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# Appendix A
# Glossary

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| **Access Services** | A service available in SharePoint that allows an Access database to be published to a SharePoint site and available to a user in a browser. The database objects and data are moved to SharePoint lists. |
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| **Action** | • The smallest unit of work in a workflow system. An action can contain one or more tasks that define work that actors need to do. Actions are deployed and registered in the workflow system to be activated by protocol client users.<br>• A unit of work that can be performed by a workflow and is typically defined in a workflow markup file. |
| **Active Directory** | Also referred to as AD and it is used to manage network administration on Window's networks. It helps to facilitate complex relationships between network resources and provides a single access point for setting security policies on these resources. |
| **ActiveX Data Objects (ADO)** | A data access interface that connects to, retrieves, manipulates, and updates data in OLE (object linking and embedding) database-compliant data sources. |
| **Activity** | An object that stores information about either an action or an activity model. |
| **Activity Feed** | A message that provides updates about items of interest based on custom notification settings. This includes updates about changes to documents, the status of colleagues, social tags, and colleague profiles. |

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| **Activity Flow** | A running instance of a workflow that consists of a sequence of action instances and/or activity model instances. Action instances and activity model instances can be sequenced in any order to create a single activity flow. |
| **Activity Model** | A predefined sequence of actions. |
| **Add-in** | Supplemental functionality that is provided by an external application or macro to extend the capabilities of an application. |
| **Agendas** | A default content type used to plan a list of topics to be discussed at a meeting. |
| **Alert Subscription** | A request to receive an Internet message automatically when user-defined criteria are met. Such messages are generated automatically when items such as documents, webpages, list items, sites, or other resources on a server are changed. |
| **Alerts** | A notification sent by SharePoint through email of a change in content in a SharePoint site. Alerts can be configured by users and administrators. |
| **Analysis Services** | The abbreviated name for Microsoft® SQL Server™ Analysis Services, which is used to create and maintain multidimensional data that is sent to clients in response to queries. Also referred to as **Online Analytical Processing (OLAP) server**. |
| **Analytics** | Also called Web Analytics. Existing reports in SharePoint that help administrators evaluate usage of sites and site collections. |
| **Announcements** | A default content type which supports sharing news. |
| **Anonymous Authentication** | An authentication mode in which neither party verifies the identity of the other party. |
| **Anonymous User** | A user who presents no credentials when identifying himself or herself. The process for determining an anonymous user can differ based on the authentication protocol, and the documentation for the relevant authentication protocol should be consulted. |
| **Application Model** | In the Business Data Connectivity Services, an object that contains one or more external content types and resources that are used by those external content types. Application models are primarily useful for importing and exporting sets of external content types and resources in and out of the Business Data Connectivity Services. |
| **Application Server** | A computer that provides key infrastructure and services for applications that are hosted on a farm. |

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| **Application Session** | The period of time when an application is running. When an application starts, the session starts. When an application quits, the session ends. |
| **Asynchronous Event** | An event whose handler runs in a different processing thread from the action that raised the event. The event handler and the action are processed simultaneously. |
| **Attachment** | An external file that is included with an Internet message or associated with an item in a SharePoint list. |
| **Audience** | A named group of users that is used for targeting content. |
| **Audience Compilation** | The process of evaluating a set of user profile entities with an audience rule to determine which user profile entities are members of the audience. |
| **Audience Rule** | A set of logical conditions that determine whether a user profile can be a member of an audience. |
| **Authentication** | • The ability of one entity to determine the identity of another entity.<br>• The act of proving an identity to a server while providing key material which binds the identity to subsequent communications. |
| **Author** | The user who created a list item. |
| **Authority Hops** | The number of site levels to be navigated from the start address to a given item. |
| **Authority Page** | A webpage that a site collection administrator has designated as more relevant than other webpages. This is typically the URL of the home page for the intranet of an organization. The higher the authority level assigned to a page, the higher the page appears in search results. Also referred to as **authoritative page**. |
| **Authorization** | The secure computation of roles and accesses granted to an identity. |

# B

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| **Backward Signing** | A condition of a handwritten signature, in an image or .ink file, that specifies the direction of the characters in the signature, right-to-left or left-to-right. |
| **Base URL** | A URL that is specified for a webpage to convert all relative URLs on that page to absolute URLs. A base URL ends with either a file name, such as `http://www.example.com/sample.htm`, or a slash, such as `http://www.example.com/subdir/`. |

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| **Basic Meeting Workspace** | A site template in SharePoint used to manage all the details of a meeting. |
| **Blank Meeting Workspace** | A site template in SharePoint used to create a custom site. |
| **Blank Site** | A site template available in SharePoint. This should be used to provide a home page that is blank which will be customized. No built-in functions are included on a blank site. |
| **Blog** | A web-based journal for public viewing. Blog content, posting frequency, and other blog items such as links included are decided upon by each person. |
| **Blog Site** | A site template available in SharePoint optimized for working with blogs. |
| **Bookmarklet** | A script-based applet that is stored as a favorite or bookmark in a Web browser, or is accessed through a hyperlink on a webpage. A bookmarklet can be used to comment on or tag pages and items on a SharePoint site or the Internet. |
| **Boolean Search** | A method of searching for data that uses logical operators (e.g. AND, OR, NOT). |
| **Business Connectivity Services** | SharePoint  services that provide for interaction with external data. These services may be needed to display data in SharePoint that is currently stored in an external proprietary database. |
| **Business Data Actions** | A program or Web page, accessible by using its uniform resource locator (URL), that can be associated with an external content type so that users can perform the action on items of that type. |
| **Business Data Catalog** | A shared service that stores information about business application data that exists outside the server farm. This service can be used to display business data in lists, Web Parts, search, user profiles, and custom applications. |
| **Business Data Connectivity Shared Service** | The SharePoint shared service that provides a means for storing and securing external content types, application models, and external data sources. |
| **Business Object** | An object that performs a defined set of operations, such as data validation or business rule logic, related to a business process or workflow. |

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| **Central Administration Site** | A special SharePoint site where an administrator can manage all sites and servers in a farm that is running Microsoft® SharePoint® Products and Technologies. |
| **Claims-Based Identity** | A unique identifier that represents a specific user, application, computer, or other entity. It enables that entity to gain access to multiple resources, such as applications and network resources, without entering their credentials multiple times. It also enables resources to validate requests from an entity. |
| **Client Context** | The object that is used to initiate any actions with the client-side object model. It is the primary entry point for the client object model, and the primary object for coordinating requests against corresponding objects in a site collection. |
| **Collaborative Application Markup Language (CAML)** | An XML-based language that is used to describe various elements, such as queries and views, in sites that are based on Microsoft® SharePoint® Products and Technologies. |
| **Communities** | One of the six pillars of SharePoint. The concept of tools which bring teams together through social networking. An example of this is the ability to provide and review user profiles. |
| **Composites** | One of the six pillars of SharePoint. Provides for business solutions that do not require developers and solutions use the browser to incorporate the needed components. |
| **Contacts** | A default content type which supports a list of names and related contact information. |
| **Content** | One of the six pillars of SharePoint. The concept of providing a central location for items and providing control over these items through permissions and other business rules. |
| **Content Migration Package** | A package of XML-formatted files that is used to migrate content between site collections, sites, and lists. |
| **Content Placeholder** | A region within a page layout that is populated dynamically with the value of the publishing page field to which it is bound. |

