SharePoint® 2010 for Effective Project Management

*A manual by **Advisicon®***

Helping You Build a Project Management Culture

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The Purpose of This Book

The purpose of this book is to assist teams in communicating and collaborating more efficiently with the use of the SharePoint technology. One of the immediate benefits of using SharePoint is that organizations can improve consistency in the standardization, optimization, creation and use of Sites and Workspaces in SharePoint. This book is designed to familiarize end users with the different capabilities, options, and ways to apply SharePoint (namely, SharePoint Foundation) in supporting teams.

This book is designed to assist team leaders, team members, management, executives and stakeholders in understanding how to best use the components of SharePoint in support of organizational initiatives. It includes industry best practices used by managers and team members to better manage and create results with technology leading to higher productivity and return on investment.

We have included a Glossary of terms at the end to familiarize you with terminology.

We hope that you enjoy this reference book. Please feel free to provide your comments or feedback to Advisicon, Inc. through our web site at www.Advisicon.com.

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About Advisicon

Advisicon is a professional project and portfolio management consulting, training and custom application development company. Advisicon helps our clients leverage the best practices of project management methods and technologies to manage projects more effectively.

Advisicon is a Registered Education Provider (REP) of the Project Management Institute (PMI), giving clients the confidence that they have chosen an organization that is well qualified to provide the instruction they need as well as the convenience of receiving Professional Development Units (PDUs).

Advisicon is a Microsoft® Gold Certified Partner with Enterprise Project Management (EPM), Information Worker, and multiple other advanced certifications. Advisicon helps organizations use Microsoft Project, Microsoft Office Project Server and SharePoint Services to manage their projects more effectively through optimization, training in best practices, and process and template development. Advisicon's consultants deliver deep expertise to our clients to help them use MS Project more effectively to deliver sustained results.

Our People

Advisicon's team of professionals includes Project Management Institute certified Project Management Professionals (PMPs), Microsoft Certified Professionals with specializations in Enterprise Project Management, Networking and Infrastructure Solutions, and Microsoft MVPs.

Our Philosophy

Advisicon is about delivering: Optimization, Knowledge Transfer and Sustained Results.

Our Services

- Microsoft Project and Project Server Deployments, Consulting and Training
- SharePoint Deployment, Custom WebPart Development, and Training
- Microsoft Access & SharePoint Application Development, Consulting and Training (see back of book for contact information or check our website, www.Advisicon.com)
- Project Management Office Formation and Development
- Project and Portfolio Management Consulting and Training
- Project Management Maturity Assessments
- On-Site Project Management Support
- Custom Application and Database Development

Our Team

- Project Management Institute-certified PMPs
- Microsoft® Certified Professionals (specializations in Enterprise Project Management, Networking and Infrastructure Solutions)

Advisicon serves clients in every type of industry including business, government, and non-profit. Our services span international companies in North, Central and South America as well as Europe and Asia Pacific.

Visit Advisicon's website to read case studies of how Advisicon has helped clients, or to learn more about our services and products, contact Advisicon at 1-866-36-ADVIS or visit us at www.Advisicon.com.

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Cindy has been a sought-after consultant called on to help numerous companies both locally and across North America to assist and rescue failed Project Server implementations in Project Server 2002, 2003, and 2007. In Project Server 2010 Cindy has captured complex business requirements and delivered a best in case solution recommending features that derive value for the business and provided consultative training to apply these features immediately. She has deployed Project Server 2010, deployed Proof-of-Concept instances and has directed Project Server 2007 to Project Server 2010 upgrades.

Cindy also enjoys leading large groups and has provided extensive training on Microsoft Project via both live and virtual classrooms. In addition to teaching, she has taken a role as the lead author on courseware development for new courses on Microsoft Project and Project Server.

Comments & Feedback

We are interested in your feedback about this publication. It is our goal to continually improve our books and resources and to enhance your learning experience. Please email us at info@Advisicon.com, and let us know your thoughts.

We look forward to hearing from you. Happy learning!

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Legend of Icons in this Book

PMBOK reference

The PMBOK icon and call-out box refers you to where you can find a concept or term in the Project Management Institute's Project Management Body of Knowledge – The PMBOK.

Note

The Note icon and call-out box indicates a key fact or insight to help participants better understand helpful background information, quirks, explanations for the way things work, answers to Frequently Asked Questions (FAQs), and helpful things to remember.

Tip

The Tip, Trick and Shortcut icon and call-out box presents quick ways to do things faster and impress colleagues.

Warning

The Warning icon and call-out box will draw your attention to important risks, pitfalls, potential issues, and alternate concepts that may assist you with managing your project processes.

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Chapter 1

What is SharePoint and Why is it Here?

"If at first you don't succeed, your skydiving is over."
~ Anonymous Bumper Sticker

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1.1 Overview

Upon completion of this chapter, the participant will be able to:

- Understand the components of SharePoint 2010.
- Learn the history of SharePoint.
- Different between the versions and feature set of SharePoint 2010.

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1.2 What is SharePoint?

This is a great question. In many cases the answer is “What is SharePoint not?” SharePoint has a rich and evolved history, however overall the tool has been referred to as a place to store documents, or a graveyard for presentation slide decks. The truth is that SharePoint has evolved into a premier collaboration platform. From its humble beginnings in 1997, SharePoint has become an integral platform base for Microsoft’s software stack.

This versatile technology enables organizations to take advantage of robust features such as team sites, document libraries, discussion boards, calendars, surveys, and blogs. These features support team collaboration strategies and organizational and/or departmental content collaboration management with flexible and scalable governance and security measures.

SharePoint simplifies collaboration. Teams are able to consolidate project and initiative communication and documentation for all team members and stakeholders in one central location.

SharePoint offers simple, yet powerful functionality to integrate best practices and core technologies for teams and projects. SharePoint enables teams to strategically consolidate information and metrics, allowing for standardization of tools, templates and terms as well as project information.

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1.2.1 SharePoint Components

SharePoint is built upon 6 pillars to provide extensibility and scalability.

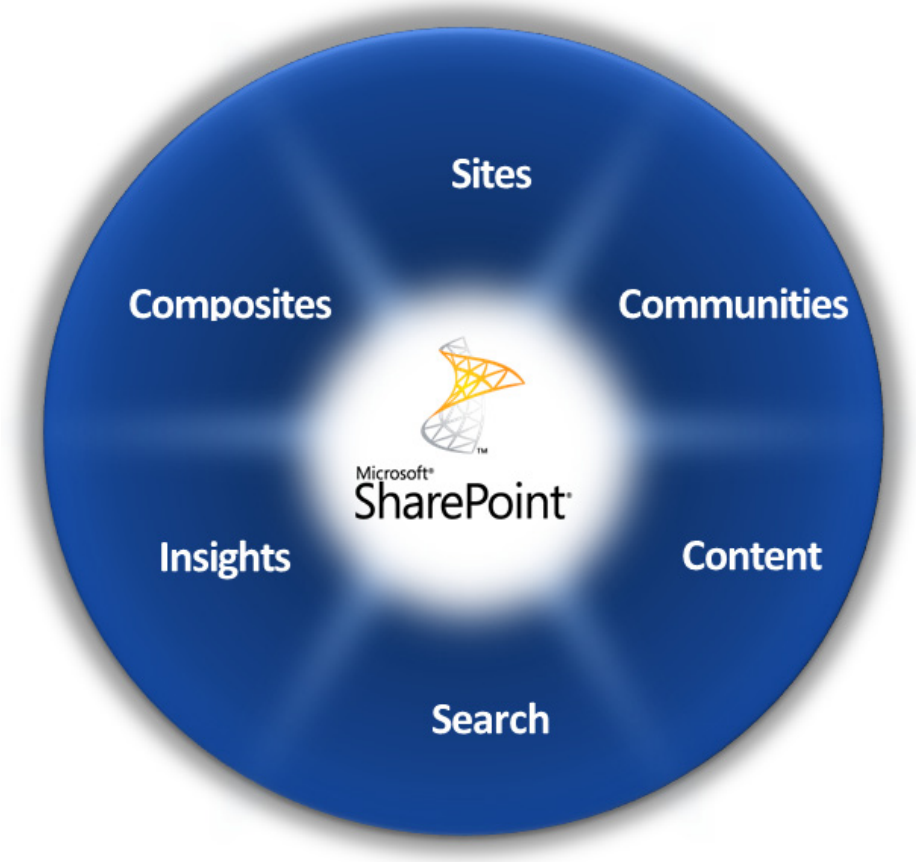

Figure 1-1 *Components of SharePoint 2010*

Sites

Sites provide a single infrastructure for creating and housing all business websites. These sites contain documents, photos, surveys, links, etc. that enable one central location for teams to collaborate. Teams can easily share and work together on content in a familiar and customizable environment. **My Sites** even allows each individual user to customize how they view content without affecting other colleagues' use of sites.

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Communities

SharePoint integrates useful tools to bring teams together. As social networking has taken a firm hold, SharePoint accommodates the benefits of this stage so colleagues can network internally by posting updates on current activities. Each person can also develop a profile listing basic information such as job title, location and contact information, but also biographies, interests and skills. This information is easily viewable by colleagues making it easy to reach out for assistance with knowledge transfer, projects and issues.

Content

SharePoint provides robust content management by providing a central repository for items. Features such as version control, check in and out and permissions security protect the integrity of data while managing collaboration and transparency of development. Control of data can be maintained through permissions, data retention protocols and legal compliance via preservation.

Search

SharePoint offers a customizable vehicle for finding content and people faster. Whether looking for a document or a person within the organization, SharePoint Search utilizes metadata to create a deep search engine allowing people to work effectively and find needed information efficiently.

Insights

SharePoint Insights provides critical business information and intelligence and can display the relevant information from reports and databases in colorful dashboards and scorecards making the data easily accessible and visible. Insights is built to allow self-service business intelligence, empowering workers to get the information they need quickly via a browser and freeing IT and teams to concentrate on business relevant work.

Composites

SharePoint Composites bring essential building blocks together for creating business solutions. Connecting organizational data through easy, code-free development, Composites enables the creation of solutions incorporating things such as InfoPath Form Services, Access, and Visio in the browser. SharePoint 2010 also has sandbox solutions that allow testing of solutions in a locked environment that will not affect the production's environment.

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1.2.2 The Goal of SharePoint

SharePoint is designed to establish a common and standard platform for integrating web functionality with the ability of database and application management. It provides a streamlined, simple, easy-to-use interface for the team so that they can focus on easily distributing communication in different media from one location.

Microsoft wanted to create a highly functional and scalable platform that could support functions that are contained in most websites.

Key Goals and Objectives of the Application

- Establish common collaboration portal(s) for team communications and document sharing.
- House key communications and collaboration components migrated from different applications.
- Provide an infrastructure for future enterprise applications to be built upon websites or “Workspaces” that are easy to create, nest, manage and modify, and that can be created to expedite interaction by people.
- Simplify and standardize security and permissions structure to leverage existing Microsoft functionality and technologies like Active Directory.

1.2.3 The History of SharePoint

1997–1999

Before SharePoint arrived, there was a product called Site Server (and Site Server Commerce Edition) that contained features including: web content management and replication, site analytics, personalization, indexing/search, document management and e-commerce. Site Server felt less like a product, more a collection of tools that didn’t have a home anywhere else. At the time, there weren’t too many servers to choose from. King of the range was Exchange Server (version 5.5), the messaging platform. SQL Server 6.5 was paddling around in the nursery pool.

In 1998 Microsoft announced that the next version of Exchange (Platinum) would include a new information store – the Web Store – designed for handling documents and web content, as well as email. A new product (Tahoe) would enhance Platinum by introducing document management through a technology called WebDAV (Document Authoring and Versioning) and an improved indexing/search engine. A separate project was also

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underway – developing the Local Web Store – to provide local replication of content between client and server (if this all sounds familiar, you've probably worked with Lotus Notes…).

The combination of Platinum and Tahoe would be Microsoft's next generation messaging, collaboration, and document management platform. Of the remaining Site Server features, content replication moved into a new product called Application Center. Commerce Edition kept the personalization, e-commerce and site analytics, and was renamed Commerce Server. The web content management features were, from memory, pretty ugly and retired to be replaced by a product acquisition…

In April 1999, a toolkit originally called the Digital Dashboard Starter Kit was released as a free download and introduced Microsoft's first portal framework. The User Interface could sit in a browser or in Outlook and contained "nuggets" displaying information from different content sources. Nuggets would later be renamed as Web Parts.

2000–2001

In 2000, Microsoft finally released Windows Server 2000 (upgrade from NT 4.0, introducing Active Directory) and SQL Server 2000 (upgrade to SQL Server 6.5). Exchange Server 2000 was completed and also released. All three releases were major product upgrades. Tahoe began the year in beta 1 development. The Digital Dashboard Starter Kit was up to its third release and renamed Digital Dashboard Resource Kit.

By mid-2000, the portal market was taking center stage and, in October, Tahoe beta 2 was released complete with a new UI based on the Digital Dashboard Resource Kit. Tahoe had adopted a portal UI. Its product name was finally announced: SharePoint Portal Server 2001 (SPS 2001).

By late-2000, SQL Server 2000 was outperforming its stable mate – Exchange 2000 – and in December 2000 Microsoft (Steve Ballmer to be precise) killed the Local Web Store project, announcing that future database development would be based on SQL Server 2000.

Early in 2001, SPS 2001 was finally released. Having started life as a document management and indexing application, its new focus was on targeting the growing portal market. While its features were basically good, it was saddled with two major problems: the web store and the digital dashboard. The web store under-performed, limiting the scale of the product. The digital dashboard was outside of Microsoft's core development platform – Visual Studio – and had limited support within the developer community.

Also in 2001 Microsoft acquired content management vendor nCompass, and re-branded the product as Content Management Server 2001 (CMS 2001). Initially the product was targeted at providing CMS capabilities for Commerce Server (re-completing the feature set that existed back in Site Server days). However, as the portal market continued to grow and overlap with the existing

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web content management market, CMS 2001 began to compete with SPS 2001.

And to further confuse customers, Microsoft also released a free add-on to Office 2000 called SharePoint Team Services (STS) that provided web-based team collaboration features. Confused? Plenty of customers were.

2002–2003

Development options for the next version of SharePoint were relatively simple: replace the Web Store with SQL Server as the storage back-end, and replace Digital Dashboard with ASP.NET for the front-end. As always, the devil was in the details; easy choices don't necessarily lead to easy development. The focus was on improving scalability and improving portal features and that meant some of the document management features were going to struggle to be included. There's a good reason why most document management systems choose to use a hierarchical database as opposed to a relational one for storing content. As it was, features such as document profiles and workflow were left out of SPS v2. The relationship between SPS and STS needed sorting out, and the two groups were merged together. CMS continued on its own path, with an upgrade (CMS 2002) that used ASP.NET as the front-end.

In October 2003, Microsoft released a new version of Office 2003, and included the new upgraded SharePoint range within the Office brand. STS was renamed Windows SharePoint Services (WSS), and became part of Windows Server 2003. It provided a collaboration store and a Web Part user interface built using ASP.NET. SPS v2 was built on top of WSS and named Microsoft Office SharePoint Portal Server 2003 (SPS 2003). SPS contained indexing/search, personalization and enhanced management/taxonomy.

So we now had a portal product with a bit more scale than its predecessor that used Microsoft's common developer tools (well, pretty much). Microsoft began to creep up Gartner's magic quadrant for portals, and all would have been well if it hadn't been for Enron and WorldCom…

2004–2007

Just as SharePoint moved away from document management and focused on portal capabilities, Sarbanes-Oxley was born and, all of a sudden, document and records management moved back up the agenda. Simultaneously, the continued growth of the portal market made it clear that portals and web content management were on a collision course, with document and records management joining the party.

CMS and SPS finally joined together as the two product groups were merged in 2004. Web parts built using ASP.NET were beginning to take on a life of

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their own and were moved fully into the developer playground. ASP.NET v2, launched at the end of 2005, included native Web Parts. Workflow was back on the agenda, and hence a common engine to build around: Windows Workflow Foundation (WinWF). Just like Windows SharePoint Services (WSS), WinWF became a native add-on to Windows Server, providing a workflow service that all other applications can build upon.

Another missing piece of the SharePoint puzzle had been offline synchronization. The local web store was originally going to be used, but that project was cancelled before it was ever launched. Outlook was the logical place to introduce such a feature and, sure enough, the capability of having offline SharePoint folders in Outlook was added. But in 2005, Microsoft acquired Groove, a peer-to-peer (P2P) team-based collaboration product that also included synchronization of SharePoint sites. This likely caused some confusion again with customers, similar to when STS and SPS first appeared. Adding to the confusion is the fact that Groove has its own built-in forms service, and InfoPath also provides a forms service. But suffice it to say, Groove added collaboration spaces and templates to the mix.

While compliance requirements have sobered up the content management party, business intelligence (BI) helped put back some fizz. Portals have always been the logical place for BI to come of age, moving away from the niche specialists such as business and data analysts to become integrated in every day work. In 2005, Microsoft released Business Scorecard Manager 2005 (BSM 2005), including integration with SharePoint, and in 2006, they acquired ProClarity.

On January 30, 2007 Microsoft officially released Office 2007, which included SharePoint Server 2007. Alongside Microsoft Office SharePoint Server (MOSS) 2007 a new product was added – Microsoft Performance Point 2007 – providing pervasive BI capabilities or more commonly referenced as Balance Scorecard. This in combination with Project Server 2007 and the release of Office 2007 designed to specifically take advantage of the SharePoint collaboration infrastructure made this one of the most heavily invested software technologies to date.

2008–Present

As SharePoint 2007 matured in the marketplace, the foreseen potential for this flexible and feature-rich solution became vibrant. The economy was moving to a global stage. Teams were growing more diverse and virtual. Mobile workforces became one of the fastest growing worker segments of all time. It became clear that a collaborative platform made sense in the business world.

A move toward unifying the Microsoft stack emerged. The idea being that if the different programs, such as Office, Outlook, PowerPoint and Excel (the most widely used programs in the world) had a similar look, feel and synergy, then adoption would be that much easier.

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The next logical step was tightening the integration between the different programs in the Microsoft stack. It was a sound business decision. Millions of people already used Microsoft Office, so if integration was easier, it would make sense that people would stick with it.

In April 2008 Microsoft acquired FAST Search and Transfer, a Norwegian company whose product offered enterprise search capabilities, business intelligence solutions and information access features.

In May 2010, Microsoft released the latest version of SharePoint, known as SharePoint 2010. Obvious integrations included items such as the Fluent User Interface, or more popularly known as The Ribbon. There were also many feature enhancements as Microsoft virtually placed SharePoint as its main platform and other software programs now functioned as an integral plug-in to SharePoint. One clear example is Project Server 2010, released in May 2010 as well. You cannot have Project Server with its full 2010 features and capabilities without SharePoint Server 2010. They are effectively joined at the hip.

The proliferation of social networking was not overlooked. In the age of FaceBook and Twitter (the evolution pace is faster than ever with MySpace all but forgotten by 2010) social aspects of individual and team functions and work process have emerged and look like this culture is here to stay. Organizations have been making the move to adapt to the benefits of this social fiber. Organizations are reaping benefits from team members finding other colleagues internally that possess the skills sought out and a social media mind-set has facilitated knowledge transfer, growing the skills of workers, and the intellectual property assets of organizations. This culminates in My Sites which provides a social site for individuals within an organization that can highlight not only technical skills, hobbies, and interests (this has been proven to support team development by creating common bonds outside the realm of just work responsibilities), but also in creating a “wall” that folks can update what they are working on, what they have created, or an issue they are struggling with. Other colleagues can support, assist or learn as they read these “walls.”

Other items received a performance boost. Search functionality was enhanced, a benefit of the FAST acquisition, to quickly find information, not just in a site, but across an enterprise. This information includes not only documents, slides, and files, but people and skills as well.

In keeping with the drive to merge SPS and CMS to meet compliance market demands, records management is still going strong. Storage, archiving and eDiscovery capabilities remain strong in the SharePoint environment.

Line of business integration was furthered by Business Connectivity Services. This allows SharePoint to integrate with external data, such as SAP, custom applications and diverse Web Parts. Excel Services, Access Services and Visio Services added to the overall functionality of SharePoint being a central hub for data.

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Sandbox solutions were introduced to allow organizations to quickly create and test SharePoint-based business solutions by providing a safe and secure location within the organizational SharePoint environment, but secluded from production environments.

Microsoft spent the time between major version releases honing business intelligence. Metadata made its varsity debut as a driving force enabling robust analysis of data from lists, to libraries, to dashboards. Business intelligence has moved closer to center stage in the 2010 release. With the inclusion of PerformancePoint Services (formally known as PerformancePoint Server) data can be sliced and diced to create massive reports and analysis that can be drilled down to a very granular level with a click of the mouse.

It is clear that SharePoint is here to stay. That is well witnessed in third party applications popping up to extend or support SharePoint functionality. There is a whole marketplace for third party Web Parts growing every day.

The future of SharePoint will see a strong presence in the Cloud. SharePoint Online has already made its debut and all signs are leading to the ability to utilize SharePoint on premise or virtually.

Collaboration is now the name of the game. Tied to SharePoint's ability to be the hub for data, information and line of business integration it has developed into a force to be reckoned with.

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1.3 Versions of SharePoint

To meet the needs of a varying range of customers SharePoint is available in three major versions in the 2010 release.

- SharePoint Foundation
- SharePoint Server Standard
- SharePoint Server Enterprise

Each version contains unique features to best match the needs of users. This book focuses primarily on SharePoint Foundation.

One of the reasons for the success of SharePoint is that even though there has been a tremendous amount of money poured into the development of this product by Microsoft, there has been a “Free” version of it made available to anyone.

This “Free” version of SharePoint has gone through many different naming conventions, but now is referred to as SharePoint Foundation.

If an organization is thinking of leveraging the abilities of SharePoint, it is an excellent opportunity for them to do so without purchasing software licensing for the full blown SharePoint Server product.

SharePoint Foundation is available as a free download provided the organization is using Windows Server 2008 R2 or later.

1.3.1 Key Differences Between the SharePoint Versions

There is an extensive list of features all versions of SharePoint share. They include:

- The Ribbon
- Lists
- Custom Lists
- Libraries
- Workspaces
- Wikis
- Alerts and Notifications
- Templates
- Web parts
- Sandboxed Solutions

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- SharePoint Designer
- Business Connectivity Services
- Multi-Browser Support
- Configuration Wizards
- Connection with Microsoft Office
- Connection to Exchange
- Connection to Office Communication Server
- External Lists
- Mobile Connectivity
- Permissions Management
- Photos and Presence Capability
- SharePoint Health Analyzer
- Central Administration
- Usage Reporting and Logging
- Visual Upgrade
- PowerShell

There are many features that differ between the three versions of SharePoint as well. SharePoint Server Standard includes all of the features of SharePoint Foundation, plus several more. Likewise, SharePoint Server Enterprise builds on the SharePoint Server Standard feature set. Table 1.1 shows the differences between the Foundation, Standard, and Enterprise feature sets.

Table 1.1 *Differences in the SharePoint Foundation, Standard, and Enterprise feature sets*

Feature	SharePoint Foundation	SharePoint Server (Standard)	SharePoint Server (Enterprise)
Audience Targeting	No	Yes	Yes
Content Organizer	No	Yes	Yes
Document Sets	No	Yes	Yes
Enterprise Search	No	Yes	Yes
My Profile	No	Yes	Yes
Metadata-driven Navigation	No	Yes	Yes
People and Expertise Search	No	Yes	Yes
Ratings	No	Yes	Yes
Tags	No	Yes	Yes
Workflow Templates	No	Yes	Yes
PerformancePoint Services	No	No	Yes

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Table 1.1 *Differences in the SharePoint Foundation, Standard, and Enterprise feature sets*

Feature	SharePoint Foundation	SharePoint Server (Standard)	SharePoint Server (Enterprise)
Access Services	No	No	Yes
Excel Services	No	No	Yes
Visio Services	No	No	Yes
Calculated Key Performance Indicators (KPIs)	No	No	Yes
Business Intelligence Center	No	No	Yes
PowerPivot for SharePoint	No	No	Yes
InfoPath Forms Services	No	No	Yes
Thumbnails and Previews in Search	No	No	Yes
Visual Best Bets	No	No	Yes

SharePoint has come a long way in its multiple morphs over the years. From an awkward and lanky adolescent, SharePoint has now blossomed into a well-rounded platform. Offering many team features that can be immediately put into place, organizations are realizing immediate and sizable return on investment with SharePoint.

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1.4 Key Points to Remember

- SharePoint started as a somewhat haphazard collection of application and is now a major player as a collaboration platform.
- SharePoint is built upon 6 pillars – Sites, Communities, Content, Search, Insights, and Composites.
- SharePoint provides a common information and communication hub for teams.
- There are three versions of SharePoint 2010 – SharePoint Foundation, SharePoint Server Standard, and SharePoint Server Enterprise.

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Chapter 2

Understanding SharePoint as a Team Collaboration Tool

"It takes less to do a thing right than it does to explain why you did it wrong."
~ Henry Wadsworth Longfellow

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2.1 Overview

Upon completion of this chapter, the participant will be able to:

- Discuss the business marketplace trends and how software is accommodating these trends.
- Create common standards to help team adoption and reduce ramp up time for learning where to find information.
- Understand the capacity SharePoint can serve a hub for people and content.
- Learn how SharePoint supports project management lifecycle management.

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2.2 SharePoint and Team Collaboration

SharePoint has become one of the all-time fastest growing software programs that Microsoft has deployed. The success of SharePoint is that it isn't just designed to work in a single functioning environment, but to establish an entire series of functionality and make it easy to use from a website, connecting files to people and different types of communication between people anywhere in the world.

Collaboration isn't just about following a series of pre-defined steps or building a Microsoft Project schedule. In fact it relies heavily on communication, teamwork, synergy, visibility, and corrective action to an ever increasing number of variables that impact the scope, schedule, and budget as well as the resources of a project.

SharePoint provides a unique tool that teams can easily deploy and leverage to great success in automating, and increasing communication between teams, stakeholders, and customers.

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2.2.1 Team Communication

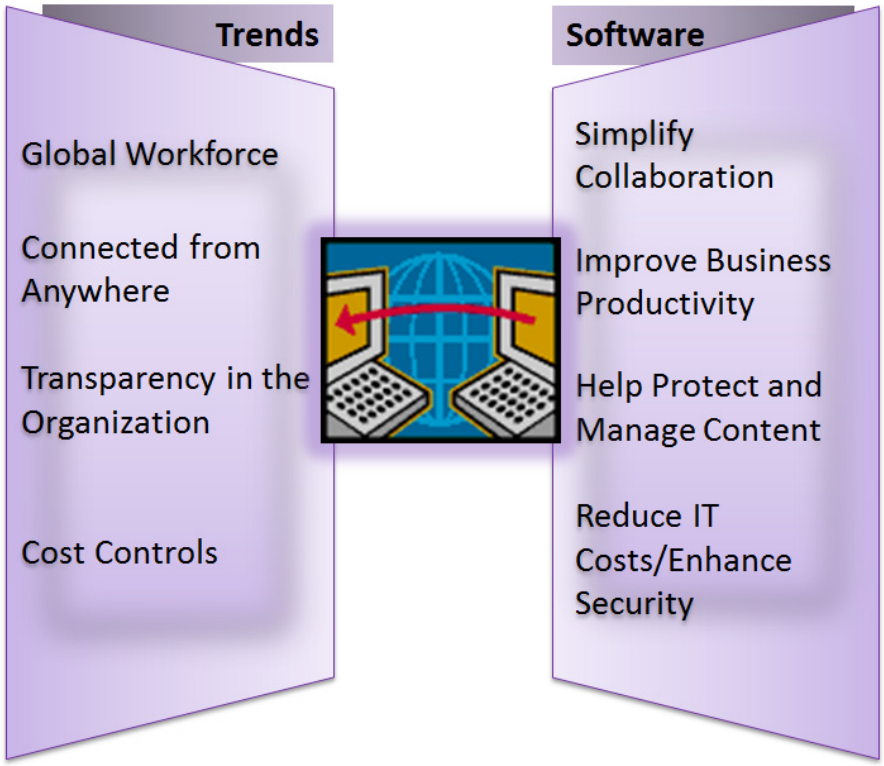

Figure 2-1 *Trends and Software*

Communication is the lifeblood of any team. SharePoint enhances communications for the team lead, team members, stakeholders, sponsors and anyone who has an interest in the project. Everyone can utilize the project SharePoint site.

By posting key documents, discussions, events, pictures and files, the ability of the team to communicate information simply and easily is enhanced.

One of the key successes that separates a good team lead from a great team lead is the number of surprises that they can prevent from happening. Timely, clear and specific communication to stakeholders, team members and customers helps to reduce the likelihood of issues cropping up or mistakes being made.

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Key Areas SharePoint Assists Team Collaboration

- Establishes a collaboration web portal.
- Gatekeeps **what** and **who** has access to which information.
- Manages and distributes lists and report information.
- Ties to other enterprise project and portfolio reporting tools.
- Establishes visibility to events, activities and threaded communication.
- Archives, versions and organizes filing of related project documentation, such as documents, pictures, drawings, spreadsheet, etc.

2.2.2 Common Look and Feel

SharePoint gives teams the ability to create a template and library with a standard “look and feel.” It provides a common interface for team members, especially if they work across multiple projects, which helps create a level of consistency to facilitate predictable outcomes.

The same elements and functionality will be accessible for working with other projects, creating a “Normalization” of elements used in managing projects.

This normalization and standardization makes the use of the SharePoint site easy for customers, executives, and team members to navigate, quickly get access to desired information, and creates a familiar environment from project to project that requires less time for people to figure out and learn.

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2.2.3 Easy to Build, Manage and Modify

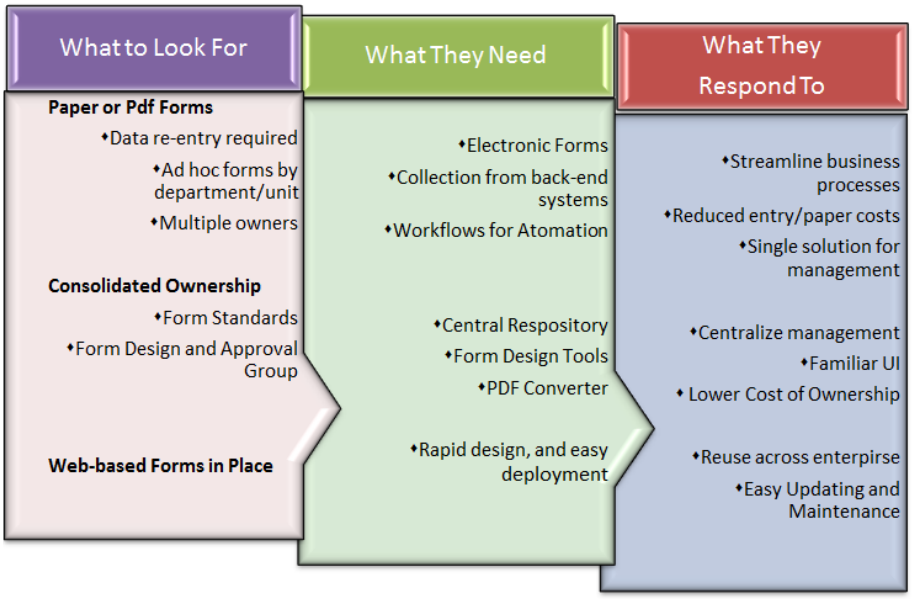

Figure 2-2 *What Users Will Respond To*

SharePoint simplifies collaboration. Teams are able to consolidate project communication and documentation for the team members and stakeholders in one central location.

SharePoint enables teams to strategically consolidate project information and metrics, allowing for standardization of tools, templates and terms as well as project management information.

Microsoft created SharePoint to add a critically needed element in successful Enterprise Project Management (EPM) to enhance the communication and centralization of interrelated project documentation.

SharePoint offers simple, yet powerful, functionality to integrate best practices and core technologies for teams and team members.

The SharePoint interface is easy to manage. Users have the ability to simply re-arrange or add functionality based upon the components that are made available with Web Parts. Changes can be controlled based upon permissions assigned by an administrator.

The ability to create custom solutions within this product is easy to design and work with using Front Page, XML, .Net, and SQL. These are all standards that provide an open schema for lists, databases, and providing functional sorting or filtering options for the respective data.

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What Makes SharePoint Easy to Build, Manage and Modify

- Navigation controls and properties are the same everywhere
- It does **not** require a web developer to change, modify or manage a site
- Security, roles, and permissions are easy to use
- SharePoint can be automated through active directory or with the SharePoint workflow capability
- Drag and drop functionality for modifying a page

2.2.4 Centralized Hub for Information

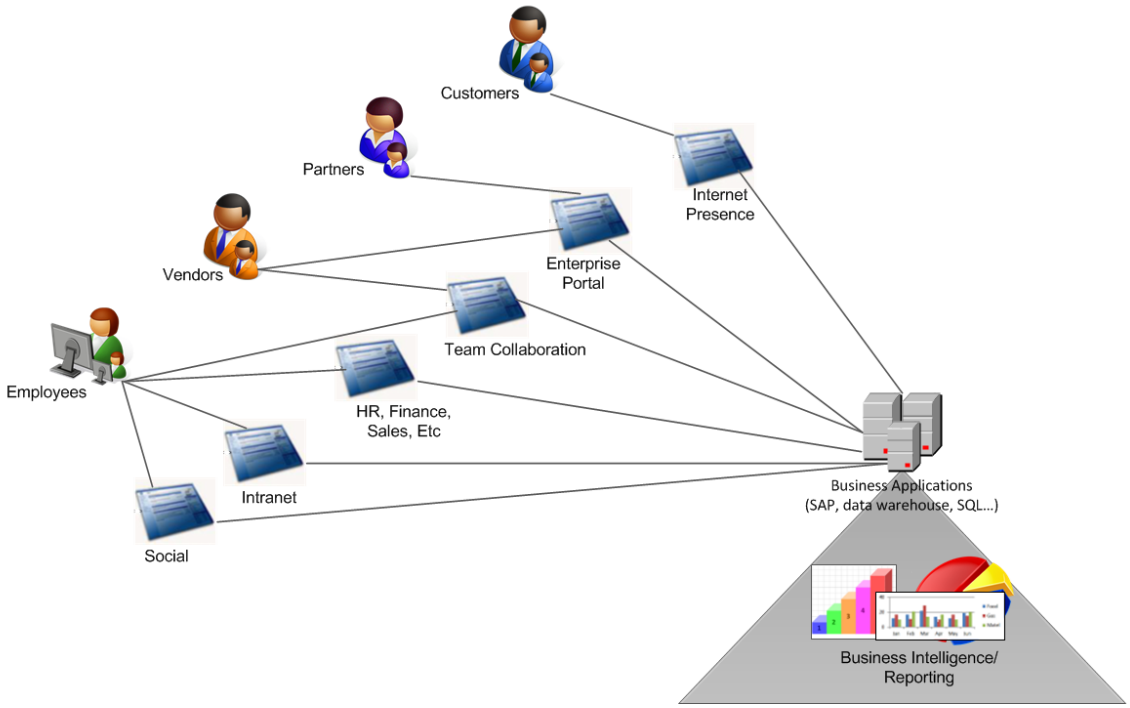

Figure 2-3 *SharePoint Technology Vision*

SharePoint provides a way to store mission critical data in a central location and allow everyone who needs it to access it easily and efficiently, thus increasing ease of collaboration, productivity, and speed of deployment.

The long-term strategy for storage technology at Microsoft is for SQL Server technology to become the single repository for everything. This will assist with the functionality of managing and collaborating on all related data.

All content, configuration information, and other SharePoint products and technologies data is stored in SQL Server databases. The only exception are the full-text search indices created by Microsoft Search technologies and certain pages that are stored in the file system on front-end Web servers, which are only as a performance enhancement.

Using a single consistent, integrated data storage platform creates significant advantages for IT professionals and developers by increasing their productivity and reducing their day-to-day development, deployment, and management costs.

By creating a centralized storage area for all communication, documents, lists and pictures it helps establish a “Pull” process instead of a “Push” process. For example instead of sending an email file attachment to 30 people, you would simply have everyone come to the SharePoint site and review or check in or out the document, file, or whatever the communication happens to be.

Benefits of a Centralized Hub of Information

- All documents can be easily uploaded and downloaded
- Picture and document libraries provide extended features
- Version control can be turned on to manage team editing
- Threaded discussions, blogs are easy to use and available
- Normal lists (Excel, Word Tables, Access Data Tables) can be published and maintained
- SQL reporting services reports can be posted
- Wiki sites are available for simple knowledge capture

2.2.5 Organizational Change and SharePoint

As SharePoint is integrated into the everyday life of the business worker, it is important to look at the impact upon the established culture and chain of command of the organization since, in most cases, the utilization of these processes will represent a significant change to current systems and how staff works with one another.

SharePoint’s flexibility lends itself to meet varying organizational policies, procedures and methodologies. An organization should establish how SharePoint is to be rolled out and deployed. This is typically called a **Governance Policy**.

It is important for an organization to establish a committee representing a wide range of users including IT, managers, executives and end users in developing and maintaining the governance policy. Representation of each

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business user of the SharePoint environment will ensure that the environment serves all users and aligns within the organizational structure.

2.2.6 Leveraging Technology for Project Lifecycle Management

As companies further integrate collaboration processes and culture into their organizational structure, it is necessary to consider how to utilize technological tools to ensure the stability and financial well-being of the organization. Software such as SharePoint can assist in regulating and optimizing the duration, cost, use of human and capital resources, and affect the quality of the product or system being produced.

Most corporate objectives and initiatives are highly complex undertakings. They require a neutral system of reporting and evaluation that presents data to teams, management, and stakeholders and that allows them to react pro-actively and adjust to the inevitable changes (both positive and negative) that will occur. Recognizing SharePoint as a results communication, collaboration, and optimization tool that will assist in better decision making by team members will certainly have a positive impact on the various “bottom-line” objectives and, to a greater extent, the overall organization.

Automation, Optimization & Centralization Benefits of Technology

- Automate workflow, communication, collaboration.
- 90% of the business world is integrated with Microsoft technologies in the workplace.
- Centralize metrics, reports, documentation, communication and collaboration.
- Apply controls to initiatives and work.
- Simplify the number of applications, templates and mechanisms for managing & communicating.

Integration of a solid technology platform like SharePoint allows teams to work and collaborate in a more effectual manner, increasing productivity. SharePoint supports team collaboration, communication and processes. And given the appropriate planning, SharePoint provides organizations with the mechanism to capitalize on the associated work of teams to benefit across the enterprise.

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2.3 Key Points to Remember

- SharePoint enables teams to automate processes, streamline communication and control collaboration – all things that contribute to gaining efficiencies in project work.
- SharePoint provides a platform to create a “Pull” system of communication instead of “Push” – which can eliminate confusion and multiple versions in emails.
- Organizations should convene a committee to define how SharePoint will be built, used, rolled out and maintained. This is referred to as a governance policy.
- Controls can be put in place optimizing the technology of SharePoint in managing project lifecycles.

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Chapter 3

Introduction to SharePoint Objects and Architecture

"No man becomes a fool until he stops asking questions."
~ Charles Steinmetz

3.1 Overview

Upon completion of this chapter, the participant will be able to:

- Understand the architecture of SharePoint.
- Identify SharePoint's building blocks.
- Learn how taxonomy and folksonomy creates and helps to manage metadata.
- Learn the navigation terminology of a site.
- Learn Search techniques.

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3.2 What is the Architecture of SharePoint

SharePoint is essentially built upon SQL Server, one of the most widely used relational database platforms available. SharePoint has a specific architecture to take advantage of this diverse and flexible access to data.

