all set to everybody and the user can't change, remove the visibility dropdown from master page.

## Removing “View My Profile as seen by”

Remove or hide the line (i.e. add Visible=“false”)

```
<SPSWC:AsSeenBy runat="server"  
id="ddlAsSeenBy" SelectionMode="Single"  
autopostback="true"/>
```

on person.aspx (only page with it)

# Adding Additional Properties

- Stick to what is relevant
- Don't over do it with items (i.e. favorite sports teams, vacation spots, pictures of your pets)
- Can be a great way to search for people
- If you add them then spend the effort to get people to populate them

# Profile Pictures

- No longer tied to a person's personal content area.
- Now stored in central area (<http://<my site host>/User Photos>).
- Three sizes stored but not original (144x144, 96x96, and 32x32)

# Newsfeed Considerations

- Lots of items are tracked by default.
- Users can change what is tracked.
- Some companies might view the level of exposure as intrusive or afraid that users may be spending too much time looking at what others are doing.

# Newsfeed Options

Activities I am following:

- Manager Change
- Weblog Update
- Membership Change
- Sharing Interests
- Social Tagging by Colleague
- Noteboard Posts
- Social Tagging by Anyone
- Social Ratings
- Birthday Reminder
- Birthday Today
- Workplace Anniversary Reminder
- Workplace Anniversary Today
- Colleague Addition
- Title Change
- Profile Property Change

Check or uncheck boxes to set types of activities you want to see for your colleagues.

# Organizational Chart Considerations

- Interactive one requires Silverlight which may be an issue in some environments.
- Shows up in three places within My Sites and once on People Search.
- In some companies titles reflect pay grade and may be sensitive information.

# Tags and Notes Considerations

- New concepts in SP 2010
- Adding a note also sends an email.
- Tags and Notes can quickly add up. Doesn't take much space but the number of items can increase crawl time.
- Built in tag/note maintenance is cumbersome (read time consuming)

# Managing Notes/Tags

The screenshot shows the 'Manage Social Tags and Notes' page in SharePoint 2010 Central Administration. The page title is 'Manage Social Tags and Notes' and the breadcrumb is 'Central Administration > Manage Social Tags and Notes'. The page includes a navigation sidebar on the left with options like 'Recycle Bin' and 'All Site Content'. The main content area has a search form with fields for 'Type' (set to 'Notes'), 'User' (set to 'Michael Doyle'), 'URL', 'Date Range', and 'Tag/Note Contains'. A 'Find' button is present. Below the search form is a 'Delete' button and a table of search results.

Use this page to manage users' social items. You can find social items and delete them. Removing social tags does not remove the terms from the term store. Use the Term Store Manager to add or remove terms.

Type:

User:

URL:

Date Range:

Tag/Note Contains:

<input type="checkbox"/>	Date	Title	URL	Tag/Note	Type	Preferred Name
<input type="checkbox"/>	1/11/2010 2:53 PM	WAGGED\mdoyle	<a href="http://oross2010:7777/Person.aspx?accountname=WAGGED%5Cmdoyle">http://oross2010:7777/Person.aspx?accountname=WAGGED%5Cmdoyle</a>	I am just posting some stuff.	Note	Michael Doyle

# My Site page locations

- **Root of My Site host.**
  - Overview (default) – person.aspx
  - Organization – Organization.aspx
  - Content – personcontent.aspx
  
- **\_layouts directory (file system)**
  - Document – viewlists.aspx
  - Tags and Notes – thoughts.aspx
  - Colleagues – MyContactLinks.aspx
  - Memberships – MyMemberships.aspx

# Editing My Site Pages

- Can use SharePoint Designer to edit files located under My Site Host
- Other files can be opened as individual files with other tools but don't appear as part of the site.
- Always make backups. Designer can throw in code that makes recovery difficult.

# Multiple Page Issues

- Items that cross pages
  - Everything in the Mysite.master (or master page chosen).
  - The top level menu
  - The sub level menu
- 
- Profile information is displayed independently on each page.