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| **Content Source** | A set of options for specifying the type of content to be crawled and the start addresses for the content to be indexed. A content source is defined by the protocol handler that is used to access specific systems, such as SharePoint sites, file systems, and external Web sites. A content source can contain up to 500 start addresses. |
| **Content Type** | A reusable collection of columns for a list. The advantage of content types is various permissions can be attached to each content type and they may be reused for multiple sites. |
| **Content Type Group** | A named category of content types that is used to organize content types of a similar purpose. |
| **Content Type Identifier** | A unique identifier that is assigned to a content type. |
| **Content Type Order** | The sequence in which content types are displayed. |
| **Content Type Resource Folder** | A folder that stores the resource files that are associated with a content type. |
| **Content Type Schema** | An XML definition that describes the contents of a content type. |
| **Content Type Specific View** | A view that is associated with a particular content type that is associated with a folder. |
| **Context Site** | A site that corresponds to the context of the current request. |
| **Contextual Search Scope** | A system-defined restriction that can optionally be added to a query to restrict the query results to items that are from a specific site or list. |
| **Contribute** | A type of permission which allows the user to view, add, update, delete, approve, and customize lists or libraries within the site. This permission is above the Read permission. |
| **Conversion Item** | A single document that is converted as part of a conversion job. |
| **Conversion Job** | The basic unit of work for Word Automation Services. |
| **Conversion Process** | A single instance of Word Automation Services. |
| **Conversion Queue** | A persistent database that stores a list of conversions that are pending, in progress, or completed. |
| **Crawl** | The process of traversing a URL space to acquire items to record in a search catalog. |

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| **Crawl Log** | A set of properties that provides information about the results of crawling a display URL. The information includes whether the crawl was successful, the content source to which the display URL belongs, and the level, message, time, and identifier for any errors that occur. |
| **Crawl Queue** | A data structure that stores the list of items to crawl next. |
| **Crawl Rule** | A set of preferences that applies to a specific URL or range of URLs. A crawl rule can be used to include or exclude items in a crawl and to specify the content access account to use when crawling that URL or range of URLs. |
| **Crawl Status** | The state of a crawl operation. |
| **Crawl Type** | A setting that specifies whether to evaluate all of the users and member groups in the directory service that is crawled, or only those users and member groups that were modified after the last crawl. |
| **Crawl URL History** | A data structure that stores a list of URLs and their properties, such as when a URL was last crawled. |
| **Crawler** | A process that browses and indexes content from a content source. |
| **Current User** | The authenticated user during processing operations in a front-end Web server and a back-end database server. |

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| **Dashboards** | A display of interactive views, reports, and graphics on a SharePoint site. The interactive nature of a dashboard allows a user to drill in to see more details or use the power of services such as Excel services to further manipulate the data. |
| **Data Connection** | • A link between an application and a data source. Data connections can be used to query and submit data.<br>• A collection of information, such as the type and location, that defines how to connect to an external data source, such as a database, Web service, SharePoint list, or XML file.<br>• A connection between an InfoPath form template and an external data source, as specified by settings in an InfoPath form template (.xsn) manifest file or a universal data connection (.udcx) file. |
| **Data Connection Library** | A document library, located on a site running PRODUCTNAME:[msosps2007sp1], that contains a collection of universal data connection (.udcx) and Office data connection (.odc) files. |

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| **Data Source** | • A database, Web service, disk, file, or other collection of information from which data is queried or submitted. Supported data sources can vary based on application and the data provider that is specified. |
| | • A collection of fields and groups that define and store the data for an InfoPath form. Controls in a form are bound to the fields and groups in the data sources of the form. and secondary data source. |
| **Data Source Control** | An object that can be added to an ASP.NET Web page that encapsulates the necessary logic to connect to a data source, such as a database or XML file, and that can execute queries or other data-access commands. A data source control can in turn provide data to other controls on that page. |
| **Data Type** | A property of a field that defines the kinds of data that can be stored in the field. |
| **Data Validation** | The process of testing the accuracy of data; a set of rules that specify the type and range of data that users can enter. |
| **Data View Web Part** | A Web Part that is used to display items in a list. |
| **Datasheet View** | Display of information in a table. Each row across represents one record of information. Each column vertically represents one field of information. |
| **Decision Meeting Workspace** | A site template in SharePoint used to manage all pending decisions and actions from a meeting. |
| **Default List View** | The view of a list that is defined by the owner of the list to appear when users browse to the list without specifying a view. |
| **Default Mobile List View** | The view of a list that is defined by the owner of the list to appear when users browse to the list from a mobile device without specifying a view. |
| **Default Search Scope** | The search scope that is assigned automatically to a search scope display group. |
| **Defined Name** | A word or string of characters in a formula that represents a cell, range of cells, formula, or constant value. |
| **Deployment Package** | A collection of files that represent a serialized snapshot of data. A deployment package is stored as XML files that describe the deployment objects and their relationships, and a binary file for each object. Optionally, the resulting set of files can be compressed into one or more files in the compressed PRIME data format (CMP). |
| **Deployment System Object** | An object that is created as part of a site or site collection. Examples of deployment system objects are root folders, catalogs, default pages, and galleries that are created during site or site collection creation. A deployment system object is not part of a template. |

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| **Design** | A type of permission which allows the user to view, add, update, delete, approve, and customize items or pages within the site. This permission is above the Contribute permission. |
| **Distributed Archive** | A document repository (usually large) that spans multiple site collections. |
| **Distribution List** | A collection of users, computers, contacts, or other groups that is used only for email distribution, and addressed as a single recipient. |
| **Document Center** | A site template in SharePoint designed to manage a large amount of content. (Large is considered 50,000 active document edits). |
| **Document Library** | A collection of related documents. These documents do not have to contain the same type of file (e.g. Word, Excel, PDF files can be included). SharePoint provides the Shared Documents library by default. Document libraries contain specialized features to manage documents, such as version control. |
| **Document Workspace** | A site template in SharePoint which contains a minimum of one document library, a task list and announcements.  A document repository that enables users to collaborate on one or more documents. |
| **Duplicate** | A search result that is identified as having identical or near identical content. |
| **Duplicate Result Removal** | An operation to compare the similarity of items and remove duplicates from search results. |
| **Dynamic Rank** | A component of the rank that depends on how well query text matches an indexed item. |

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| **Endpoint** | A consumer in a Web Part connection that receives data from a provider, used in connections for PerformancePoint Web Parts. |