3.2.1 Understanding SharePoint's Hierarchy

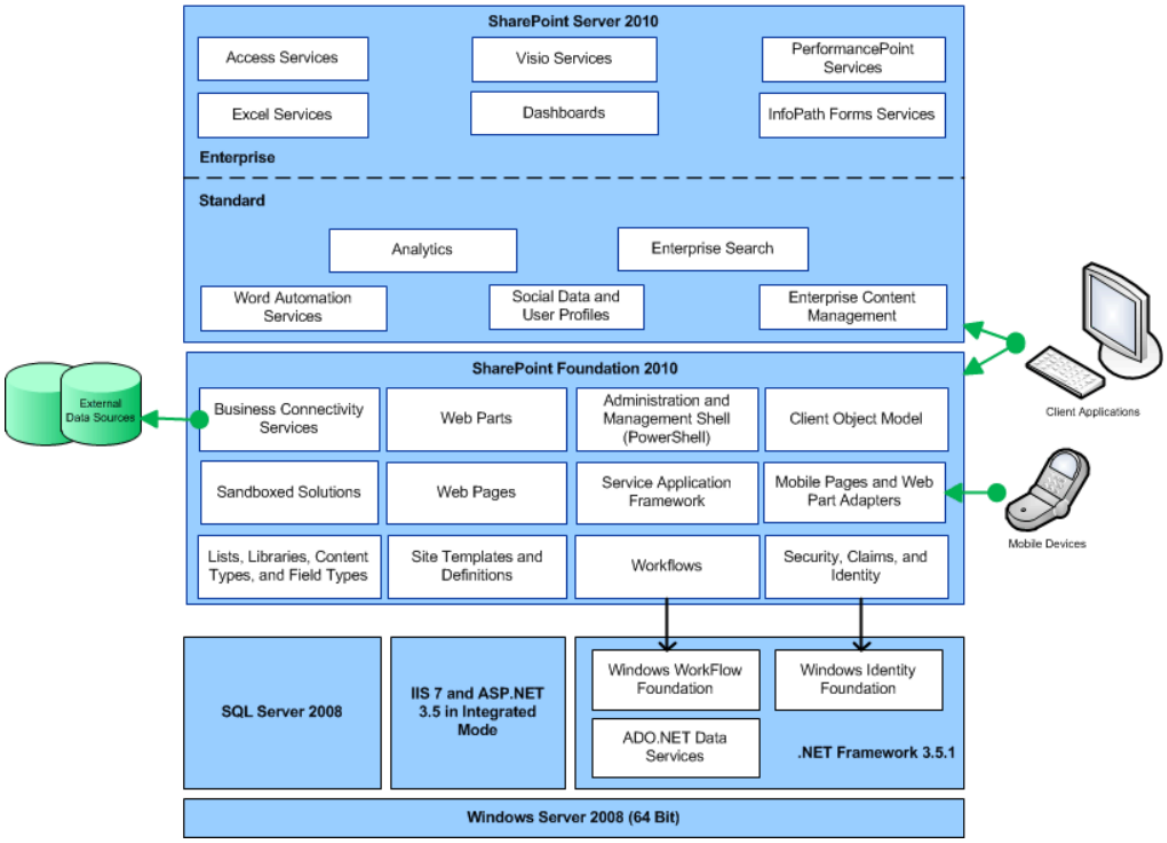

Figure 3-1 *SharePoint Architecture (Source: `http://msdn.microsoft.com/en-us/library/gg552610.aspx#SP14Architectures_Overview`)*

A feature of SharePoint that makes it very powerful is the ability for SharePoint to integrate with data, internally and externally.

SharePoint is also built in a hierarchical fashion. SharePoint is aligned from bottom up and top down; each piece builds or supports the architecture.

SharePoint is built upon building blocks. These building blocks create sites. Related sites create groups called **Site Collections**. Site collections are supported by a web application that enables web features for the portal to access the sites and site collections.

3.2.2 SharePoint Basic Building Blocks

List

A list is a customized table of related data arranged in rows and columns. All data in a list shares the same schema. Examples of some lists are: Calendars, Announcements, Links, and Tasks.

Type	Title	Assigned To	Status	Priority
	Task 1 NEW	Cindy Lewis	Not Started	(2) Normal
	Task 2 NEW	Lynn Olhausen	Not Started	(2) Normal
	Task 3 NEW	Cindy Lewis	Not Started	(2) Normal

Figure 3-2 *Example of a List*

Library

A library is a specialized form of a list. It is a repository for related list items and offers some extended capabilities beyond traditional lists. Examples of libraries are: Document Libraries, Picture Libraries, and Form Libraries.

Type	Name	Modified
	Test Doc 1 NEW	8/6/2011 1:44 PM
	Test Doc 2 NEW	8/6/2011 1:45 PM
	Test Doc 3 NEW	8/6/2011 1:45 PM
	Test Doc 4 NEW	8/6/2011 1:46 PM

Figure 3-3 *Example of a Library*

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Link

A link is a shortcut to a document or object. For example, when you click Shared Documents in the Quick Launch Menu, it “links” you to the actual Document Library.

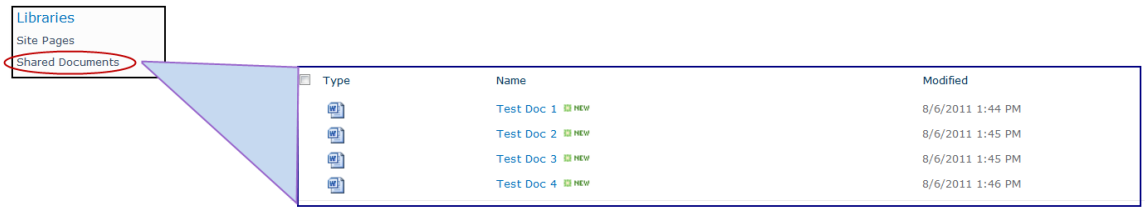

Figure 3-4 *Example of a Link*

Web Part

A **Web Part** is a component that displays data. Each SharePoint site is comprised of web parts. Examples of web parts are: Announcements, Links, and Calendars. Web parts are displayed in regions or zones, on the site page, and can be set via a corporate template.

Web parts are an integrated set of controls for creating websites that enable end users to modify the content, appearance, and behavior of web pages directly from a browser. You could compare a web part to a widget and you would be pretty close. Many third party development companies are creating web parts and selling or posting them for people to use.

> If you are looking for a specific functionality in a Web Part, you may want to see if a third party has already developed one. It is more efficient not to recreate the wheel if you don’t have to!

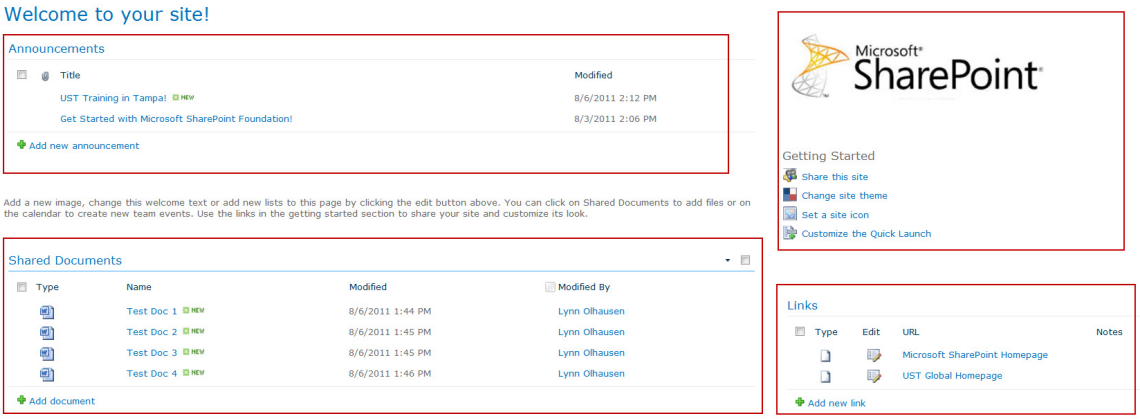

Figure 3-5 *Example of Web Parts*

3.2.3 Content Types

In its simplest form, a content type is a collection of columns. These collections can also be reused by different users and different sites, depending on the configuration of the content type. That's it! SharePoint contains many out of the box content types, such as Announcements, Calendars, Lists, Tasks, etc. So what is the big deal?

The benefit of utilizing content types is that a user or organization can apply different rules for each different type of content type. A user with the appropriate permissions can create custom content types.

To illustrate this, let's say the accounting department has an expense report content type, purchase request content type, and a check request content type. And SharePoint can help manage these work items by applying specific columns to collect the pertinent data. An expense report may require items such as mileage, hotel and food costs, tolls and parking costs, and client association with the expense. A purchase request may require matching to a business objective, assign a department, and have a workflow assigned for manager approval. And finally a check request may require amount, which department budget the check will apply to, and a workflow requiring approval by the department manager for amounts up to $5000 and department director for amounts greater than $5000.

Content types should not be confused with document types. A document type would be things such as a Microsoft Word document, or an Excel spreadsheet. Content types would be an expense report (that just happens to be an Excel spreadsheet), and a check request or a purchase acquisition request (that just happen to be Microsoft Word documents).

3.2.4 Metadata

Metadata is definitely a highlight of SharePoint 2010. Metadata drives critical processes like reporting, organization of data, and search functionality.

Metadata is simply data about data. SharePoint collects this data to form a malleable information structure that lends itself to manipulation by an organization. Metadata is assigned to items via Tags. When a user uploads an item to a site, they apply tags that SharePoint will catalog.

It is imperative to maintain an organized construction of this data. Without an organized approach the data will be easily mismanaged and become just like a garage stuffed with a lot of stuff, it will be unclear what is actually in there and where anything is. There are two structures used for metadata collection – taxonomy and folksonomy.

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Taxonomy is a formal collection structure assigned by the organization. An organization can outline what keywords would provide meaningful data management, and create assignment of these keywords through content types.

The other structure is called folksonomy. SharePoint end users discover new or different keywords that help manage data. In SharePoint 2010, end users can assign their own tags to data. The SharePoint administrator should periodically review the folksonomy and determine if certain trends should be incorporated into the organizational taxonomy.

3.2.5 General Site Layout

Let's start exploring a SharePoint site by reviewing the layout and the common terminology.

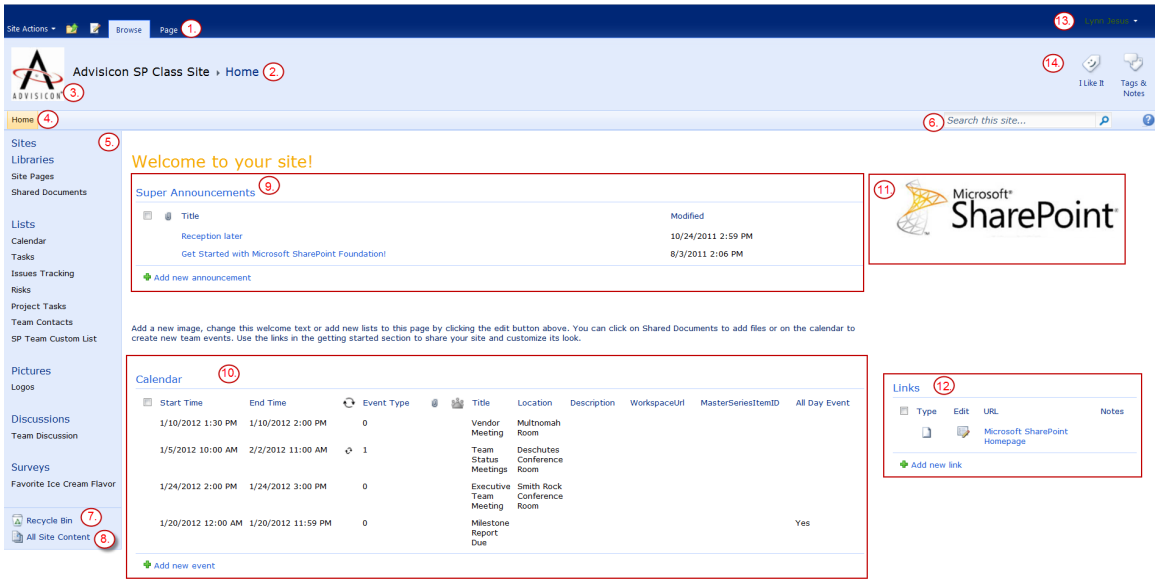

Figure 3-6 *Site Home Page Layout*

Site Terminology

1. Ribbon
2. Bread Crumb Trail
3. Site icon
4. Top link bar
5. Quick Launch menu

6. Search box
7. Recycle Bin link
8. All Site Content link
9. Announcement web part
10. Calendar web part
11. Image web part
12. Link web part
13. User menu
14. I Like It & Notes and Tags

> I Like It and Tag & Notes options are available on SharePoint Server version only.

3.2.6 General Navigation

SharePoint 2010 has created many opportunities for efficiency in navigating a site. Navigation is now more user intuitive than in previous versions.

The Ribbon

SharePoint 2010 has integrated the Fluent User Interface, commonly referred to as the Ribbon.

The Ribbon consists of logically grouped commands that make locating commands quicker and easier than the traditional toolbar. Another efficient feature is that often Ribbon groups only appear when needed, such as for formatting a picture.

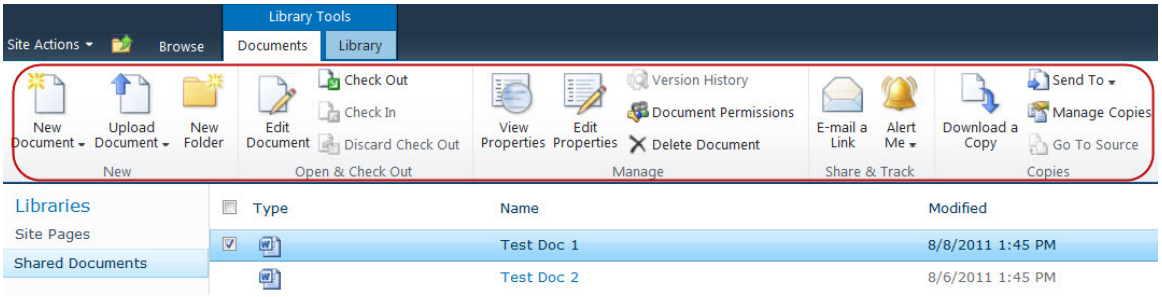

Figure 3-7 *The Ribbon*

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The Ribbon is sectioned into tabs and groups. For example, to delete a document, in the **Document** tab, **Manage** group, click **Delete Document**.

Bread Crumb Trail

Another extremely useful navigation tool is known as the Bread Crumb Trail. This shows where the user is within each level of the site. Each listing is a link that can be used to go back to a different level in the site, without requiring exiting to the Home Page each time a user wants to navigate somewhere else.

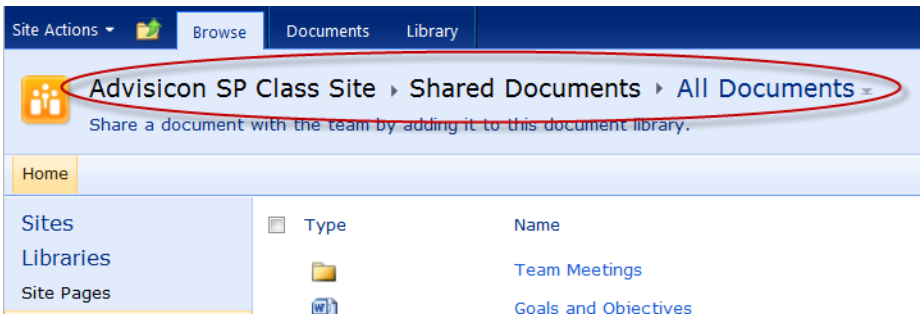

Figure 3-8 *The Bread Crumb Trail*

There is also a folder icon in the Ribbon. Clicking this folder opens a menu. Click on the desired destination.

Browse Tab

A user can navigate the site through the Browse tab as well. By clicking on the Browse tab, a hierarchical list appears revealing where a user has navigated in the site. Each level in this menu is a link that can quickly redirect the user to another part of the site. Again, this removes the need to go all the way back to the Home Page before redirecting navigation.

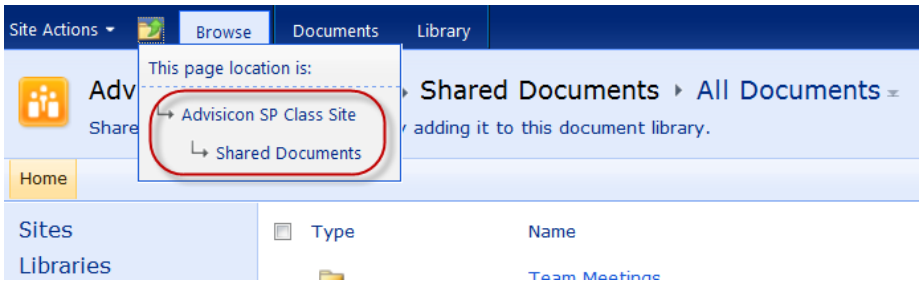

Figure 3-9 *The Browse Tab*

Site Actions Menu

Located in the upper left corner of the site, the Site Actions dropdown menu reveals a list of actions for the site. This is where lists, libraries, etc. can be created, page features can be edited, and site settings accessed, among other action features.

> The list of options will be dependent on the level of permissions the user is granted.

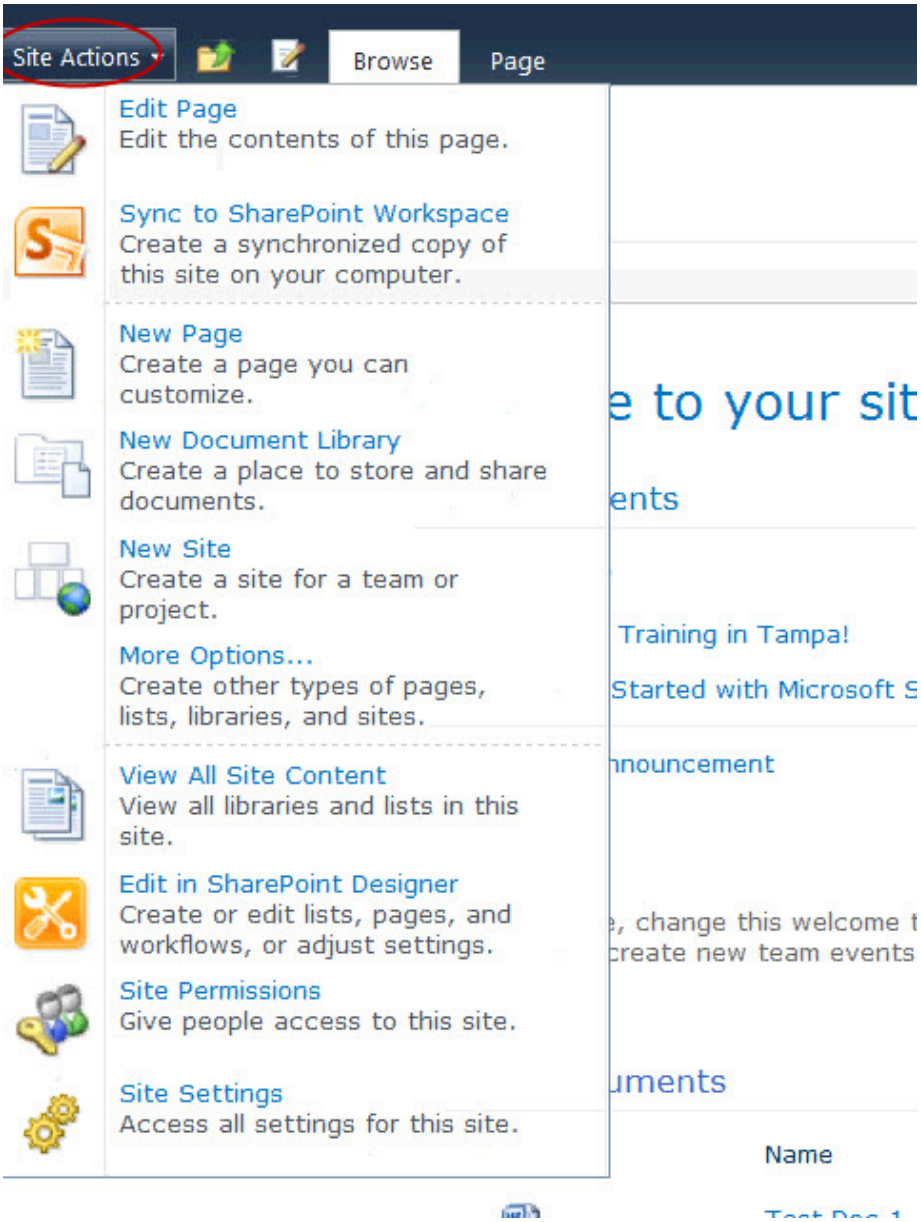

Figure 3-10 *Site Actions Menu*

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Quick Launch Menu

The Quick Launch menu offers quick navigation to portions of the site. With one click users can navigate directly to lists, libraries, discussions, etc. It is located along the left side of the page.

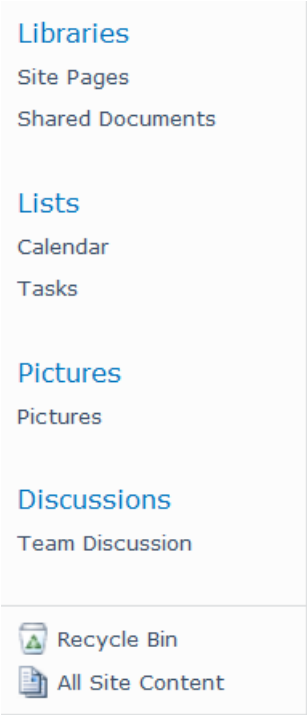

Figure 3-11 *The Quick Launch Menu*

Customizing the Quick Launch Menu

What items show up in the Quick Launch menu is customizable, provided the user has the correct level of permissions. The order in which items appear (Lists, Libraries, etc.) is also customizable.

To customize the Quick Launch Menu:

1. In the **Site Actions** menu, click **Site Settings**.

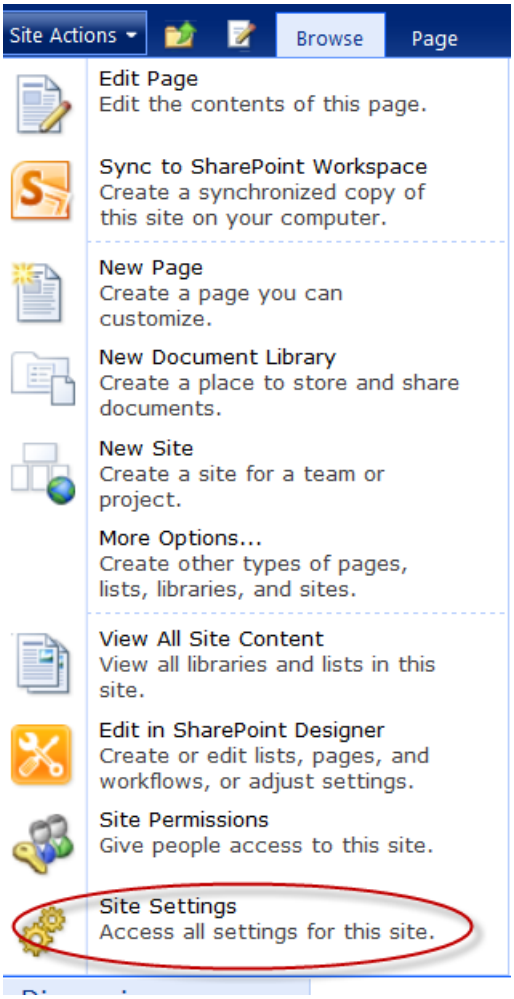

Figure 3-12 *Site Actions Menu > Site Settings*

2. Under the **Look and Feel** section, click **Quick launch**.

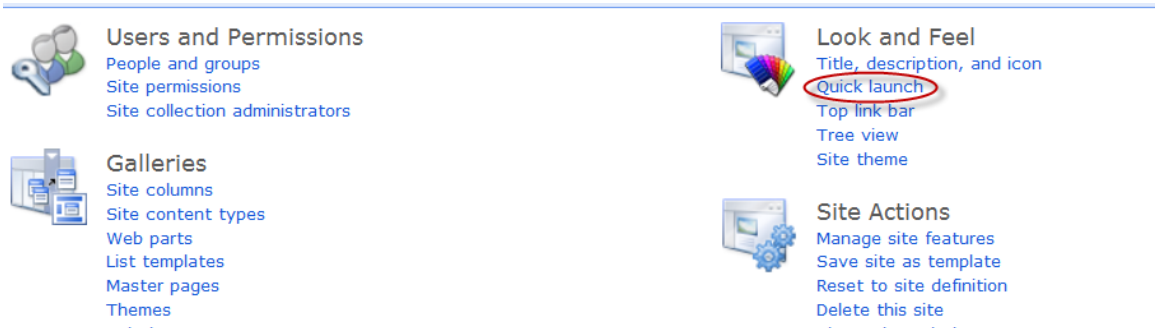

Figure 3-13 *Site Settings > Look and Feel > Quick Launch*

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Modification can be made from selecting the desired option on the customization bar.

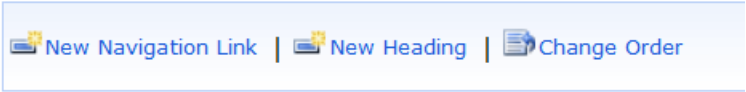

Figure 3-14 *Quick Launch Customization Bar*

View All Site Content

It is important to keep only the most frequently accessed items in the Quick Launch menu. If there are too many extraneous items in the Quick Launch menu efficiency quickly evaporates. Also, depending on the length of the Quick Launch menu users may have to scroll up and down to access different parts of the site.

Less frequently used items can be accessed through the **All Site Content** link located at the bottom of the **Quick Launch** menu.

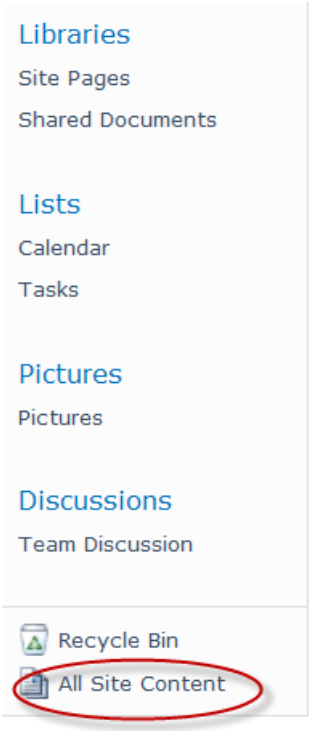

Figure 3-15 *All Site Content Link*

This page will list everything that is on the site. The user only needs to click on the desired item.

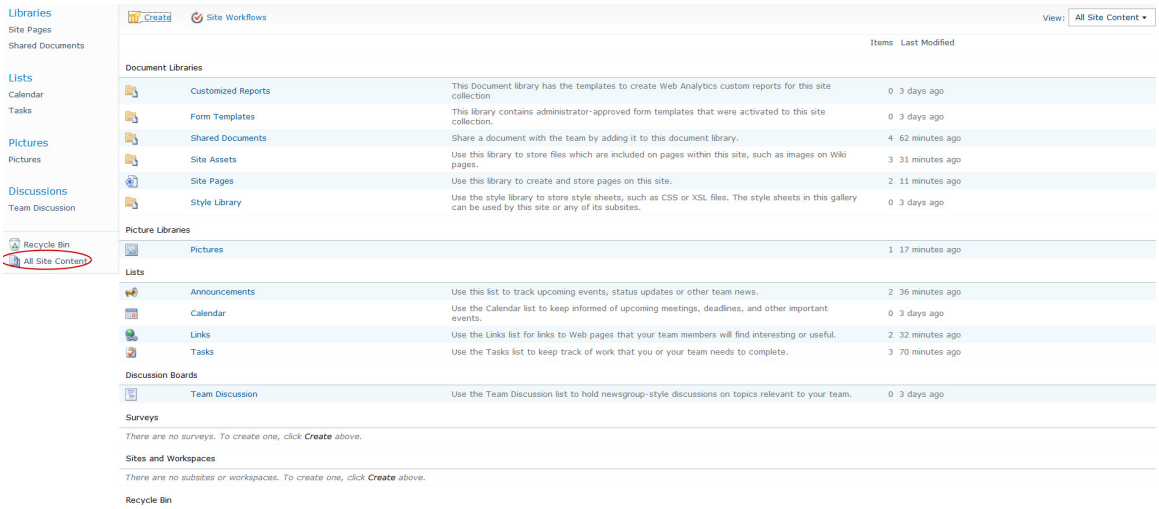

Figure 3-16 *All Site Content Page*

3.2.7 Recycle Bin

SharePoint has a feature of a multi-level recycle bin as well. This means that there is a recycle bin on the Site level, Site Collection level, and the SharePoint administrator has access to a different recycle bin. Each bin can be customized as to the length of time items remain in the bin without being permanently deleted. These timeframes will be determined by the governance policy, or organizational policy.

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End User Site Recycle Bin

Each site has a recycle bin. This recycle bin works much the same way the recycle bin on the desktop works. Provided users have the correct level of permissions they can delete items sending these items to the recycle bin.

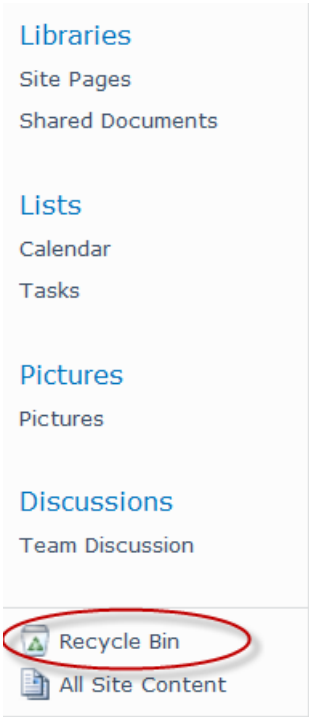

Figure 3-17 *Recycle Bin Link*

After clicking **Recycle Bin** in the **Quick Launch** menu, you can select files from that screen that were previously deleted and either restore or delete them.

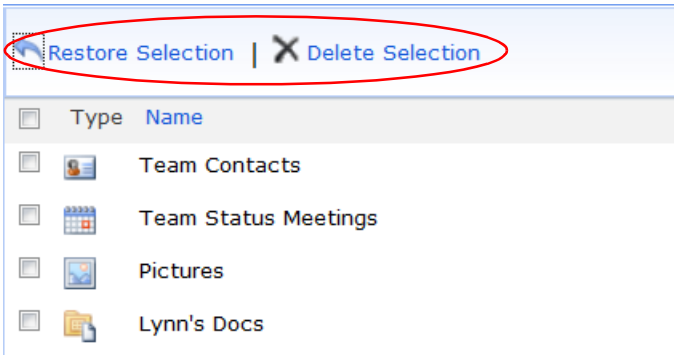

Figure 3-18 *End User Recycle Bin*

Site Collection Recycle Bin

Recycle bin access to restore or permanently delete items is controlled by permissions. So to access this level of recycle bin, the user would need to have the appropriate permissions.

To access the Site Collection Recycle Bin:

1. In the **Site Actions** menu, click **Site Settings**.

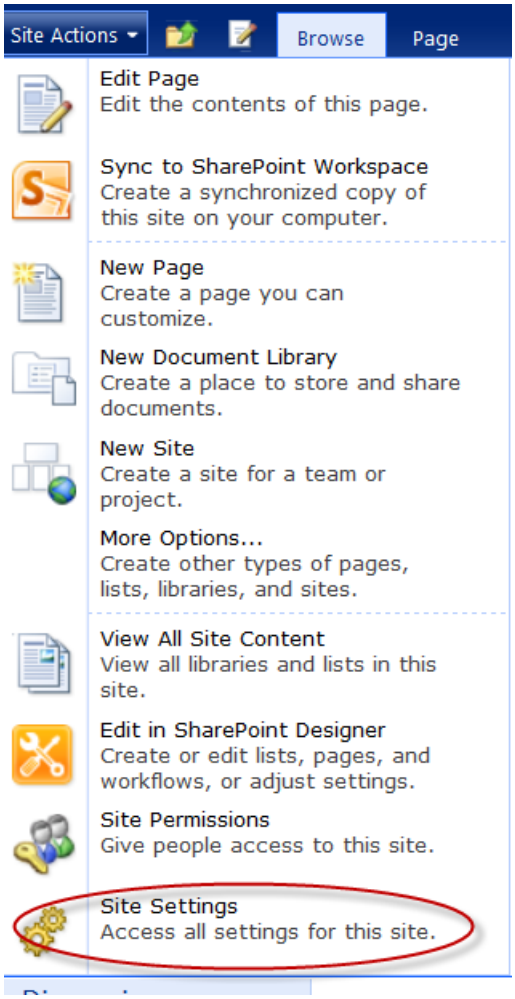

Figure 3-19 *Site Actions Menu > Site Settings*

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2. Under the **Site Collection Administration** section, click **Recycle bin**.

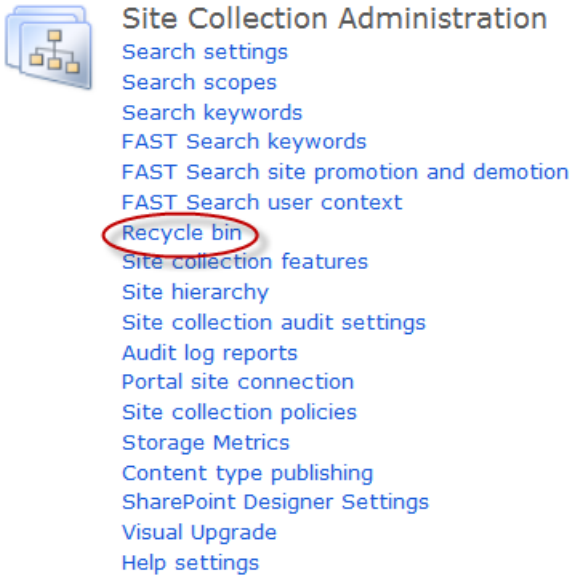

Figure 3-20 *Site Collection Recycle Bin Link*

Remember that a Site Collection can contain more than one site, so select the appropriate Recycle bin from the menu on the left.

3. Restore, Delete or Empty the Recycle Bin, as desired.

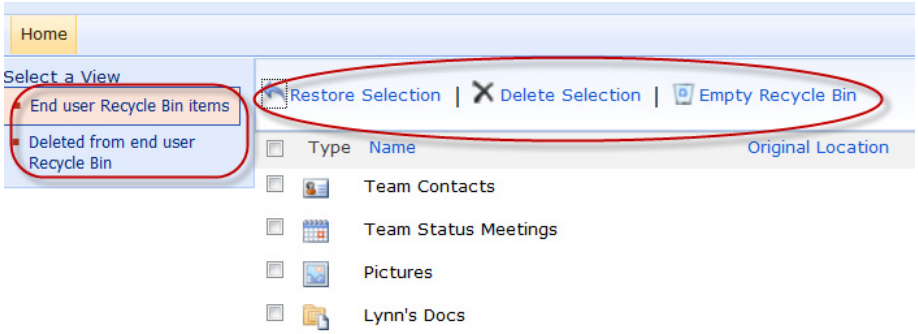

Figure 3-21 *Site Collection Recycle Bin*

Administrator Level Recycle Bin

If files are deleted from here they go to the final recycle bin. These are the files that are deleted from either the site collection or end user recycle bins. Typically only a SharePoint administrator will have access to this recycle bin. When items are deleted from here they are gone permanently.

3.2.8 Search

SharePoint Search is amazingly robust and allows users the ability to find relevant content in a wide range of repositories and formats.

Search operates in a familiar capacity like a search engine. Simply type a search word or phrase in the Search box located in the upper right corner of the Page and hit `Enter` or click the magnifying glass.

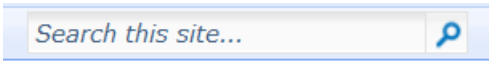

Figure 3-22 *Search Box*

Depending on the configuration of the site collection, Search may be limited to searching the immediate site only, or opened up across the site collection, or to all sites.

A results page will appear that looks like any other search engine. It produces a list of items that related to your search terms. You can sort by relevance or modified date. The results list shows the type of file, where it's found, the first part of the content of the file, who posted it, when it was posted, and how big it is. Click any file to view or download it.

SharePoint Server has the added features of social computing. Search will then extend to people and skill sets. This can be very helpful when looking for a specific person to contact or a competency within an organization.

Syntax for Searching

When using the search function, there are different syntax options that will help narrow the search, beyond just adding more text. Although SharePoint Search does not recognize Boolean contexts, such as wildcard searches using an asterisk, there are some syntax characters that can help refine search results.

First there is inclusion and exclusion.

- To include specific search terms use the '+' sign. This seems unnecessary, but the purpose is that it guarantees that this word is included in the search result.
- To exclude specific search terms user the '-' sign.
- Putting quotes (" ") around a section of text will search for that exact phrase.

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Property constraints can also be defined in the search terms.

- `site:` [site URL] searches for only this site.
- `Author:` searches for only this author.
- Enter a file type extension, such as `.doc` or `.pdf`, to search for only that type of file.

3.3 Key Points to Remember

- The building blocks of SharePoint are: list, library, link and web part.
- While SharePoint has many out of the box content types, such as announcements, calendars, task lists, etc. organizations can create their own content types to customize forms to their needs.
- Metadata drives search and data organization. Metadata is observed in organizational taxonomy and folksonomy.
- SharePoint 2010 now has the Fluent User Interface, or The Ribbon, for navigation.
- Only keep necessary and often accessed items in the Quick Launch menu. To view items not listed in the Quick Launch menu, use the View All Site Content link.
- While Search does not support Boolean contexts, there are special characters that can assist in searching for terms.

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Chapter 4

Creating SharePoint Sites

"Don't judge each day by the harvest you reap,
but by the seeds you plant."
~ Robert Louis Stevenson

4.1 Overview

Upon completion of this chapter, the participant will be able to:

- Identify different types of SharePoint sites.
- Optimize site creation.
- Create a site and save it as a template.
- Learn site creation best and worst practices.

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4.2 Planning Site Creation

One of the great things about SharePoint is that it is easy to use, user-friendly and intuitive. One bad thing about SharePoint is that it is easy to use, user-friendly and intuitive. That being said, careful consideration must be made when creating sites. This will prevent sprawl and keep things overall orderly and organized.

One of the most important work activities is to not just install and start playing with SharePoint, but to actually plan how the organization will leverage and utilize the SharePoint technology.

Some organizations have been able to completely replace their Intranet with a SharePoint site, saving money and maximizing the abilities contained with their organizations. As might be imagined, swapping out an entire website can dramatically impact many different systems and users.

That is why pre-planning the use and capabilities of SharePoint are vital to limiting frustration and the potential chaos from the widespread use of the product.

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4.3 Different Types of Sites and Workspaces

SharePoint has different types of Sites available out of the box. Each has a different template with pre-designed Sites, including things such as Discussion Boards, Task Lists and Shared Documents Libraries.

SharePoint also offers collaborative spaces called Workspaces. These offer a space for a team to work on a specific task, such as drafting an organizational policy. These Workspaces are controlled by permissions, only allowing appropriate parties to access the item in the workspace. The team will have access to lists and libraries that pertain to this one initiative, rather than the same type of lists and libraries for the general Site.