# Personal Content Sites

My Site My Newsfeed My Content My Profile Find People Michael Doyle

Site Actions Browse Page

Michael Doyle My Content I Like It Tags & Notes

Search this site...

Lists  
test

Documents  
Personal Documents  
Shared Documents

Pictures  
Shared Pictures

Recycle Bin  
All Site Content

Set as default My Site

Shared Documents

Type	Name	Modified	Modified By
	Project2010	5/17/2010 10:03 AM	Michael Doyle
	Scenarios	5/22/2009 2:50 PM	Michael Doyle
	Using the CDS Web Service to get a list of Employees in InfoPath Forms	3/2/2009 2:23 PM	Michael Doyle
	VirtualEarthWebPart	6/18/2009 4:14 PM	Michael Doyle

Add document

Personal Documents

Type	Name	Modified	Modified By
	Instructions	1/19/2009 11:45 AM	Michael Doyle
	test	6/24/2008 3:55 PM	Michael Doyle

Recent Blog Posts

Create a blog to share your thoughts within your organization.  
Create Blog

My Links

You have not created any links.

Add Link

Colleagues

General

Ian Benson  Ken Bonnin, Jr  
 Lara Ferguson  LaShelle Cline  
 Matt Giardina

Add Colleagues

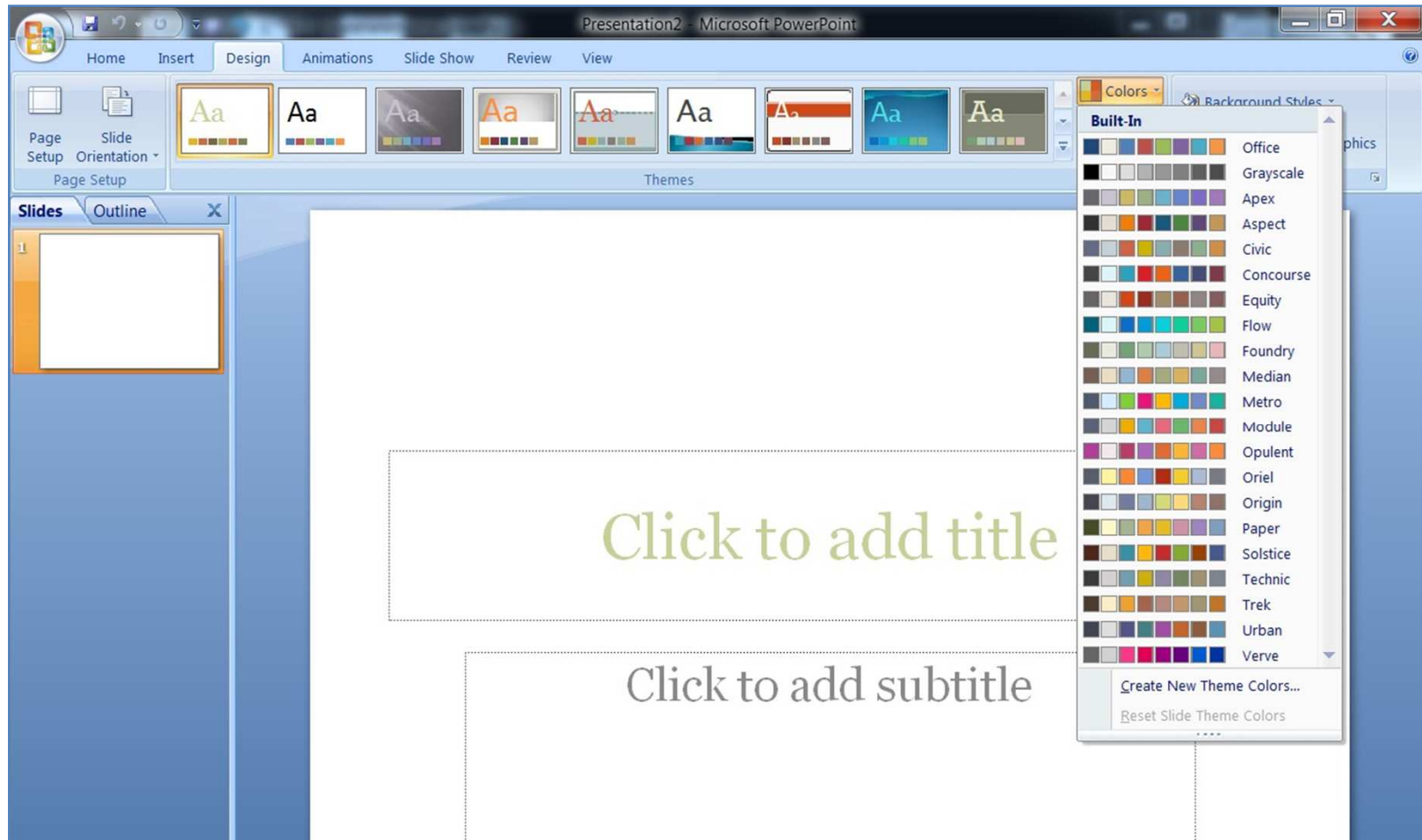
# Personal Content Site Concerns

- Each person is a site collection administrator
- Each site can have it's own theme (theme does not inherit) and potentially it's own master page
- User's can potentially delete their own sites (yes, I have seen this happen)
- Increases administration needs

# Themes

- Same themes used in the Office 2010 suite.
- Easy to apply.
- PowerPoint has the best and easiest to use theme editor.
- Limited.
- Combination of themes and CSS is probably your best bet.

# Themes



# Getting My Site Information

- SharePoint Web Controls
- Web Services
- SharePoint Object Model

# SharePoint Web Controls

- Register SPSWC at top
- User Profile data accessible via adding  
`<SPSWC:ProfilePropertyLoader  
