



Getting Started With Sharepoint

Windows® SharePoint™ Services (WSS) comes free with Windows Server 2003/2008, yet some customers have yet to discover the value of this tool for information sharing and document collaboration. SharePoint *Team Sites* can be created in minutes, and allow users to collaborate on documents, email, tasks, contacts, events, and other information.

SharePoint Server 2007 Team Sites are created by choosing an appropriate template from the basic collection, which generates a Web Page designed for team collaboration. Pick the members of your team from a Selection Box, and send them an invitation that provides them with a link back to the site. Through simple drag and drop procedures, Team Sites may be populated with many out-of-the-box functions. Some examples:

- o **Document Libraries** allow members to upload documents to be shared with the “Team”, directly from within Microsoft Office. Members may then “check out” the documents from the library, edit the document, and “check in” a new modified version. SharePoint can save all previous versions in the event it becomes necessary to go back to a prior version.
- o **Workflows** provide capabilities such as the routing of a document from the Document Library to various members of the Team for approval. Each member in sequence receives an email link to the document in their inbox, allowing review of the document and resulting in a decision to reject, edit, or approve. The decision determines how the document moves forward through the Workflow.
- o **Contact Lists** and various types of lists can be created on the Team Site including a list of Contacts relevant to the purpose of the site. As with documents, Contacts may be uploaded to the Team Site directly from Microsoft Office.
- o **Tasks and Events** may be scheduled on a Team Calendar. Tasks may be assigned to individual members, and alerts may be sent through email as Tasks become due.
- o **An Announcements** area may be created on the Site that allows members to post critical information for all members to read (one-way). Discussion Boards, Wikis and/or Blogs may be created within the site for opinion exchange.
- o **Surveys** may be created with a tool that automates the production of questions with an answering mechanism that stores the answers in a Microsoft database for subsequent analysis and presentation with tools like Microsoft Excel.
- o **Project-oriented sites** can provide Task Assignment and Scheduling, Issue Tracking, and Gantt Chart Analysis.

As SharePoint evolves from a portal technology (that most companies used as a rudimentary Intranet) into a full fledge Document and Information Asset Management System, companies are starting to think harder about what it takes to use this tool effectively. OTT Consulting can help you structure an intelligent design. For more information, contact Olsen Thielen Technologies at info@otstechnologies.com.

IT Tips & Tricks: Mailing Label Merger

Using the mail merge function of Microsoft Word can turn worksheet entries into printable mailing labels.

By creating a mail merge in Microsoft® Word and then linking to a list in Excel®, you can turn worksheet data such as the addresses of your customers into printable mailing labels. Here's how.

1. Make sure the data is in list format. Each column has a label in the first row and contains similar facts, and there are no blank rows or columns within the list. You'll use the column labels to specify what data goes where in the mail merge.

Make sure the column labels clearly identify the type of data in the column. This helps you select the right data as you construct the mail merge. For example, labels such as First Name, Last Name, Address and City are better than Column 1, Column 2, Column 3 and Column 4.

Make sure you have a separate column for each element that you want to include in the mail merge. For example, if you're creating form letters and want to use each recipient's first name in the body of the letter, make sure you have a column that contains first names, rather than a single column with both first and last names. If you want to refer to each recipient by title and last name, such as Mr. Smith, you can use a single column containing both titles and last names, or use one column for title and another for last name.

To make the list easy to find when you select it for the mail merge, give it a name:

- o Select the entire list
 - o On the Insert menu, point to Name, and then click Define
 - o Type a name for the list
 - o Click Add, and then click Close
2. Save and close the workbook that contains the data.
 3. Switch to Microsoft Word.
 4. On the Tools menu, point to Letters and Mailings, and then click Mail Merge Wizard
 5. In the first two steps of the Mail Merge Wizard, select the document type and start the document. If you're creating mailing labels, click Labels in Step 1, and then click Label options in Step 2 to select the size and type of labels to print. For more information about these steps, see Word Help.
 6. In the third step, under Select recipients, click Use an Existing List, and then click Browse.
 7. In the Look in list, click the folder in which you saved the workbook with your data, click the workbook, and then click Open.
 8. In the Select Table dialog box, locate and click your list. Make sure the First row of data contains column headers and the check box is selected, and then click OK.
 9. If you want to include only selected recipients in the mail merge, click Edit recipient list and select the recipients you want.
 10. Use the rest of the wizard steps to write, add recipient information, preview, personalize, save, and print or e-mail your documents. For information about these steps, see Word Help.



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Notes

- o While Word has your workbook open to create the mail merge, you can't open the workbook in Excel. If you need to see the data and its column labels, go to Step 3 or 5 of the wizard and click Edit recipient list.
- o You can continue to use mail merges with Excel data that you created in earlier versions of Word. To open and use these mail merges in Word 2002 or later, you'll need to install Microsoft Query. Query is no longer required to create new mail merges in Word.

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