Examples of Sites and Workspaces are:

- **Team Site** – provides a collaboration hub for a group to author content, share information and organization content.
- **Work Group Site** – provides a collaboration site for groups that include pre-built items such as a group calendar or a phone call memo, and allows groups to quickly share information and organize content.
- **Blank Site** – this is a blank template ready for customization to match specific requirements. Users can build the site with only the items needed.
- **Document Workspace** – provides a collaboration space for a small group or committee to plan and draft a document. This site is usually used to control access to the draft document to a select group prior to publishing the document to a main site.
- **Social Meeting Workspace** – provides a collaborative site for a small group or committee to plan a social gathering. This site provides items to manage meetings and a library to store photos of the event.
- **Meeting Workspace** – provides a collaborative site to manage meetings and capture meeting artifacts. List items in the template include a place for agendas, meeting notes. There is also a decision meeting space to capture final decision making results.

Sites will typically be allotted a certain amount of space on the server. Controlling site size is imperative to ensure performance and that there will be ample space across the organization to accommodate all sites. Known as a site quota, these limits are usually controlled by the SharePoint administrator.

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4.4 Creating a New Site or Workspace

One of the actions that is very easy to do is to create a new site or workspace within SharePoint. It is important to note that a SharePoint site can be created for just about everything that is stored or posted into SharePoint, potentially creating a gigantic series of sub-sites. Some careful planning is needed in order to ensure simple site management.

4.4.1 What to Look for in Creating a New Site or Workspace

Site creation is a simple and fun process, but if done incorrectly it can be time consuming and mundane. These processes will help you understand how site creation works, and streamline that process.

Creating a New Site or Workspace

To create a site from a template:

1. In the **Site Actions** menu, click **More Options**.

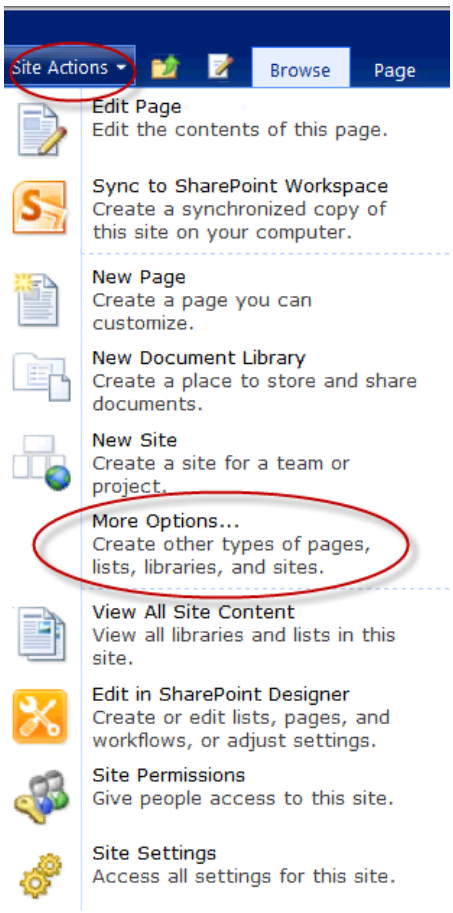

Figure 4-1 *Site Actions Menu > More Options*

2. Click **Site** in the **Filter By:** menu on the left side of the **Create** dialog box.

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3. Select the appropriate choice from the **Site** menu. Assign a relevant name to the item. Click **More Options**.

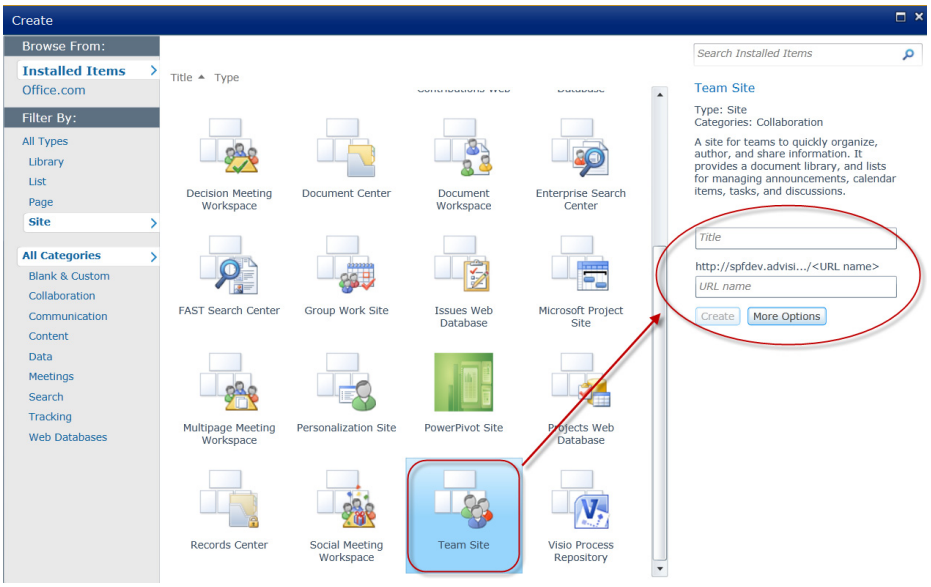

Figure 4-2 *Create Team Site*

4. Provide a description and decide if this site will appear in the Quick menu. Creating site will also have some additional instructions to complete, such as a URL name and Permissions.

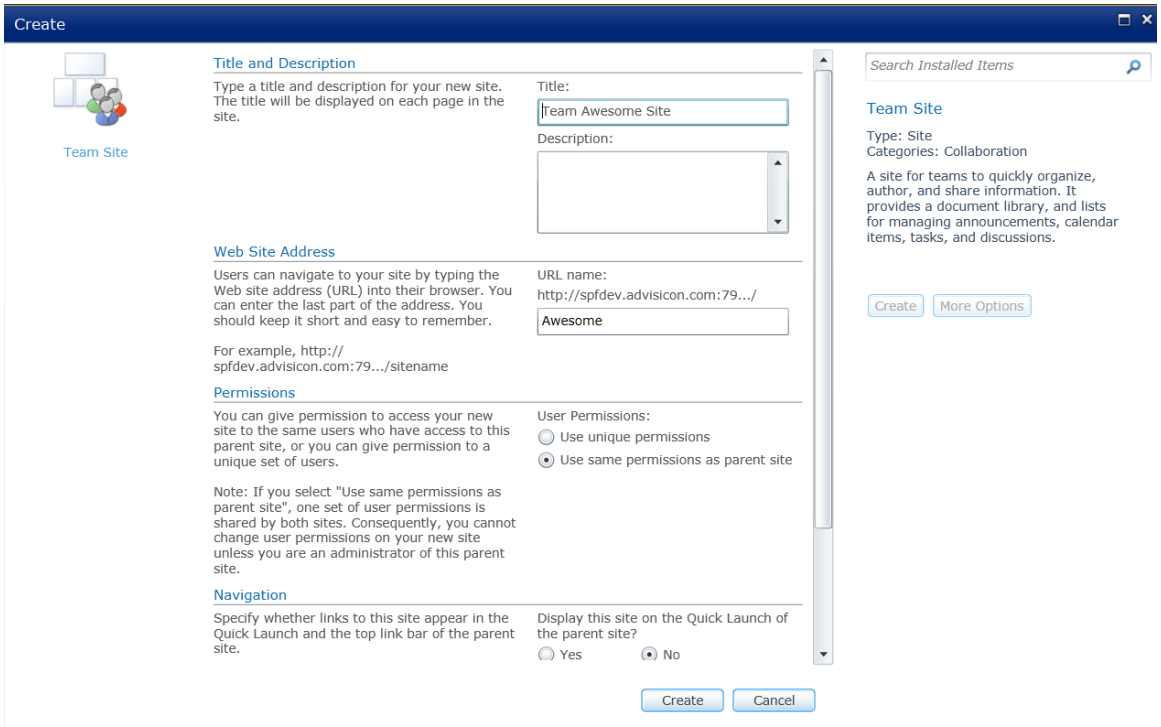

Figure 4-3 *Create Team Site Form*

5. Click **Create**.

4.4.2 *Optimizing Site and Workspace Creation*

To optimize the site creation process, use a site template. This will create a site with the a preferred layout without the time consuming actions of adding desired lists, libraries and web parts.

There may be occasions where you may want what a Team Site template offers, but also want each Team Site to have a Calendar and require Versioning on the Shared Document Library. You can create your own site templates in SharePoint for future use by the organization.

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Saving a Site or Workspace as a Template

If there has been customization done to a site, and the organization would like other sites to match that layout, a template can be created to make the site layout reusable. This can save an enormous amount of time, as teams will not need to repeat the customizations previously completed.

Once you have your site customized:

1. In the **Site Actions** menu, click **Site Settings**.

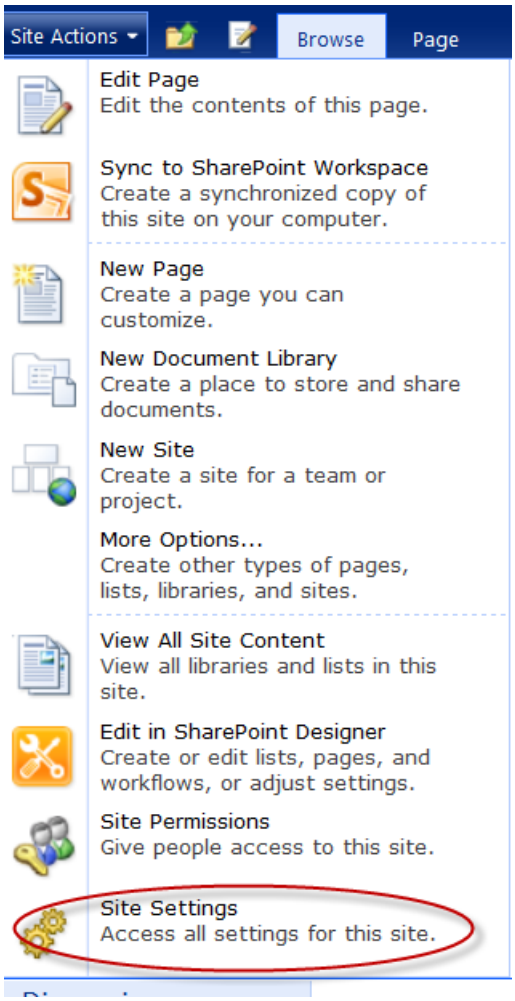

Figure 4-4 *Site Actions Menu > Site Settings*

2. In the **Site Actions** section, click **Save site as a template**.

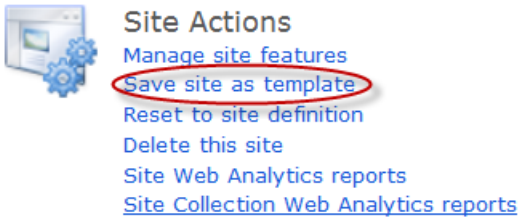

Figure 4-5 *Save Site as a Template Link*

3. Enter file name, template name, and description.

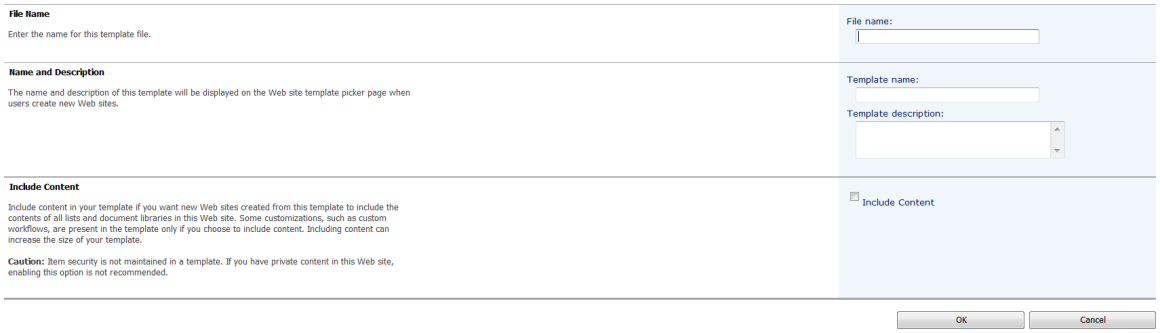

Figure 4-6 *Save Site as a Template Form*

If you have content you want to include, select the Include Content check box.

4. Click **OK**.

There is a limit on template size, so if you have too much content it will cause the template creation to fail. Note security settings aren't saved in the template.

4.4.3 Site Creation Best and Worst Practices

Much of this information has come from first-hand experience in cleaning up or trying to manage the widespread unrestricted use of SharePoint within organizations. The more systematic an organization rolls out sites, the better off they will be in having a manageable SharePoint environment.

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Best Practices Summary

- Ensure you have enough dedicated space on the server.
- Assign ample quotas for Sites and Site Collections.
- Define needs and uses for SharePoint.
- Do not roll the environment out prematurely.
- Create a test environment to ensure functionality before going into a production environment.
- Appropriately restrict access to site information.
- Create a committee of key stakeholders to be involved in the organizational use of SharePoint.
- Draft and regularly update the organizational governance policy.

Worst Practices Summary

- Not including the IT department in rolling out SharePoint
- Pre-mature rollout of SharePoint
- Not training resources on how to use SharePoint
- Not briefing senior management in the potential use and capabilities and impacts that SharePoint can have on an organization
- Not having appropriate controls in place to prevent Site sprawl

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4.5 Key Points to Remember

- Careful planning is required for a manageable SharePoint rollout to control site sprawl and extraneous burden on servers.
- Sites that have been customized by an organization can be saved as templates making them reusable by other teams and departments.
- Organizations should regularly update the governance policy to make sure it fits the current environment.
- Sites are assigned a size quota, so sites should be planned to meet the user needs, but optimizing internal infrastructure.

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Chapter 5

Managing Site Permissions and Users

"Problems are only opportunities in work clothes."
~ Henry J. Kaiser

5.1 Overview

Upon completion of this chapter, the participant will be able to:

- Describe the different default user permissions in SharePoint 2010.
- Understand permission inheritance.
- Learn the importance of permissions management.
- Learn how to add and remove users.

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5.2 Security Roles and Permissions

One of the key functionalities that makes SharePoint so effective for organizations is that everything within the SharePoint environment is controlled by permissions. This means that only people assigned the appropriate permission will be able to do or see something.

Another nice feature is that SharePoint is attuned to people's permissions. Generally if they do not have the permission to do something, a user will not even see the option. For example, if a user does not have the permission to adjust site settings they will not even see that option in the Site Actions menu. This also cuts down on end user frustration from dealing with a lot of grayed out options that no matter how much they click it, it just doesn't do anything!

5.2.1 Types of Permissions

SharePoint offers scalable and flexible permissions out of the box to manage what users can see, modify, add and change site structure and content. You can select any combination of these permissions. You are not restricted to just one type.

In 2010, the following are default user permissions:

- **Limited Access** – used to provide users with access to only certain site content, such as a specific library.
- **Read** – this permission allows user to view content, but no content can be modified, deleted, or altered.
- **Contribute** – this permission allows users to view, add, update, and delete content within lists and libraries.
- **Design** – this permission level allows users to view, add, update, delete, approve and customize items or pages within the site.
- **Full Control** – this permission grants the user with full control over the site.

These permissions are the most commonly seen and are part of the out of the box team site template. Additional permissions are accessible depending on the type of template used and the customization by the SharePoint administrator. Usually, organizational policy will dictate which permission levels will be allowed and how these permission levels are assigned to users.

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Permissions Inheritance

When sites and sub-sites are created, there is an option to inherit the permissions of the parent site. Permission inheritance is configured on a site to site basis, as well as to any list or library.

It is recommended to use permission inheritance unless you have special requirements for a specific site or site collection. Setting permissions individually on a site to site basis makes things harder to manage and troubleshoot. If everything is inherited, then you only have to make the change once, rather than trying to make sure you were able to make the change to the permission settings on all the applicable pages.

While it is usually the best practice to inherit permission from the parent, there is an option to break this inheritance and create custom permissions. Remember that prolific custom permissions can create a management nightmare. It is suggested to carefully think about the need and make sure it is warranted before breaking inheritance.

If you custom edit the permissions for a site, list, or library, then any permission changes on the parent level will not trickle down and change on the site, library, or list where you have edited permissions.

If you make changes to the parent site and want them to show up in the edited permissions of the site, library, or list, you need to manually make the edits or turn on permission inheritance again (this will erase any permissions on the site, library, or list that are different from the parent).

5.2.2 Defining Permission Levels and Users

To reduce clutter and misuse of the site, it is important to set appropriate permission levels to the resources with access to sites. For example, you might want an outside contractor to have access to the site to be able to read content, but not make changes, additions or deletions.

The site administrator has the power to set the site permissions and manage its users. The administrator can customize the site permissions upon its creation.

While permissions can be assigned user by user, groups can be used to manage users with similar roles. There are three out of the box groups in SharePoint 2010:

- **Owners**, who have Full Control permissions
- **Members**, who have Contribute permissions
- **Visitors**, who have Read permissions

When setting up security permissions, use groups for people that will have the same permissions. Then changing the permission level or giving access to a

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new site for all those users is a much simpler process. You should set up your groups in a roll-based fashion. Developers go in one group, administrators go in another, and so on.

It is beneficial to create groups and manage users via groups. This way if there are changes in the groups, there is one main place to make changes.

If permissions are managed user by user and object by object make sure to keep a spreadsheet of who and where users have been granted permissions. As you can imagine, this is not a best practice!

5.2.3 Adding a New Group

There may be times when creating different groups is desired, even though they may have the same permissions as other team members. An example may be having a group of Team Leads, and another group of Team Lead Delegates. You can create these two groups and assign Design permission to both groups.

To add a new group:

1. In the **Site Actions** menu, click **Site Permissions**.

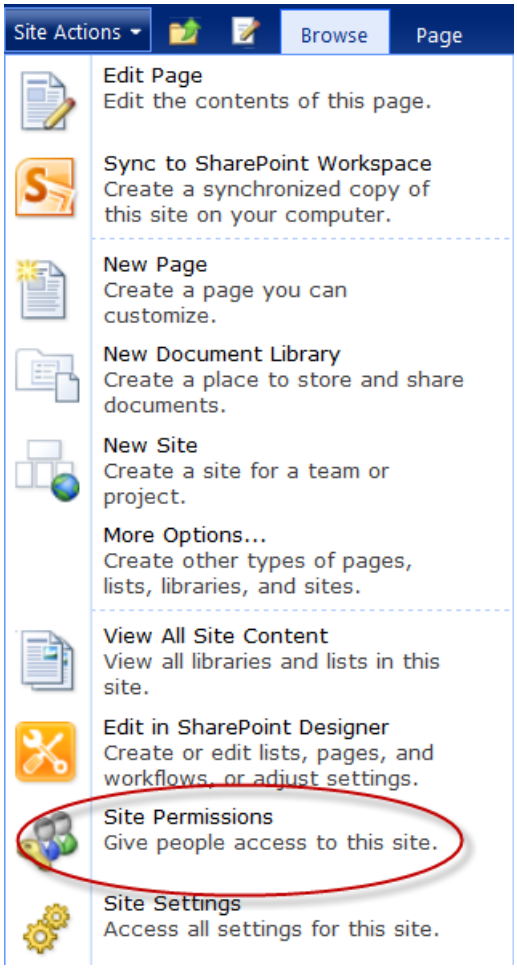

Figure 5-1 *Site Actions Menu > Site Permissions*

2. In the **Edit** tab, **Grant** group, click **Create Group**.

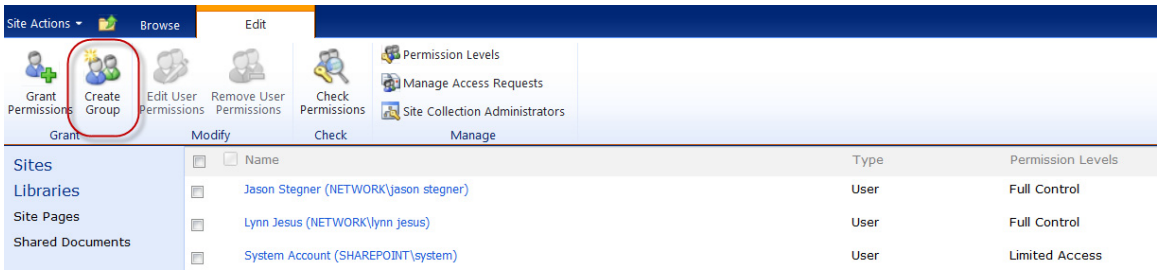

Figure 5-2 *Figure 35 - 5-2 Ribbon > Create Group*

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3. Complete the Form. Click **Create**.

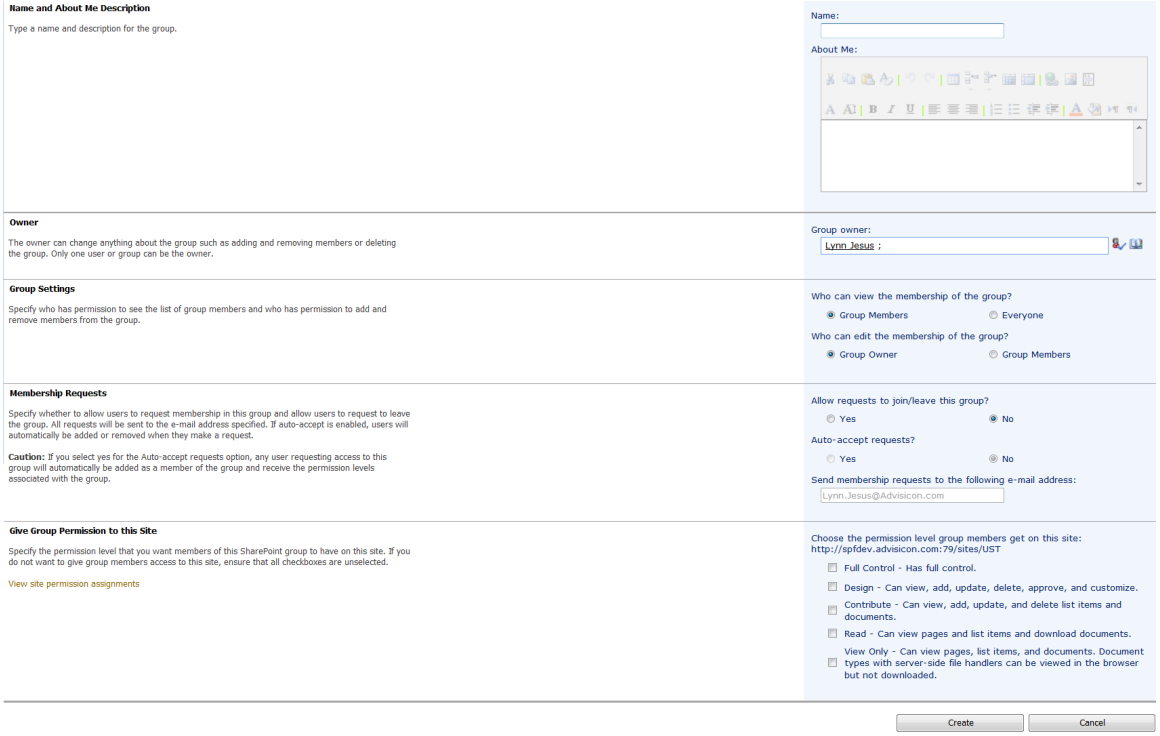

Figure 5-3 *Create Group Form*

5.2.4 Permissions with Active Directory

If you have SharePoint setup in an Active Directory environment, it is very helpful to use Active Directory groups to populate your SharePoint groups. This makes adding several users at once a much simpler process.

This also makes managing users simpler. It provides a single portal to add or remove users, similar to using SharePoint groups alone. But management of users for other applications can be completed at the same time in Active Directory.

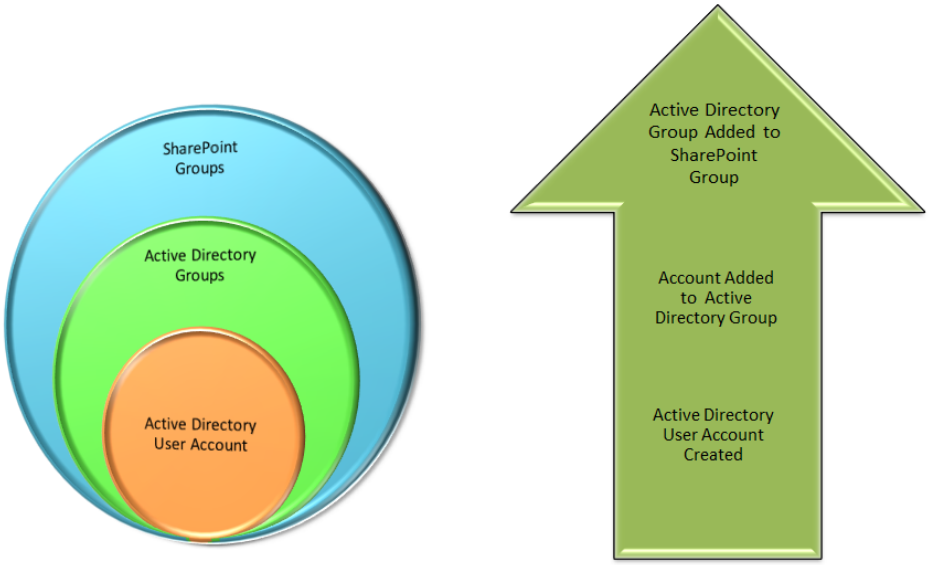

Figure 5-4 *SharePoint and Active Directory*

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Collection of Active Directory Users or Groups

To populate a SharePoint security group:

1. In the **Site Actions** menu, click **Site Permissions**.

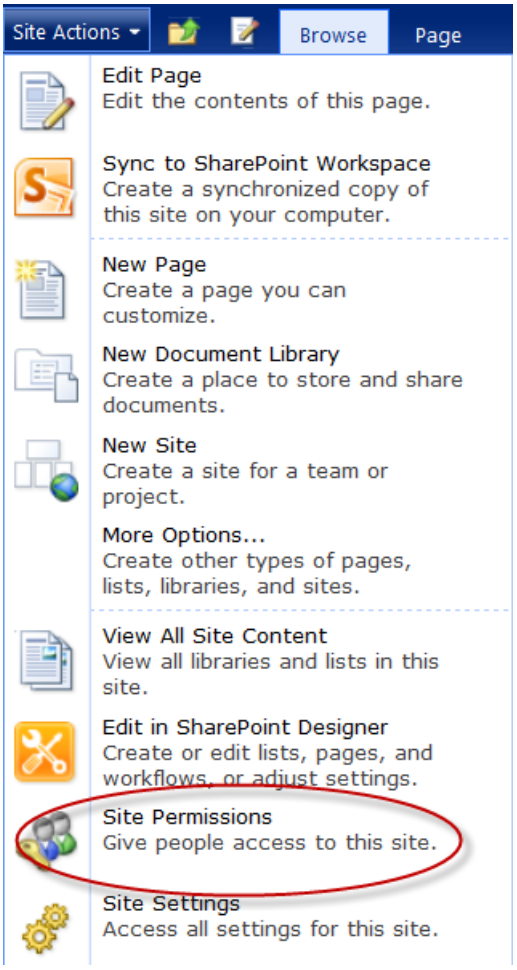

Figure 5-5 *Site Actions Menu > Site Permissions*

2. In the **Edit** tab, **Grant** group, click **Grant Permissions**.

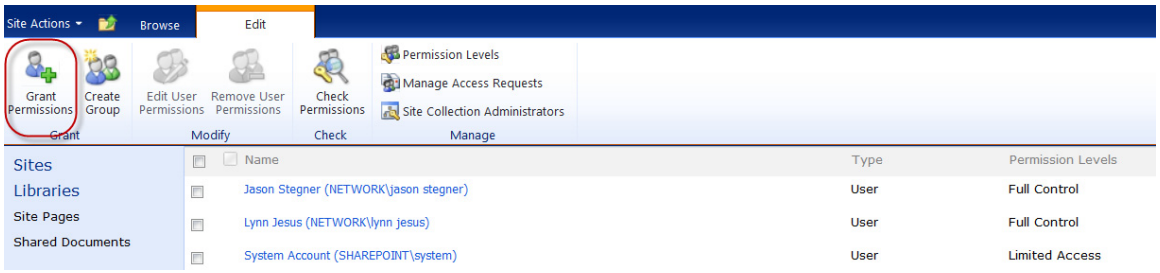

Figure 5-6 *Ribbon – Grant Permissions*

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3. Specify the group from Active Directory in the **Select Users** section. Assign a SharePoint Group from the Grant Permissions section.

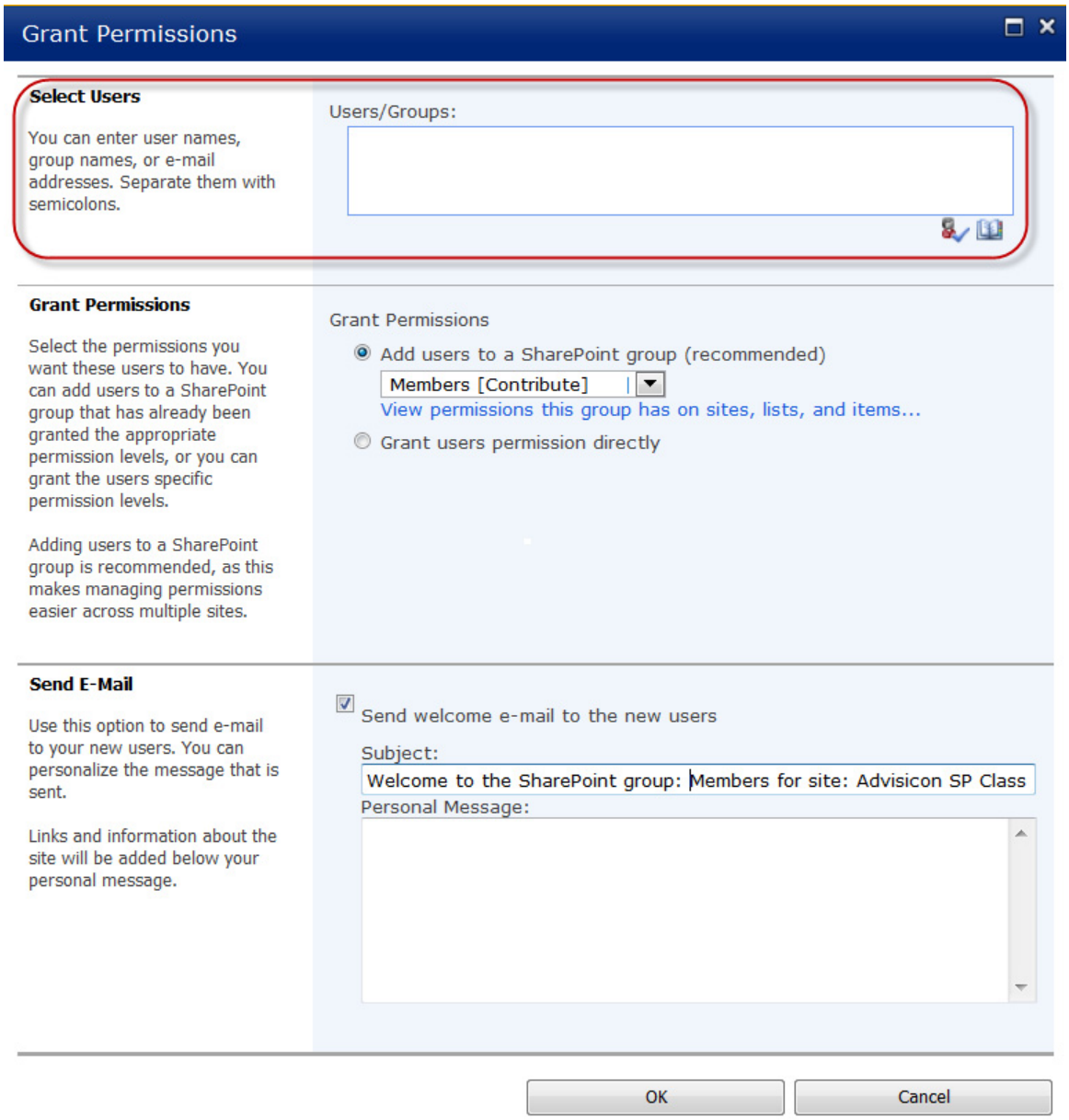

Figure 5-7 *Grant Group Permissions Form*

4. Click **OK**.

5.2.5 Managing Permissions

To manage the permissions a group may have:

1. In the **Site Actions** menu, click **Site Permissions**.

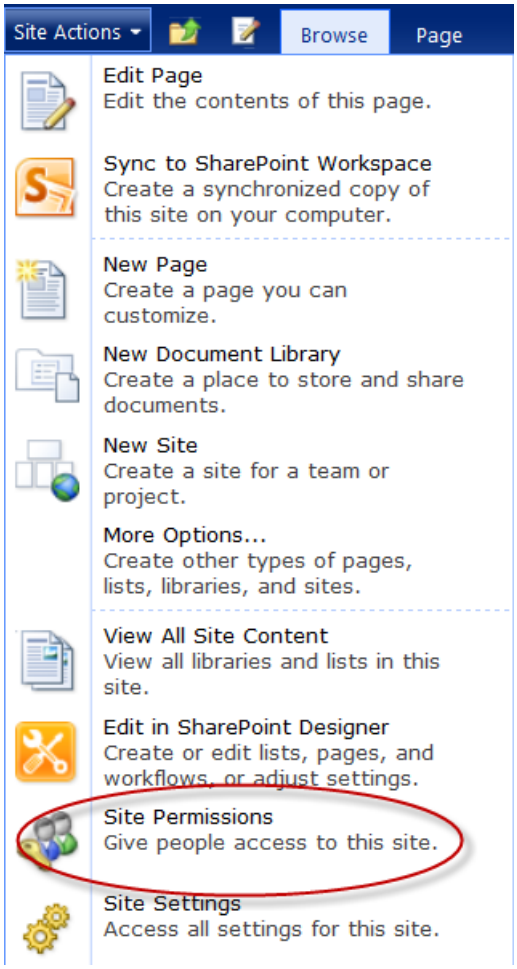

Figure 5-8 *Site Actions Menu > Site Permissions*

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2. In the **Edit** tab, **Manage** group, click **Permission Levels**.

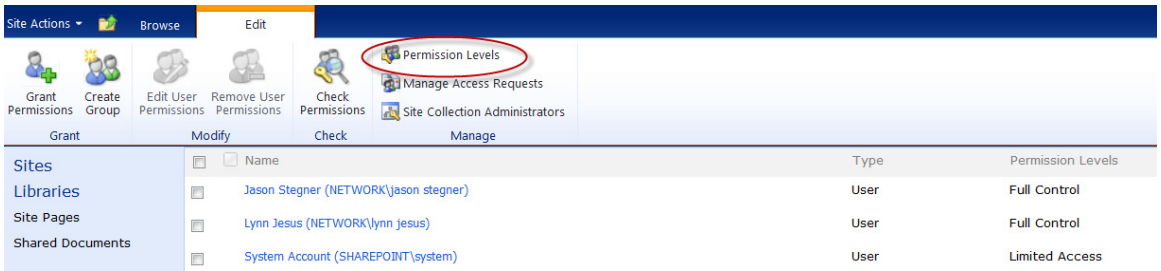

Figure 5-9 *Ribbon > Permission Levels*

This form allows the review of the current permission groups. From this screen you can add another group, or delete an existing group by making a level selection and clicking **Add a Permission Level** or **Delete Selected Permission Levels**.

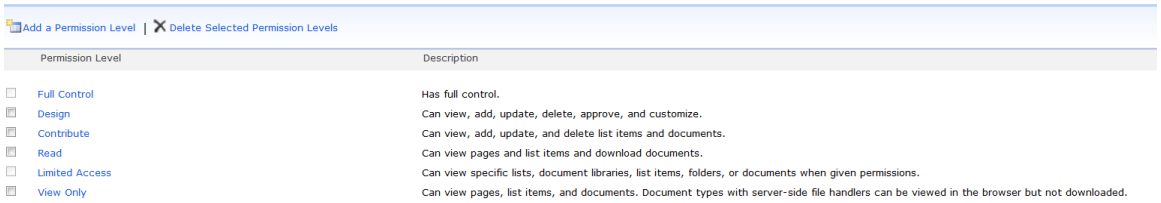

Figure 5-10 *Managing Group Permissions*

By clicking on the group name, modifications can be made to each level. Select or de-select the permission and click **Submit**.

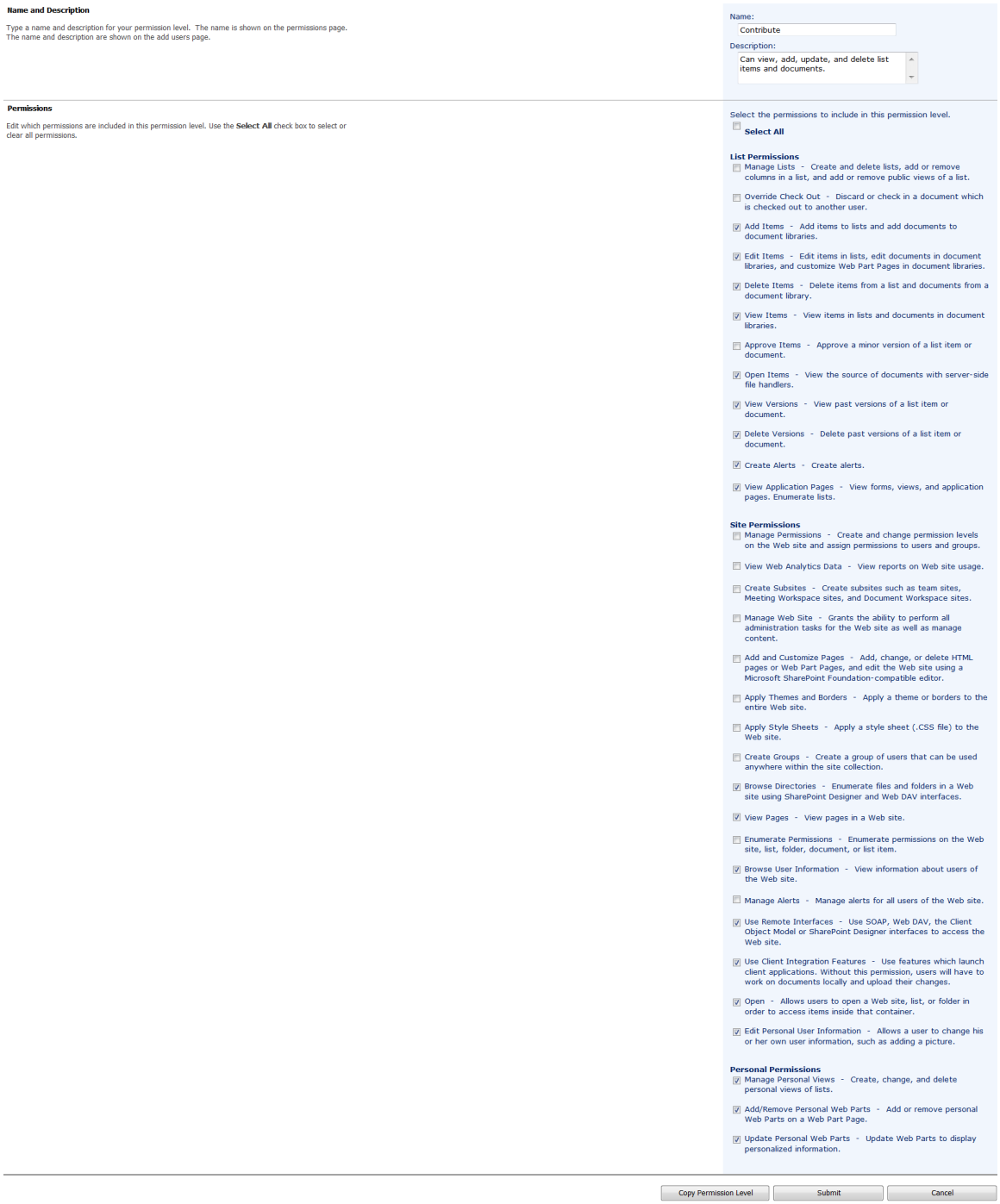

Figure 5-11 *Managing Group Permissions Form*

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5.2.6 Administrators Role in Site Management

The site administrator is the primary person who will be dealing with site permissions. It will be their role to create users and groups and to define what permission level they receive, set permission inheritance, and define the structure of the site. The site administrator has the power to set the site permissions and manage its users. The administrator can customize the site permissions upon its creation. Any changes to site permissions should go through your site administrator.