id="m_objLoader"  
LoadFullProfileOfCurrentUser="true"  
runat="server"/>`
- User profile data can be put anywhere on a page  
i.e. `<SPSWC:ProfilePropertyImage  
PropertyName="PictureUrl"  
RenderWrapTable="False" runat="server"/>`

# Social Web Services

- People.asmx
  - Useful for getting a list of users.
- UserProfileService.asmx
  - Provides profile information based upon an individual user.
- SocialDataService.asmx
  - Useful for dealing with tag data.

# User Information List Issues

- Still in SharePoint 2010
- Users who are added individually or have visited the site collection.
- Provides data for the drop down for people list.
- Can cause problems when user logon changes.


## What about Quick Links





- They are not on My Sites by default
- To add them back edit one of the pages (such as person.aspx) and put the Quick Links control on there.
- Being replaced with the Tag cloud

# My Site info in People Search


search ▶ People Search Results

All Sites **People**

michael  [Preferences Search Options](#)

Focus: 1-1 of 1 results Sort by: Default    

**All**  
Name  
Expertise



**Michael Doyle**  
SharePoint Architect  
Technology Services  
+1 503 443 7158 | x37158  
Remote-California  
[mdoyle@waggeneredstrom.com](mailto:mdoyle@waggeneredstrom.com)

Me  
» [Browse in organizational chart](#)  
» [View recent content](#)

**About Me:**  
I have been working with SharePoint for the last five years. I have been in the software arena professionally for the last 15 years and have worked for companies such as A-dec, Fedex, Intel, NETWARCOM, Deloitte and Touche, HCA, Vanderbilt, and others. In my spare time I like to go kayaking, rock climbing, and scuba diving. My favorite Hawaiian island is Kauai. Molokai is cool too. I currently reside in Bonny Doon.