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| **Enterprise Content Management** | According to the Association for Information and Image Management:<br><br>"Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM covers the management of information within the entire scope of an enterprise whether that information is in the form of a paper document, an electronic file, a database print stream, or even an email."<br><br>According to the Microsoft MSDN library:<br><br>"Enterprise Content Management, or ECM, in SharePoint enables the management, storage, retention, workflow, and delivery of documents and other content types across the enterprise." |
| **Enterprise Search** | The overarching name given to the collection of features available in SharePoint used to locate information/data. |
| **Enterprise Wiki** | A site template in SharePoint used for managing information across the enterprise. See **Wiki**. |
| **Events** | A default content type which supports coordinating an special meeting such as a party. |
| **Excel Services** | A service available in SharePoint that allows the use of Excel workbook features for display of information and may further allow user interaction with that Excel workbook in a browser. |
| **Excluded Item** | An item that is excluded from a crawl by the administrator of the host site or the search administrator of the crawler. |
| **External Content Type** | A reusable collection of metadata that defines a set of data from one or more external data sources, the operations avaialble on that data, and connectivity information related to that data. |
| **External Content Type Layout** | One or more Microsoft Office External Data Parts arranged in a one-dimensional or two-dimensional way to display information to a user. Typically used to show data in Microsoft Outlook task panes. |
| **External Data** | Data that is stored in a repository outside a workbook. |
| **External Data Column** | A single field in an item of an external content type. |
| **External Data Grid** | A Web Part that displays a list of external items from a business application registered in the BDC metadata store. For example, you can use a Business Data List Web Part to display the customers or orders from a database such as the AdventureWorks database. |
| **External Data Item** | A single item in an external list. |

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| **External Data Part** | A Windows Forms control that shows details of a single item or a list of items that belong to an external content type. |
| **External Data Related List** | Displays a list of related external items from a business application. For example, you can use a Business Data Related List Web Part to display all the orders for a particular customer from the AdventureWorks database. |
| **External Item Content Control** | External data from an External Data column in a SharePoint document library that is made available as a content control in Word 2010 through Microsoft Business Connectivity Services. The content control also provides picking and resolving capabilities. External data that is exposed in content controls is read-only. |
| **External List** | A list of items of an external content type. |
| **External Reference** | A reference to a cell, range, defined name, or other object in another worksheet or workbook. |
| **External System** | A supported source of data that can be modeled by Business Connectivity Services, such as a database, Web service, or custom .NET Framework assembly. |
| **External Workbook** | A workbook, other than the active workbook, that is on disk or in memory and to which a dependency is implied or intended. |
| **Extracted Definition** | The definition that is obtained by an index server during a crawl, to identify if any sentences in the item match the pattern for defining a term. |
| **Extracted Term** | A term that an extracted definition applies to. |

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| **Farm Administrators Group** | A group of users that has permission to manage all of the servers in a server farm. Members of the Farm Administrators group can perform command-line operations and all of the administrative tasks in Central Administration for the server or server farm. |
| **Farm Solution** | A custom solution that can be deployed to a farm by a farm administrator. A farm solution has full access to system resources and other sites in the farm. |
| **Feature** | A package of Windows SharePoint Services elements that can be activated or deactivated for a specific feature scope. |
| **Feature Definition** | An XML fragment that defines a feature and its attributes. |

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| **Feature Identifier** | A GUID that identifies a feature. |
| **Feature Property** | A property that is associated with an active feature at a particular scope. |
| **Feature Scope** | The scope at which a feature can be activated. |
| **Field** | The data elements that constitute an Entity in a line-of-business (LOB) system. |
| **First Class Object (FCO)** | A top-level object for building dashboards in PerformancePoint Services. Types of FCO are dashboards, scorecards, reports, filters, KPIs, indicators, and data sources. FCOs are stored as content types in SharePoint lists and document libraries. They have common attributes such as name, description, person responsible, custom properties, and in some cases, versioning or history. |
| **First-Stage Recycle Bin** | A container for items that are deleted. Items in this container are visible to users with the appropriate permissions and to site collection administrators. |
| **Form Library** | A collection of related XML forms. When a user fills out a form, the information saved is what is entered in the form, not the form layout/ template itself. Form libraries contain specialized features to manage form data, such as approvals. |
| **Front-end Web Server** | A server that hosts Web pages, performs processing tasks, and accepts requests from protocol clients and sends them to the appropriate back-end server for further processing. |
| **Full Control** | A type of permission which gives the user full control over the site. This permission is above the Design permission and it is the highest level of permission. |

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| **Gallery** | A library that is used to store a collection of site resources, such as Web Parts, list templates, or site templates. |
| **Group Work Site** | A site template in SharePoint used for a longer term group collaboration effort. |

# H/I/J

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| **Hyperlink** | See **link**. |
| **Index Server** | A server that has been assigned the task of crawling. |
| **InfoPath Forms Services** | A service available in SharePoint that allows users to fill out forms in a web browser. This information stays with the site and is available for further searching or reporting on. |
| **Initiator** | An actor who starts an action instance. |
| **Insights** | One of the six pillars of SharePoint. The ability for users to display information/data in a easy way through self-serve reports/dashboards. |
| **Issues** | A default content type which supports the tracking of situations (issues) that occur during the project. |
| **Job Definition** | A persistent container that defines and stores instructions for a job to be run on a server, server farm, or server cluster. To run, a job must have an associated job definition, and a definition must be associated with a service or a Web application. |

# K/L

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| **Key Performance Indicator (KPI)** | A predefined measure that is used to track performance against a strategic goal, objective, plan, initiative, or business process. A visual cue is frequently used to communicate performance against the measure. |
| **Keyword** | One or more words or phrases that site administrators identified as important. A keyword provides a way to display best bets and definitions on a search results page. |
| **Keyword Consumer** | A site collection that uses a particular set of keywords, synonyms, and best bets. |
| **Keyword Consumer Group** | A collection of keyword consumers. |
| **Keyword Synonym** | An alternate phrasing of a particular keyword. When a user types a keyword synonym, search returns the same best bet result as the keyword. |
| **Language Auto-Detection** | A process that automatically determines the language code identifier (LCID) for text in a document. |

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| **Language Pack** | A collection of binaries that can be installed on top of a core product and enables users to select a specific language for displaying the user interface and Help content. |
| **Library** | A specialized form of list which stores related file items such as documents. Examples of libraries include: Form Libraries, Picture Libraries, and Document Libraries. |
| **Limited Access** | A type of permission provides access to the user to only a specific site content items such as a library. This is the lowest level permission. |
| **Line-of-Business (LOB) System** | A software system that is used to store business data and can also contain business rules and logic that support business processes. |
| **Link (Hyperlink)** | A shortcut to a document or object. Also called **hyperlink**. |
| **Links (Content Type)** | Not to be confused with clicking a link. A default content type which supports hyperlinks.  A shortcut to a document or object. |
| **List** | • A container within a SharePoint site that stores list items. A list has a customizable schema that is composed of one or more fields.<br>• An organization of a region of cells into a tabular structure in a workbook. |
| **List Column** | See **Field**. |
| **List Folder** | A folder that is contained within a SharePoint list. A list folder can contain documents or list items, and it retains the characteristics of other items in the list, such as a customizable schema. |
| **List Form** | A page that allows users to create, view, or edit an item in a list. |
| **List Form Web Part** | A Web Part that is used to display, edit, or view an item in a list. |
| **List Item** | An individual entry within a SharePoint list. Each list item has a schema that maps to fields in the list that contains the item, depending on the content type of the item. |
| **List Item Attachment** | A file contained within a list item that is stored in a folder in the list with the segment "Attachments." |
| **List Level** | A condition of a paragraph that specifies which numbering system and indentation to use, relative to other paragraphs in a bulleted or numbered list. |
| **List Schema** | The Collaborative Application Markup Language (CAML) schema of a list. |