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5.3 Managing SharePoint Site Users

Depending on a user's permission level, they may be able to add or delete users from sites they manage. This can ease the burden on the SharePoint administrator's time demands.

5.3.1 Adding and Removing Users

Add A New User to a Group

Remember that managing users by groups adds ease to the maintenance process.

1. In the **Site Actions** menu select **Site Settings**.

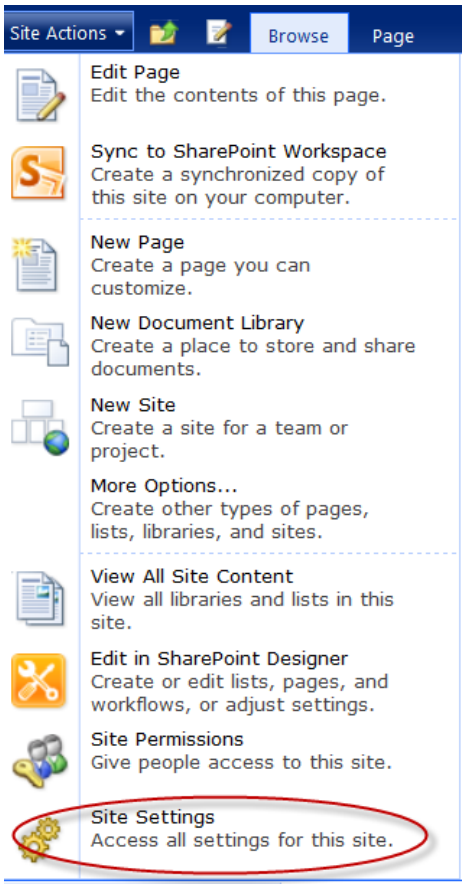

Figure 5-12 *Site Actions Menu > Site Settings*

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2. In the **Users and Permission** section, select **People and groups**.

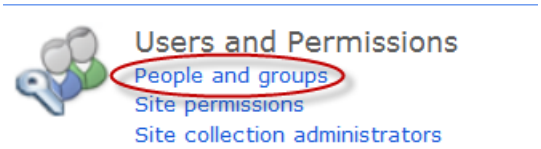

Figure 5-13 *Site Settings > Users and Permissions > People and Groups*

3. Select the desired group from the **Groups** menu on the left side of the page.

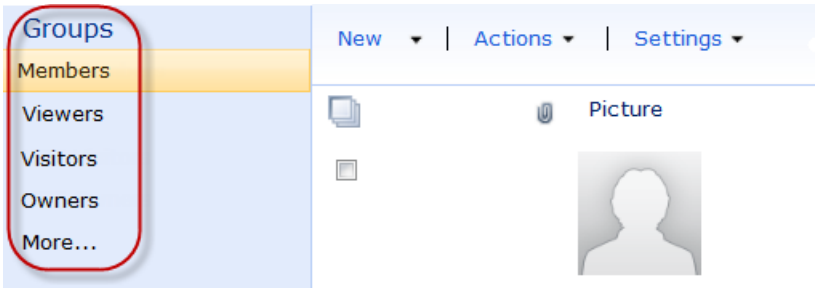

Figure 5-14 *Groups Menu*

4. Click the **New** dropdown, select **Add Users**.

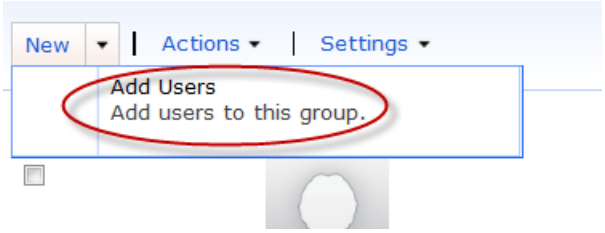

Figure 5-15 *Add Users to a Group Link*

5. Complete the **Grant Permissions** form.

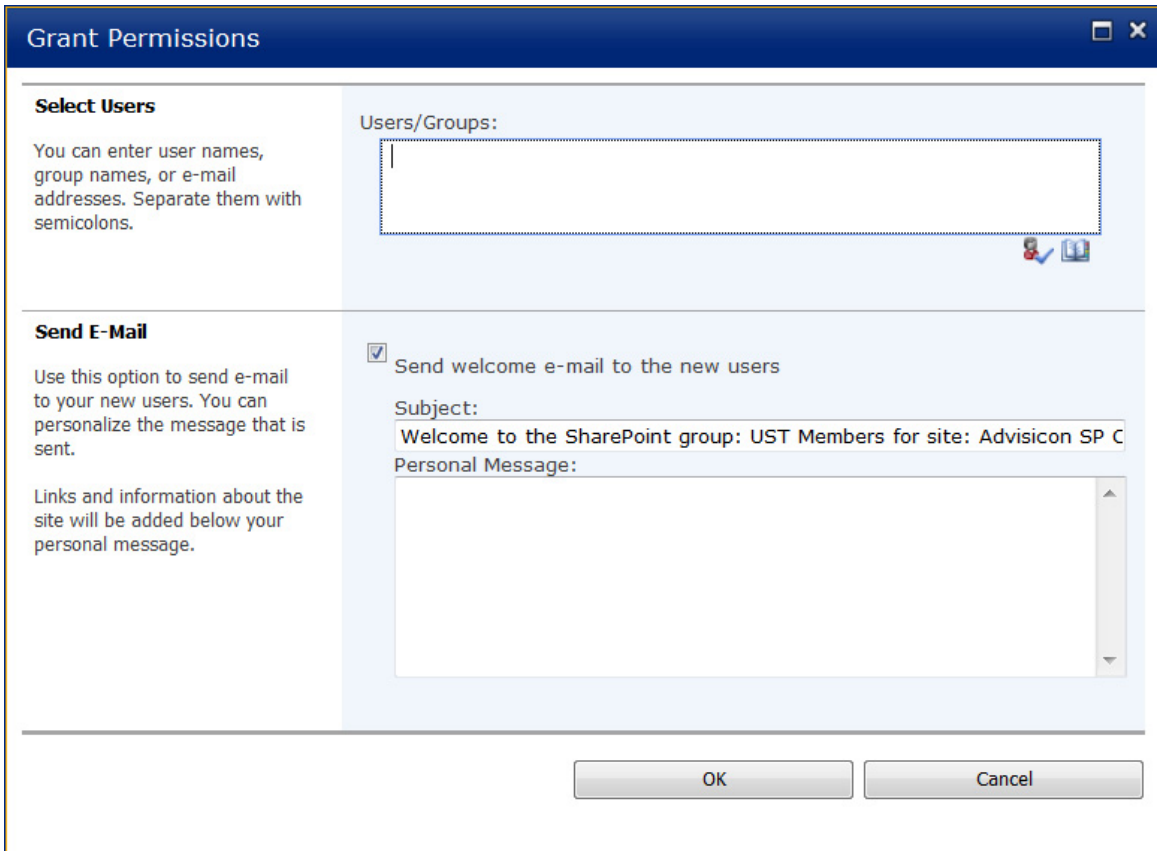

Figure 5-16 *Add Users Form*

6. Click **OK**.

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Add a New User Individually

Care should be taken when adding users separately. Management of these users and their permissions can quickly become cumbersome. It is suggested that the site owner keep track of all separately added users via a spreadsheet or some document that can track where people have been added and what permissions have been assigned.

1. In the **Site Actions** menu, click **Site Permissions**.

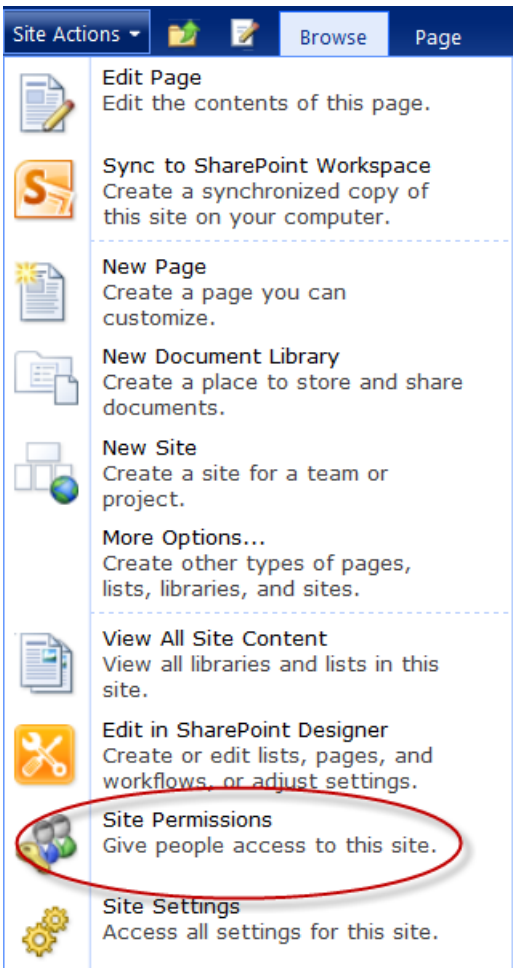

Figure 5-17 *Site Actions Menu > Site Permissions*

2. In the **Edit** tab, **Grant** group, click **Grant Permissions**.

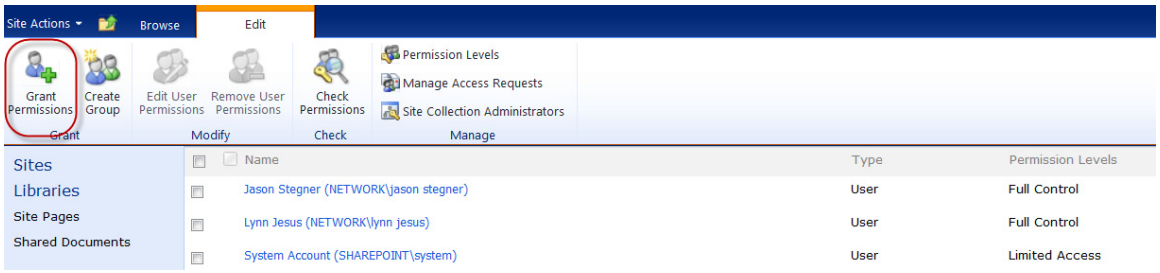

Figure 5-18 *Ribbon > Grant Permissions*

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3. Complete the **Grant Permission** form. In **Grant Permissions** section, select **Grant users permission directly**.

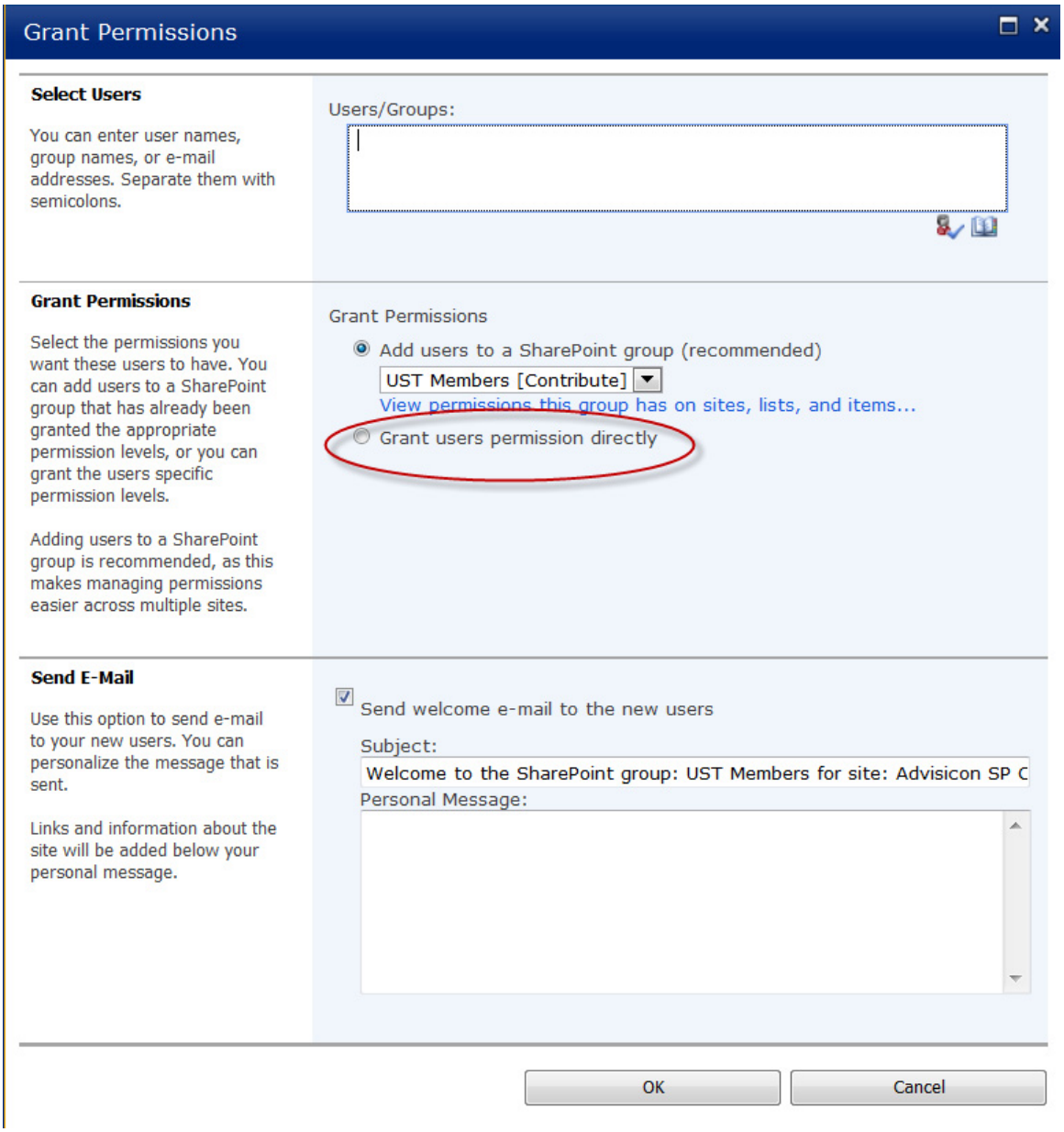

Figure 5-19 *Grant Permissions to an Individual User*

Removing Users from a Group

Removing a user depends on where the user is setup. If the user is part of a group, go to the group, select the user, and hit **Remove Users from Group** in the **Actions** menu.

1. In the **Site Actions** menu select **Site Settings**.

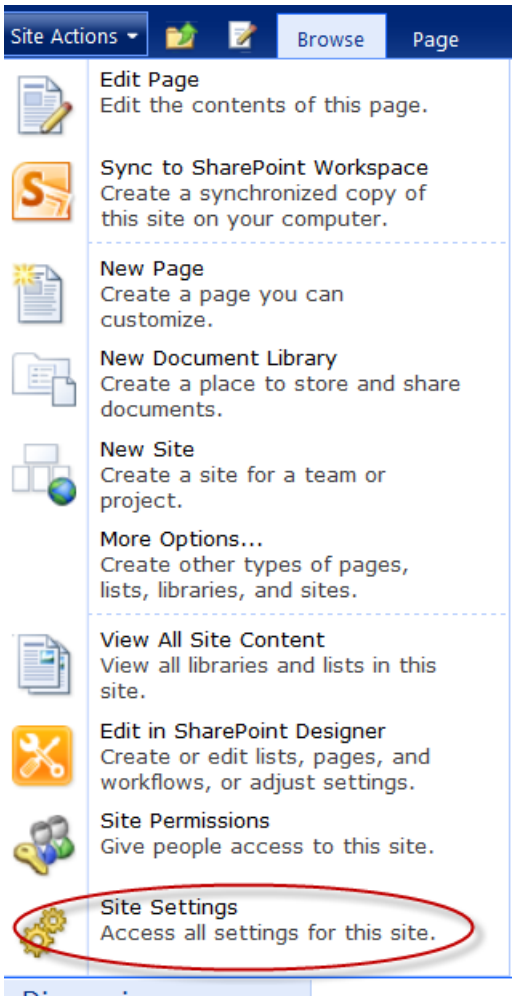

Figure 5-20 *Site Actions Menu > Site Settings*

2. In the **Users and Permission** section, select **People and groups**.

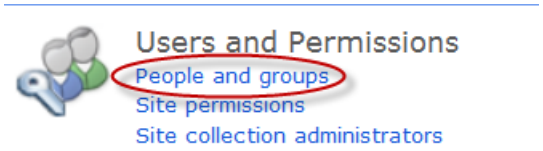

Figure 5-21 *Site Settings > Users and Permissions > People and Groups*

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3. Select the desired group from the **Groups** menu on the left side of the page.

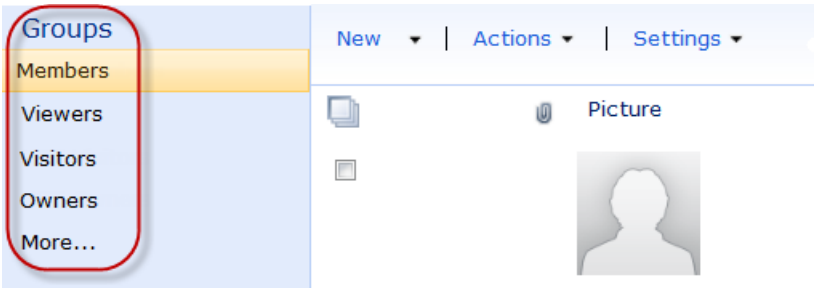

Figure 5-22 *Groups Menu*

4. Select the desired user. Click the **Actions** dropdown arrow and select **Remove Users from Group**.

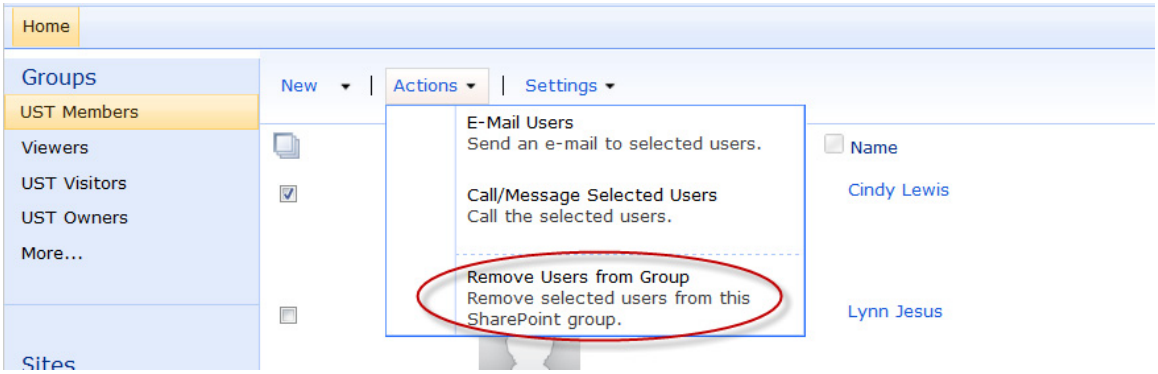

Figure 5-23 *Remove Users from Group*

Remove Users Individually

1. In the **Site Actions** menu, click **Site Permissions**.

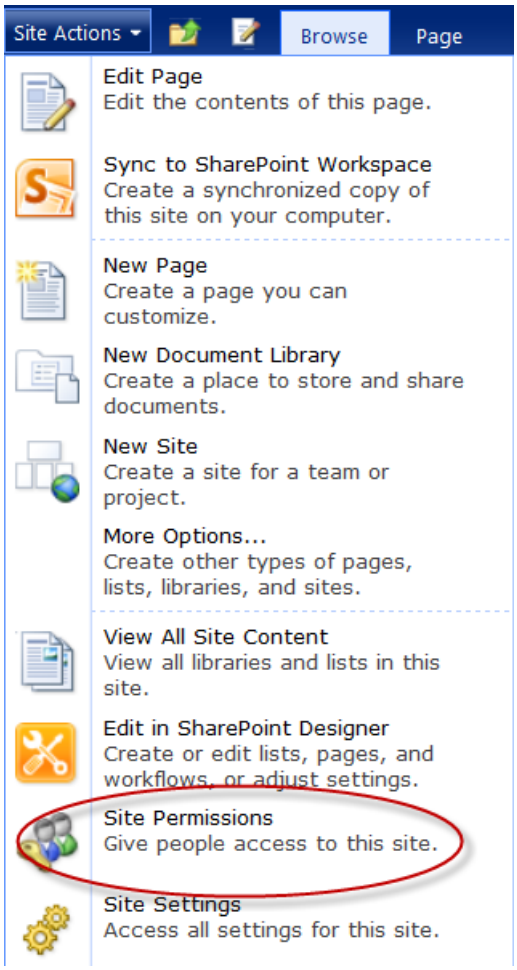

Figure 5-24 *Site Actions Menu > Site Permissions*

2. Select the desired user. In the **Edit** tab, **Modify** group, click **Remove User Permissions**.

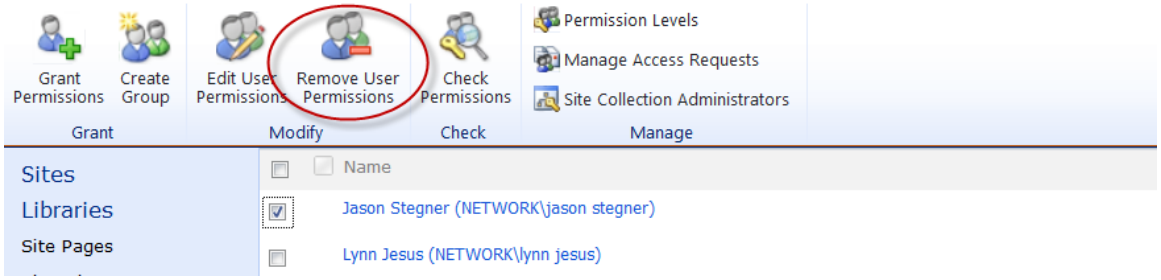

Figure 5-25 *Ribbon > Remove User Permissions*

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If users have been added to items individually, they will need to be removed from each assigned item.

5.4 Key Points to Remember

- SharePoint operates on intuitive permissions. This means that if a user does not have permissions to do an action, the user will not see the option. For example, if a user cannot add, remove or modify permissions, they will not see Site Permissions in the Site Actions menu.
- Best practice is to manage users and permissions through Active Directory. If Active Directory is not in use, the next best option is to manage users and permissions through SharePoint groups. It is not recommended to add users individually as that carries a lot of management overhead.
- Unless the request has a verified business case, it is recommended to always inherit site permissions from the parent site.

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Chapter 6

Working with SharePoint Objects

"There is no such thing as information overload, just bad design."
~ Edward Tufte

6.1 Overview

Upon completion of this chapter, the participant will be able to:

- Describe the anatomy of a list.
- Create SharePoint objects, such as lists and libraries.
- Learn the benefits and uses for check in and check out, and versioning for content management.
- Learn SharePoint features for collaboration.

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6.2 Lists

Lists are the foundation of SharePoint. Everything is a list in SharePoint; even libraries are a type of lists. Lists can be customized to meet team requirements and show you any type of information you want to see. There are many different types of lists and each has its own purpose.

6.2.1 Anatomy of a List: Relational Data

Virtually all information housed on a SharePoint site can be found in a list. Very much like a database table, SharePoint lists contain records made up of fields. You can configure any combination of fields when creating a list. Every list has a default set of fields, however they can be modified to better suit your purpose.

Standard SharePoint List Objects

When clicking on the link for Lists, it will open up a view that shows you all the different lists on your site.

Lists in SharePoint are web-based editable tables that provide the team with the ability to work with a structure of rows and columns with related data, very similar to Excel or Access tables.

There are several default list types that you will commonly find in most SharePoint sites:

- Announcements
- Events
- Links
- Tasks
- Contacts
- Issues
- Risks
- Agendas

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6.3 Working with Lists

6.3.1 Creating a List

1. In the **Site Actions** menu, click **More Options**.

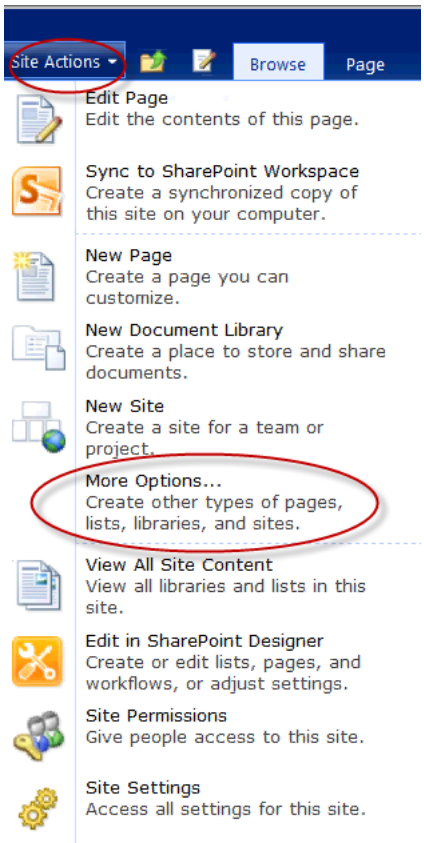

Figure 6-1 *Site Actions Menu > More Options*

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2. Select **List** from the left side menu. This will filter for additional List types that can be created. Choose the desired List type.

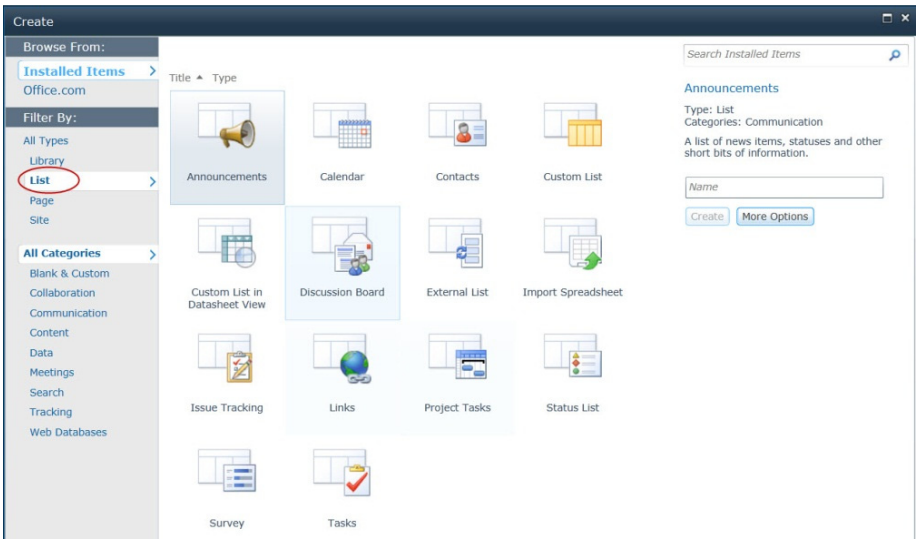

Figure 6-2 *Create a New List*

3. Once the desired List type is selected, an option to name the List appears on the right side of the window, including more options to configure the List type.

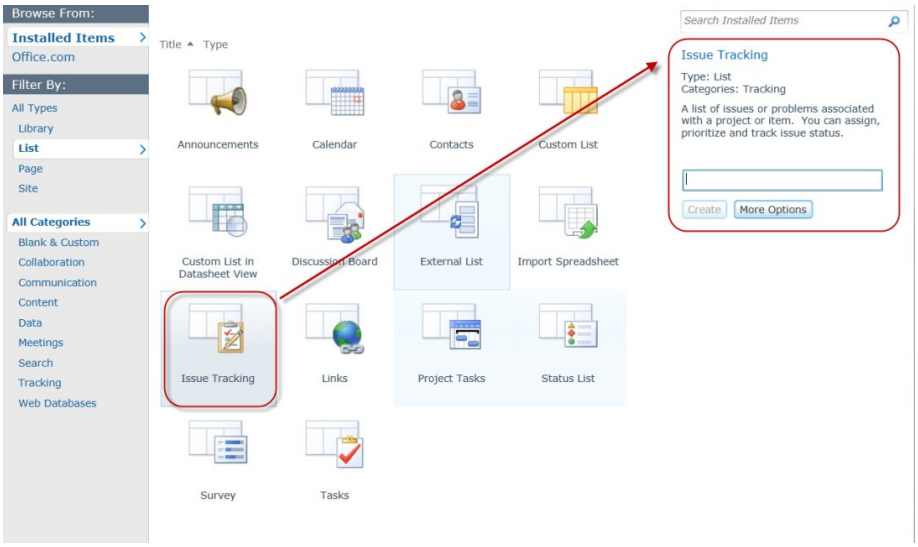

Figure 6-3 *Naming a New List*

4. Enter the name of the List.

5. By clicking **More Options**, the Create dialog box will open. A description of the List type as well as the option to include it in the Quick Launch menu is available.

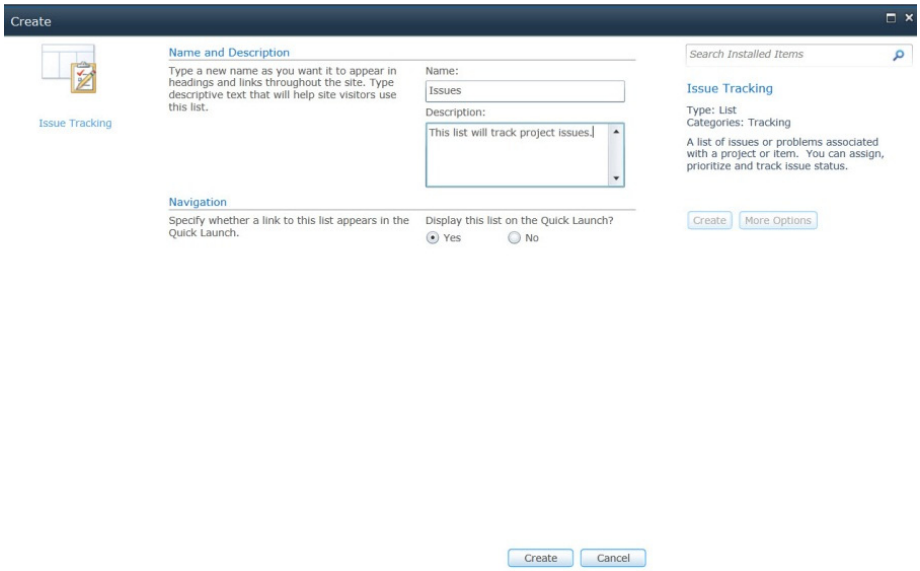

Figure 6-4 *New List Form*

Only keep frequently used items in the **Quick Launch** menu to ensure efficiency of use. Less frequently used items can be accessed through the **All Site Content** link.

The options in the **More Options** menu may differ depending on the type of content being created, but the creations steps are the same.

6.3.2 Navigating Lists

1. Navigate to the desired list either via the **Quick Launch** menu, or by **All Site Content**.

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2. Hover over the desired document for the dropdown menu arrow to appear.

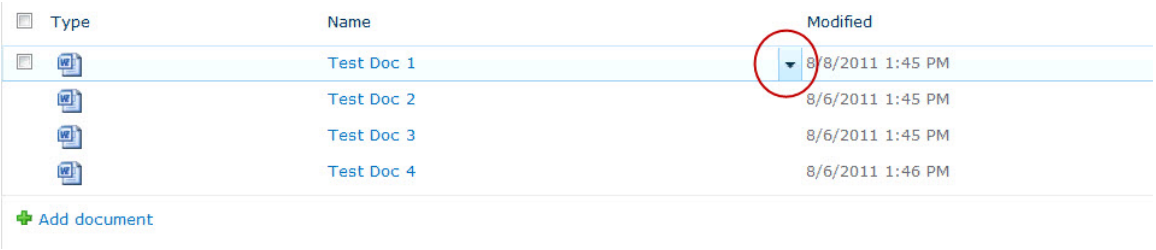

Figure 6-5 *Navigating List Drop Down*

3. Click on the down arrow to reveal a list of options.

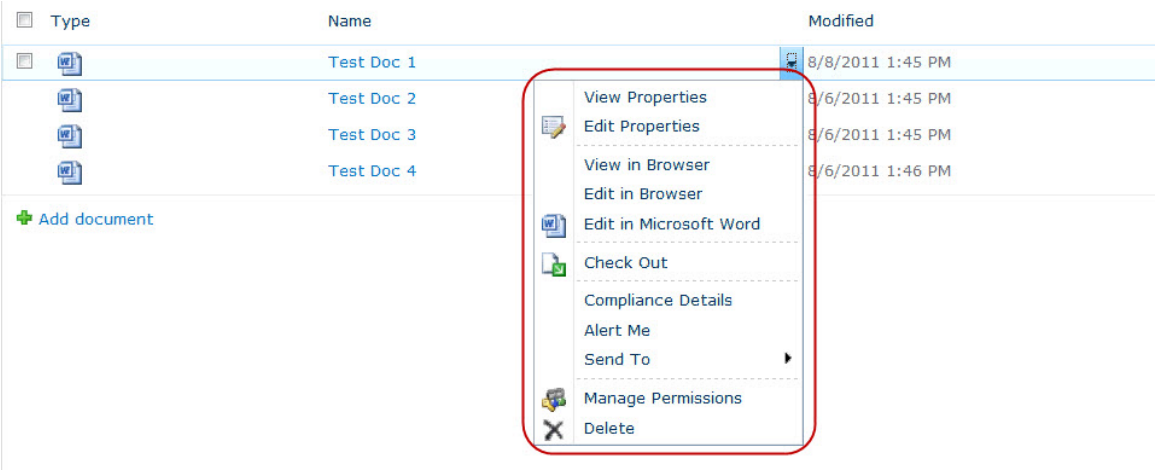

Figure 6-6 *List Drop Down Menu*

The list of options will be dependent on the level of permissions the user is granted.

6.4 Libraries

Libraries are just a different type of list in SharePoint. They provide many extended features such as item management, collaboration, advanced security settings and versioning.

Libraries offer storage for related items, easily accessed by team members, in a logical central location. For example, there may be a library that contains Contracts, and another that contains Invoices, and a third library that contains Work Orders.

While libraries usually contain related documents, they can have different document types (Adobe Acrobat .pdfs, Microsoft Word .docs, Microsoft Excel spreadsheets, etc.) within the same library.

Utilizing SharePoint's security capabilities, libraries allow users to establish permissions and controls of what end users can do with files, folders, pictures, and forms stored within any of its site's collections.

The usual default size limit for files is 2 gigabytes, but this amount can be adjusted lower to save on site storage. Libraries are also limited to 50 million items, but let's hope data is a bit more organized than to require such a large library! Note that there are other factors, such as database query limitations, organizational infrastructure, and governance policies that may affect performance of a library as well.

SharePoint 2010 has four common libraries:

- Document Library
- Picture Library
- Form Library
- Slide Library

While there are additional Library types, such as Reports and Asset Libraries, the above are the most common libraries utilized by teams.

6.4.1 Document Libraries

While SharePoint isn't a full document management system or software application, it does provide the most common functionality used in managing documents and documentation.

A new document can be created directly within the Library, or uploaded from another location.

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Create a New Document within a Library

1. Navigate to the desired Document Library and in the **Document** tab, **New** group, click **New Document**.

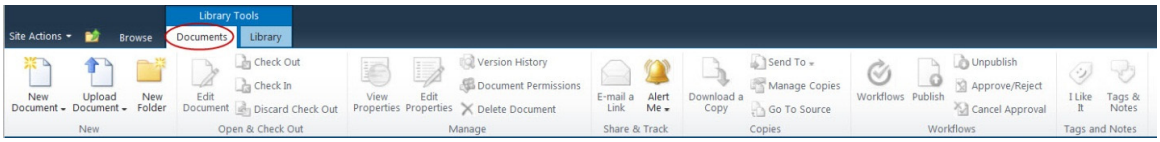

Figure 6-7 *Ribbon > New Document*

2. A new Microsoft Word document will open that is ready for use.

Document Management Control

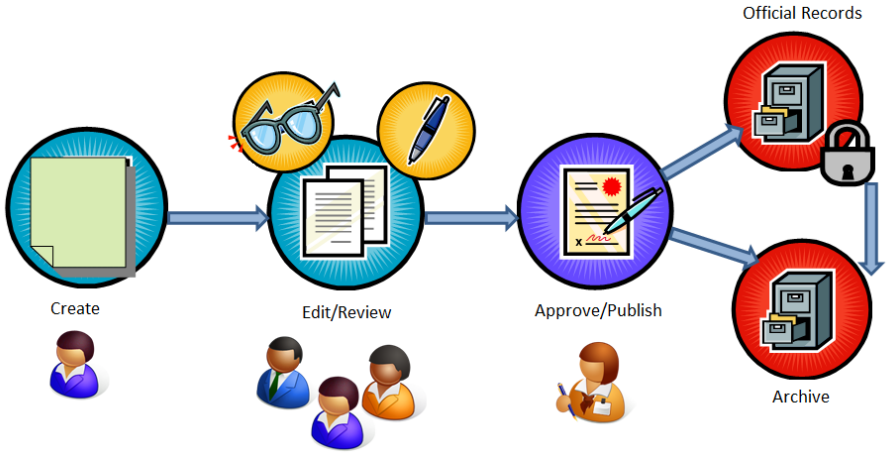

Figure 6-8 *Document Management Control*

It may simply be enough to allow team members to see who has a document checked out or to review a series of edits to documentation through the different stored versions.

Overall the 80/20 rule (Pareto Principle) seems to apply to most document management needs. SharePoint is providing 80% of what people need through about 20% of the functionality of a full blown Document Management system.

6.4.2 Picture Libraries

Picture Libraries are an effective way to communicate with your team, especially those who might not be on site. Picture Libraries are similar to Document Libraries except their documents are pictures. Picture Libraries provide several methods of viewing, locating and modifying your pictures.

Be sure to check the file size of the photo prior to uploading it to the site. Large files can make it difficult to navigate through the photo library and take up unnecessary space on the site.

Instead of sending a project schedule or sending large files to an outside group or contact, you can post pictures of your schedule and key events. Practically any image that you would find helpful to your team can be inserted into a SharePoint site.

Many organizations use the Picture Library feature of SharePoint to brainstorm with teams coming from different shifts, locations, and time zones. Only your imagination will limit your ability to incorporate screen images, pictures or snapshots regarding work or activities within a project.

The pictures don't just have to be the project related information; many teams have a celebration at the end of a project and pictures from these events posted make the site a place for people to catalogue the unfolding and conclusion of the project.

Though most communication on a project is done with written documents, there are times when photos can greatly enhance team communication. For example, a construction project foreman might use snapshots from the job site to keep the other disbursed teams updated on the site progress.

6.4.3 Form Library

A Form Library is a special type of library that can contain and promote any information from any XML file. All documents stored within it are based on a specified XML-based form template. The most used form is an InfoPath form.

The form library allows the form to be maintained, deployed, and shared for use by the members of an organization. The form library can display columns of information extracted from the forms. With these columns, custom views can be created to organize the forms and their content, called property promotion.

The form library also makes the extracted information available for searching as part of the SharePoint site. A form designer can use InfoPath to publish a form template directly to the form library and to define custom views for the forms.

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6.4.4 Slide Library

A Slide Library stores slides from Microsoft PowerPoint 2007 or later. Efficiencies can be built into presentation preparation by making slides available for viewing and reuse in one centrally located place. Slides can be reused between marketing presentations, stakeholder presentations, conferences, etc.

