SharePoint Services: Working with “My Site”

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The My Site Environment

Parts covered in this training session:

1. Quick Launch
2. Content Area
3. Site Actions button
4. SharePoint Sites Web Part
5. Colleague Tracker Web Part
Introduction to My Site

My Site is a personal site that gives you a central location to manage and store your documents, content, links, and contacts. My Site serves as a point of contact for other users in your organization to find information about you and your skills and interests. Content providers can use My Site as a method of customizing the information they present to users.

Overview

Your My Site provides:

- A central location for you to view and manage all of your documents, tasks, links, calendar, colleagues, and other personal information.
- A way for other users to learn about you and your areas of expertise, current projects, and colleague relationships.
- A place for content providers to target information to you based on the information that you and your organization provide in your profile, such as your title, department, and interests.
- A place for administrators to present personalized Web sites.

My Site presents lists of memberships, such as distribution lists, and shows you how you can share those lists with other people. My Site displays a list of your colleagues and an organization hierarchy diagram to show your position within your immediate team. When other people visit your My Site, they can quickly see what they have in common with you — colleagues whom you both know, memberships that you share, and the first manager whom you both share.

Privacy groups allow you to decide who gets to view some of the information on your public page, such as the list of your colleagues, distribution list memberships, your skills and interests, and other information you may want to display only to your workgroup or your manager.

The site

By default, your My Site includes two parts: a personal site called My Home and a public profile page called My Profile.

You are the administrator of the personal site, which starts with a private home page. My Site is similar to having your own personal Microsoft Windows SharePoint Services 3.0 site — you can create document libraries and picture libraries, calendars, surveys, tasks, and other SharePoint lists. You can create other pages on your personal site and provide links to those pages by using your public home page. Any of the documents and lists that you create in your personal site can be shared with other people or viewed by only you.

Your administrator determines how the profile page looks, but you decide whether to add more detail. You can also control how some of the content on the public profile page is shared with various groups of people — similar to a filter.

Ways to work with My Site

The following are some of the ways you can use your My Site:

Use and keep track of links

The My Links page allows you to keep track of your favorite Web sites and access them from any computer on your network. When you log on, My Links appears in the upper-right corner on every site. By using the My Links menu, you can easily add new links, reorganize your links, access sites where you are a member, and click links to save them to your My Links list.
Keep track of your colleagues
The Colleagues Web Part helps you to keep track of events, such as whether your colleagues are in the office, in meetings, or on the telephone. You can also be notified when colleagues change departments or responsibilities, add documents to a SharePoint library, or have an anniversary or birthday. In addition, you can choose who appears on your Colleagues list and organize your Colleagues list by groups.

Set up a document workflow
You can set up a workflow in your Shared Documents library to route documents for approval. This allows you to request approval, collect feedback and signatures, set up tasks, and view the history of the workflow.

Share documents and save to SharePoint sites
The SharePoint Sites Web Part on your home page is useful for listing all of the documents you have created, saved, or modified in any site in your organization. The SharePoint Sites Web Part automatically displays documents for five sites where you are listed in the Site Name Member SharePoint group. The SharePoint Sites Web Part also lists any tasks that you are assigned in any site. You can add as many sites as you want to the SharePoint Sites Web Part.

The Documents Web Part on your public page allows you to share documents with other people. All documents you have saved to every library in your organization, except for your Private (Personal) Documents Library, automatically appear in the list for other people to access. You can change the permissions on list items and libraries to prevent them from appearing in the Documents Web Part.

You can use the My Site places link in Microsoft Office programs to save files to your My Site. The My Site places folder opens the document libraries, SharePoint sites, and document workspace sites that you have created on your My Site. By default, you have four document libraries to save files to: My Pages, My Pictures, Private (Personal) Documents, and Shared Documents.

Access previous versions of documents
If you set up your My Site lists or libraries to track versions of list items or files, you can view the version history. The version history contains information about when the item or file was changed and who changed it. In libraries, the version history may also contain comments that people made about their changes.

The version history also contains changes to properties, sometimes known as metadata. Examples are when someone changes the name of the person whom the list item is assigned to, or when the file is due to be completed. Libraries can track major versions, like those in which a new section was added to a document, and minor versions, like those in which a spelling error was corrected. Lists can track only major versions. To view the version history, you must have permission to read items in a list or library.

Create Meeting Workspace and Document Workspace sites
You can use your My Site to create a workspace site for projects, a team site, a wiki site, a new blog, or a records repository. Two of the most common ways to use My Site is for Meeting Workspace sites and Document Workspace sites.