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| **List Server Template** | A value that identifies the template that is used for a list. |
| **List Template** | An XML-based definition of list settings, including fields and views, and optionally list items. List templates are stored in .stp files in the content database. |
| **List View** | A named collection of settings for querying and displaying items in a SharePoint list. There are two types of views: Personal, which can be used only by the user who creates them; and Public, which can be used by all users who have access to the site. |
| **List View Page** | A Web Part Page that displays a view of a list. |
| **List View Web Part** | A reusable component that generates HTML-based views of items in a SharePoint list. |
| **Lists** | A customized table of related data arranged in rows and columns. Items in a list share the same schema. Examples of lists include: Tasks, Calendars, Announcements, and Links. |
| **Login Name** | A string that is used to identify a user or entity to an operating system, directory service, or distributed system. For example, in Windows® integrated authentication, a login name uses the form DOMAIN\username. |
| **Lookup Field** | A field of the Lookup type that allows a user to select an item from another data source. |

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| **Major Version** | An iteration of a software component, document, or list item that is ready for a larger group to see, or has changed significantly since the previous major version. For an item on a SharePoint site, the minor version is always zero for a major version. |
| **Managed Keyword** | A word or phrase that is added to a SharePoint item, either as a value in the Managed Keyword column or as a social tag. |
| **Managed Metadata** | A hierarchical collection of centrally managed terms that you can define, and then use as attributes for SharePoint items. |
| **Managed Term** | A word or a phrase that can be associated with a SharePoint item . Managed terms, are usually predefined, can be created only by users with the appropriate permissions, and are often organized into a hierarchy. Also called "term" where "managed" is clear from the context. |

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| **Mapping Order** | An integer value that defines the order in which crawl properties are mapped to managed properties. The value of a mapping order is unique for each managed property; no two mappings for the same managed property have the same mapping order value. |
| **Meeting Instance** | A collection of data for a meeting that occurs only once or a single occurrence of a meeting that occurs multiple times. The data can be stored in a client application or on a website. |
| **Meeting Workspace Site** | A SharePoint site that is based on a Meeting Workspace site template and has a template ID of 2. A Meeting Workspace site is used for planning, posting, and working together on meeting materials. |
| **Member** | • A user in the Members group of a site. |
| | • An identity that belongs to a PRODUCTNAME:[grv2007] shared space. |
| | • See **OLAP member**. |
| **Member Group** | A group of users that is specific to the user profile service. Examples of types of member groups are distribution lists, security groups, and SharePoint sites. A member group contains metadata such as the group name, email address, URL, and the list of members. |
| **Metadata** | Data about data. In other words, descriptions attached to key data to facilitate searching and indexing of information. Metadata can be done through the process of selecting (tagging) key words or phrases of a list item or document. |
| **Metadata Index** | A data structure on a back-end database server that stores properties that are associated with each item, and attributes of those properties. |
| **Metadata Model** | A collection of semantically-related MetadataObjects that define how to interact with a specific line-of-business (LOB) system. |
| **Metadata Schema** | A schema that is used to manage information about an item. |
| **Metadata Store** | A database that is stored on a back-end database server and contains all stored procedures and storage for the MetadataObject types. |
| **Microsoft Office** | A software suite by Microsoft. This suite is offered in a variety of options. For example Office Professional currently includes Word, Excel, Outlook, PowerPoint, OneNote, Access, and Publisher. |

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| **Minor Version** | An iteration of a software component, document, or list item that is in progress or has changed only slightly from the previous version. For an item on a SharePoint site, the minor version number is never zero and is incremented for each new version of an item, unless a major version is explicitly published. When minor versioning is disabled on a SharePoint site, only major version numbers are incremented, and the minor version is always zero. |
| **Model** | A collection of MetadataObjects that describes a line-of-business (LOB) system. It provides a framework for converting operations that are requested by a protocol client into requests that are specific to a given LOB system. |
| **Moderated Object** | An object for which a moderator reviews and either approves or rejects additions or changes to that object. New objects and changes to existing objects can be seen by other users only after they have been approved by the moderator. |
| **Moderation Status** | A content approval status of an item in a list. |
| **Multipage Meeting Workspace** | A site template in SharePoint used for repeat meetings, complex meetings, and conferences. |

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| **Natural Language Query** | Query text that contains words and does not contain any property restrictions. |
| **Navigation Node** | An element in the navigation structure of a site. The element is a link, or series of links, to a specific page in the site. |
| **Navigation Structure** | A hierarchical organization of links between related content, such as lists within a site. |
| **New Form** | A form that allows for the creation of a list item. |

# O

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| **Objects** | A generic name given to a component or building block of SharePoint. |
| **ODBC** | See **Open Database Connectivity (ODBC)**. |

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| **Office 365** | A subscription program to a collection of Microsoft software products optimized for online integration. Office 365 includes options for small, midsize, and large organizations and includes collaboration features such as file sharing. |
| **Office Data Connection (ODC) File** | A file that stores information about a connection to a data source, such as an Access® database, worksheet, or text file. This file facilitates data source administration. |
| **Office SharePoint Server Search Service** | The farm-wide service that either responds to query requests from front-end Web servers or crawls items. |
| **OLAP** | See **Online Analytical Processing (OLAP)**. |
| **Online Analytical Processing (OLAP)** | A technology that uses multidimensional structures to provide access to data for analysis. The source data for OLAP is stored in data warehouses in a relational database. |
| **Open Database Connectivity (ODBC)** | A standard software API method for accessing data that is stored in a variety of proprietary personal computer, minicomputer, and mainframe databases. It is an implementation of TSQL-CLI-2003 and provides extensions to that standard. |
| **Owner** | A security principal who has the requisite permissions to a security group. |

# P/Q

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| **Page** | Also called webpage. A collection of content visible on either one computer screen or visible via scrolling. A page can be related to one page in a notebook.  A file consisting of HTML that can include references to graphics, scripts, or dynamic content such as Web Parts. |
| **Page Hop** | A process of traversing from one item to another during a crawl. |
| **Page Layout** | A dynamic Web template that is stored as a document. It contains content placeholders that bind to fields of a publishing page. A page layout has an associated content type that determines which publishing pages it can be bound to. |
| **Paged View** | A view that supports one or more visual pages. A paged view is used to break up large sets of data into smaller sets for increased performance and manageability. |
| **Parent Farm** | A farm that crawls content from another farm and also responds to query requests from that farm. |