> Slide Libraries can contain slides in the .pptx format only, unless a .ppt has only one slide.

6.4.5 Creating a Library

1. In the **Site Actions** menu, click **More Options**.

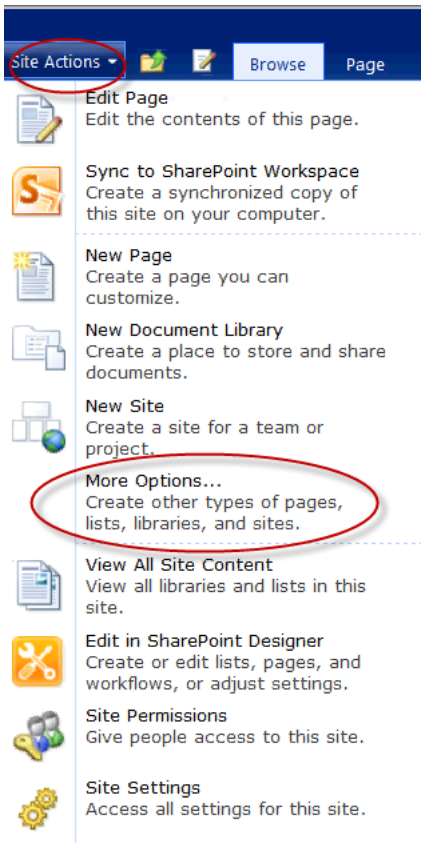

Figure 6-9 *Site Actions Menu > More Options*

2. Select **Library** from the left side menu. This will filter for additional Library types that can be created. Choose the desired Library type.

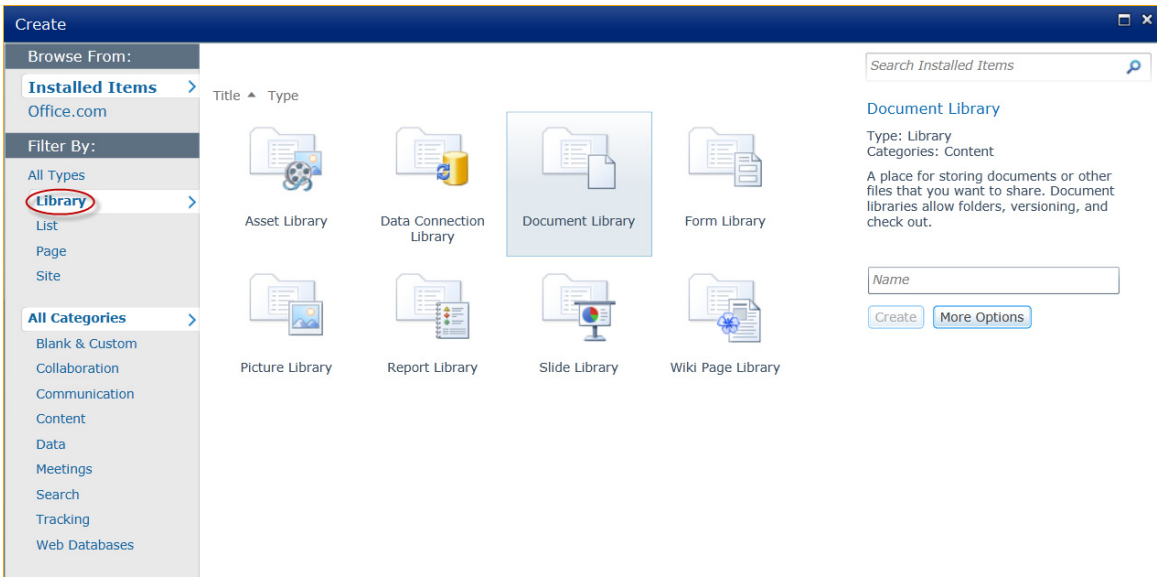

Figure 6-10 *Create a New Library*

3. Once the desired Library type is chosen, an option to name the Library appears on the right side of the window, including **More Options** to configure the Library type.

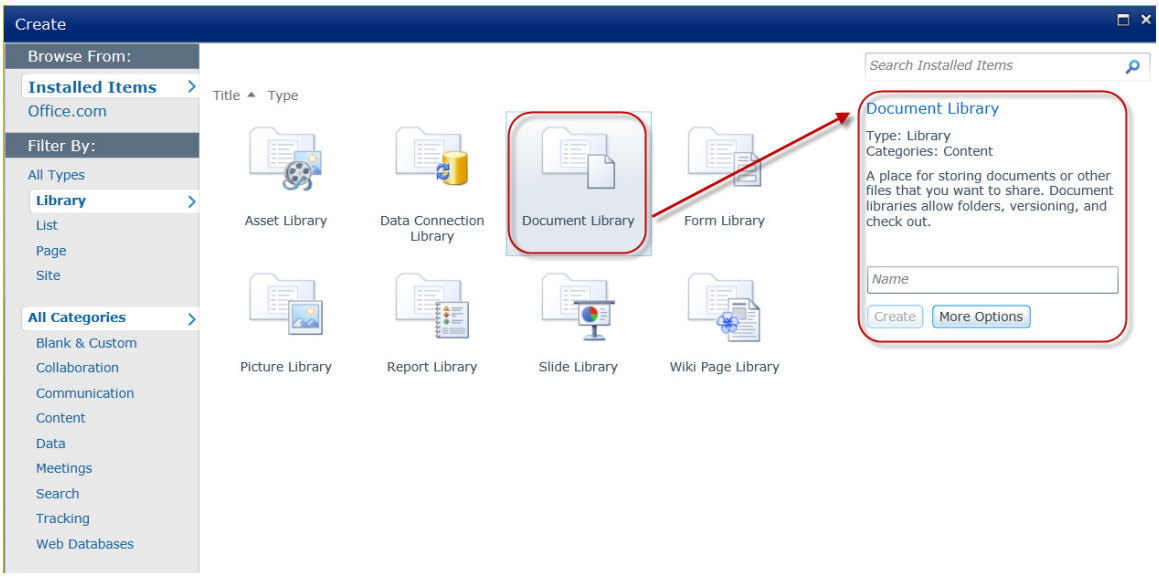

Figure 6-11 *Naming a Library*

4. Enter the name of the Library.

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5. By clicking **More Options**, the **Create** dialog box opens. A description of the Library type as well as the option to include it in the Quick Launch menu is available.

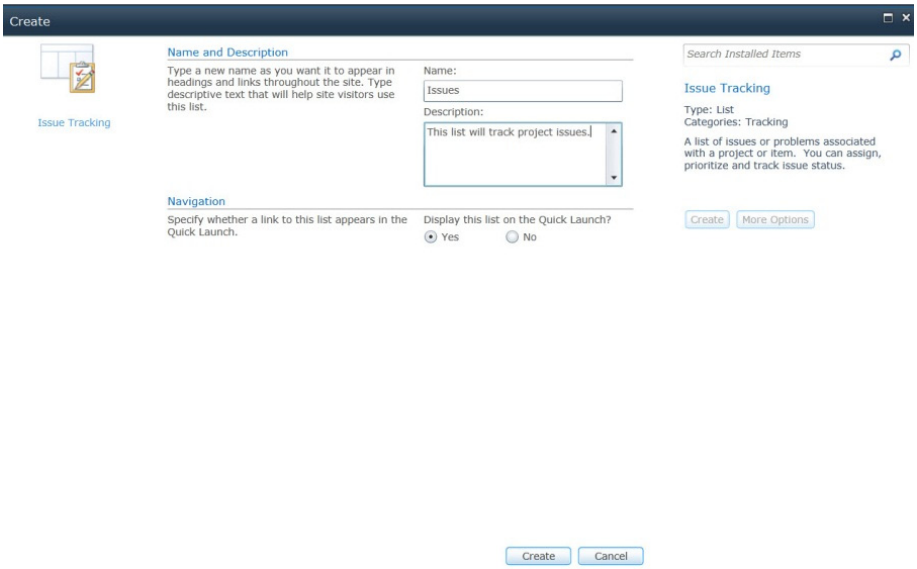

Figure 6-12 *New Library Form*

6. Click **Create**.

Only keep frequently used items in the **Quick Launch** menu to ensure efficiency of use. Less frequently used items can be accessed through the **All Site Content** link.

The options in the **More Options** menu may differ depending on the type of content being created, but the creation steps are the same.

6.5 Working with Libraries

The extended capabilities of Libraries make access, collaboration and security of items easy. The following examples are illustrated with a Document Library, but all libraries function similarly, so these steps can be applied to any Library.

6.5.1 Upload a Single Item

There are two ways to add an item to a library.

One option is:

1. Navigate to the desired Library.
2. Click on the **Add document** link at the lower left of the window.

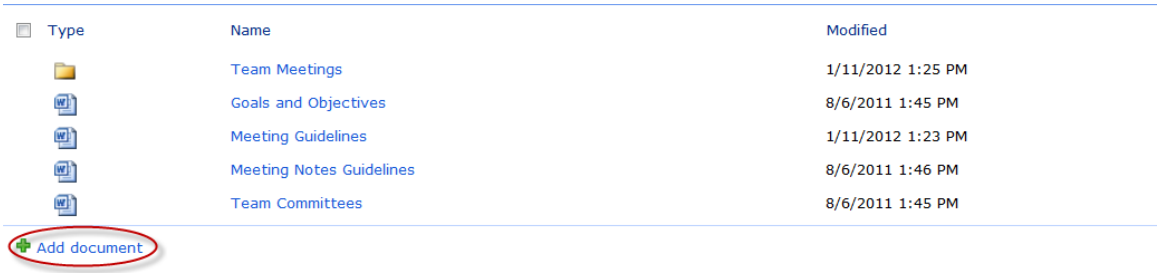

Figure 6-13 *Add Document*

3. The Upload Document dialog box will open. Browse to the item to be uploaded.
4. When finished click **OK**.

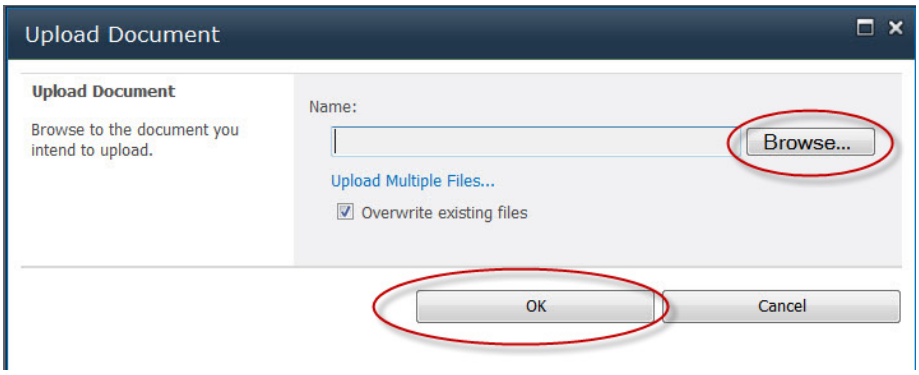

Figure 6-14 *Upload Single Document*

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The second option for uploading a single item is:

1. In the **Document** tab, **New** group, click **Upload Document**.

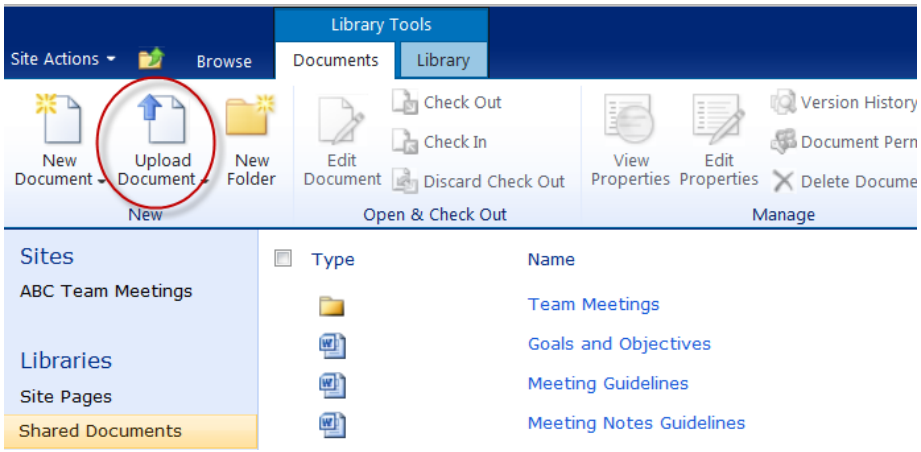

Figure 6-15 *Ribbon - Upload Document*

Or the dropdown arrow next to the **Upload Document** button.

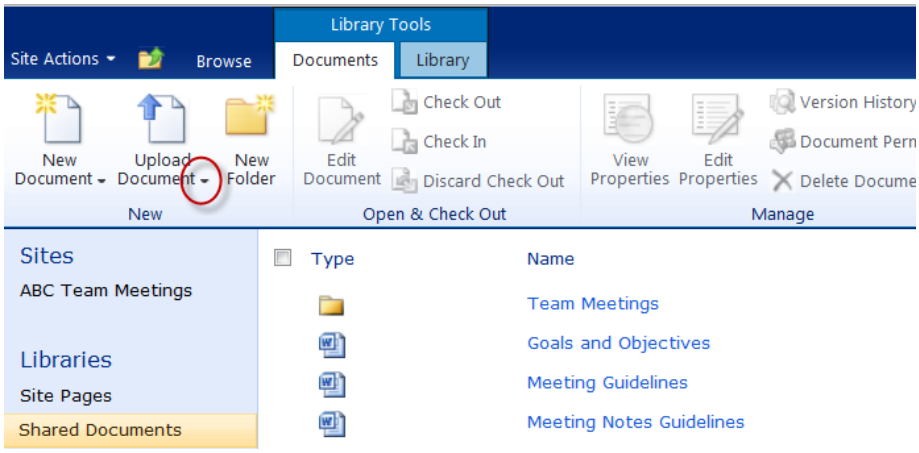

Figure 6-16 *Upload Drop Down Arrow*

2. Select **Upload Document**.

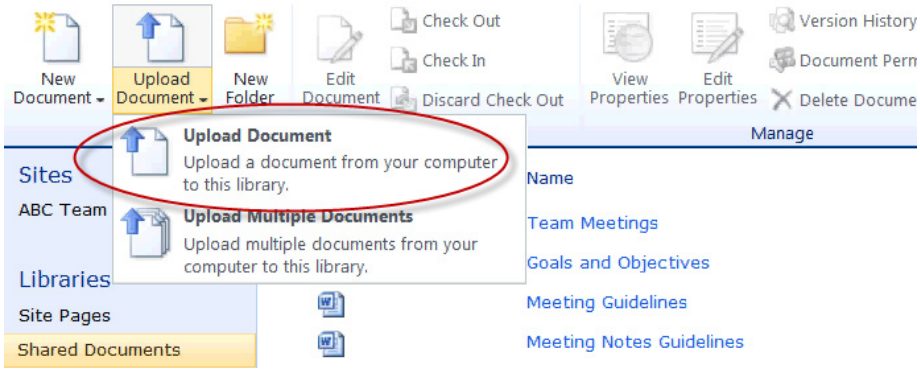

Figure 6-17 *Upload Document Drop Down Menu – Single Document*

3. A window to upload an item will open. Browse to the item to be uploaded.
4. When finished click **OK**.

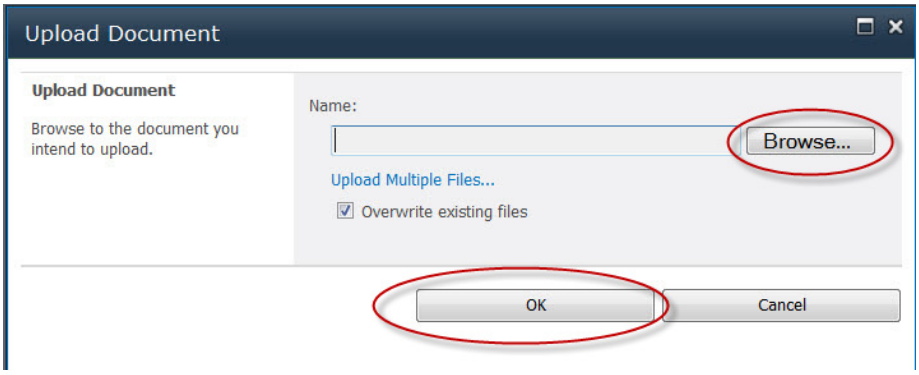

Figure 6-18 *Browse and Upload Document*

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6.5.2 Upload Multiple Items

SharePoint enables uploading of multiple items to a library at one time. This is an efficient and quick way to load items into a library.

1. In the **Documents** tab, **New** group, click the dropdown arrow next to **Upload Document**.

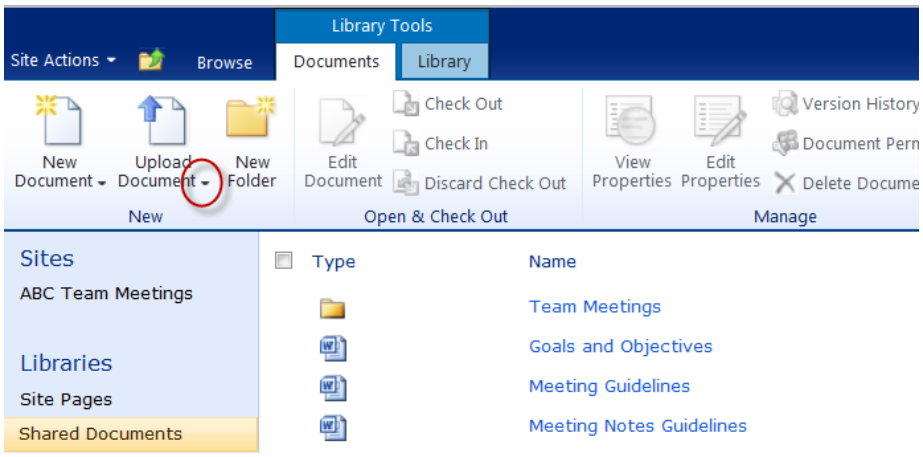

Figure 6-19 *Upload Drop Down Arrow*

2. Select **Upload Multiple Documents**.

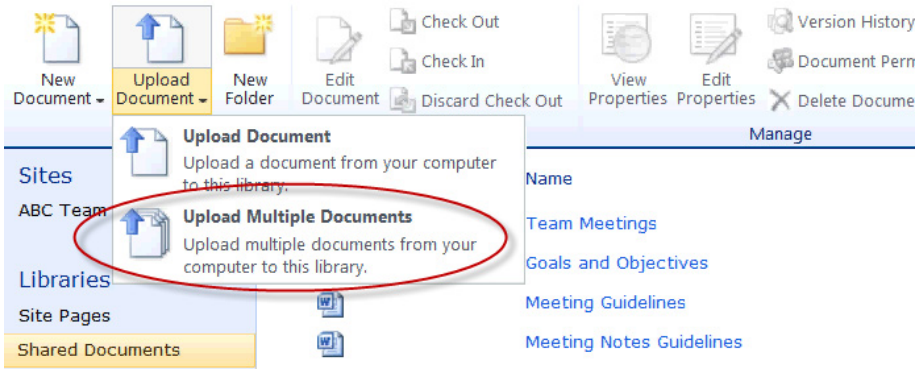

Figure 6-20 *Upload Document Drop Down Menu – Multiple Documents*

3. The **Upload Multiple Documents** will open. Depending on the configuration of the ActiveX component with Microsoft Office, you will see one of two windows.

   The window below allows multiple documents to be dragged and dropped into the gray box. When finished, click **OK**.

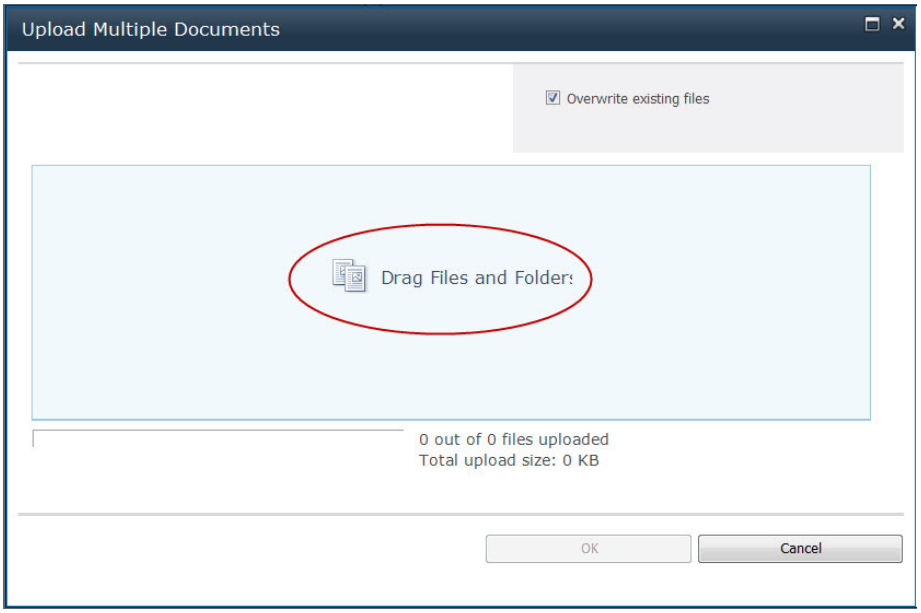

Figure 6-21 *Multiple Document Upload - Drag and Drop*

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Or a window will open showing a tree navigation theme. Navigate to the desired folders on the left, and select the desired items by checking the boxes.

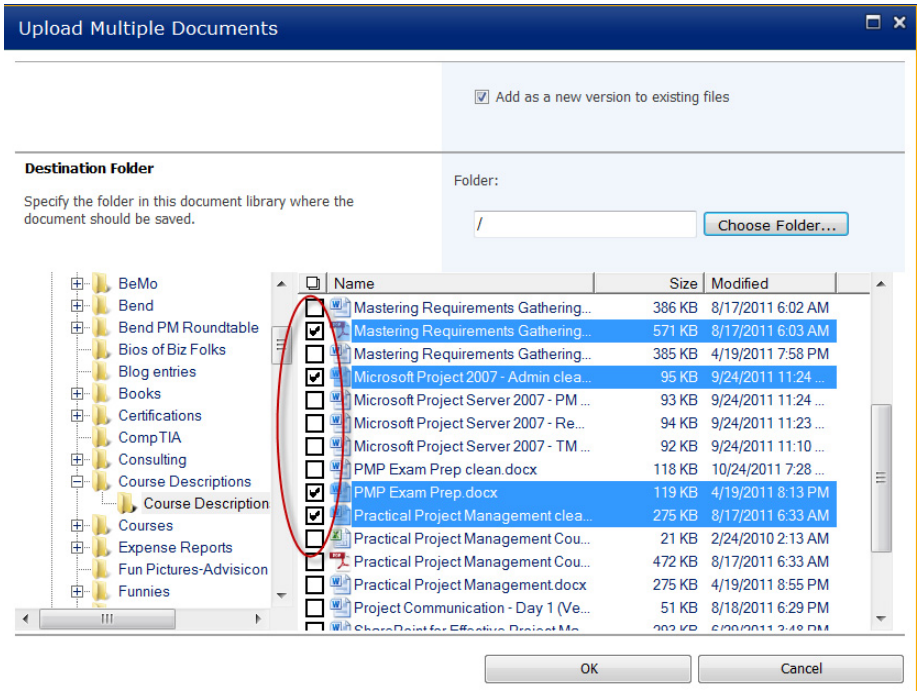

Figure 6-22 *Multiple Upload Tree View*

4. When finished click **OK**.

If the single document option is chosen, there is the ability to change this to a multiple document upload. Click the **Upload Multiple Files** link in the Upload Document dialog box to change this option.

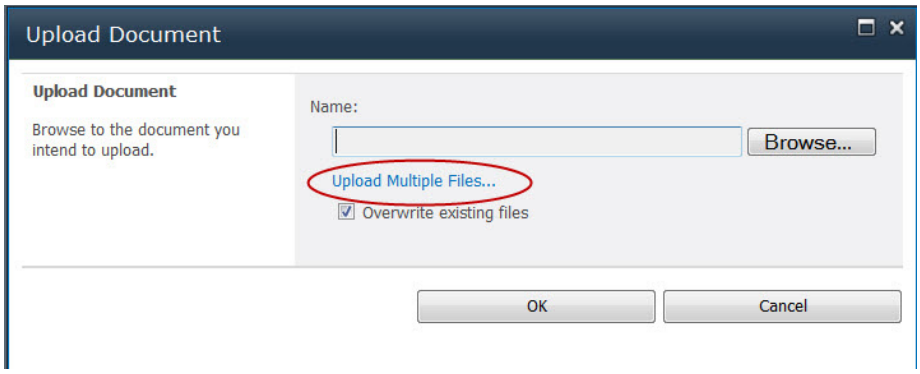

Figure 6-23 *Upload Multiple Files from Single Upload Window*

6.5.3 Creating Folders

Folders can be created to organize items in libraries, much like folders are used on computer drives. This is a familiar system of organization to most users.

1. Navigate to the desired library.
2. In the **Documents** tab, **New** group, click **New Folder**.

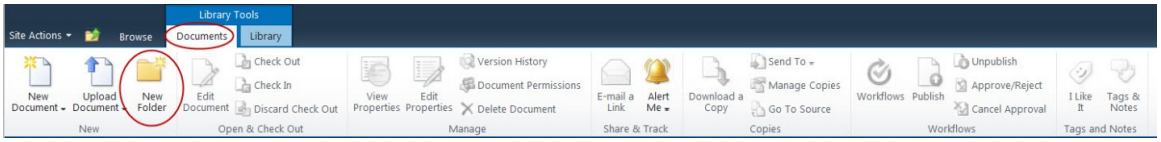

Figure 6-24 *Ribbon > New Folder*

1. The New Folder dialog box will open. Type the desired name of the folder and click **Save**.

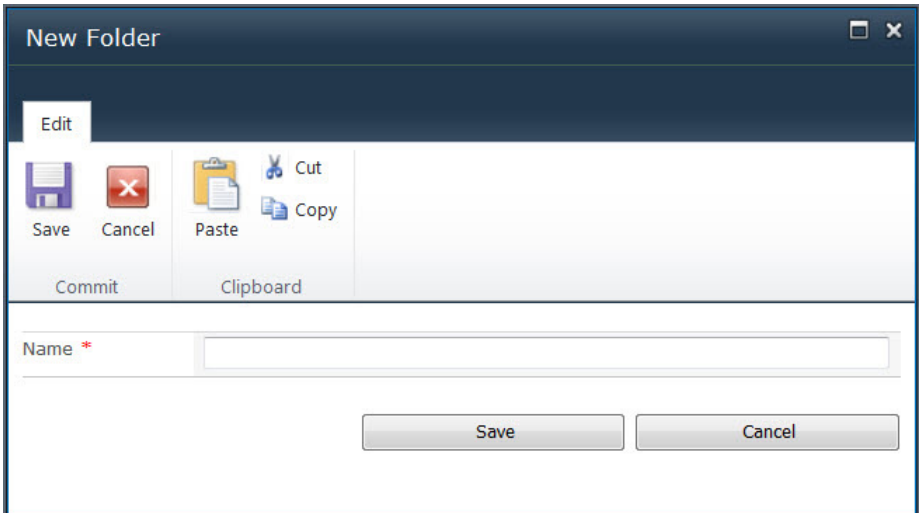

Figure 6-25 *Creating a New Folder*

Folders or Metadata

There are two schools of thought between using folders or utilizing metadata for organization of data.

Folders are already familiar to most users. Users have been trained in using folders for many years with their desktop and laptop computers. They are easy to use and organize data quickly.

But how can you organize data in a way that is available for multiple groupings? For example, vacation pictures can be organized in folders by

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individual trips, such as Camping Summer 2011, Paris Spring 2011, Road Trip Fall 2011. In this schema finding the pictures from one trip or another is quite easy.

Now imagine the ability to easily filter all of these pictures by trip one time, then perhaps by a specific family member another time, all without reorganizing the photos. This is accomplished through those metadata tagging. By applying metadata, or another way to think of it is as applying labels, to the pictures you can easily sort and filter through the pictures. Having labels of location, date and even people in the picture will create metadata for that item.

It is as easy as typing some information when you initially upload the picture. These keywords can always be updated by editing the item.

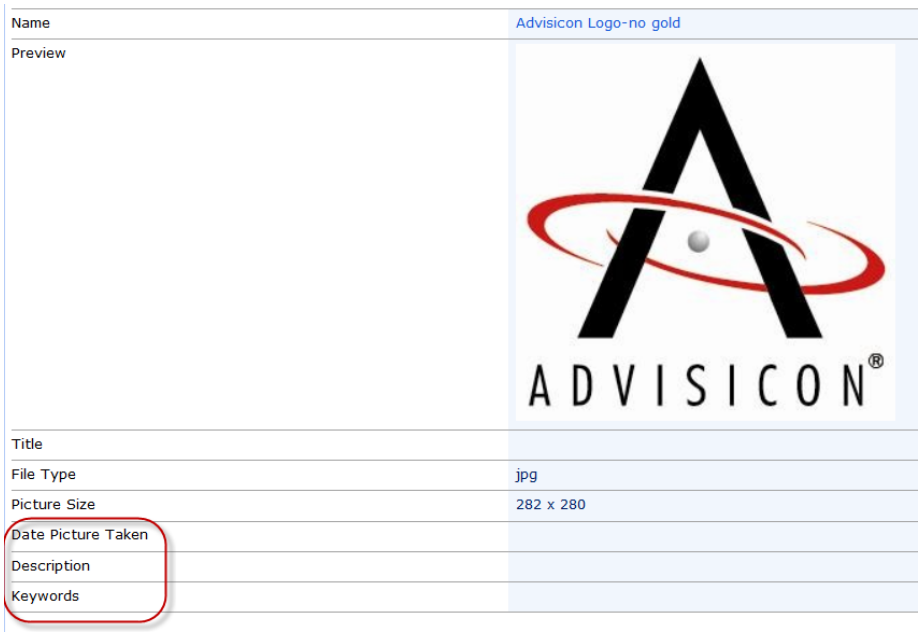

Figure 6-26 *Information Fields for Metadata*

These fields are also customizable to ensure capturing the pertinent and desired data.

6.5.4 Editing Control

One of SharePoint's strongest suits is its collaboration features. SharePoint offers robust features enabling collaboration from multiple parties, and control over the content management.

Checking In and Checking Out is such a feature. When an item is checked out other users can view the item in read-only mode, but cannot edit or change

the item. Only the user that has it checked out can make any revisions to the item.

This prevents simultaneous editing and provides control so multiple users are not making conflicting changes to the document.

Once the item is checked in, it will then be available for other users to edit.

Check Out

To Check Out an item:

1. Navigate to the desired library either via the **Quick Launch** menu, or by **All Site Content**.
2. Hover over the desired document for the dropdown arrow to appear.

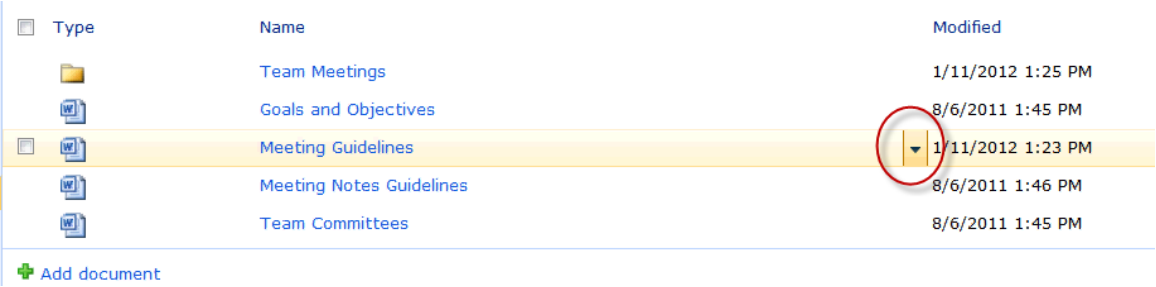

Figure 6-27 *Item Drop Down Arrow*

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3. Click on the dropdown arrow to reveal a list of options.

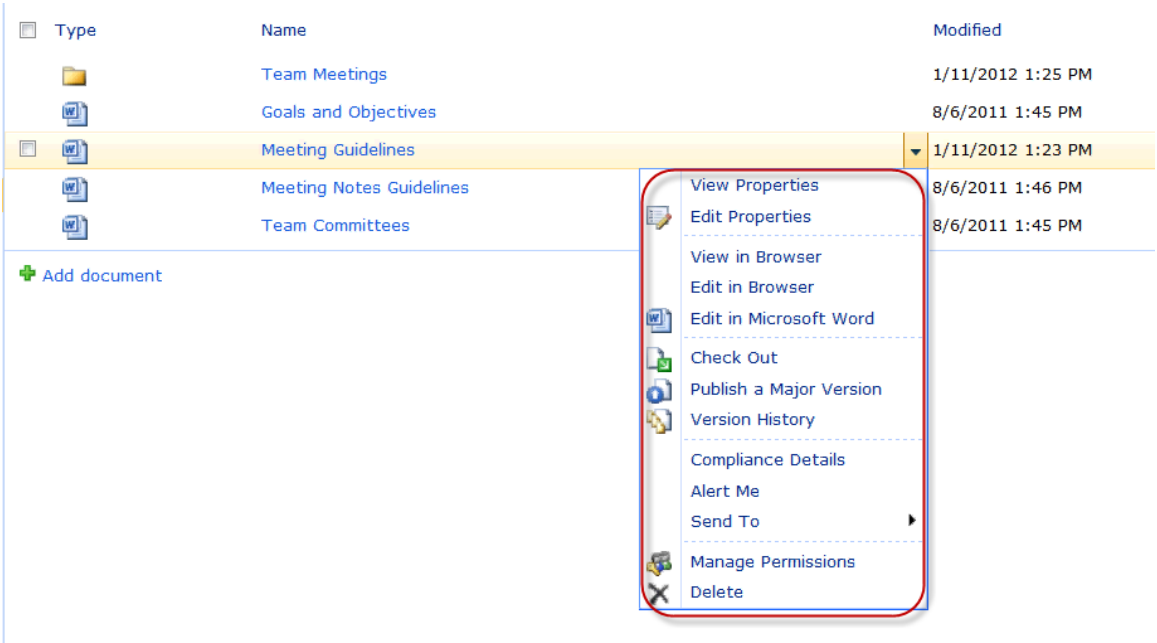

Figure 6-28 *Item Drop Down Menu*

The list of options will be dependent on the level of permissions the user is granted.

4. Click **Check Out**.

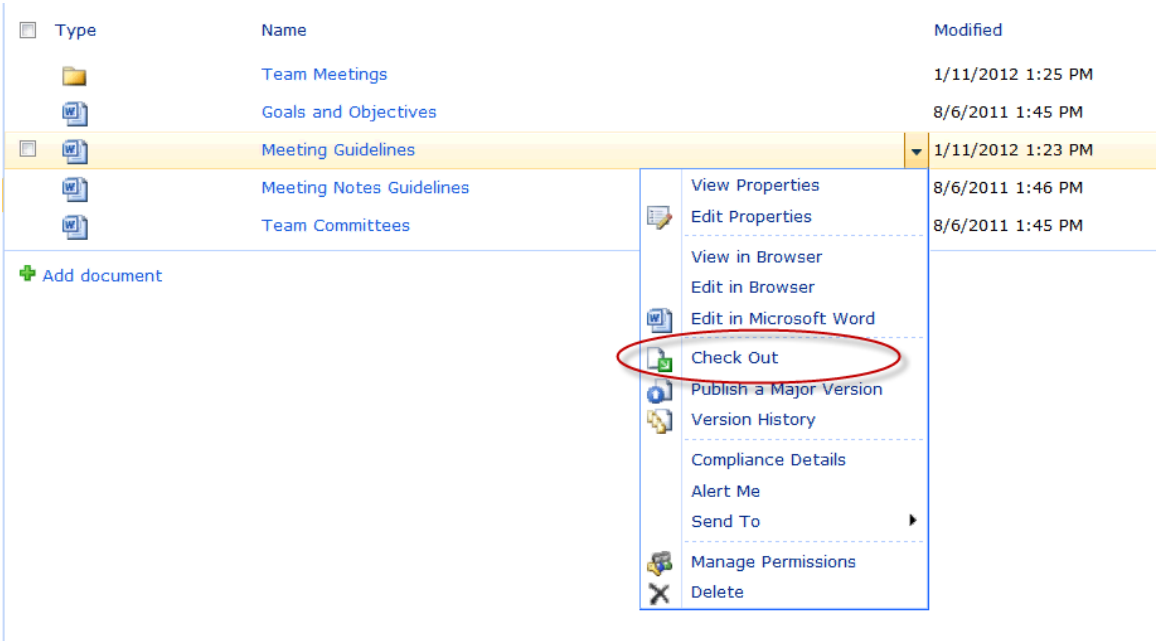

Figure 6-29 *Checking Out an Item*

The document is now checked out. No one else can modify this document until it is checked back in. SharePoint gives you a visual cue that is it checked out. Look for the green arrow pointing out on the document icon.

Figure 6-30 *Checked Out Icon*

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If you hover over the green arrow, a window will pop up containing the name of the person who has the document checked out.

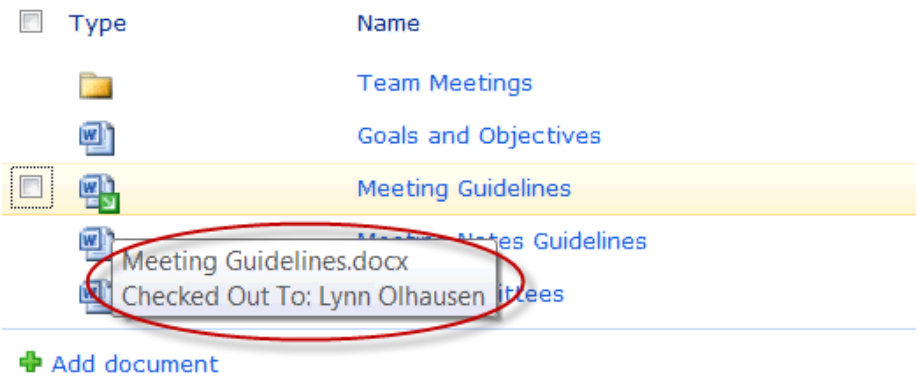

Figure 6-31 *See Who Has Checked Out an Item*

Check In

Documents that are checked out must be checked back in before another person can modify them. Users can view the last checked in version as a read only document while the document is checked out.