Meeting Workspace site: Use this Web site for gathering all the information and materials for one or more meetings. If your meeting materials, such as agendas, related documents, objectives, and tasks, are often scattered, a Meeting Workspace site can help you keep them all in one place.

A Meeting Workspace site provides a place where your meeting attendees can go for the most up-to-date information about the meeting, whether you are managing a year-long project with recurring meetings or planning a small event.
The following are some ways you can use a Meeting Workspace site:

- Before the meeting, publish the agenda, attendee list, and documents that you plan to discuss.
- During the meeting, add the tasks, record the decisions, and review the related documents.
- After the meeting, publish the minutes, add other follow-up information, and track the status of the tasks.

**Document Workspace site:** This type of Web site helps you to coordinate the development of one or more related documents with other people. The site provides tools to share and update files and to keep people informed about the status of those files.

You and your colleagues can work together on a Document Workspace site to develop a document in the following ways:

- Work directly on the copy located on the Document Workspace site.
- Work on a local copy and update the copy regularly on the Document Workspace site.

You and other workspace members can also use a Document Workspace site to publish announcements, assign tasks, share relevant links, and receive alerts about changes to site content. You can create a Document Workspace site for a short-term project and delete the site when the project ends or keep the site permanently.

**Share information on the My Site public page**

The My Site public page allows you to display details about yourself to people who visit your My Site. This information becomes part of your user profile and can include your picture, text that describes you, your projects, and your interests. Your administrator may provide additional details that appear on your public page and are also included in your user profile.

Some of the information you provide can be filtered, so that only certain people can view it. You do this by using privacy groups. For example, you can make your mobile phone number visible to only your workgroup.

**Search by using profile details:** You can use any detail in a user profile to search for someone in your organization, even when you don't know his or her name. For example, if you wanted to find someone who had knowledge about Microsoft Office Excel, you could search to find people who list your search words in the **Interests** or **Skills** boxes on the **Details** page of their public profile.

**What do you have in common with other people?** When someone visits your public page or you visit another's page, the **In Common with You** Web Part displays the colleagues whom you both know, the distribution lists and SharePoint sites that you both belong to, and the first manager whom you have in common.

**Display your affiliations:** The Memberships Web Part automatically displays the Active Directory directory service distribution lists and SharePoint sites of which you are a member. As with other types of information on the page, you can choose who gets to view the memberships or whether the memberships are displayed at all.

**Show whom you work with:** You can display a list of the people you work with and group them according to project, by whom they report to, or in any type of grouping that makes sense to you. Free/busy information in Microsoft Office Outlook helps keep you up-to-date on people’s whereabouts.
Get better search results when you share information
Some of the information on your public page may be displayed automatically by your administrator, who may use sources such as Active Directory or other LDAP-compatible applications. It is likely that this information comes from databases like those that your Human Resources department might use and provides details like your title, department name, and manager relationship.

Most of the information on the public page is optional. However, the more information that you share about your projects, responsibilities, areas of expertise, skills, and interests, the better the collaboration can be within your organization. You can limit who can view the information that you share, but when you share it with everyone, you allow people to find you, your expertise, and links to your colleagues and projects.

Manage your documents and tasks on your My Site
Your My Site is a personal site that provides you with a central place to manage the documents that you have created, opened, saved, or checked out on any Microsoft Office SharePoint Server 2007 site throughout your organization. You can view and work on your documents privately or share them on your public page. You can also use your My Site to view and access all of the tasks that are assigned to you in every site in the organization.

The SharePoint Sites Web Part on your My Site home page displays a list of the last 15 documents that you have created, opened, saved, or checked out in any site in your organization. In addition to the documents, all of the tasks that are assigned to you in the site are displayed in the Tasks section of the Web Part.

You can use the links in the SharePoint Sites Web Part to access the documents, their location, and their properties, as well as the tasks that are assigned to you.

The SharePoint Sites Web Part automatically displays a list of five sites of which you are a member. The sites in the list are based on the total number of members in the site. To be a member of a site, you must be listed in the Site Name Members SharePoint group on the site. You can increase the number of sites that are automatically displayed by modifying the view of the Web Part.

Increase the number of sites that are displayed:

1) On the Site Actions menu, click Edit Page.

2) In the SharePoint Sites Web Part, click the Web Part menu, and then click Modify Shared Web Part.

3) In the tool pane, under View, the Number of tabs to show before More box displays a default value of 5.

4) Click the 5, and then type the number of SharePoint sites you want to be displayed automatically / OK

You can add sites to the tabs across the top of the SharePoint Sites Web Part, making it easy to view documents and tasks in sites that you access frequently. You can add tabs for sites regardless of whether you are a member of the site.
Add a new site tab to the SharePoint Sites Web Part bar
You can easily access all of your documents and tasks in a single site by defining a site tab on the SharePoint Sites Web Part bar.