**Responsibilities:**  
SharePoint: :kayaking

**Summary:**  
541-335-1097

Help people find me	<a href="#">Update My Profile</a>	<a href="#">Update My Keywords</a>
	Number of searches that led to me: <b>1</b> time(s) in the last month <b>0</b> time(s) in the last week	Keyword searches that led to me: <i>michael</i>

# Recent Info in People Search

The screenshot shows a SharePoint search interface. At the top, there's a search bar with 'michael' entered. Below the search bar, there are tabs for 'All Sites' and 'People'. The search results show one result for Michael Doyle, a SharePoint Architect. The profile includes a photo, contact information, and an 'About Me' section. A 'Help people find me' button is visible, which has triggered a dropdown menu showing 'Authored Content' for the search term 'About michael'. The dropdown lists several items: 'About', '100\_1285', '100\_1292', '100\_1294', and '100\_1301'. A 'View more results' link is at the bottom of the dropdown.


search ▶ People Search Results

All Sites **People**

michael [Preferences](#) [Search Options](#)

Focus **1-1 of 1 results** Sort by: Default

All  
Name  
Expertise

 **Michael Doyle**  
SharePoint Architect  
Technology Services  
+1 503 443 7158 | x37158  
Remote-California  
[mdoyle@waggeneredstrom.com](mailto:mdoyle@waggeneredstrom.com)

Me  
» [Browse in organizational chart](#)  
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I have been working with SharePoint for the last five years. I have been in the software arena professionally for the last 15 years and have worked for companies such as A-dec, Fedex, Intel, NETWARCOM, Deloitte and Touche, HCA, Vanderbilt, and others. In my spare time I like to go kayaking, rock climbing, and scuba diving. My favorite Hawaiian island is Kauai. Molokai is cool too. I currently reside in Bonny Doon.

Responsibilities:  
SharePoint: :kayaking

Help people find me

Up  
Nu  
1  
C

About "michael" Authored Content

- About
- 100\_1285
- 100\_1292
- 100\_1294
- 100\_1301

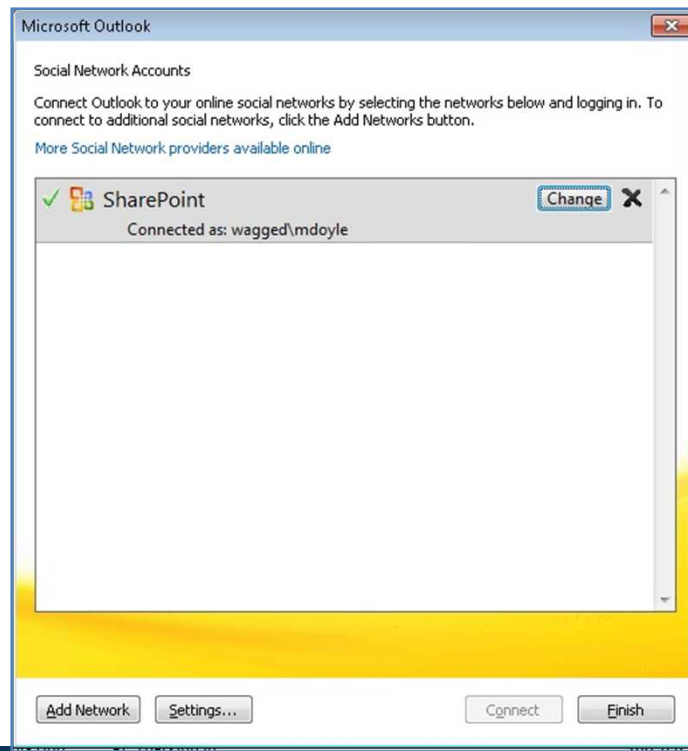
[View more results >](#)

## Outlook integration with My Sites

- My Site info is visible in Outlook once the social connector is configured.
- Can be found by going to the View tab on Outlook and clicking on People Pane and going to Account settings.
- Pulls in activities and status updates.

# Hooking up My Sites

- Users have to enter My Site Host and user name/password.