To Check In a document:

1. Save the document to the library.
2. Hover over the desired document for the dropdown arrow to appear.

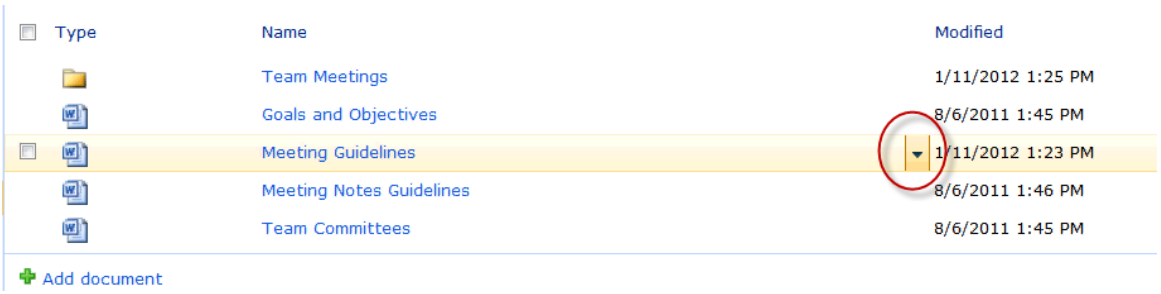

Figure 6-32 *Item Drop Down Arrow*

3. Click on the dropdown arrow to reveal a list of options.

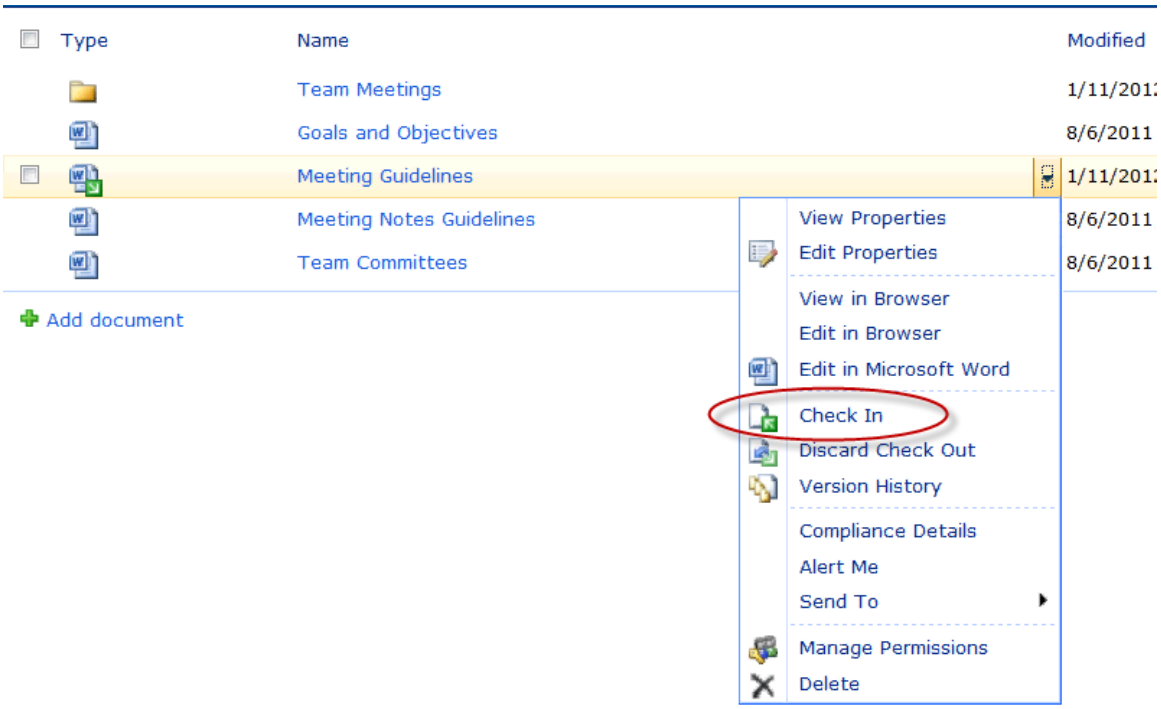

Figure 6-33 *Checking In an Item*

The list of options will be dependent on the level of permissions the user is granted.

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If no changes have been made, or the item was checked out in error, the user can discard the Check Out by selecting **Discard Check Out** from the dropdown menu.

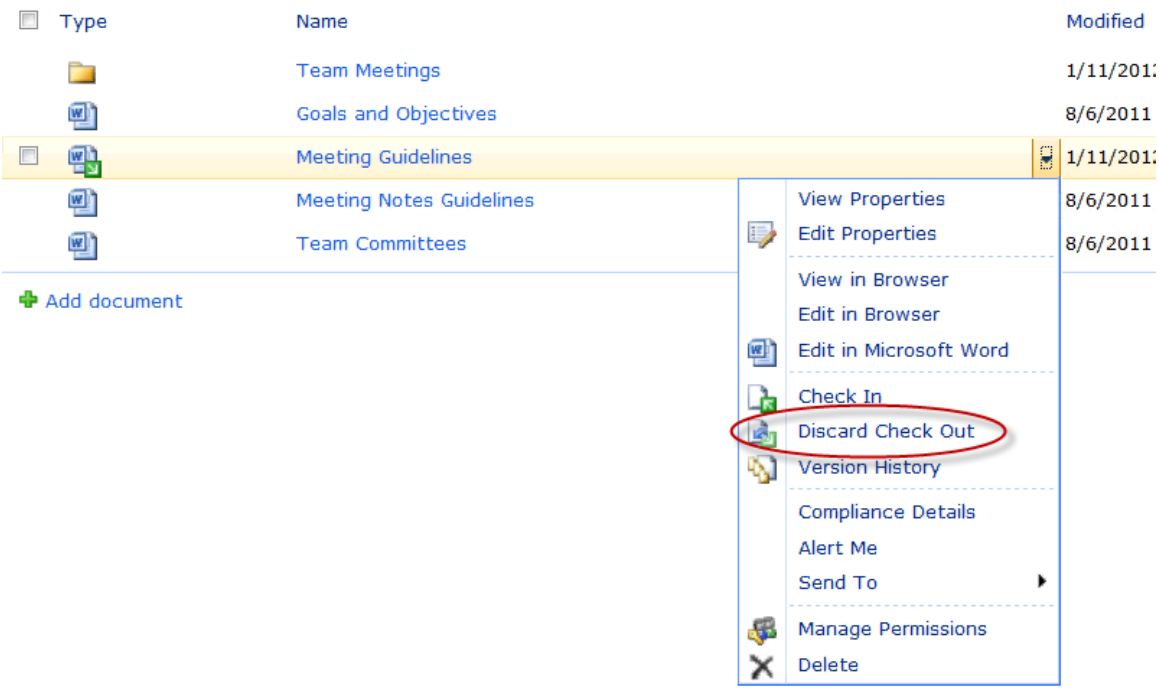

Figure 6-34 *Discarding Check Out*

4. Click **Check In**. The Check In dialog box will open.

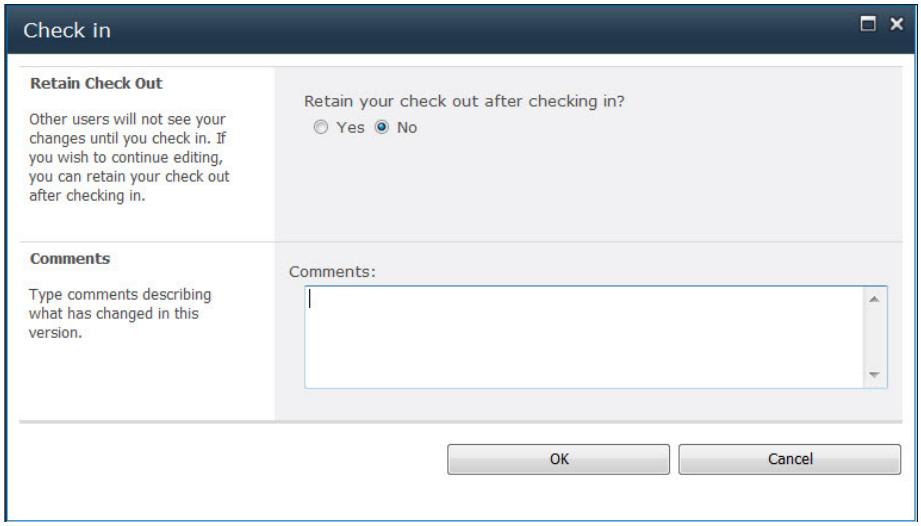

Figure 6-35 *Checking In Comment Box*

5. Add any pertinent comments, if desired, and click **OK**.

There is an option to “Retain a check out after checking in.” This is useful if, for example, one user is writing a draft of a chapter and a second user is reviewing. The user that is writing can check in the work completed at a point in time. The second user can open a read only version and begin reviewing the document while the first user maintains control over who can access the document for modification.

Forced Check In

While Check Out and Check In is helpful in maintaining control over documents, it can be problematic if a user has checked out a document, and then left for vacation without checking in the document. Now no other user can modify the document.

There is a feature called Forced Check In. The SharePoint administrator, or person with appropriate permission levels, can forcibly check in the document so others can have access to it.

6.5.5 Version Control

Version control adds a layer of content management that allows minor and major drafts of an item to be logged. The latest version will be available to users.

What delineates a major version from a minor version is dependent on organizational policy. SharePoint is so customizable that organizations can decide if they will only use major versions for version control, or include minor versions. This offers a flexible control structure.

The SharePoint administrator, or person with appropriate permission levels, can require version control for a library. This decision is also an organizational decision. Version control is enabled through Library Settings.

To require Version Control:

1. In the **Library** tab, **Settings** group, click **Library Settings**.

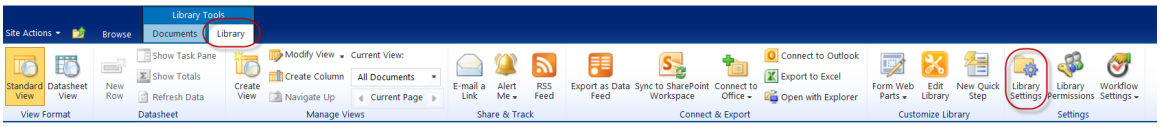

Figure 6-36 *Ribbon > Library Settings*

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2. On the **Library Settings** page, click **Version settings**.

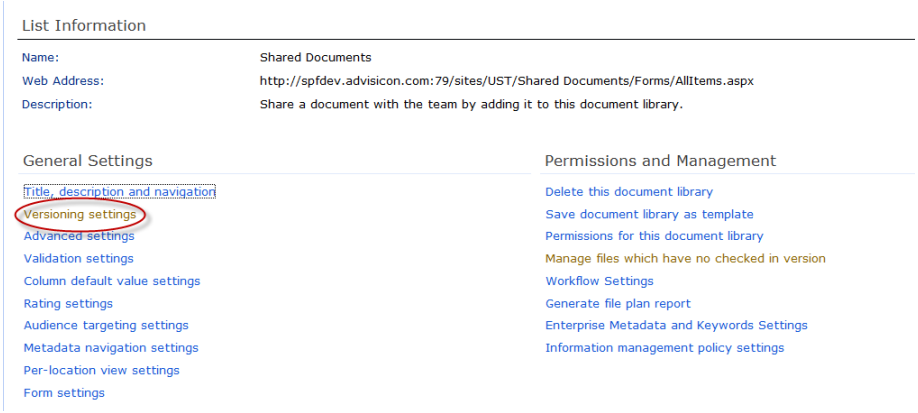

Figure 6-37 *Version Settings Link on Library Settings Page*

3. Complete the Version settings form.

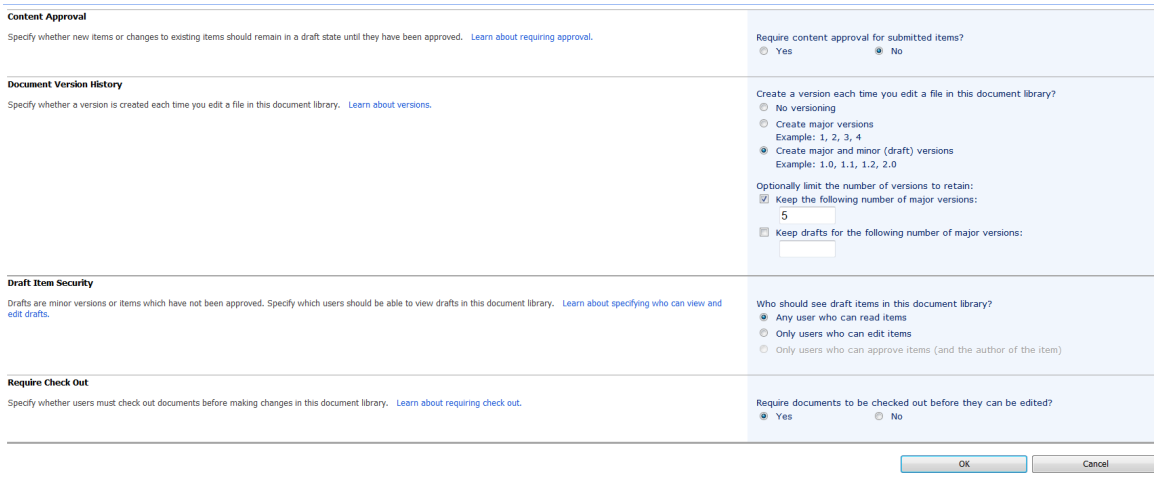

Figure 6-38 *Version Control Form*

When requiring Version Control, there are a few decisions to be made:

- **Content Approval**
  - Will the new version of the document need to be approved when submitted?
- **Document Version History**
  - Will major and minor versions be utilized?
  - How many document versions will be retained?

    Depending on organizational culture, best practice suggests keeping between 3–5 versions. Anything older than that is not usually needed. This will mean that the 3 latest versions of the document will be retained in the library.

This also means that if you save 5 versions for retention, when the sixth version is saved, version one will disappear. It is important to note that it does not go to the recycle bin. It disappears.

► **Draft Item Security**

- Will any user be able to see drafts?

► **Require Check Out**

- Will Check Out be required for the documents?

  It is a good idea to require check in/out because even though versions are being logged, if check in/out is not required, multiple users will still be able to modify the document at the same time.

Once an item is checked out and modified, it can be saved to the library and upon check in the Check In dialog box will open. This window allows comments denoting what modifications were made to the document. These comments will be stored as a running log.

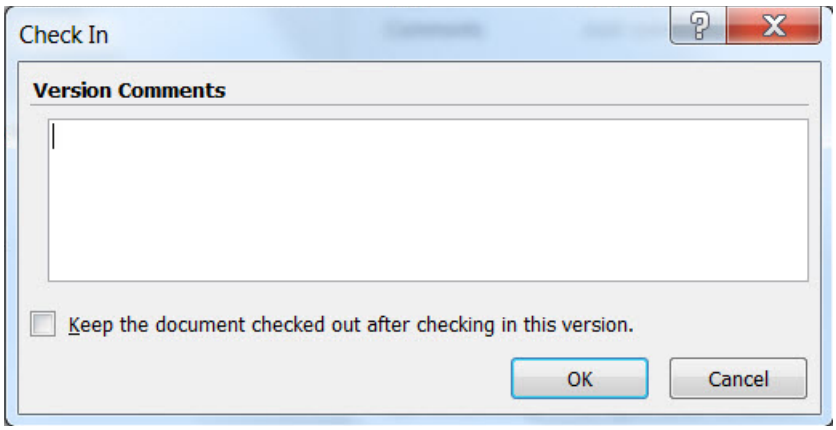

Figure 6-39 *Version Comments Comment Box*

4. Click **OK**.

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Version History

SharePoint maintains logs of the modifications noted through versioning.

To view Version History:

1. Click **Version History** from the document dropdown menu. A Version History dialog box will open.

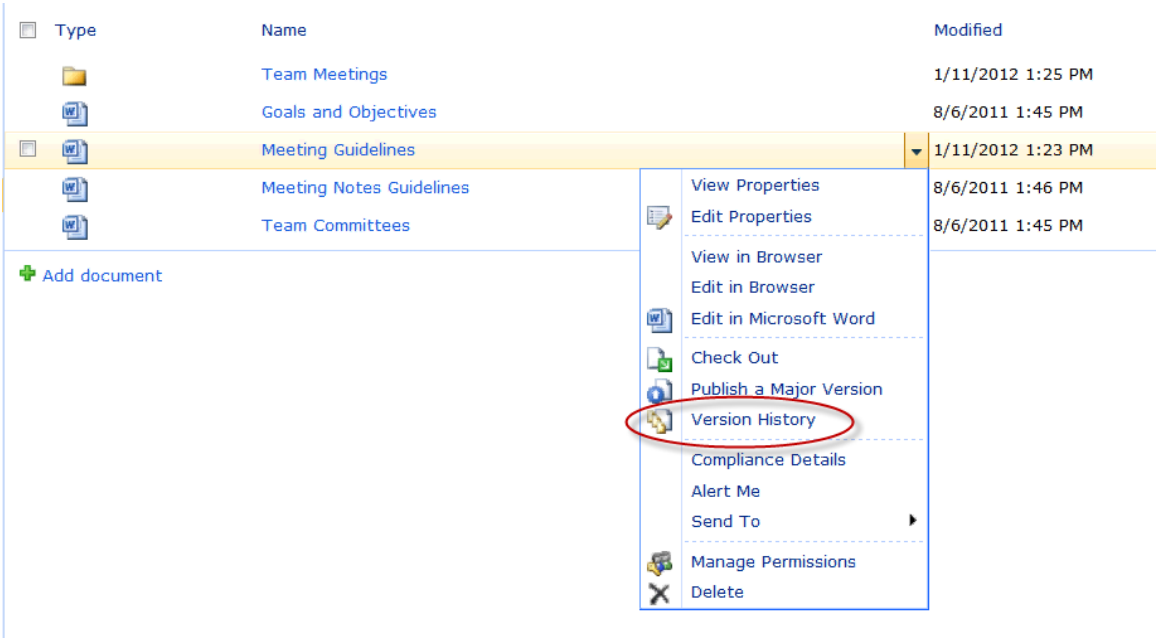

Figure 6-40 *Version History in Drop Down Menu*

2. The dialog box will show the Version History for the document, including who modified the item, when, and any comments.

Figure 6-41 *Version History*

There are some times when there is a need to revert to an earlier version of an item. For example, an upcoming business decision will affect what details are needed within a document. Revisions are completed and logged through Version History. But due to unforeseen circumstances, the upcoming business decision was changed and all modifications pertaining to this decision are now null. Instead of re-revising the latest draft, an earlier version of the document can be easily restored.

To restore a previous version:

1. Hover over the **Modified** date to reveal a dropdown arrow. Click the dropdown arrow.

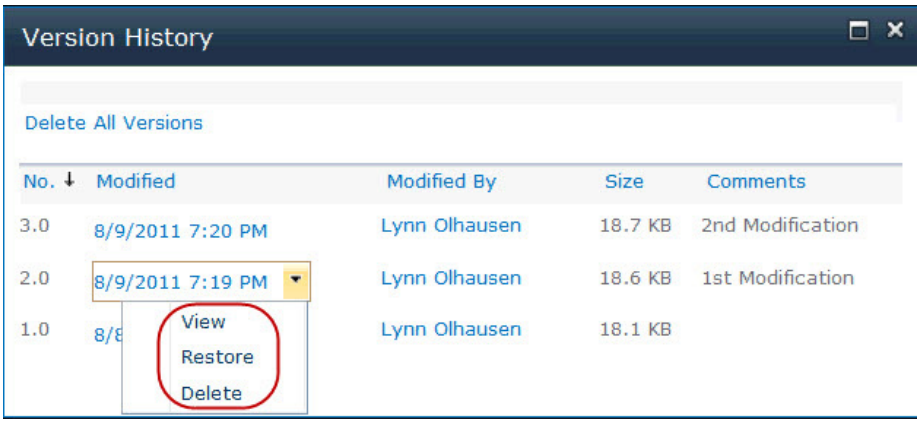

Figure 6-42 *View / Restore / Delete Item Version*

2. Click the appropriate choice to **View**, **Restore** or **Delete**.

Only stored versions can be restored. If Version Control limits the Library to five versions and the sixth oldest version is the required version to restore, SharePoint will not have that version available.

Even though the actual item may be gone, the version history log will still retain information pertaining to every version.

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Upload Window with Version Control

Without Version Control enabled, the window to upload an item has the following checkbox: **Overwrite existing files**.

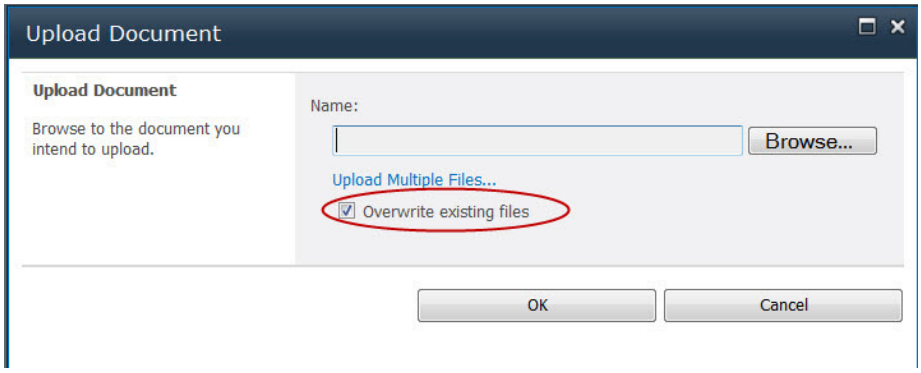

Figure 6-43 *Upload Document without Version Control*

This means that if the checkbox is marked, SharePoint will replace any item with the same name in the library with the newly uploaded document.

It is important to understand that SharePoint will overwrite the previous item. It is not sent to the recycle bin. The overwritten version is gone.

With Version Control enabled, the language differs slightly. Now the check box reads: **Add as a new version to existing files**.

So with this checkbox enabled, it does the opposite as before. Each document uploaded will be uploaded as a new version. No document will be rewritten.

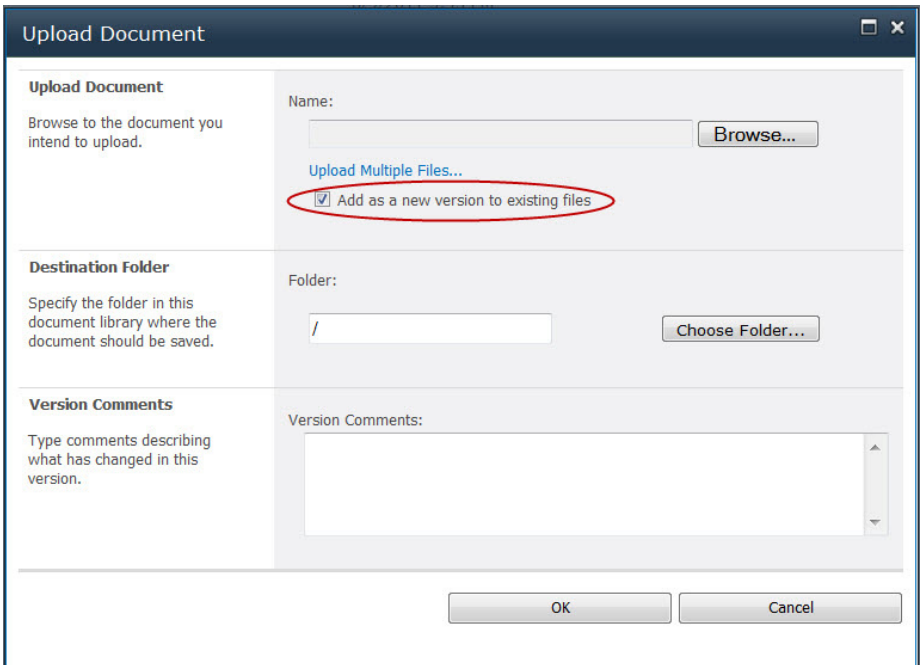

Figure 6-44 *Upload Document Window with Version Control*

Make sure that the enabled checkboxes are functioning in the manner you need them to when Version Control is enabled or not enabled.

6.5.6 Deleting Items from a Library

To delete items from a Library:

1. Select the desired item from the library by clicking the checkbox.

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2. In the **Document** tab, **Manage** group, click **Delete Document**.

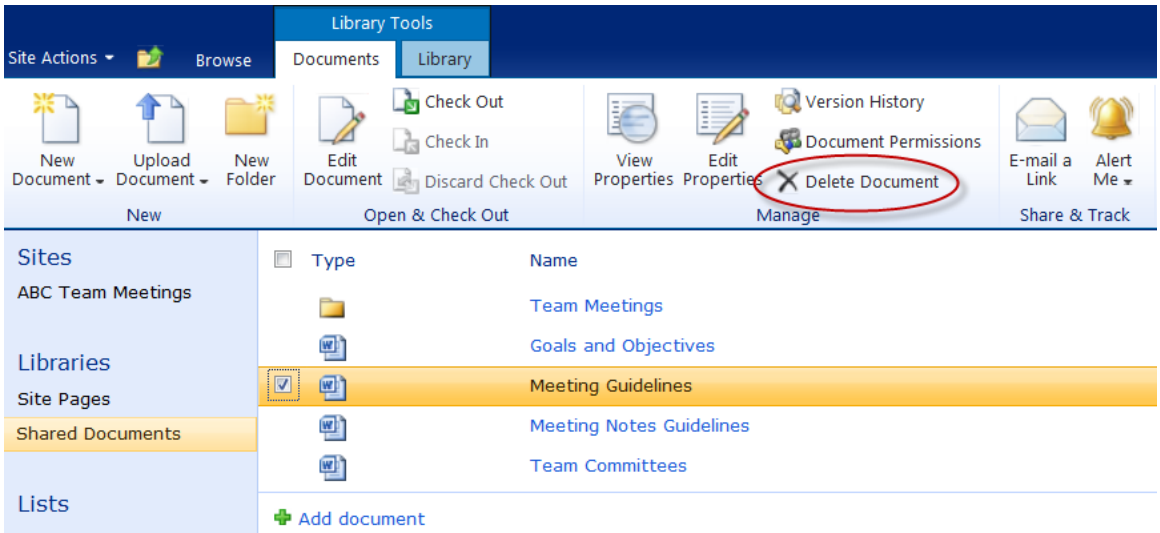

Figure 6-45 *Ribbon > Delete Document*

3. A dialogue box will open, asking for confirmation of the deletion. Click **OK**.

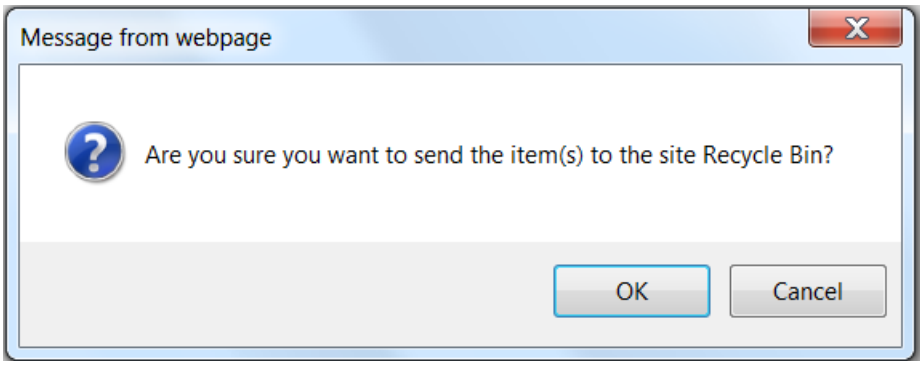

Figure 6-46 *Deletion Confirmation Dialogue Box*

6.5.7 Modifying Document Library Settings

SharePoint has made modifying Library Setting easy. From a single window a user with the appropriate permissions can modify library settings as needed.

To modify Library settings:

1. In the **Library** tab, **Settings** group, click **Library Settings**.

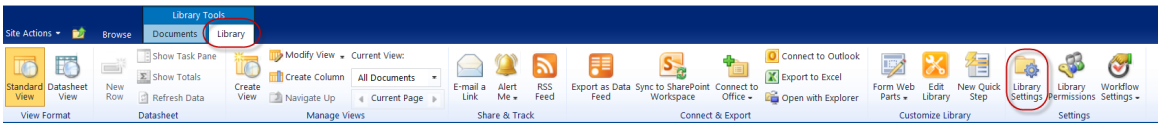

Figure 6-47 *Ribbon > Library Settings*

This will open a window that will list all the modifications that can be made. Each modification will have its own window.

2. Select the desired modifications.

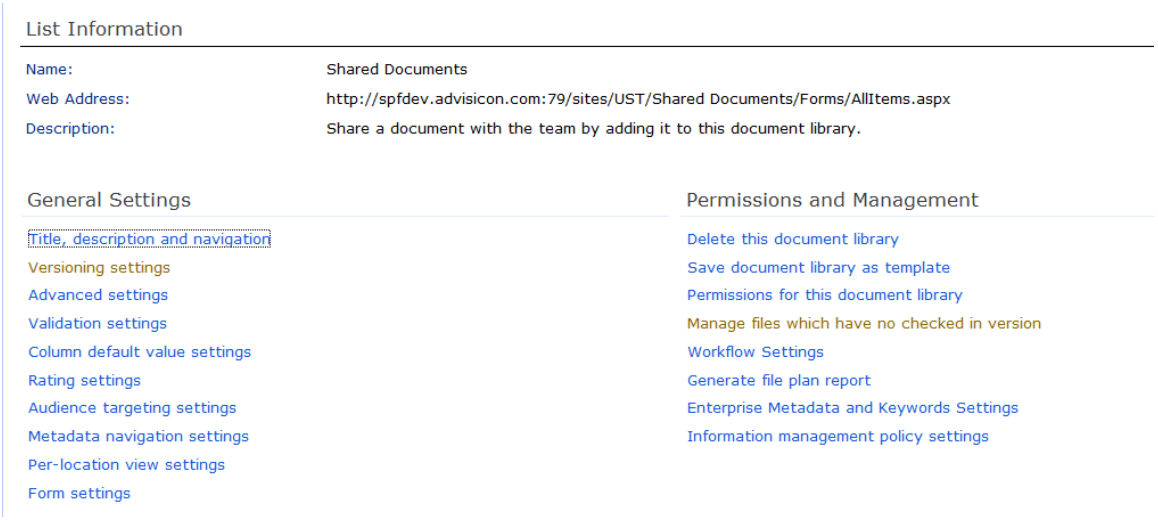

Figure 6-48 *Library Settings Page*

Some of the more popular modification choices are:

- Changing the title, description and navigation of the library – this allows the user to change the name and description of the library. Navigation options include the ability to move the library from the Quick Launch menu to be assessed by View All Site Content.
- Setting or changing versioning settings – this option manages version control options for the library.
- Deleting the Library – this will delete the library from the site.
- Modifying permission for the Library – this option manages permissions for the library.
- Advanced settings such as enabling the use of folders and allowing search within the Library

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6.6 List Items Useful for Collaboration

When people have had a quick introduction to SharePoint they often think of SharePoint as a place to load documents. There are many more out of the box features that turns a site from a shared drive to a robust communication and collaboration hub.

The following are specific lists that are often very helpful in fostering teamwork.

6.6.1 SharePoint for Tracking

Issues will arise. Expect them. It is imperative to capture them so issues do not fall through the cracks and create a larger problem than necessary for the team.

SharePoint offers an out of the box Issues Tracking List.

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Creating an Issues List:

1. Click **Site Actions**, **More Options**.

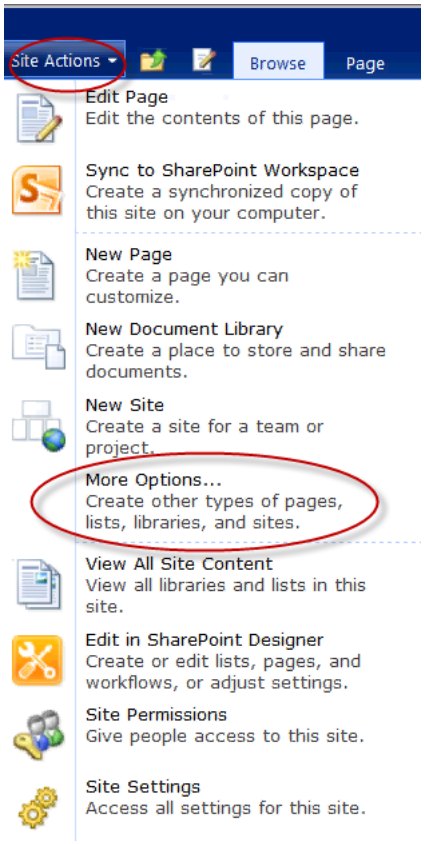

Figure 6-49 *Site Actions Menu > More Options*

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2. Select **Issue Tracking** from the list menu. Name the List. Click **More Options**.

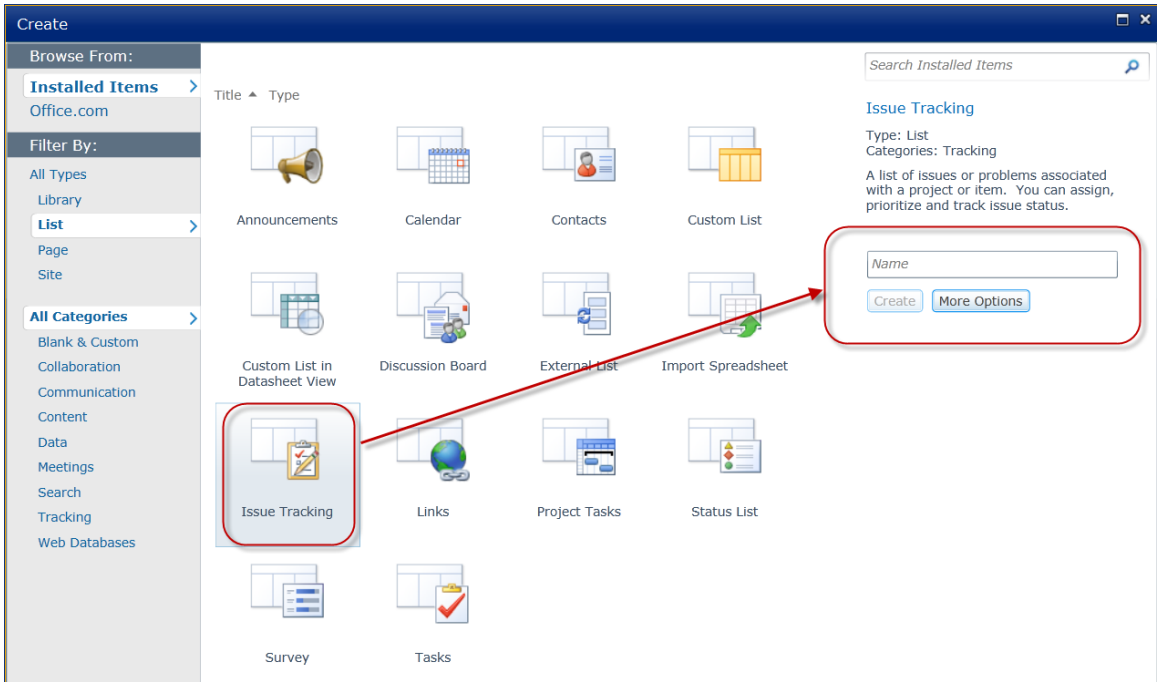

Figure 6-50 *Creating Issues Tracking List*

3. Provide a description and decide if this list will appear in the Quick Launch menu.

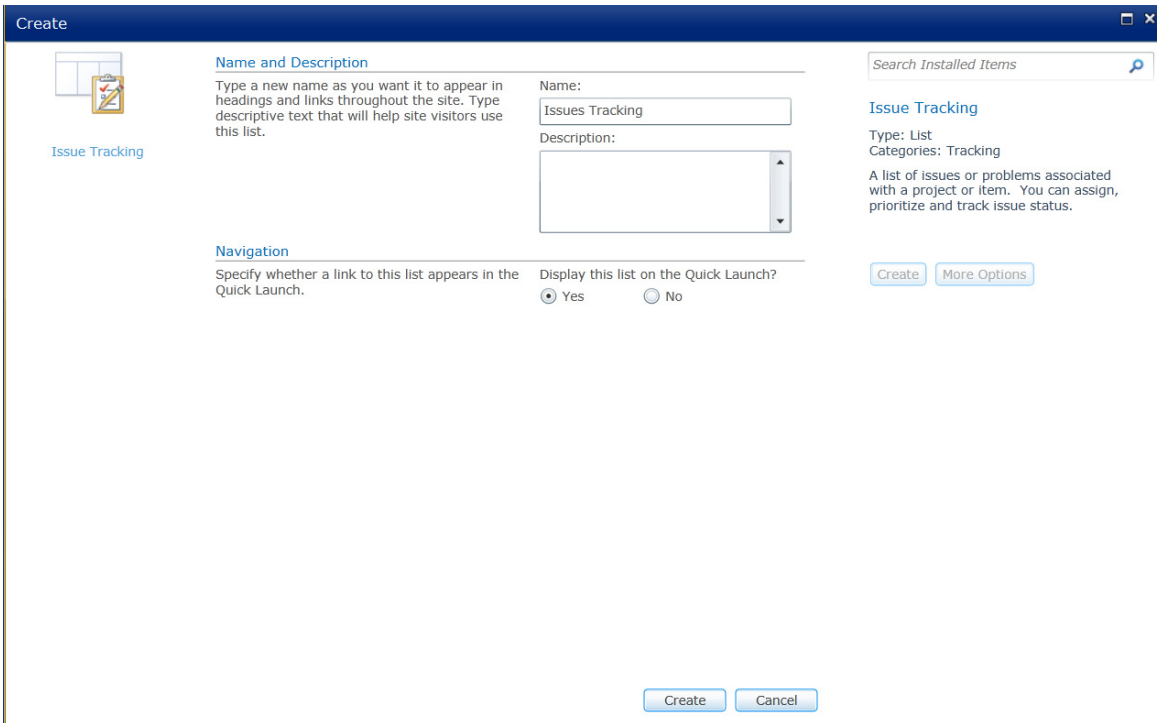

Figure 6-51 *Issue Tracking List Form*

4. Click **Create**.

Creating an Issue Item

1. Navigate to the Issues Tracking List either via the **Quick Launch** menu, or by **All Site Content**.
2. Click Add Item.

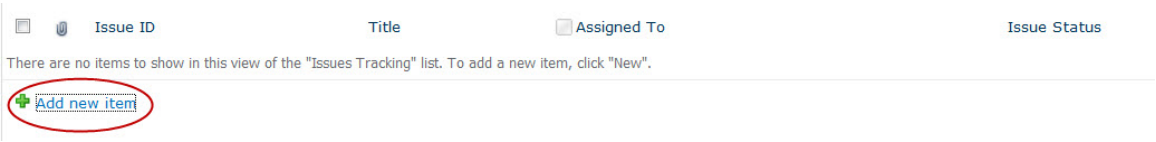

Figure 6-52 *Add a New Issue Item*

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3. A New Item dialog box will open to create the Issue. Complete the Issue Form.