1) In the SharePoint Sites Web Part, on the Sites menu, click New Site Tab.
2) In the Create a new site tab dialog box, do one of the following.

<table>
<thead>
<tr>
<th>To add a site tab</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>For a site where you are a member</td>
<td>1. Click the Select site from Memberships list.</td>
</tr>
<tr>
<td></td>
<td>2. Click the site on the menu.</td>
</tr>
<tr>
<td></td>
<td>3. Click Create.</td>
</tr>
<tr>
<td>For a site where you are not a member</td>
<td>1. Click Type SharePoint site URL and name.</td>
</tr>
<tr>
<td></td>
<td>2. Under Site URL, type the URL of the site you want to add.</td>
</tr>
<tr>
<td></td>
<td>3. Under Site Name, type the name that you want to appear on the tab.</td>
</tr>
<tr>
<td></td>
<td>4. Click Create.</td>
</tr>
</tbody>
</table>

Delete a site from the SharePoint Sites Web Part bar
You can delete a site from the SharePoint Sites Web Part bar. If you are a member of the site, the site name moves to the Memberships section of the Sites menu. If you are not a member of the site, the site is deleted from the SharePoint Sites Web Part bar.

- To delete a site from the SharePoint Sites Web Part bar, click the arrow next to the site, and then click Delete.

Hide or show a site on the SharePoint Sites Web Part bar
You can display as many sites on the SharePoint Sites Web Part bar that comfortably fit across your screen. Depending on your screen resolution, you may have to scroll to view the sites that you add. After a site is on the SharePoint Sites Web Part bar, you can quickly hide or show it by using the menus next to the site name and the Sites menu.

To show or hide a site on the SharePoint Sites Web Part bar, do one of the following.

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide a site tab from the sites bar.</td>
<td>1. Click the arrow next to the site name.</td>
</tr>
<tr>
<td></td>
<td>2. Click Hide.</td>
</tr>
<tr>
<td>Show a site tab on the sites bar.</td>
<td>1. Click the arrow next to the Sites menu.</td>
</tr>
<tr>
<td></td>
<td>2. Click the site you want to add to the sites bar.</td>
</tr>
</tbody>
</table>

View your public profile page
You can easily see how each category of people views your public profile page by using the As seen by option at the top of the page. Use the different views to see the page by the privacy categories you have set.
Note: The As seen by option works by using privacy settings, not security settings. Therefore, documents in the SharePoint Sites Web Part are not affected by the As seen by option and do not change with each view.

Manage your tasks

To view the tasks on a site, select the site on the SharePoint Sites Web Part bar or on the Sites menu. In the Tasks Web Part, you can click the name of the task or the Item Link. The item link is the item that you are assigned to work on, and the task name is the document management record that marks the progress of the task.

Share documents with other people

You can use the Documents Web Part on your My Site public page to share documents and sites with other people. Similar to the SharePoint Sites Web Part, the Documents Web Part gives you a view of the documents by site. In order for a site to appear in the Documents Web Part, you need to be listed as a member of the site in the site's Site Name Members SharePoint group. It is not possible to add other sites to the list.

Every document and picture that you add to every library in every site, including your My Site, is added to this location and is available to everyone who has access to your My Site. You can prevent a document from being seen by saving it to your Private (Personal) Documents library or by changing the permissions on the item or the library.

Restrict the view of personal information on your My Site

By using privacy groups, you can specify that only certain people can view some of the personal information that you provide on your My Site home page. This can be useful when you want to share personal information like your mobile phone number with only your workgroup or your manager rather than everyone in the company.

1) On any Microsoft Office SharePoint Server 2007 site, in the upper-right corner, click My Site.
2) On the Quick Launch, click Details.
3) In the Show To column, next to the information for which you want to change the privacy group, click the arrow, and then click one of the following:

<table>
<thead>
<tr>
<th>This category</th>
<th>Allows these people to view the selected colleagues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone</td>
<td>Everyone with permissions to view your My Site.</td>
</tr>
<tr>
<td>My Colleagues</td>
<td>This category includes anyone currently listed on your My Colleagues page. By default, this category includes your manager, your peers, and your direct reports.</td>
</tr>
<tr>
<td>My Work Group</td>
<td>By default, only your manager, your peers, and your direct reports are in your Workgroup. This category also includes colleagues you have added by using the Add Colleagues to My Workgroup option. New colleagues are not automatically added to your Workgroup.</td>
</tr>
<tr>
<td>My Manager</td>
<td>Your direct manager.</td>
</tr>
<tr>
<td>Only Me</td>
<td>Yourself.</td>
</tr>
</tbody>
</table>

4) On the Edit Details toolbar, click Save and Close.
Work with the colleagues list on My Site

Your Colleagues list identifies who you know so that Microsoft Office SharePoint Server 2007 can help you leverage that information. You can view status information, allow other people to see your relationships, and, by using the My Colleagues privacy category, help protect your information.