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| **Parent List** | A list that contains a list item or list folder. |
| **Parent Site** | The site that is above the current site in the hierarchy of the site collection. |
| **Performance-Point Content List** | A list that stores the elements that are used to construct a Performance-Point dashboard. A PerformancePoint dashboard is a related group of interactive scorecards, filters, and report views that are organized together into a set of Web pages. |
| **Performance-Point Data Connections Library** | A SharePoint document library that may contain Office Data Connections (ODC), Universal Data Connection (UDC) files, and PerformancePoint data connections. Data connections identify a source of business data that may include cubes or perspectives that are based on online analytical processing (OLAP) cubes, relational databases, CSV files, Microsoft Excel Services spreadsheets, or other data sources. |
| **Performance-Point Servers** | A service available in SharePoint for data analysis. It includes features for building key performance indicators (KPIs), scorecards, or dashboards. |
| **Permission Inheritance** | Permissions set at the parent level of a SharePoint site with automatically apply to the sub level of the same site. This is the simplest way to manage security in SharePoint. |
| **Permission Level** | A set of permissions that can be granted to principals or SharePoint groups on an entity such as a site, list, folder, item, or document. |
| **Permission(s)** | Security assignments in SharePoint server which may be applied to users or groups of users. These assignment control which features and options users will be able to work with. |
| **Personal Site** | A type of SharePoint site that is used by an individual user for personal productivity. The site appears to the user as My Site. |
| **Personalization Site** | A site template in SharePoint used by team members to help tailor the SharePoint information available. This helps make SharePoint relevant to each user. |
| **Picture Library** | A collection of related pictures. Pictures may be of team members, project related activities, project status; anything that would be best represented in a photo. Picture libraries contain specialized features to manage photos such as photo editors. |
| **Portal Content** | The main search catalog, which contains content sources and settings that are related to a crawl. |
| **Portal Site** | A type of SharePoint site that can act as an umbrella to other sites and that can be used by a large organization. |

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| **PowerShell** | Windows PowerShell is a task-based command-line shell and scripting language designed especially for system administration.  SharePoint 2010 Management Shell allows you to use PowerShell commands to automate tasks in SharePoint. PowerShell built-in .Net codes to perform frequently used commands are called cmdlets (pronounced command-lets). |
| **Privacy Level** | A setting that specifies the category of users who are allowed to view the personal information of other users, such as user profile properties, colleagues, or memberships. |
| **Profile Page** | A profile page displays the data for an item of an external content type. |
| **Protocol** | A URL Scheme, as specified in RFC1738, specific values of which can be unique to Microsoft® SharePoint® Products and Technologies. |
| **Publish to Server** | A process that facilitates saving a document or portions of a document to a Web server. |
| **Published** | A condition of portions of a workbook that are marked as being available to the user when that workbook is processed by a protocol server. |
| **Published Item** | A specific named object in a workbook that is published. |
| **Published Items Snapshot** | A snapshot that contains only the published items or published sheets from a workbook. When no published items are defined, the snapshot contains the entire workbook. |
| **Published Range** | A specific type of published item that represents a range of cells. |
| **Published Sheet** | A sheet that is published. |
| **Published Version** | The version of a list item that is approved and can be seen by all users. The user interface (UI) version number for a published version is incremented to the next positive major version number and the minor version is zero. and minor version. |
| **Publishing Level** | An integer that is assigned to a document to indicate the publishing status of that version of the document. |
| **Publishing Page** | A document that binds to a page layout to generate an HTML page for display to a reader. Publishing pages have specific fields that contain the content that is displayed in an HTML page. |
| **Pull** | A type of process where a user can obtain the information when desired. This is the main benefit to SharePoint over push methods such as memos or email. |
| **Push** | A type of process that requires a user to initiate the distribution of information (e.g. email documents to multiple users). |

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| **Query Logging** | The process of recording information about user searches, such as search terms and time of access. |
| **Query Result** | A result for a given query, which contains the title and URL of the item, and can also contain other managed properties and a hit-highlighted summary. |
| **Query Server** | A server that has been assigned the task of fulfilling search queries. |
| **Query Table** | A two-dimensional table that presents data from an external data source. |
| **Query Text** | The textual string portion of a query. Frequently, a user enters query text, but it can be programmatically amended and is not guaranteed to be exactly what the user typed. |

# R

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| **Read** | A type of permission which allows the user only to read information but not make any changes. This permission is above the Limited Access permission. |
| **Recalculate** | The process of computing a value in a workbook by initiating a calculation repeatedly. |
| **Record** | A group of related fields, sometimes referred to as columns, of information that are treated as a unit. Also referred to as row. |
| **Records Center** | A site template in SharePoint used to managed published documents. May be used by government agencies. |
| **Reference** | • A link in a project to another project, a .NET Framework assembly, or a compatible Component Object Model (COM) library. Adding a reference to a project allows the use of the referenced item in a project, but does not copy it to the current project folder.<br>• A means of accessing a variable, such as an element in an array or a field in a record.<br>• The means by which cells, objects, and chart elements are referred to in formulas. |
| **Refresh** | A process that retrieves values from a data source and populates a workbook with those values. |
| **Risks** | A default content type which supports the planning of potential issues (risks) that might occur during the project. |

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| **Row** | • A collection of columns that contains the property values that describe a single item from the set of items that match the restriction specified in the search query that was submitted to the query server.<br>• A single set of data that is displayed horizontally in a worksheet. |

## S

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| **Sandboxed Solution** | A custom solution that can be deployed to a site by a site collection administrator, without approval from the farm administrator. Without that approval, the solution has full access to the immediate site and restricted access to system resources and other sites. |
| **Scheduled** | A status that is applied to a list item or document that specifies a time when the item or document will be published or unpublished. |
| **Search** | One of the six pillars of SharePoint. The concept of finding content or people. The results are optimized through the use of metadata. |
| **Search Application** | A unique group of search settings that is associated, one-to-one, with a shared service provider. |
| **Second-Stage Recycle Bin** | A container for items that have been deleted from a first-stage Recycle Bin. Items in a second-stage Recycle Bin are visible only to site collection administrators. |
| **Security Descriptor** | A data structure containing the security information that is associated with a securable object. A security descriptor identifies an object's owner by security identifier (SID). |
| **Security Group** | A named group of principals on a SharePoint site. |
| **Security Policy** | In the form of a collection of security policy settings, the policy itself is an expression of administrative intent regarding how computers and resources on their network should be secured. |
| **Shared Documents Library** | A document library that is included by default in the Team Site site template. |
| **Shared View** | A view of a list or Web Part Page that every user who has the appropriate permissions can see. |
| **Shared Workbook** | A workbook that is configured to allow multiple users on a network to view and make changes at the same time. Each user who saves the workbook sees the changes that are made by other users. |