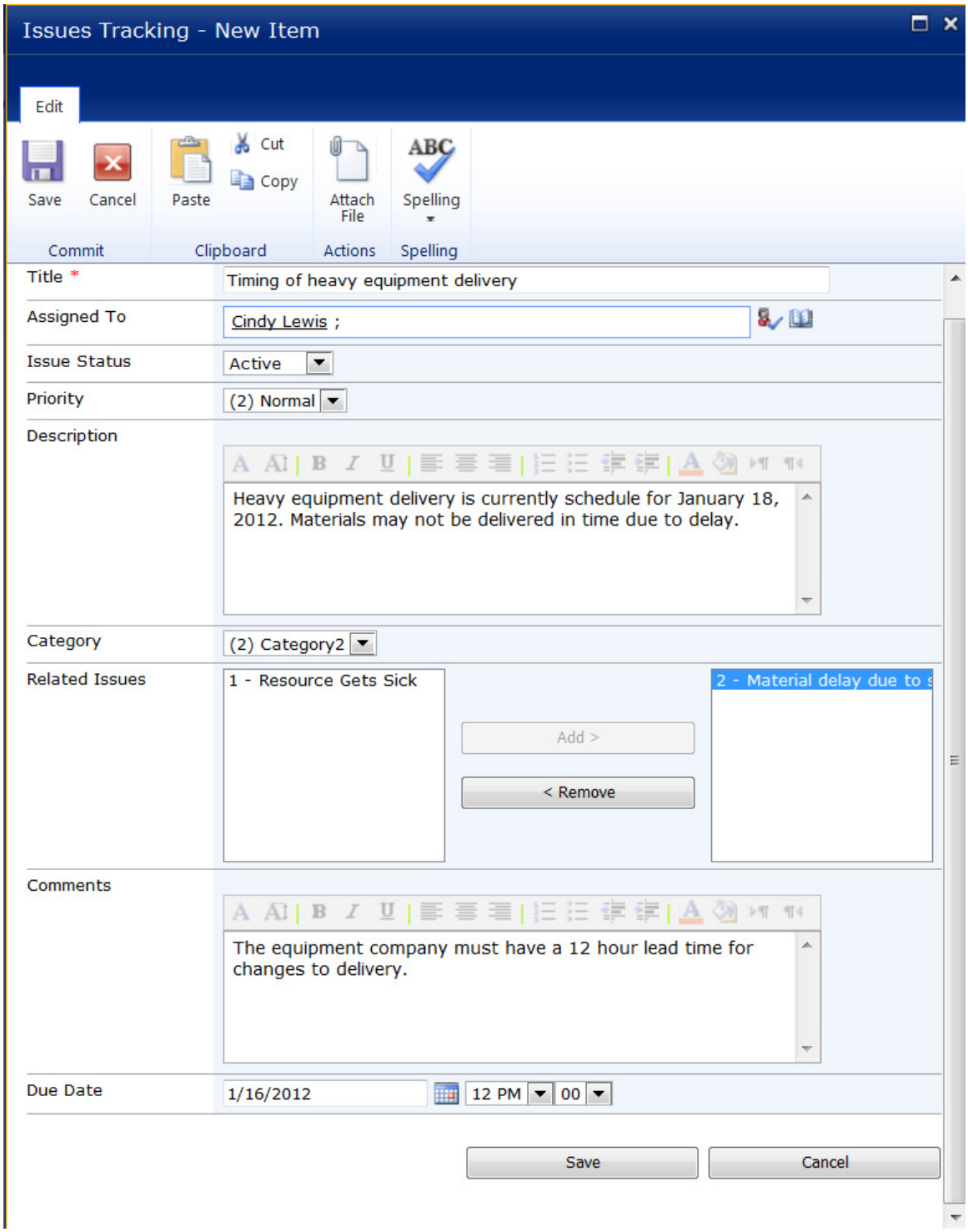

Figure 6-53 *Issues Form*

1. Click **Save**.

The Issues List has pre-defined fields available to:

- Name the issue.
- Assign to an owner.
- Assign a priority (Low/Normal/High).
- Provide a description.
- Assign a Category (these categories can be customized, such as internal, vendor, budgetary).
- Assign related issues.
  - This is a very important tracking feature. This will bring visibility to other things potentially affected by the issue.
- Provide comments.
- Assign a due date.

Managing an Issues List

It is important to actively manage Issues so they are controlled. Ignore them and they have a large chance to become larger and more destructive.

Important components for Issue Management:

- Can be assigned to a team member.
- Usually owned by a single person.
  - Be careful of assigning issues to multiple people. While multiple people may have responsibility for monitoring, researching or resolving an issue it is usually best to make one person accountable for the status of the issue.
- Documents or files can be linked providing supporting documentation.
- Contingency plans can be listed or linked.
- Mitigation plans can be listed or linked.

Risk Tracking

Risks and issues can sometimes be hard to differentiate, but truly are very different entities. Risks are conditions or a series of events that can affect the outcome of a project. There is an element of the unknown with risks. They can also be positive or negative. Make sure that the opportunities for reaping the benefits of positive risk are not missed. Risks must be identified, monitored and mitigated to avoid their occurrence.

If a risk does occur, then it becomes an issue. Issues can also arise from the day to day operation of a project, such as vendors not returning status calls or

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a delay in materials. Issues should be treated as action items that are tracked for smaller activities.

In most cases, risks and issues are not significant enough to load into a formal project schedule. But they are important enough to warrant the team's time and attention.

Use the same steps of creating an Issues List, only name it Risk Tracking, to utilize the same features for managing risk.

6.6.2 Working with Discussion Boards

Discussion Boards provide the team the ability to ask questions or post comments regarding topics or areas of interest in regard to a topic pertinent to the team.

Discussion boards are a quick way to gather input or information from team members for topics that may not warrant calling a meeting. A discussion board also allows team members to respond at a time convenient for them and allows them to have thought about the topic for more insightful feedback.

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Creating a Discussion Board

To create a Discussion Board:

1. Click **Site Actions**, **More Options**.

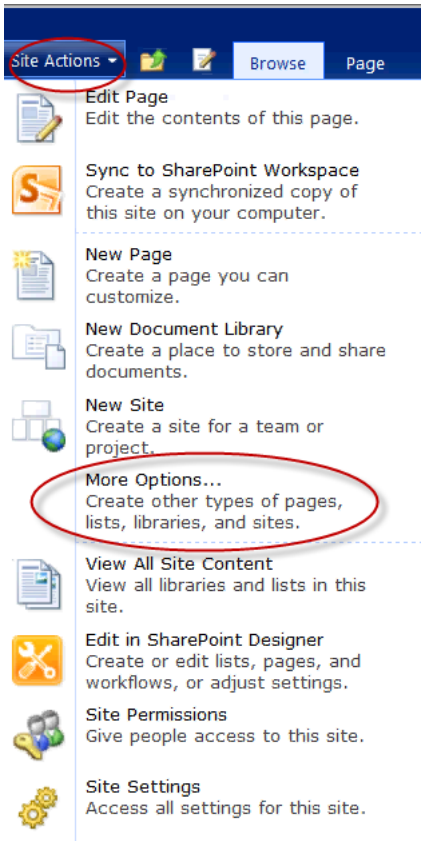

Figure 6-54 *Site Actions Menu > More Options*

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2. Select **Discussion Board** from the List menu. Name the List. Click **More Options**.

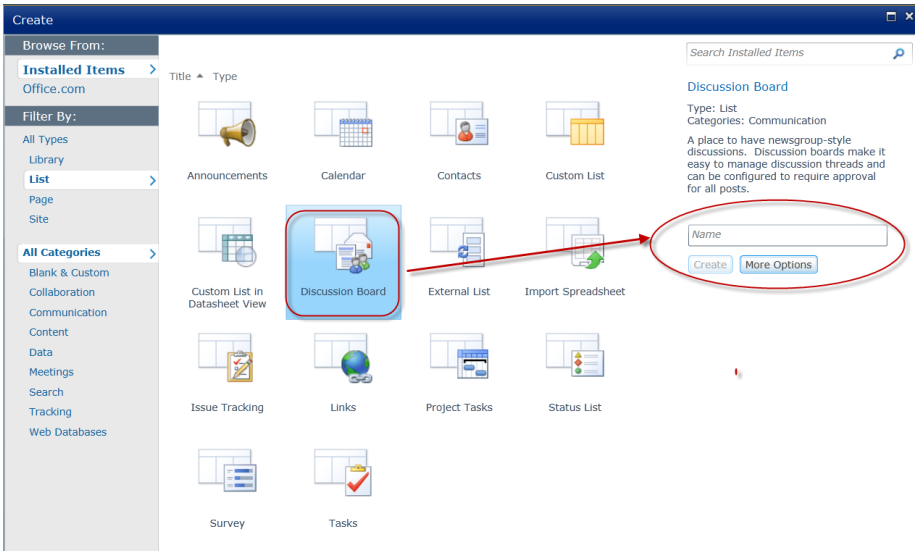

Figure 6-55 *Creating a New Discussion Board*

3. Provide a description and decide if this list will appear in the Quick Launch menu.

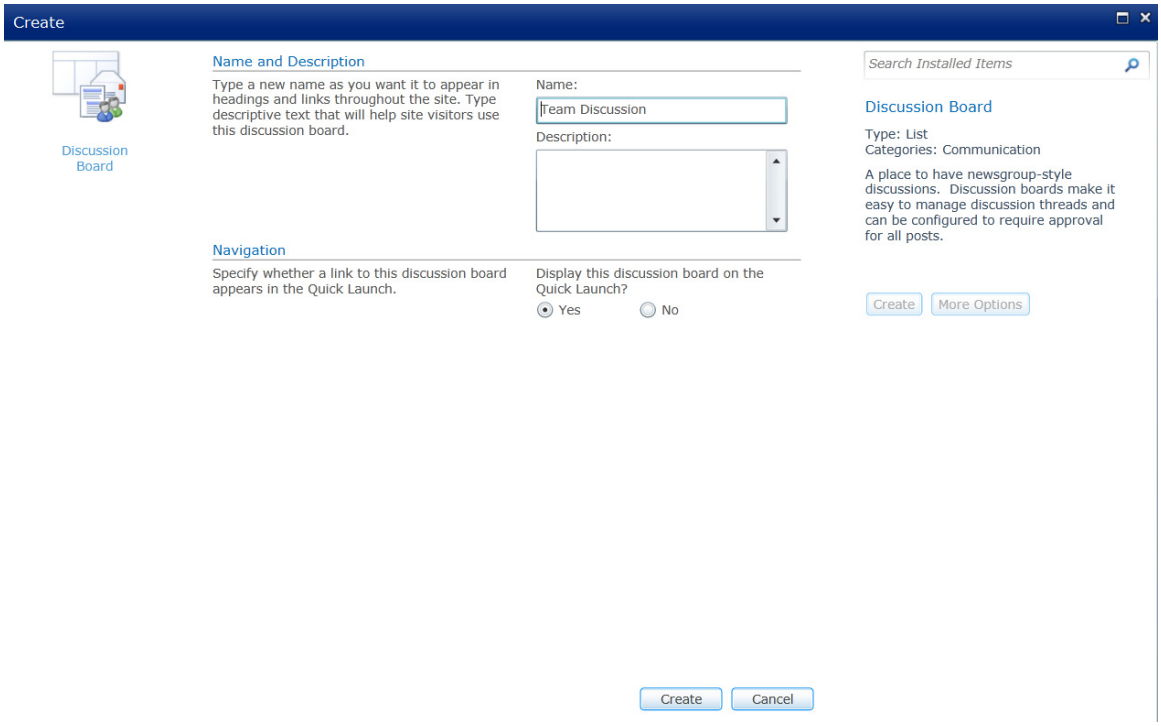

Figure 6-56 *Discussion Board List Form*

4. Click **Create**.

Initiating a Discussion

To initiate a discussion:

1. Navigate to the Discussion Board either via the **Quick Launch** menu, or by **All Site Content**.
2. Click **Add new discussion**.

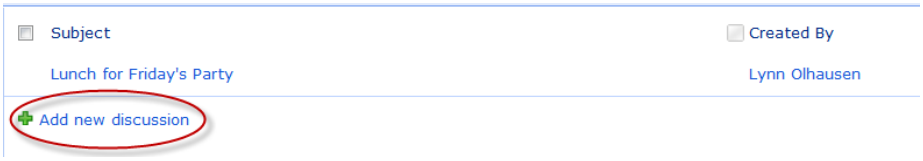

Figure 6-57 *Add a New Discussion Item*

3. Complete the form.

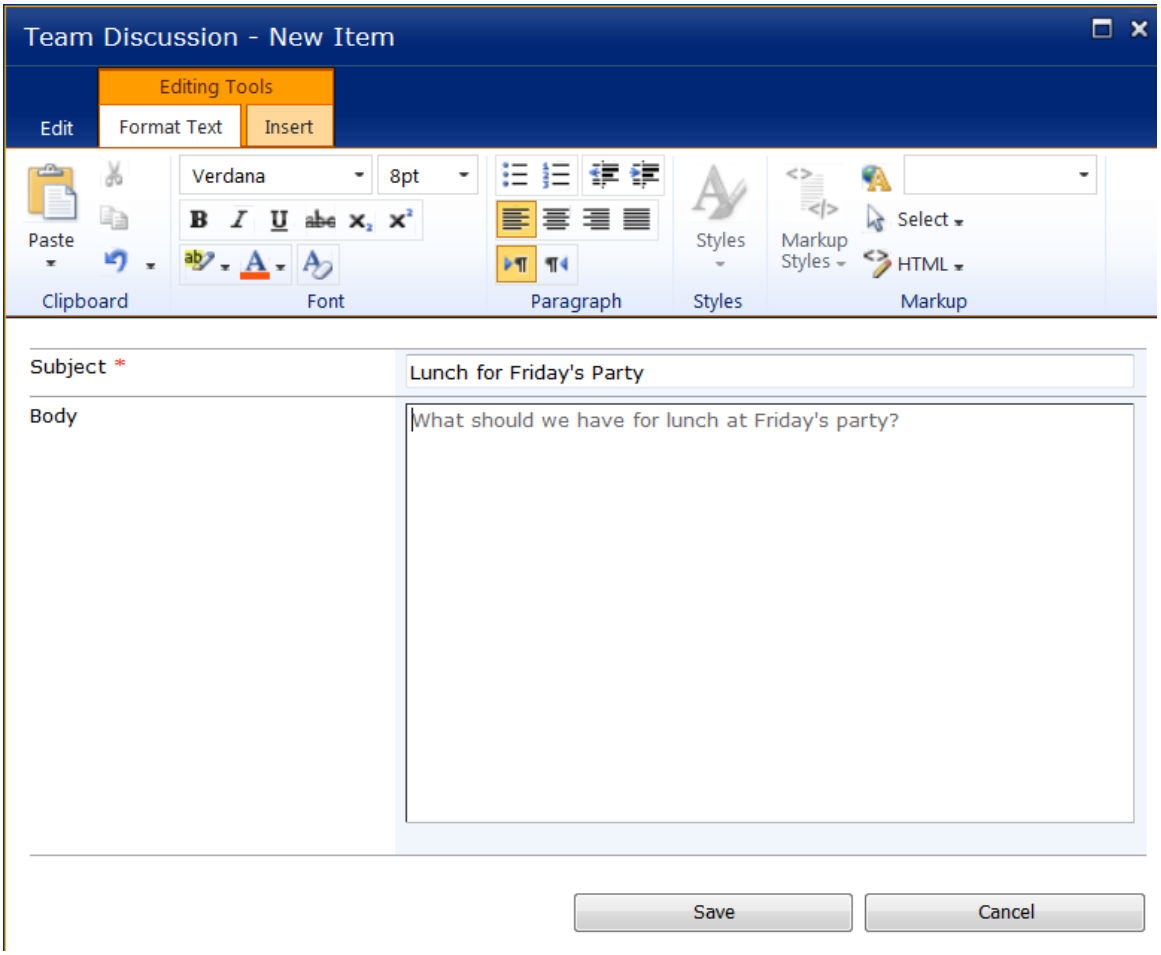

Figure 6-58 *Discussion Form*

4. Click **Save**

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SharePoint enables formatting of text, very similar to Microsoft Word. Text can be bolded, colored different colors, underlined, struck through, bulleted, etc.

Links, attachments, tables and pictures may also be inserted. All these controls are in the different tabs of the Ribbon.

Replying to a Discussion

To reply to a Discussion Board:

1. Select desired Discussion Board.
2. Choose which level of the discussion to reply. The top level will be the general discussion. Replies can also be marked for their own responses as well. Click **Reply**.

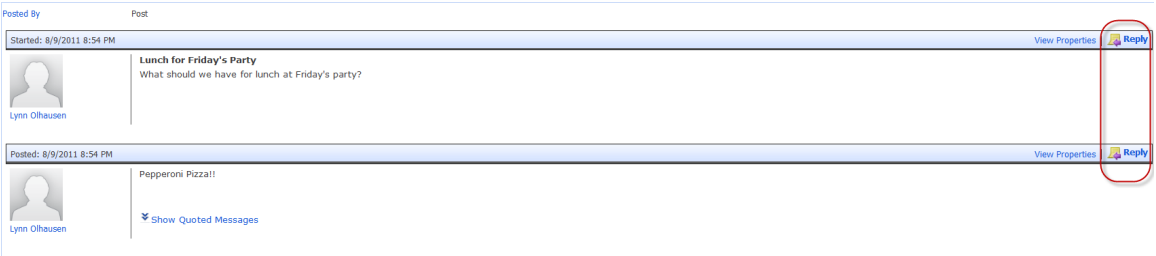

Figure 6-59 *Reply to a Discussion*

3. Complete the Reply window.

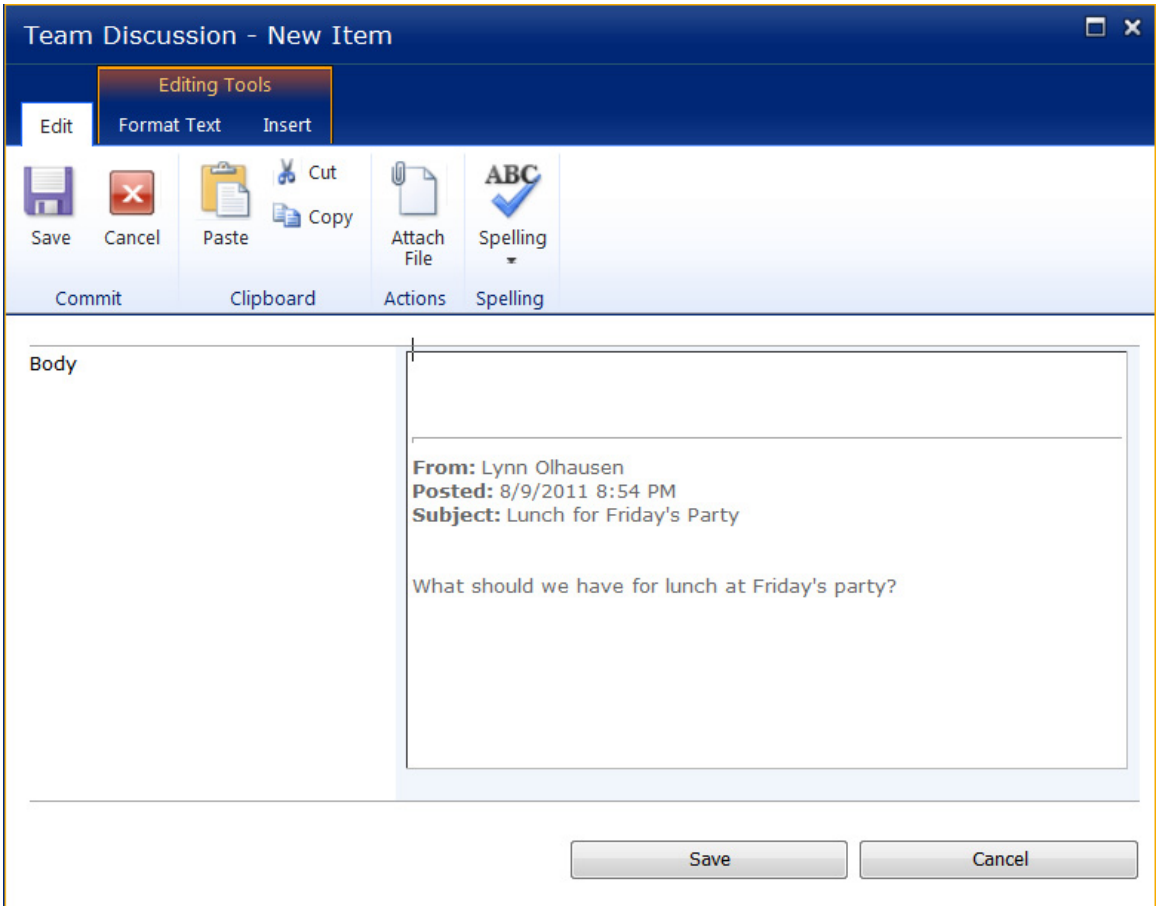

Figure 6-60 *Discussion Reply Form*

SharePoint enables formatting of text, and insertion of links, attachments, tables and pictures in replies, as well as in the initial discussion topic. All these controls are in the different tabs of the Ribbon.

4. Click **Save**.

It is important to remember that sites can contain multiple discussion boards. It can be confusing if you have similarly named topics. Make sure that you use unique names or come up with a naming convention standard.

Managing Team and Customer Discussions

The discussion board allows you to modify, and edit content, but remember that this can be viewed by most people, so monitoring the language or the

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posts is helpful to continue to elicit real feedback, while not disparaging or creating a negative atmosphere from team members.

Discussion boards are also great ways to capture potential issues or risks elicited from thoughts or concerns.

Here are some ways to manage team discussions:

- Using SharePoint discussion web parts to establish discussions and maintain visibility if high priority discussions.
- Allow any document or picture to have a communication portal around it separately.
- Assign a moderator to manage discussion posts.

Administrator's Role in Managing Discussions

An administrator might want to manage the discussions on the project page. The administrator would act as the moderator of the site. This is necessary in order to keep discussions focused on the project. The General Discussion area should be used only to discuss project information and ideas. It is not intended for personal or unrelated discussions. The administrator can also censor any confidential information that may have been posted by accident.

Discussion Board Views

There are two main types of views that can be presented to the end user:

- **Flat view** – this view type simply lists the replies or posts in the order in which they were created or posted.

Figure 6-61 *Flat View of Discussion*

► **Threaded view** – this view allows you to group comments by conversation or by thread. Every message that relates to the same topic or conversation can be seen in the order that they were created.

Figure 6-62 *Threaded View of Discussion*

Changing the View of a Discussion Board

To change the view of the Discussion Board:

1. In the **List** tab, **Manage Views** group, click dropdown arrow under **Current View**.

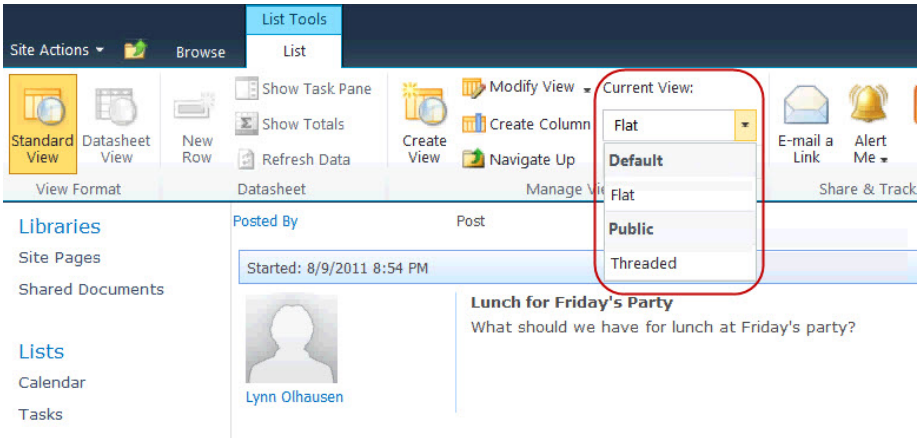

Figure 6-63 *Discussion Board Current View Drop Down Menu*

1. Select the desired view.

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6.6.3 Working with Surveys

Posting questions and surveying teams and stakeholders is another feature that SharePoint provides. This allows for feedback to be captured on topics that the team may want follow-up with.

This feature is very easy to create and use. You can email a link to individuals or distribution lists. They can follow the link, log into the SharePoint site and then post and update the survey information.

Many organizations use this to show progress, as well as to involve stakeholders at every level so that they are able to provide ongoing support and communication with areas that are critical or where guidance may be needed.

This is also an excellent way to gather feedback on making decisions, voting on project features or choices, as well as providing a mechanism for capturing lessons learned, where team resources can help to improve the process by evaluating approaches and activities happening on the project.

Surveys can serve so many different functions, however here are some overall considerations that should be considered deciding to use a survey.

Questions need to be clear and concise. If you ask an open ended question, you will need to provide text fields for the person surveyed to answer, in their own words. You can also ask close ended questions. These answers are selected from a list, choices are presented to them or you can give a weighting or numeric feedback response.

Creating a Survey

1. Click **Site Actions**, **More Options**.

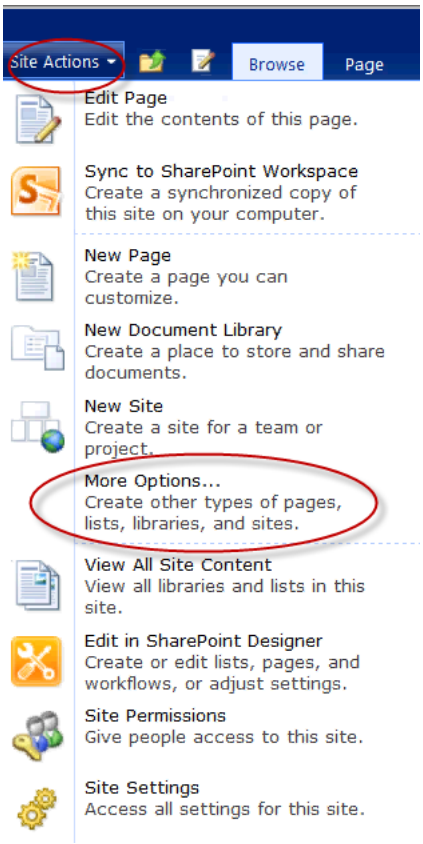

Figure 6-64 *Site Actions Menu > More Options*

2. Select Discussion Board from the List menu. Name the List. Click **More Options**.

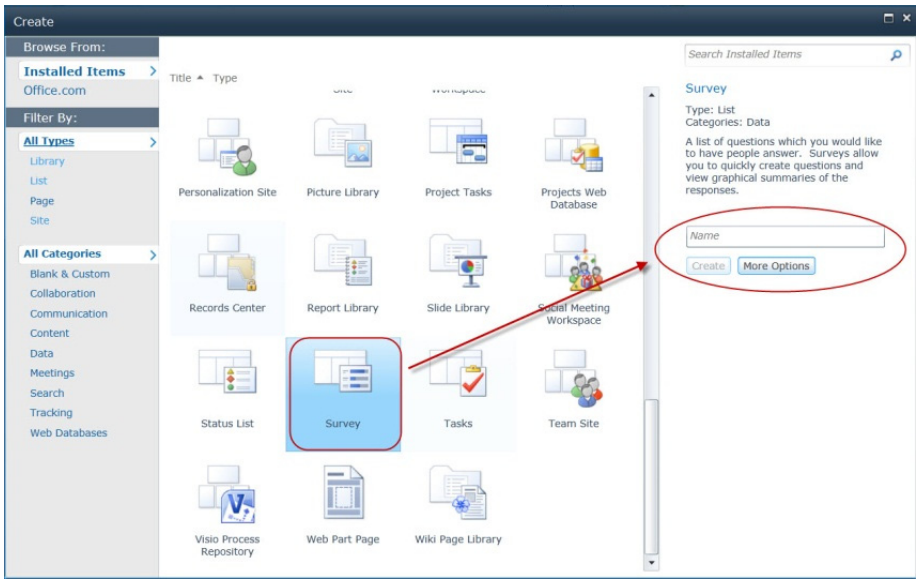

Figure 6-65 *Creating a New Survey*

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3. Provide a description and decide if this List will appear in the Quick Launch menu.

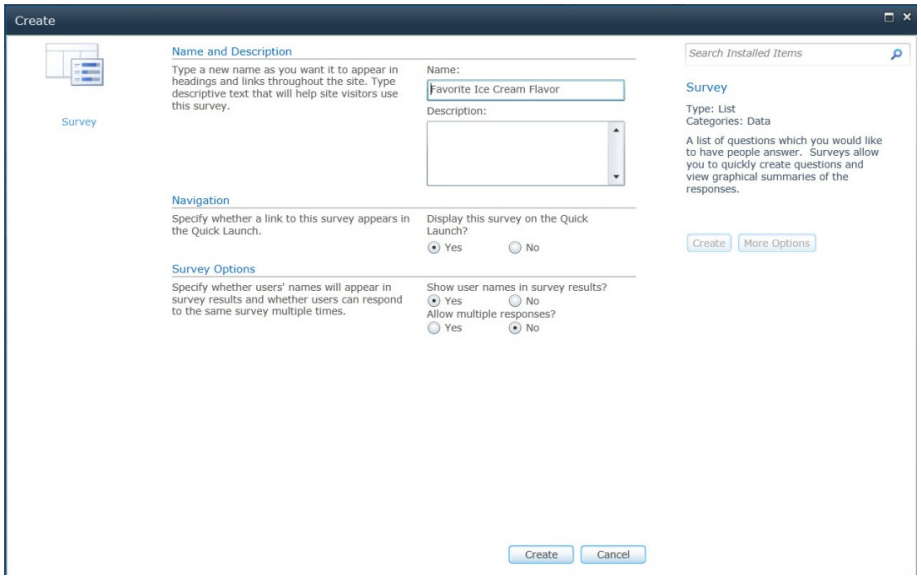

Figure 6-66 *New Survey Form*

Note the additional Survey Options:

- **Show Users Name in Survey** – mark No if the responders name is not to be shown to all users responding to the survey. Often if people's names are not attributed to responses more honest answers may be submitted.
- **Allow Multiple Responses** – SharePoint allows flexibility in developing surveys. Best practice however would suggest only allowing users to response once, so as to not skew the results via multiple responses from the same user.

  If a responder tries to answer the survey more than once, this error will show:

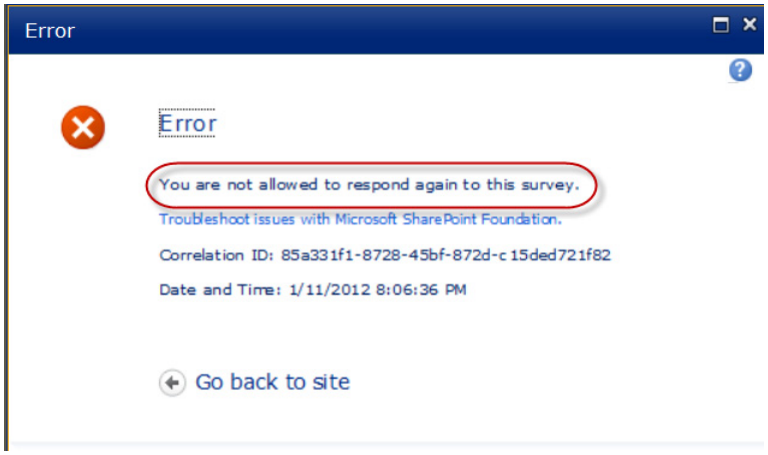

Figure 6-67 *Multiple Response Error*

4. Click **Create**. A window opens ready to prepare the first question.

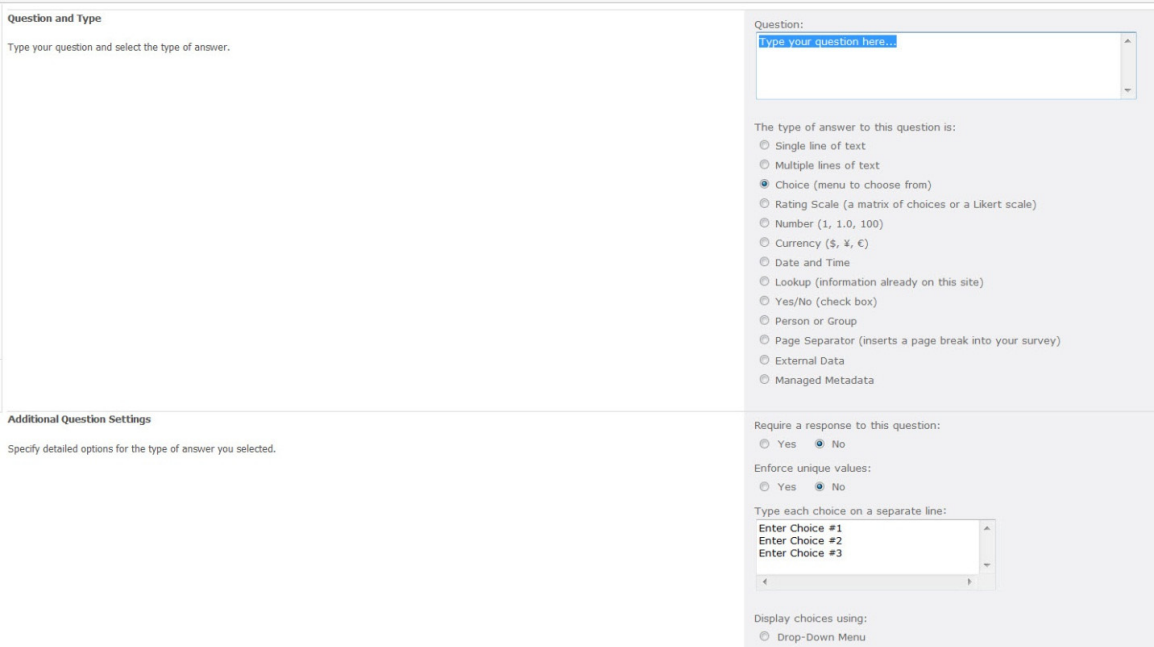

Figure 6-68 *Survey Question Form*

Remember that SharePoint will adapt this form depending on the type of question created (e.g., Single line of text, Choice, Yes/No, etc.)

5. Click **Next Question** until all questions have been completed.
6. Click **Finish** to complete the survey creation.

Options in Creating a Survey

As questions are built there are some options:

- ► There are multiple types of answers that can be asked. Some of the most frequently used are:
  - **Single line of text** – allows responder to respond on one line of text only. This will limit the size of the answer.
  - **Multiple lines of text** – expands the area the responder can answer the question. SharePoint limits multiple lines of text to six lines.
  - **Choice** – creates multiple choice type questions. Answer options can appear as a dropdown menu, radio buttons (one choice only), or checkboxes (multiple answers allowed).
  - **Rating Scale** – allows responders to choose a numbered scale rating as an answer.
- ► The Creator can make any question required to complete the survey. These questions are marked with an asterisk in the survey.

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- Fill in answers can be enabled or disabled.
- A default value can be specified. For example, in a multiple choice question a specific answer can automatically be inserted. The responder will need to physically change the answer to another option.

Currently, the option of a Yes/No answer can be misleading. It results in a checkbox to be checked for yes, or left unchecked for a no response. To clearly mark options as yes or no, it would be more suitable to utilize a multiple choice question and set 2 answer options – yes or no as a drop down or radio button on the survey.

Branching Logic

Branching logic offers options to guide the user through the questions depending on the answers they give. For example, if the user responds to a question in a certain way, you want them to answer two more questions before moving on with the survey.

Branching allows different questions to appear depending on the previous answer. If the responder answers Yes – the next question will follow path A, and if the respondent answers No – the next questions will follow path B.

For example,

Q1. Is chocolate your favorite flavor of ice cream?

A. Yes → Multiple choice question asking for a specific chocolate flavor (Do you prefer: A. Dark Chocolate. B. German Chocolate, C. White Chocolate, D. Chocolate Fudge)

A. No → Fill in question asking the respondent to type their favorite flavor into a text box.

It is important to note that when you branch to a question that falls several questions later in the survey, you will skip any questions in-between. There are many creative ways to use branching to customize a survey.

Responding to a Survey

To respond to a Survey:

1. Navigate to the desired Survey either via the **Quick Launch** menu or by **All Site Content**.

2. Click **Respond to Survey**.

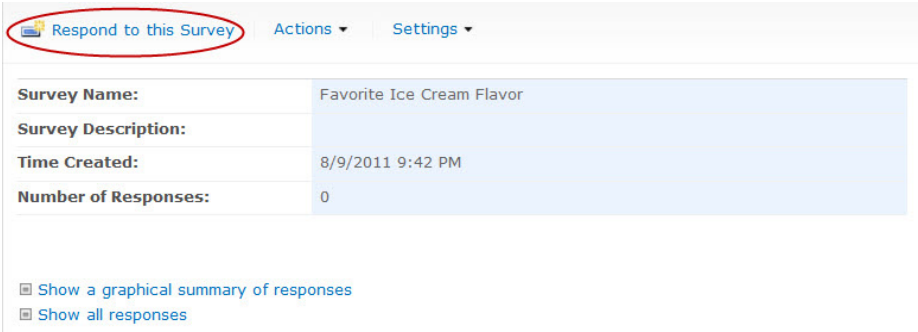

Figure 6-69 *Responding to a Survey*

3. Answer survey questions.

Depending on permission levels, there are different Actions and Settings available, as well as the ability to display all responses.

Changing General Settings of Surveys

After you finish creating your survey, you can customize it. You have the option to change general or advanced settings, such as save the survey as a template, change permissions for the survey, or delete the survey. You can also add questions and/or change the order of questions.

1. From the main page of the survey, select the desired option from the dropdown menu under **Settings**.

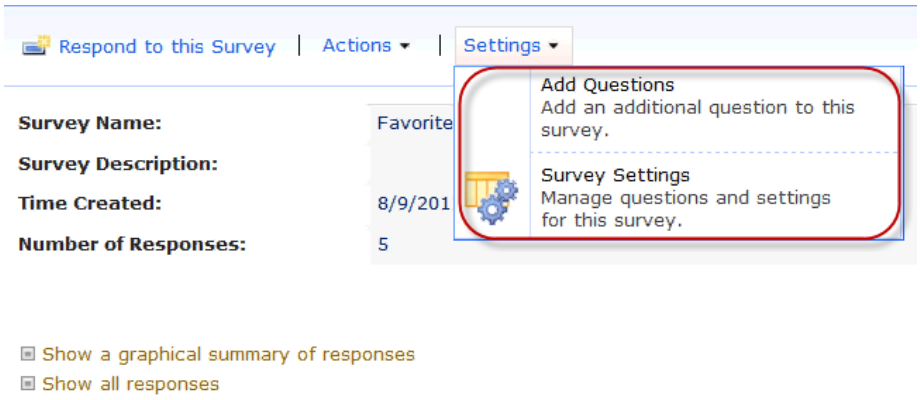

Figure 6-70 *Survey Settings Drop Down Menu*

There is an option to directly add questions, or access the general survey settings.

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Viewing Survey Results

Once posted, a graphical summary of all survey responses can be viewed by clicking **Show a graphical summary of responses** from the surveys main page.