Your Colleagues list

Your Colleagues list starts with your manager, anyone who reports to your manager, and your direct reports. You can remove any of these names and add any name from your company's directory. You can organize your colleagues into groups and choose whether to show a colleague on your public page.

If you and your colleague use an application that provides instant messaging services, such as Microsoft Office Communicator or Microsoft Windows Messenger, a status icon appears next to the colleague's name. The status indicator allows you to see information such as whether he or she is online, in a meeting, or away from their computer.

You can also set up alerts to notify you when an event occurs, such as when a colleague is out of the office, starts reporting to a different manager, creates a new document, or changes his or her name.

Sharing your Colleagues list with people in your organization is useful for building relationships and growing your personal network. When people visit your My Site, they can see who you work with and in what capacity. By using this information, the people might be able to find the contacts and information they need to do their work.

Privacy and grouping

By using privacy settings in My Site, Office SharePoint Server 2007 displays information to only a category of people. There are five privacy categories — Everyone, My Colleagues, My Workgroup, My Manager, and Only Me. The privacy setting you select for a colleague affects who can see that colleague when he or she visits your My Site.

For example, Kevin Cook's Colleagues list includes Denise Smith, Justin Thorp, Bart Duncan, and Mindy Martin. Kevin works directly with Denise, Justin, and Bart on every project, so he shows those colleagues to everyone who visits his My Site public page. Mindy is someone Kevin works with only on special projects, so he does not want to show her as a colleague to everyone. Therefore, Kevin sets up Mindy to display only to his manager — only Kevin and his manager see Mindy's name when they visit Kevin's My Site.

When you limit a colleague from everyone's view, you also limit what other people see when they view the In Common with You section of your public page. For example, Bart includes Mindy on his Colleagues list, but when he visits Kevin's My Site, he does not see Mindy listed in the Colleagues you both know section of Kevin's In Common with You area, because Kevin has Mindy set to the Only Me privacy setting.

Search results are also affected by privacy settings. When Bart searches for people related to Kevin's project, and Mindy is not Bart's colleague, he does not find Mindy's name as a colleague's colleague.

In the Privacy and Grouping options, you can also choose to add a colleague to your Workgroup. Doing this gives the colleague the privilege to view content that you set to My Workgroup. This is useful for setting up projects specific to a group of people and displaying information related to the project without showing the content to people in other groups.
You can organize your Colleagues list by groups to show relationships. By default, all of your colleagues are in the **General** group. You can create as many organizational groups as you want. It may be useful to organize your colleagues by projects or by role, such as Finance Project, Sales Project, or My Team. A colleague’s name can appear in only one group.

**Add a name to your Colleagues list**
To add people to your Colleagues list you use the **Add Colleagues** page. On this page, you may also find the **Suggested Colleagues** list. This list is compiled from your communication patterns, such as e-mail messages you send and receive, your instant message contacts, and distribution lists and SharePoint site memberships you share with other colleagues.

1) On any SharePoint site, in the upper right corner, click **My Site**.
2) On the Quick Launch, click **Colleagues**.
3) On the **My Colleagues** list toolbar, click **Add Colleagues**.
4) On the **Add Colleagues** page, under **Identify Colleagues**, do one of the following:

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add the name of someone you know</td>
<td>• Type the name in the <strong>Type Names</strong> box.</td>
</tr>
</tbody>
</table>
| Search for a name                             | 1) Next to the **Type Names** box, click **Browse**.  
2) Type as much of the name as you can in the box, and then click the green arrow.  
3) In the search results box, double-click the name of the person you want add.  
4) Click **OK**.                                                                 |
| Add one or more names from the **Suggested Colleagues** list | • Select the check box next to the name.                                                                    |

- To determine who sees the selected colleagues on your **My Profile** page, in the **Show these colleagues to** box, select one of the following categories:
- To add the colleague to the **My Workgroup** privacy category, under **Add Colleagues to My Work Group**, click **Yes**.
- To place the colleague into a group organized by role or project, under **Grouping**, select **Existing group**, and then click the arrow to pick from a group you have already created or select **New Group** to type the name of a new group.
Show or hide colleague names to My Site visitors
By using privacy categories, you can decide which My Site visitors see the names in your Colleagues list. Each colleague in the list can be set to be viewed by people who belong to one of five categories. The view of your Colleagues list changes depending on which category the viewer belongs to. By default, a colleague is shown to the category Everyone.