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| **SharePoint Designer** | Previously called Microsoft Office SharePoint Designer. This is an HTML editor and web design software used for customization to SharePoint sites. Typically used by SharePoint developers. |
| **SharePoint Enterprise** | A paid version of SharePoint which includes all available features. It has all the features of SharePoint Server Standard plus additional services such as Excel services, Performance Point services, InfoPath forms services, and other services for advanced display or reporting capabilities. |
| **SharePoint Foundation** | A version of SharePoint included at no additional charge with Windows Server 2008 R2 or later. It includes core collaboration features. |
| **SharePoint Server Standard** | A paid version of SharePoint which includes all the features of SharePoint Foundation plus additional enterprise features such as search, content management, and social computing. |
| **Single Sign-On (SSO)** | A process that enables users who have a domain account to log on to a network and gain access to any computer or resource in the domain without entering their credentials multiple times. |
| **Site Collection** | Related sites grouped together. A site collection can be related to multiple notebooks grouped together. A set of Web sites that are in the same content database, have the same owner, and share administration settings. A site collection can be identified by a GUID or the URL of the top-level site for the site collection. |
| **Site Collection Administrator** | A user who has administrative permissions for a site collection. |
| **Site Collection Quota** | An option for a site collection that allows administrators to set levels for maximum storage allowed, maximum number of users allowed, and warnings that are associated with the maximum levels. |
| **Site Column** | A field that can be associated with a content type or list within a site or site collection. |
| **Site Content Type** | A named and uniquely identifiable collection of settings and fields that store metadata for lists within individual sites. |
| **Site Definition** | A family of site definition configurations. Each site definition specifies a name and contains a list of the site definition configurations. |
| **Site Solution** | A deployable, reusable package that contains a set of features, site definitions, and assemblies that apply to sites, and that can be enabled or disabled individually. |
| **Sites** | One of the six pillars of SharePoint. A collection of pages which are related. Sites provide the infrastructure for housing business websites. A site can be related to a notebook with multiple pages. |

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| **Slide Library** | A collection of related PowerPoint slides. Slide libraries contain specialized features for managing PowerPoint slides such as a way to generate new slide decks directly from the library. |
| **Snapshot** | A copy of a workbook that contains only values and formatting. It does not contain any formulas or data connections. |
| **Social Data and User Profiles** | The concept of new features available in SharePoint Server Standard or SharePoint Enterprise which allow for social collaboration in an organization similar to other software available in user's personal life, such as Facebook. |
| **Social Meeting Workspace** | A site template in SharePoint used to manage all the details of a social event such as a party. |
| **Source Data** | The data that is used as the basis for charts, PivotTable® reports, and other data visualization features. |
| **Start Address** | A URL that identifies a point at which to start a crawl. Administrators specify start addresses when they create or edit a content source. |
| **Subsite** | A complete Web site that is stored in a named subdirectory of another Web site. The parent Web site can be the top-level site of a site collection or another subsite. Also referred to as subweb. |

# T

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| **Tagging** | Labeling a list item or document through the process of selecting key words or phrases typically available in a drop-down list. |
| **Tasks** | A default content type which supports a to do list. |
| **Team Site** | A site template optimized for team collaboration and sharing of information. It includes: document libraries, site assets, site pages, various lists, and a discussion board. |
| **Term Set** | A collection of related terms. For example, the term set named "milestone" could include the terms "M0" "M1" "M2" "Alpha" "Beta1" "Beta2" "RC1" "RC2" and "RTM." |
| **Term Store** | A database that stores managed metadata, including term sets, terms, and managed keywords. |
| **Theme** | A feature that provides a way to apply a uniform look to a SharePoint site. Themes include font and color settings of items on pages (e.g. titles, hyperlinks, page backgrounds, text, etc.). |

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| **Timer Job** | A built-in Windows® SharePoint® Services object that can perform various tasks within the environment on a scheduled or one-time event basis. |
| **Token** | A word or number in a crawled item or a search query. A token translates into a meaningful word, such as a linguistic unit, because the definition differs between languages. Examples include cat, AB14, or 42, but do not include white space. |
| **Top-Level Site** | The first site in a site collection. All other sites within a site collection are children of the top-level site. The URL of the top-level site is also the URL of the site collection. |
| **Trusted Authentication** | A mechanism whereby a user account or a process account can be used to perform operations on behalf of the current user. |
| **Trusted Subsystem** | A method of communication in which two-way trust is established between two server components. Each server component communicates with the other component by using an account that is authorized to perform privileged actions such as retrieving files and settings. |

# U/V

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| **User** | A designation for a specific person who will interact with SharePoint sites. |
| **User Display Name** | A user profile property that can contain the preferred name of a user. |
| **User Profile** | A collection of properties that pertain to a specific person or entity within a portal site. |
| **User Profile Service** | A data source that stores, provides, and applies information about users. |
| **User Profile Store** | A database that stores information about each user profile. |
| **Viewport** | A virtual window, used for controls that display content, through which all or part of the content is visible. A viewport is typically used to display a particular portion of content when all of the content will not fit in the available display space. |
| **Visible Scope** | A search scope that is displayed to site collection administrators and users. |
| **Visio Repository** | A site template in SharePoint used for management of Visio process diagrams. |

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| **Visio Services** | A service available in SharePoint that allows Visio drawings to be published to a SharePoint site and available to a user in a browser. |
| **Visitors Group** | A default group of users on a SharePoint site. By default, the Visitors group is assigned the Read permission level. |

# W/X/Y/Z

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| **Web Analytics** | See **Analytics**. |
| **Web Application** | • A container in a configuration database that stores administrative settings and entry-point URLs for site collections. <br> • A software application that uses HTTP as its core communication protocol and delivers information to the user by using Web-based languages such as HTML and XML. |
| **Web Discussion** | A component and add-in that allow users to enter comments about documents and pages without modifying actual content. |
| **Web Discussion Comment** | An individual comment that is added within a Web discussion. |
| **Webpages** | See **Page**. |
| **Web Part** | A reusable component that contains or generates Web-based content such as XML, HTML, and scripting code. It has a standard property schema and displays that content in a cohesive unit on a Web page. |
| **Web Part Cache** | A hash table of key/value pairs that is used to cache and locate internal information for Web Parts. |
| **Web Part chrome** | The common user interface elements that frame a Web Part within a given zone. The Web Part chrome includes a border, a title bar, and the icons, title text, and verbs menu that appear within the title bar. |
| **Web Part Chrome State** | The condition of a Web Part and the Web Part chrome surrounding it. Possible values are zero (0) for normal state or one (1) for minimized state. |
| **Web Part Connection** | An element in a Web Parts page that defines a provider-consumer data relationship between two Web Parts. When a Web Parts page is rendered, data provided by one Web Part can affect how and what is rendered by the other Web Part. |
| **Web Part Zone** | A structured HTML section of a Web Part Page that contains zero or more Web Parts and can be configured to control the organization and format of those Web Parts. |