# Current Outlook Social Connectors

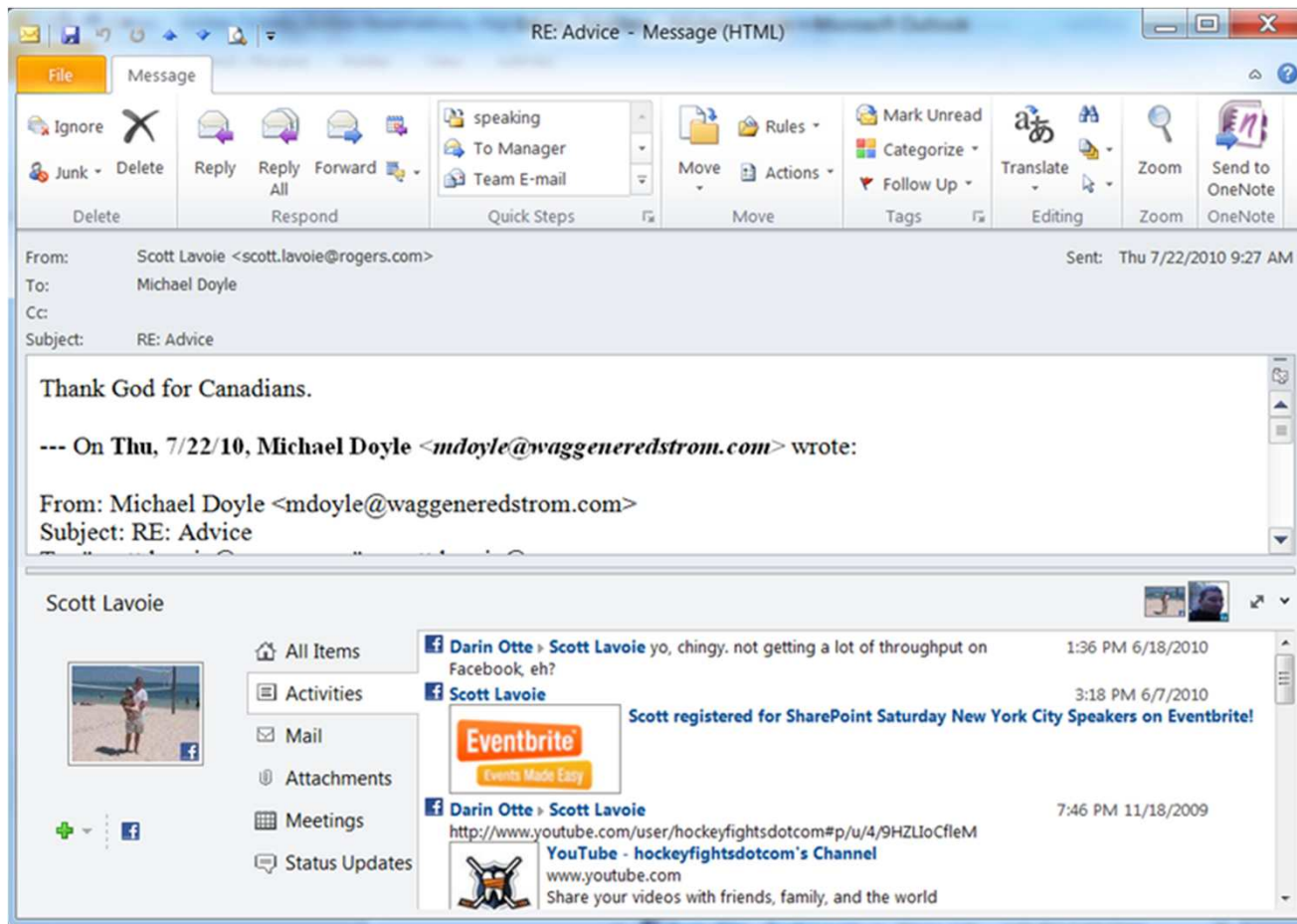
- SharePoint My Sites
- Facebook
- My Space
- Linked In
- MSN Messenger

Note: Relaxed privacy settings on most social sites can cause some accidental sharing of private information.

## Facebook Scenario

- You have the FB social connector added and you received an email from someone who is also your friend on FB. It shows recent activities of that person including anything someone has posted on their wall (i.e. pictures, profanity, etc.) right at the bottom of your Outlook.
- Depending on privacy settings you don't even have to be friends to see information.

# Facebook Social Connector Example



Thank You!  
**QUESTIONS?**