1) On any SharePoint site, in the upper right corner, click My Site.
2) On the Quick Launch, click Colleagues.
3) On the My Colleagues page, select one or more colleagues you want to show or hide from My Site visitors.
4) On the My Colleagues toolbar, click Edit Colleagues.
5) In the Show these colleagues to box, select one of the following categories to determine who sees the selected colleagues on your My Profile page.

Add or remove a colleague in the My Workgroup privacy category
My Workgroup is a category of people that you use when you want to share specific information. For example, you could use My Workgroup to display documents, distribution lists, contact information, and colleagues only to people working on a particular project. You add and remove people in the Workgroup category by using the My Colleagues page.

1) On any SharePoint site, in the upper right corner, click My Site.
2) On the Quick Launch, click Colleagues.
3) On the My Colleagues page, select one or more colleagues.
4) On the My Colleagues toolbar, click Edit Colleagues.
5) Under Add Colleagues to My Work Group, click Yes or No.

Set alerts on names in your Colleagues list
Use colleague alerts to keep track of what is happening with people you work closely with. You can choose to be notified when someone is out of the office, changes departments, subscribes to a distribution list, publishes a new document, or updates a blog. You can turn off any or all alerts. By default, you are notified of changes that occurred within the past 72 hours.

1) On any SharePoint site, in the upper right corner, click My Site.
2) On the Colleague Tracker Web Part, at the bottom, click Change what gets tracked?.
3) Select one or more of the following alerts for the colleagues in your list:

<table>
<thead>
<tr>
<th>Use this setting</th>
<th>To be notified when the colleague has one of the following events:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anniversaries</td>
<td>A birthday or hire date.</td>
</tr>
<tr>
<td>Profile Property Changes</td>
<td>Changes to manager, title, department, or name. Changes in responsibilities, skills, or interests on the profile page in My Site.</td>
</tr>
<tr>
<td>Membership Changes</td>
<td>Joins or leaves a distribution list or SharePoint site.</td>
</tr>
<tr>
<td>New Documents</td>
<td>Adds a document to SharePoint.</td>
</tr>
<tr>
<td>Out of Office</td>
<td>Is Out of Office as reported in Microsoft Exchange.</td>
</tr>
<tr>
<td>Blog Changes</td>
<td>Creates a new post to his or her blog.</td>
</tr>
</tbody>
</table>
Note: Your administrator may add other anniversary dates or key property changes to the alert notifications list.

Organize your colleagues by groups
You can organize your colleagues into groups, such as by project name or by role. For example, if you work with Joe, John, and Sarah on the Finance Committee, you might want to create a group called Finance and put those colleagues in that group. Keep in mind that your group names may assist My Site visitors in finding other colleagues who share areas of expertise or interests. Colleague names can only appear in one group.

1) On any SharePoint site, in the upper right corner, click My Site.
2) On the Quick Launch, click Colleagues.
3) On the My Colleagues page, select one or more colleagues.
4) On the My Colleagues toolbar, click Edit Colleagues.
5) Under Grouping, select Existing group, click the arrow, and select a group you have already created, or select New Group to type a new group name. The colleagues you selected are placed in the group you select or type.

Notes:
- To delete a group, remove all of the colleagues from the group. This automatically deletes the group from your Colleagues list.
- The Existing group called Multiple Values means that the colleagues you have selected are categorized in more than one group.

Remove a name from your Colleagues list
You can remove names from your Colleagues list as you change projects or move to a different department. You always have access to all of the names listed in the directory, so it is easy to add a name back to the list if you change your mind.

1) On any SharePoint site, in the upper right corner, click My Site.
2) On the Quick Launch, click Colleagues.
3) On the My Colleagues page, select one or more colleagues.
4) Click Delete.

Distribution lists and links
Setting privacy on a distribution list or a link may be useful when you belong to a site that pertains to a hobby or interest and you do not want to have it display on your public page. For example, you can set up your membership to the Games Enthusiast's Club to the Only Me privacy setting, so that people who visit your site do not know that you belong to this group. Alternatively, you can choose to show specific things to only My Colleagues or My Workgroup to direct content to a specific category of people.

Search results
Search results are affected by all privacy settings, including those set on colleagues. Setting a colleague to any setting other than Everyone can limit how people in your organization can use you to connect to other people.