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| **Web Parts** | Also referred to as Web Widgets. A component of a SharePoint site that displays information. Every SharePoint site consists of one or several web parts. Web parts are developed by Microsoft or third party programmers and simplify the process of building or modifying a SharePoint site. |
| **Web Parts Page** | An ASP.NET Web page that includes Web Part controls that enable users to customize the page, such as specifying the information that they want to display. |
| **Web Query** | An external data connection that retrieves a table from a Web site and inserts table data into a workbook. |
| **Wiki** | A web page which is changed dynamically by users through editing, adding, or removing information. One user has the ability to manipulate information posted by another user. Many wikis have users who monitor the pages to ensure organizational standards or guidelines are followed when users manipulate information. |
| **Word Automation Services** | A SharePoint service which helps convert documents to other formats or update items within a document without locating the exact program it was created in (e.g. renumbering the pages). |
| **Work Item** | An object that represents an operation that is scheduled to run at or after a specific time. |
| **Work Item Process** | A process that runs a work item. |
| **Workflow** | A sequence of steps which match a business process. In SharePoint, workflows may direct users through actions such as the completion of tasks or documents. |
| **Workflow Association** | An association of a workflow template to a specific list or content type. |
| **Workflow Condition** | A logical "if-then" statement that defines a specific situation in a workflow and any actions to be taken when that situation occurs. |
| **Workflow Configuration File** | An implementation-specific file that is a part of a workflow. The workflow configuration file contains information that is necessary to create a workflow template from the specified workflow markup and rules files, and to associate it to a specific list. |
| **Workflow History Item** | A list item that stores information about the current status of, and past actions for, a document or item that is associated with a workflow. |
| **Workflow History List** | A list that stores the history of actions or tasks for a business process. |

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| **Workflow Instance** | An instance of a workflow association that performs on a list item the process that is defined in a workflow template. |
| **Workflow Markup File** | A file that contains markup to specify the functional behavior of a workflow. |
| **Workflow Participant** | A user or group that is involved in a workflow. |
| **Workflow Task** | An action or task in a sequence that is related to a built-in or user-defined business process. |
| **Workflow Task List** | A list that stores the sequence of actions or tasks for a business process. |
| **Workflow Template** | A definition of operations, the sequence of operations, constraints, and timing for a particular process. |

# Appendix B
# Advisicon Services and Training

# B.1 About Advisicon

Advisicon delivers strategic project control solutions using advanced project and portfolio management methodologies, custom application development and consultative training.

Our clients throughout North America and Latin America have realized quantifiable results through our unique approach of combining knowledge transfer, optimization and sustainability of processes and technology while increasing stakeholder competencies.

## *B.1.1 Consulting and Training Services*

► SharePoint & Business Intelligence Training & Consulting

► Project, Program and Portfolio Methodology & Technology Training

► Project Management Office (PMO) & Program Management Organizational Maturity Consulting

► Lifecycle management; organizational change and productivity solutions with integration consulting

► Assessments and optimization consulting for project and work management

► Microsoft® Project Desktop, Server, and Portfolio Server solution and integration consulting (all versions)

► Microsoft® SharePoint Services and Server solution and integration consulting (all versions)

► Dynamic project scheduling, program administration and staffing services and consulting

► Proprietary consultative technology and methodology training curriculum (public and customized)

► Business process and ERP system integration solutions and consulting (e.g. SAP, Dynamics, Lotus, IBM, Oracle)

► Custom Application Development (complex databases, integrations, reports, workflows and dash-views)

### Microsoft Gold Certified Partner

*Microsoft* Partner
Gold Project and Portfolio Management
Silver Portals and Collaboration
Silver Midmarket Solution Provider

Advisicon is Microsoft Gold Certified Enterprise Project Management Partner— Microsoft's highest partner ranking with competencies in Networking Infrastructure Solutions and Information Worker Solutions and an Enterprise Project Management Specialization.

# Project Management Institute Global Registered Education Provider (REP)

Advisicon is a Global Registered Education Provider (REP) of the Project Management Institute (PMI). Our clients have confidence knowing that they have chosen an organization that is qualified to provide the highest level of project management training, and the convenience of receiving Professional Development Units (PDUs).

### Knowledge Transfer

Advisicon consultants first learn the key business drivers to any successful solution. Simultaneously, Advisicon consultants teach clients to internalize and standardize project management best practices and use of technology. Clients receive task-specific coaching, in-depth process development, customized project management methodology and supervised training with the technology.

### Optimization

Advisicon consultants integrate project management best practices and project management technologies to fit each client's organizational structure, strategy, goals and culture.

### Sustained Results

Through Advisicon's phased approach, our clients are able to adopt and implement strategic project management improvements one step at a time, growing from one level of project management maturity to the next. Through this process of optimization and knowledge transfer, Advisicon clients realize sustained results and scalable business options.

# B.2 Training Programs

## B.2.1 Advisicon Project Management Courses
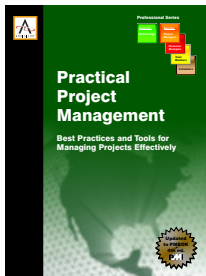
### Practical Project Management

**Learn how to manage projects from initiation to close-out**. This practical course teaches participants how to successfully initiate, plan, execute, control and close-out projects applying industry best practices. Students will learn project management concepts, helpful standard terminology, and established methods based on the Project Management Institute (PMI®) Project Management Body of Knowledge (PMBOK®).
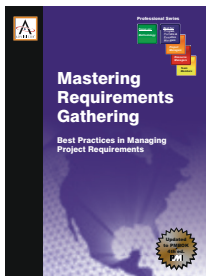
### Mastering Requirements Gathering

**Learn how to gather and manage project requirements successfully**. This course teaches participants how to elicit, characterize, document, analyze, validate, verify and manage requirements for new projects, products and services. Participants will learn how to define and document high-level business requirements, identify user classes & representatives, select elicitation techniques, differentiate and prioritize functional & non-functional requirements from users, identify business rules, and review and verify requirements with stakeholders.

## B.2.2 Advisicon Microsoft Office Project Management Technology Courses
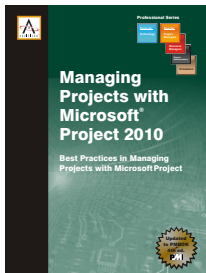
### Managing Projects with Microsoft Project 2010

**Learn how to use Microsoft Project to build, optimize and manage project schedules**. This course teaches participants how to use Microsoft Office Project to successfully create, track, manage and modify project schedules and resource pools. Participants will learn how to apply best

practices, tips and tricks to planning and managing projects with Microsoft Office Project.
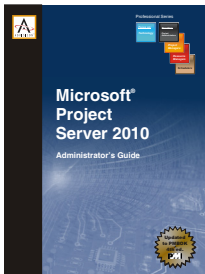
## Microsoft Project Server 2010: Administrator

**Learn how to configure, customize, administer and support Microsoft Office Project Server 2003 or 2007**. Administrators will learn how to configure, customize and support *Microsoft Office Project Server*. This course trains participants to set up and support enterprise-wide project management standards, templates, resource pools, custom fields, management metrics and reporting, as well as how to manage Project Web Access.
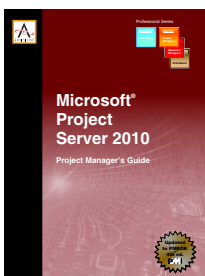
## Microsoft Project Server 2010: Project Manager

**Learn how to build, publish, and manage project schedules, issues, risks, deliverables, resources, and documents across an enterprise with Microsoft Project Server 2010**. Project Managers will learn to build, track and manage project schedules with Microsoft Office Project Professional and publish them to Project Server, and how to track, analyze, and report on projects through Project Web Access.
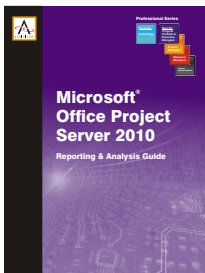
## Microsoft Project Server 2010: Reporting and Analysis

**Learn how to use Microsoft Project Server 2010 to use, create and manage helpful views and reports to analyze projects and metrics across an enterprise**. This course trains management stakeholders how to utilize the reporting and analysis features of Project Server, as well as how to use resource and schedule visibility tools for monitoring and controlling project activities across an organization or an entire portfolio of projects.
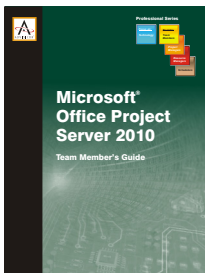
## Microsoft Project Server 2010 Team Member

**Learn how to use Microsoft Project Server 2010 to contribute to projects across an enterprise**. This course trains participants how to update and manage project tasks, enter and report on risks, issues, documents and new tasks through Project Web Access.
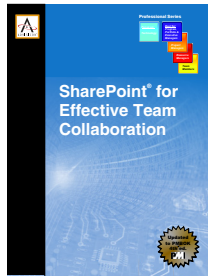
# Using SharePoint for Effective Team Collaboration

**Learn to use Microsoft Windows SharePoint Services to manage project team collaborate on projects**. This course teaches participants how to design, create customize and use SharePoint to collaborate, share documents, communicate and coordinate project activities, deliverables, communications, risks, and issues.
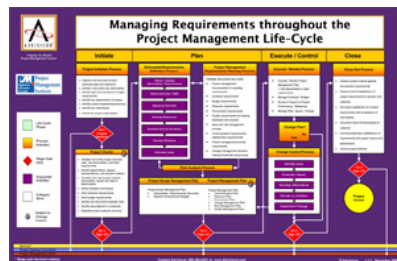
# B.3 Advisicon Flowcharts

Advisicon has created a very practical set of project management flowcharts to help project managers, PMOs, and project team members plan, collaborate, and track project activities more effectively.
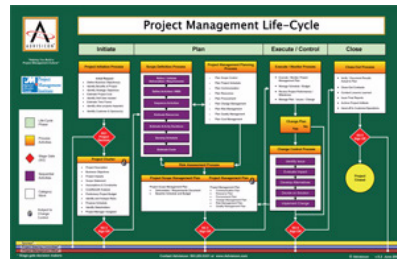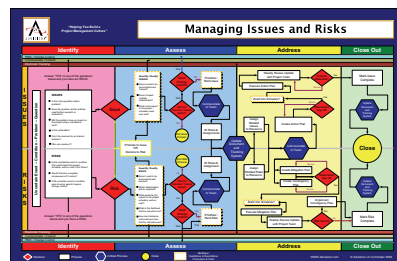


Project Management lifecycle
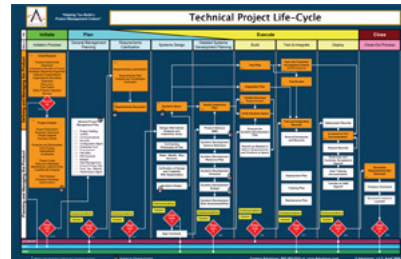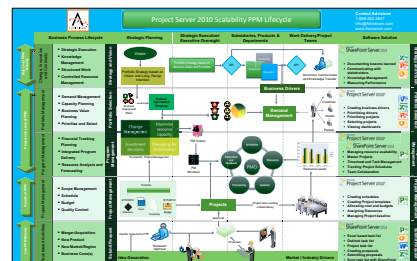


Technical Project lifecycle



Managing Requirements throughout the Project Management lifecycle
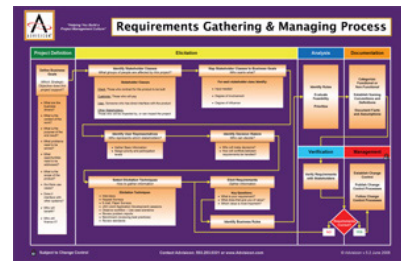


Requirements Gathering & Managing Process



Managing Issues and Risks



Project Server 2010 Scalability PPM Lifecycle

# B.4    Advisicon Project Management Tools

Advisicon's has created Project Management Tools to help project managers, PMOs, and project teams standardize and apply project management best practices. These tools will provide valuable project insight and analysis and save you days and weeks of work. You don't need to reinvent the wheel! Get the tools you need to manage your projects more effectively today!

**RACI Charts**, **Project Risk Register**, **Stakeholder Support Analyzer**, and **Risk Analyzer** are just some of the tools we offer.
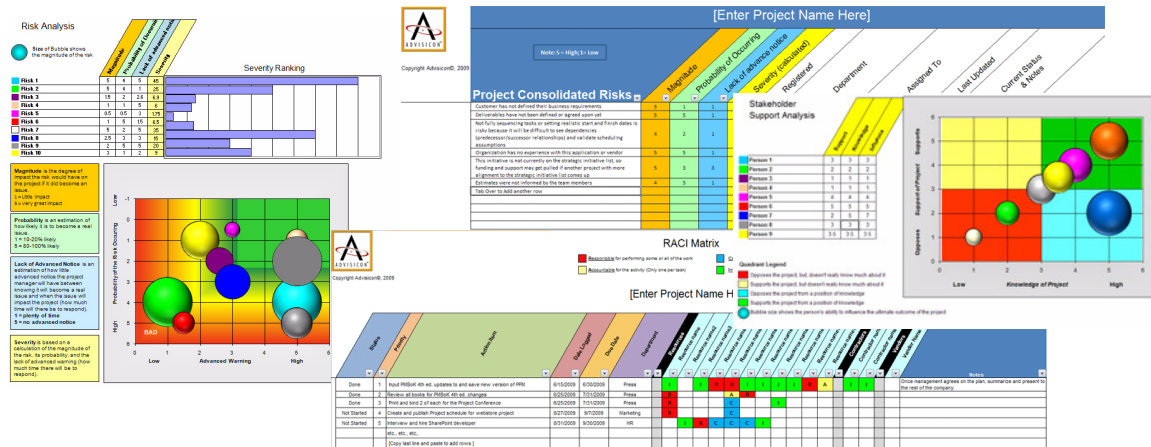


## Optimization, Knowledge Transfer, and Sustained Results

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