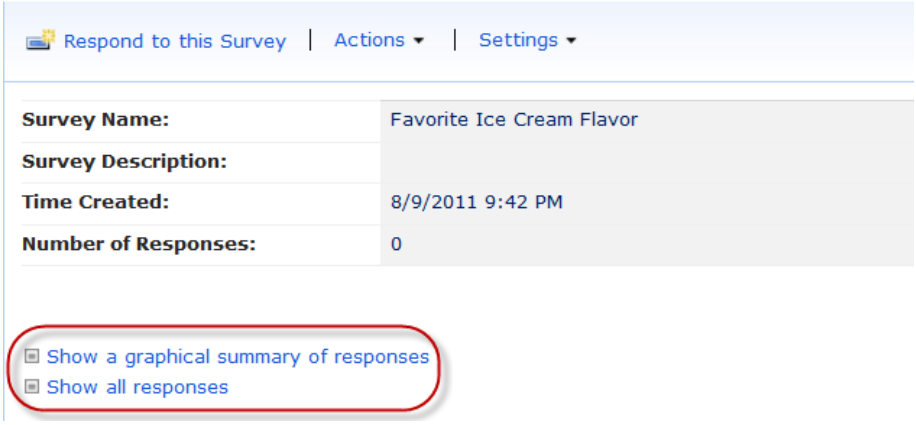

Figure 6-71 *Viewing Survey Responses*

Below is a graphical summary:

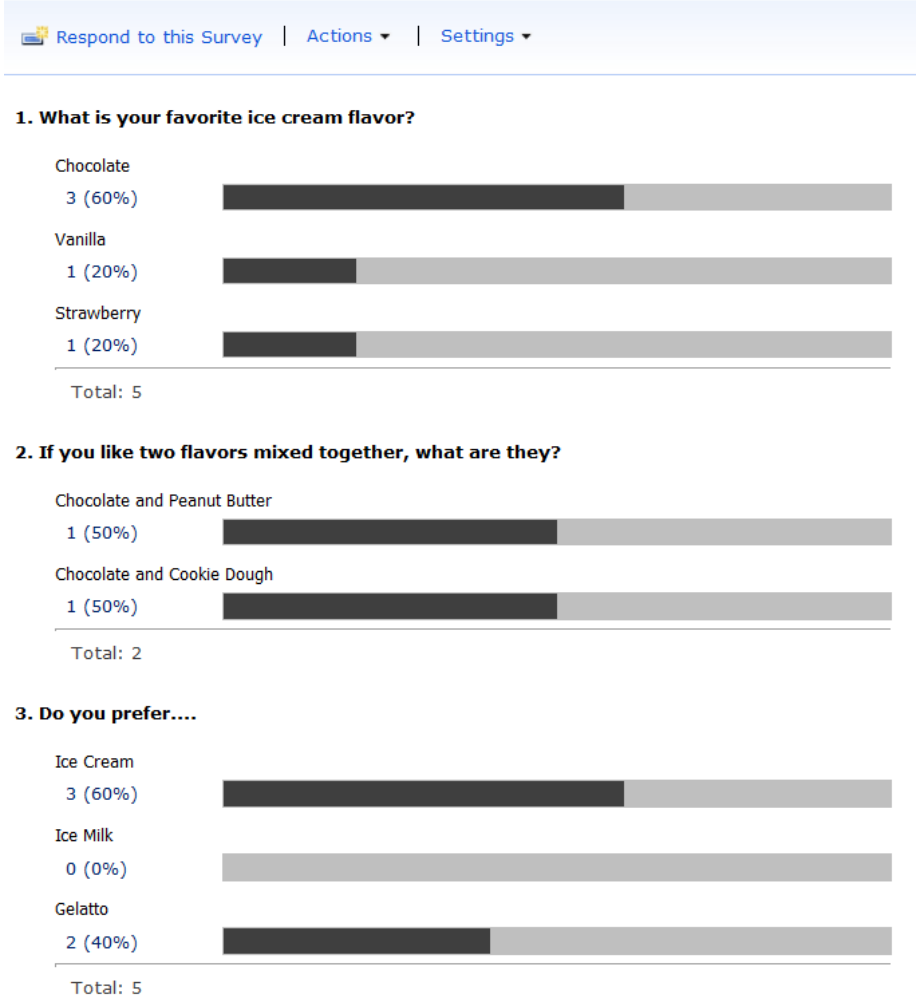

Figure 6-72 *Graphical Survey Response*

Below shows all responses:

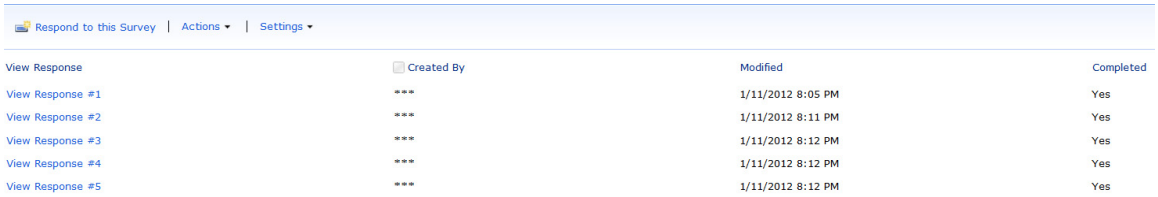

Figure 6-73 *Individual Question Survey Response*

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To limit the ability of all users seeing all responses go to the survey, select **Survey Settings** > **Advanced Settings** and set **Item-level Permissions** to **Read responses that were created by the user**.

Figure 6-74 *Restrict Viewing Responses*

6.6.4 Working with Announcements

Announcements are an effective way to get important information to your team via the collaboration portal. They can be show through a web part on the Team Site landing page.

Creating an Announcements List

To create an Announcement:

1. Click **Site Actions**, **More Options**.

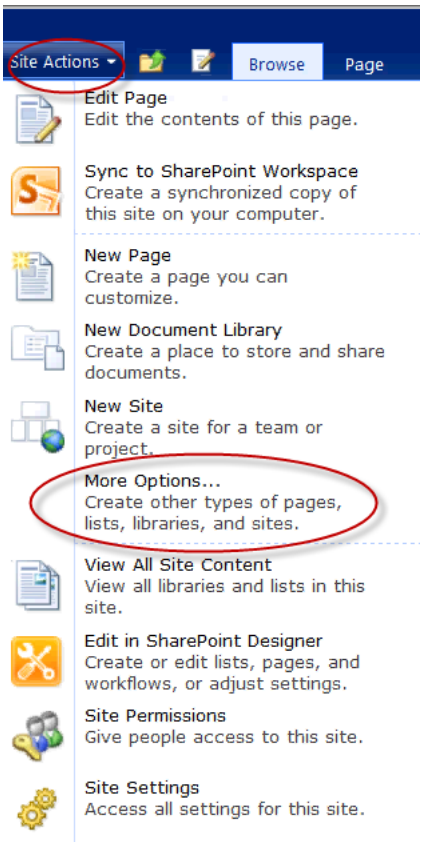

Figure 6-75 *Site Actions Menu > More Options*

2. Select **Announcements** from the List menu. Name the List. Click **More Options**.

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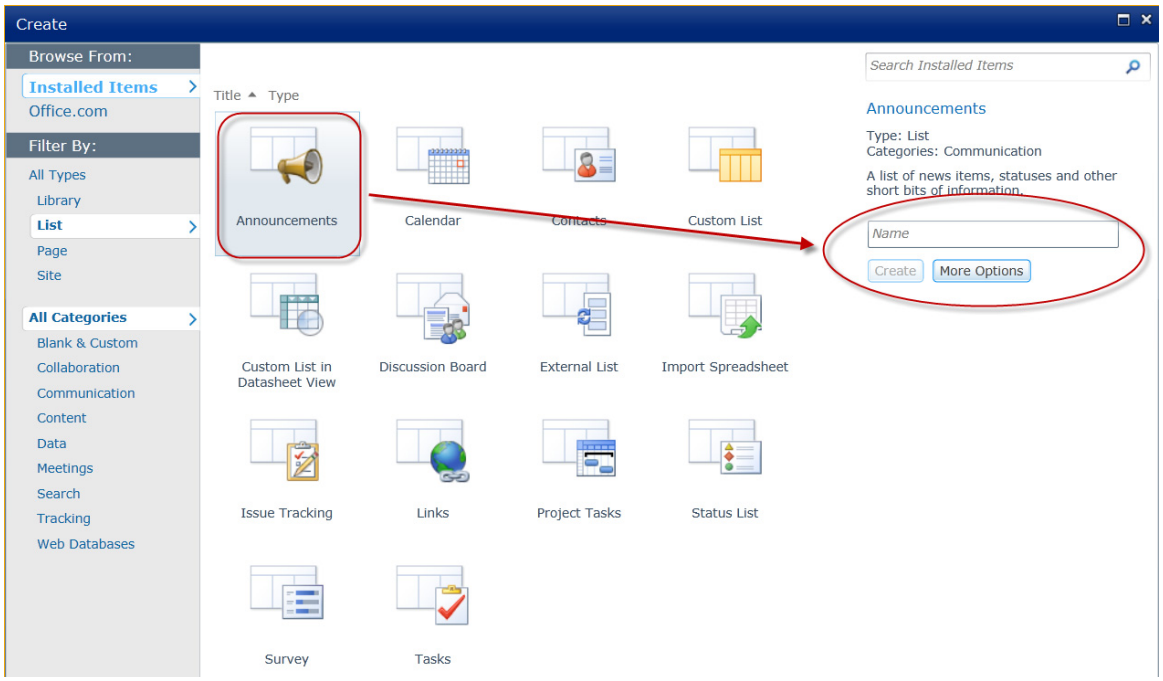

Figure 6-76 *Creating a New Announcements List*

3. Provide a description and decide if this List will appear in the Quick Launch menu.

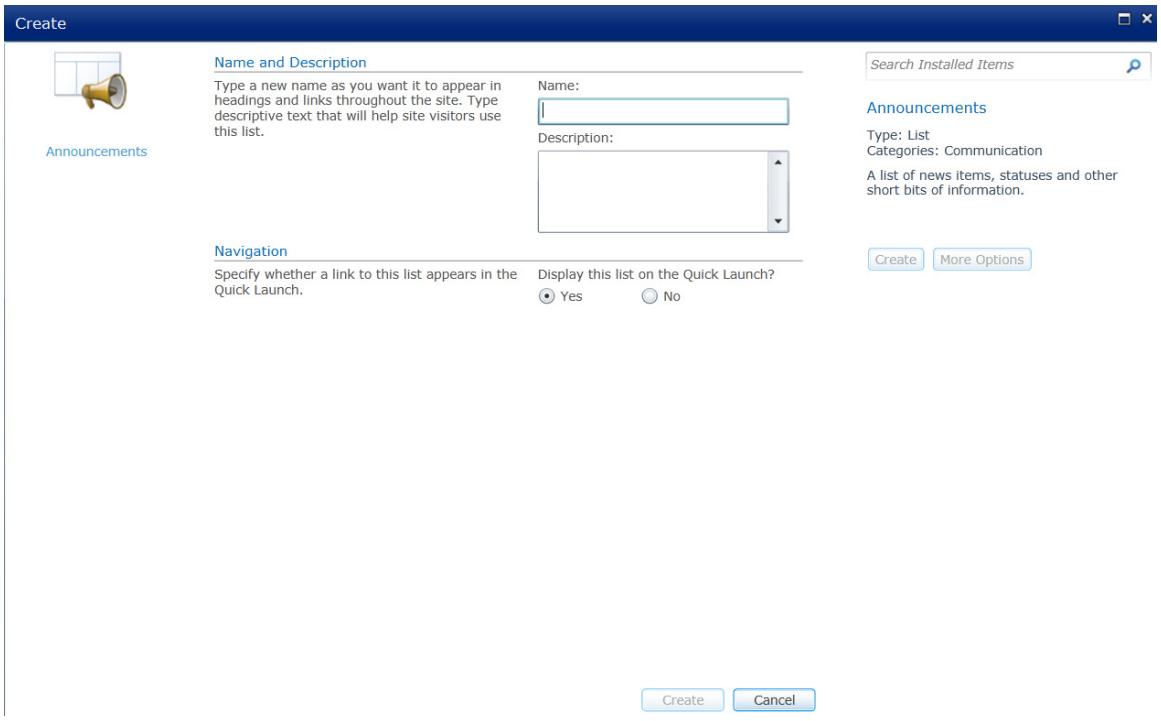

Figure 6-77 *New Announcements List Form*

4. Click **Create**.

Creating an Announcement

To create an Announcement:

1. Navigate to the desired Announcement List either via the **Quick Launch** menu, or by **All Site Content**.
2. Click **Add new announcement**. A new window will open.

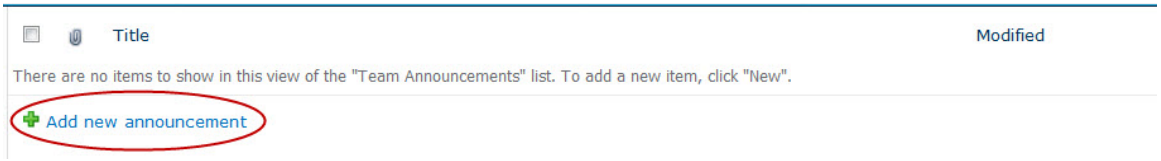

Figure 6-78 *Add a New Announcement Item*

3. Complete the Form.

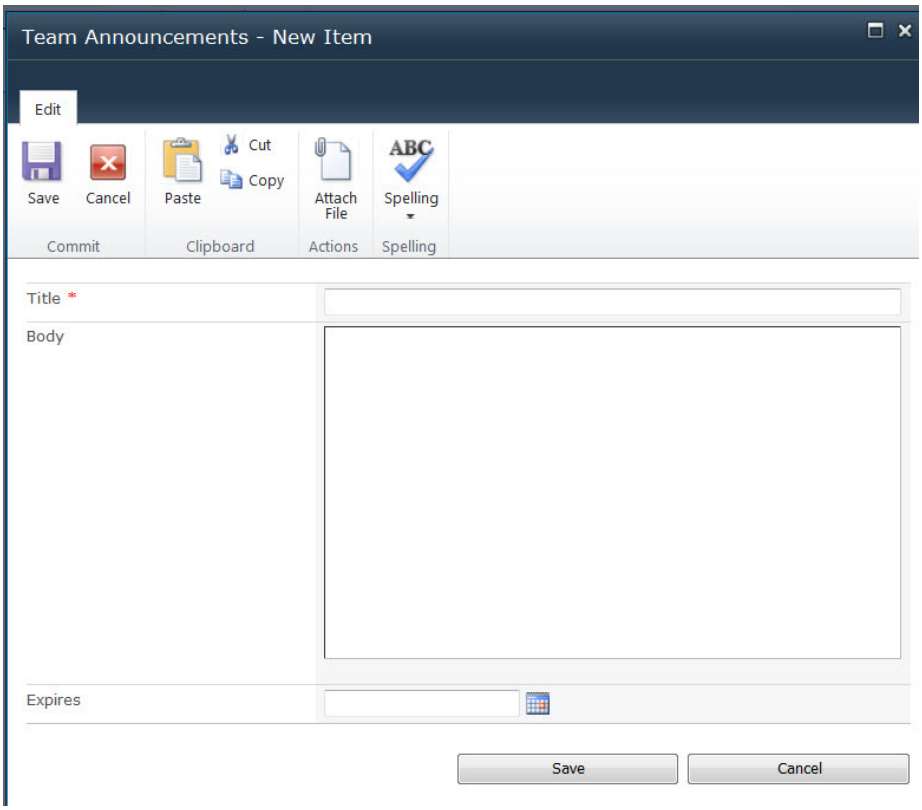

Figure 6-79 *New Announcement Form*

4. Click **Save**.

Note that items can be attached to the announcement.

A very helpful feature is assigning an expiration date to the announcement. Once the expiration date is reached the announcement will automatically no

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longer appear in the list. This type of automation creates efficiency and reduces overhead requirements to manage announcements.

6.6.5 Working with Tasks

SharePoint provides a task list that can help teams manage action items. This is especially helpful as team members can update their own task progress, rather than reporting to a team leader and the team leader updating multiple tasks.

Team members updating their task work also provides real time data on project progress. And since the team site is accessed through a web browser, it makes it easier for team members in the field or on a remote job site to update their information. They do not have to wait to get back to the office to a local program, they just need access to a web browser.

Creating a Task List

1. Click **Site Actions**, **More Options**.

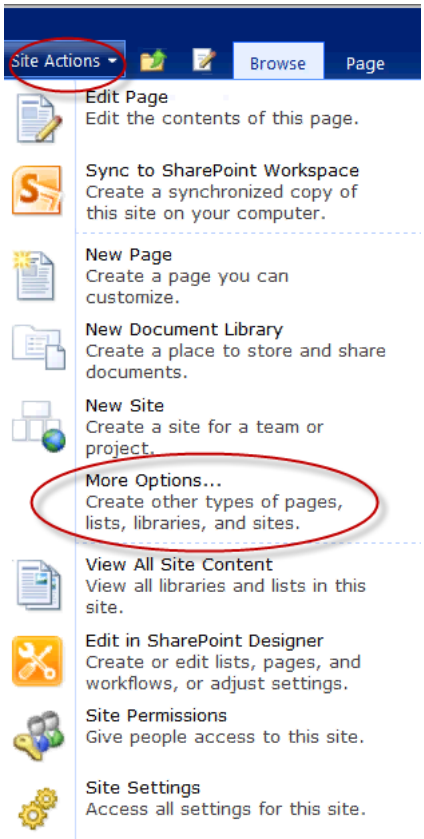

Figure 6-80 *Site Actions Menu > More Options*

2. Select **Tasks** from the List menu. Name the List. Click **More Options**.

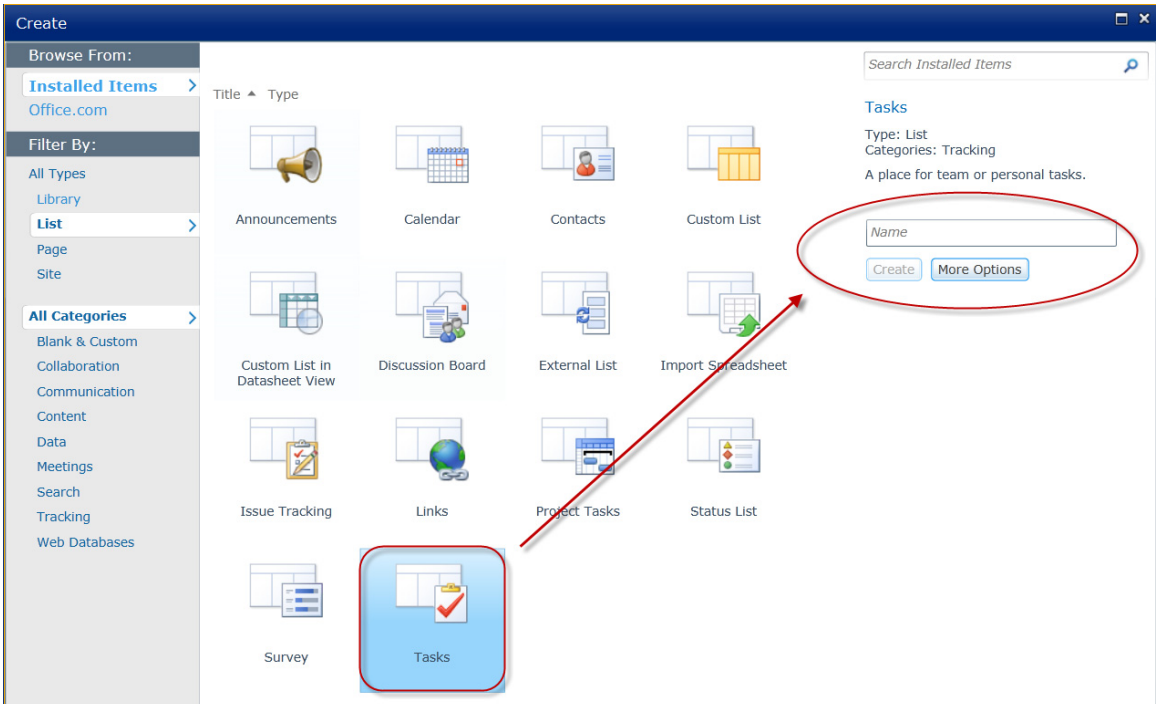

Figure 6-81 *Creating a New Task List*

3. Provide a description and decide if this List will appear in the Quick Launch menu.

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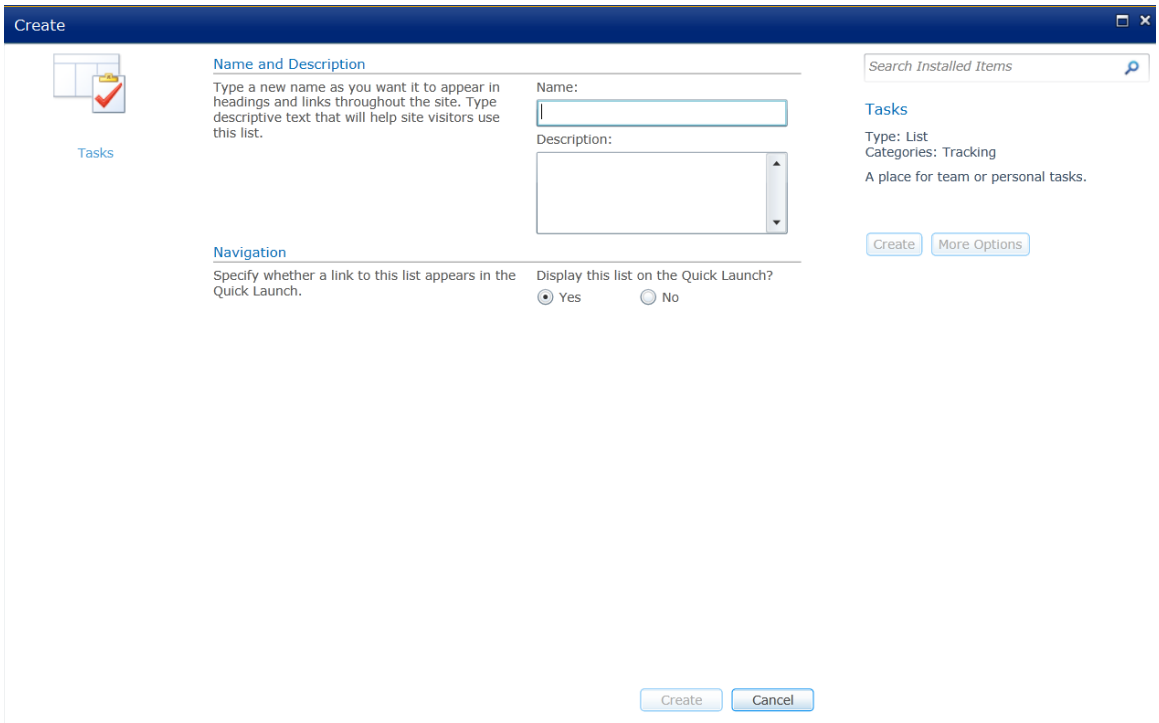

Figure 6-82 *New Task List Form*

4. Click **Create**.

Creating Tasks

1. Navigate to the desired Task List either via the **Quick Launch** menu link, or by **All Site Content**.
2. Click **Add new item**. A new window will open.

Figure 6-83 *Add a New Task Item*

3. Complete the Form.

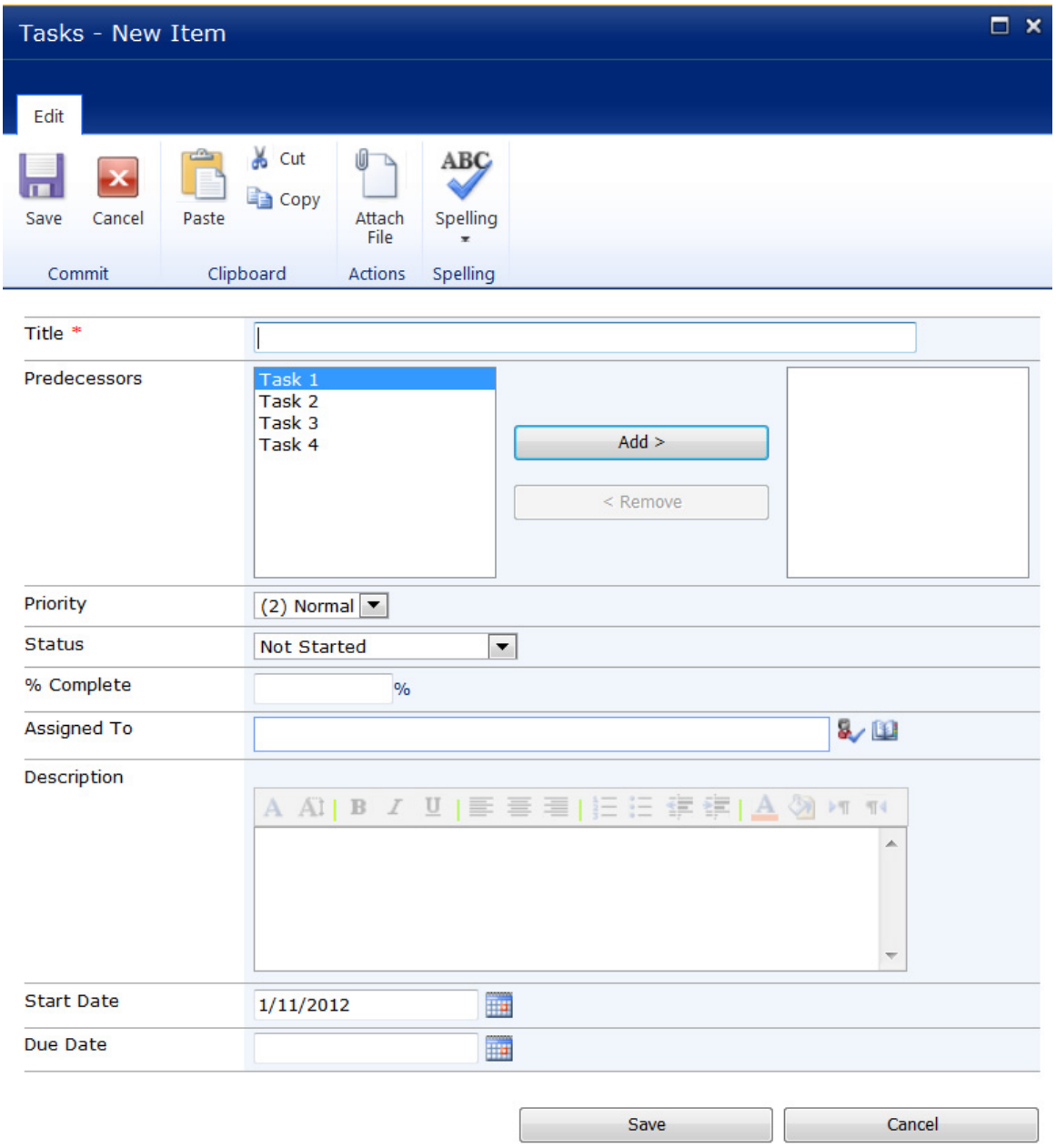

Figure 6-84 *Individual Task Form*

The Tasks List has pre-defined fields available to:

- Name the task
- Identify related predecessor tasks
- Assign a priority (Low/Normal/High)
- Assign a Status (Not Started, In Progress, Completed, Deferred, Waiting on Somebody Else)
- Update with percentage complete

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- Assign to an owner
- Provide a description, or add notes
- Assign a Start Date
- Assign a Due Date

4. Click **Save**.

Team members can then edit tasks assigned to them continuously until the task is complete. How often tasks are updated will be up to organization policy.

Creating a Gantt Chart

If a Gantt Chart format is preferred, create a Project Task List instead of a Task List. A Gantt Chart includes a bar chart illustrating task timelines and relationships.

1. Click **Site Actions**, **More Options**.

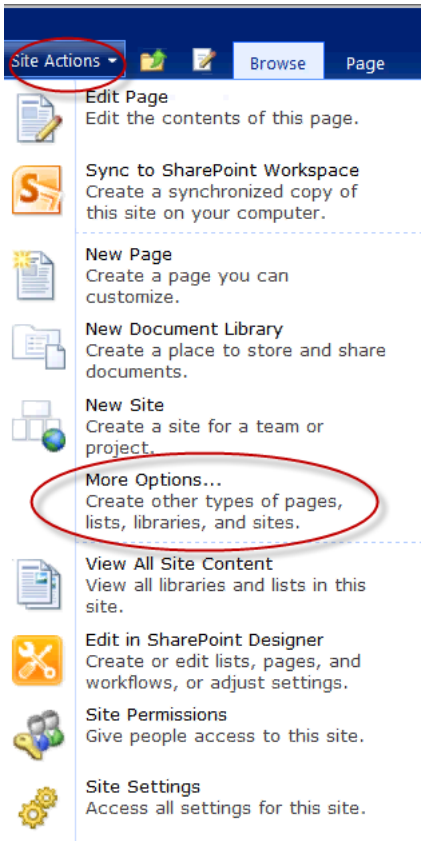

Figure 6-85 *Site Actions Menu > More Options*

2. Select **Project Tasks** from the List menu. Name the List. Click **More Options**.

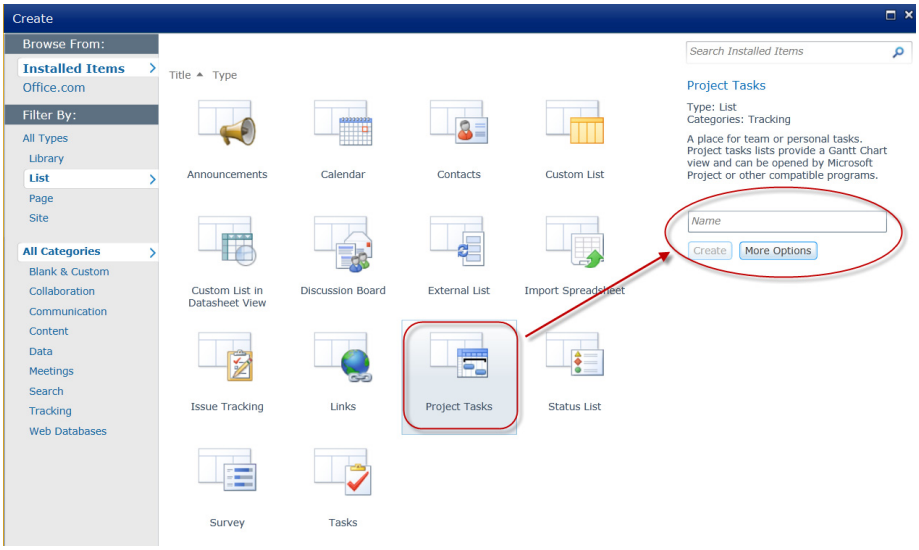

Figure 6-86 *Creating a New Project Task List*

3. Provide a description and decide if this List will appear in the Quick Launch menu.

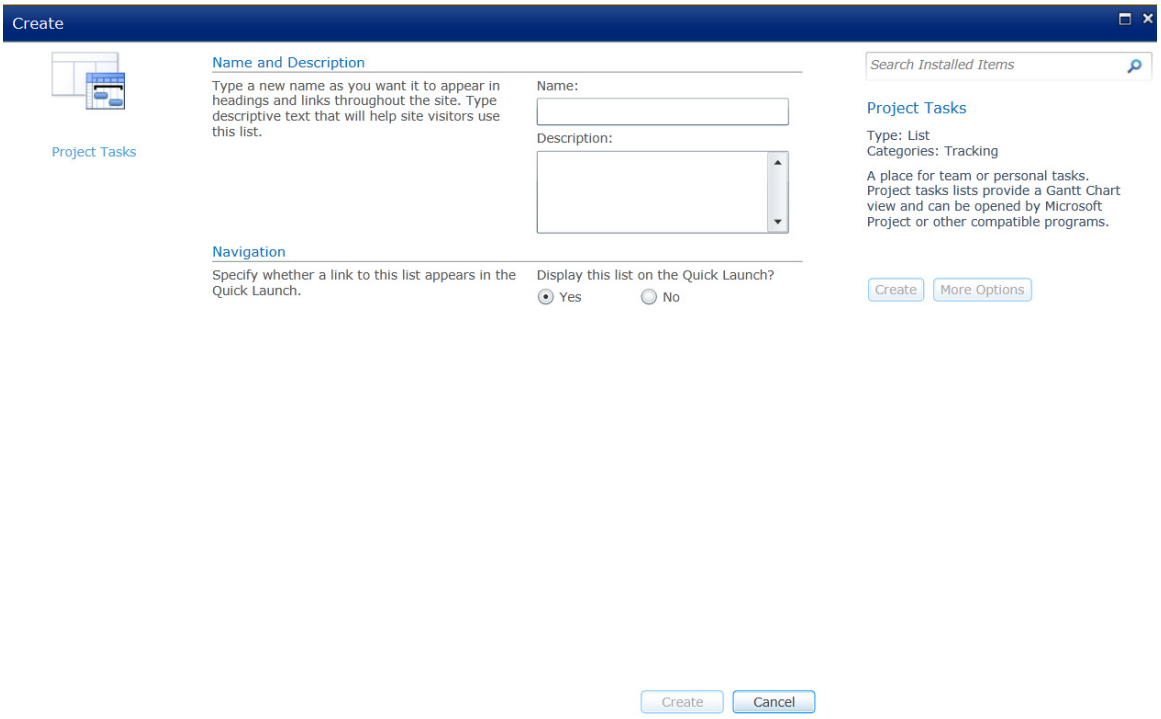

Figure 6-87 *Project Task List Form*

4. Click **Create**.

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Creating a Project Task

A Project Task List has advanced features such as Summary Tasks, showing task relationships, and milestone representation.

1. In the **Items** tab, **New** group, click **New Item**.

> A Project task can also be entered directly into the Gantt Chart table in the line with the '+' sign.

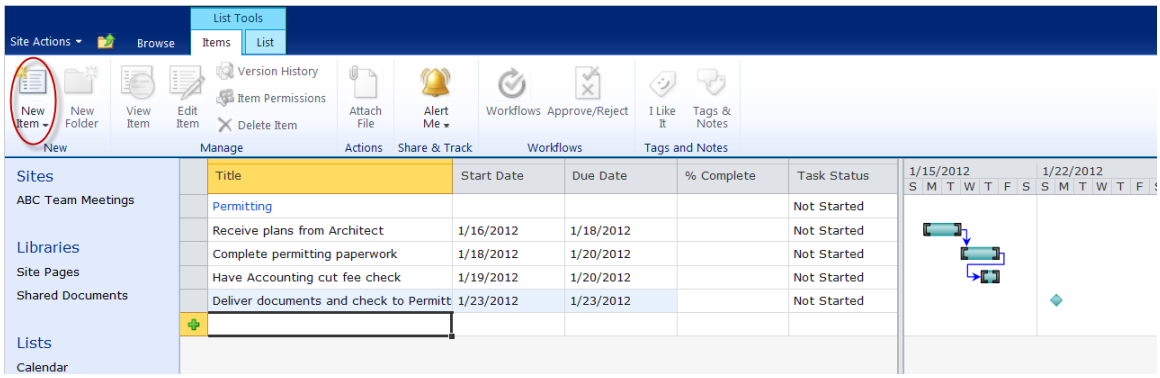

Figure 6-88 *Adding a New Project Task*

2. Complete the Form.

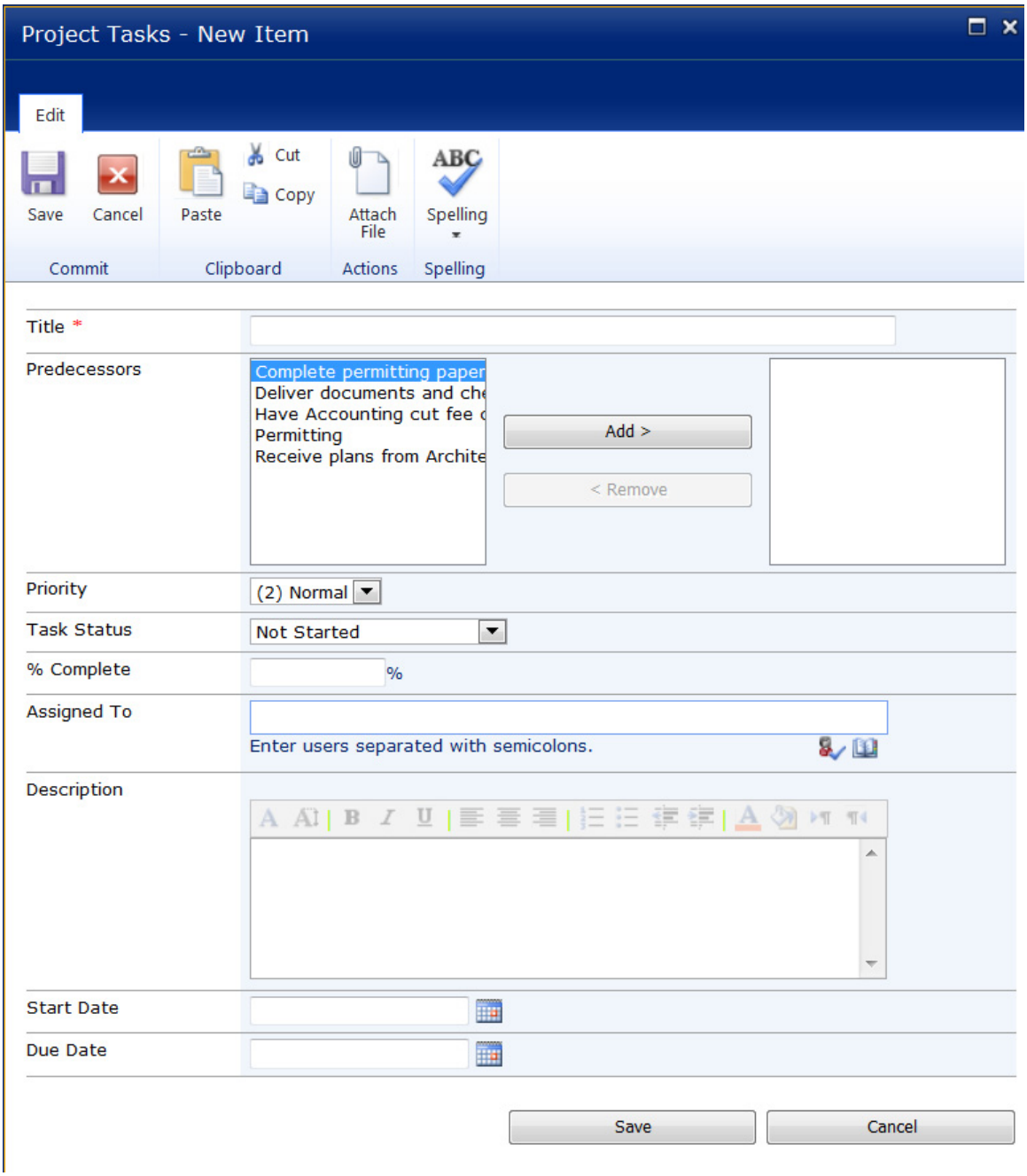

Figure 6-89 *Individual Project Task Form*

The Task List has pre-defined fields available to:

- Name the task
- Identify related predecessor tasks
- Assign a priority (Low/Normal/High)

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- Assign a Status (Not Started, In Progress, Completed, Deferred, Waiting on Somebody Else)
- Update with percentage complete
- Assign to an owner
- Provide a description, or add notes
- Assign a Start Date
- Assign a Due Date

3. Click **Save**.

Team members can then edit project tasks assigned to them continuously until the task is complete. How often project tasks are updated will be up to organization policy.

6.6.6 Working with Calendars

Calendars are a useful tool to organize events. Team members can easily see when significant events are scheduled, such as team meetings. An event type holds basic information about the event itself: title, date and time, description, and the location. Users can then be notified of the event and have reminders setup to email them. An event workspace can also be created to provide a location for event discussion, information, and a location to post documents or pictures related to the event.

The calendar feature allows the ability to keep an event log of critical dates and key events that your team or stakeholders need to know. This posting of dates is a text-based approach as opposed to managing lists of information.

Whether you want to present the information in a calendar look or feel, or in a simple list, SharePoint allows you to quickly manage, add, edit, view and provide notifications to users of updates or changes on any event or activity you want to publish.

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Creating a Calendar

To create a Calendar:

1. Click **Site Actions**, **More Options**.

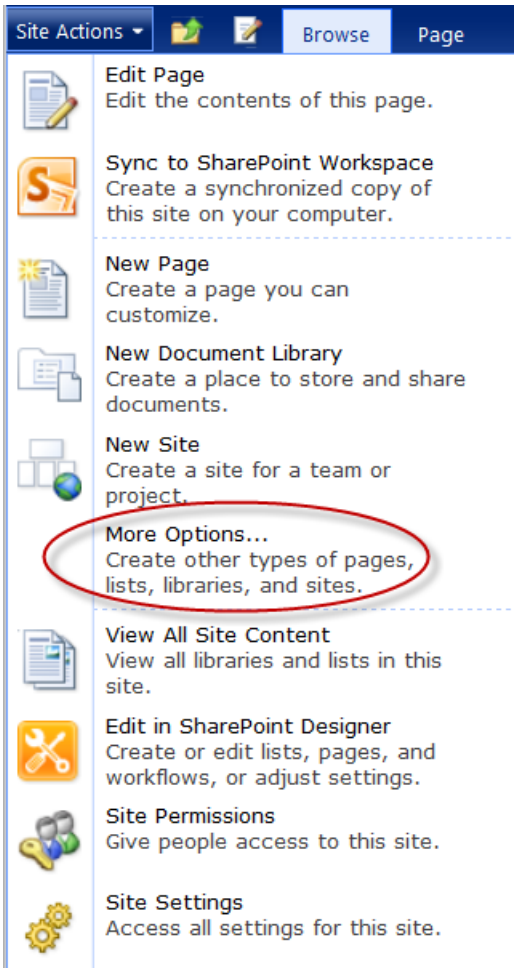

Figure 6-90 *Site Actions Menu > More Options*

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2. Select **Calendar** from the List menu. Name the List. Click **More Options**.

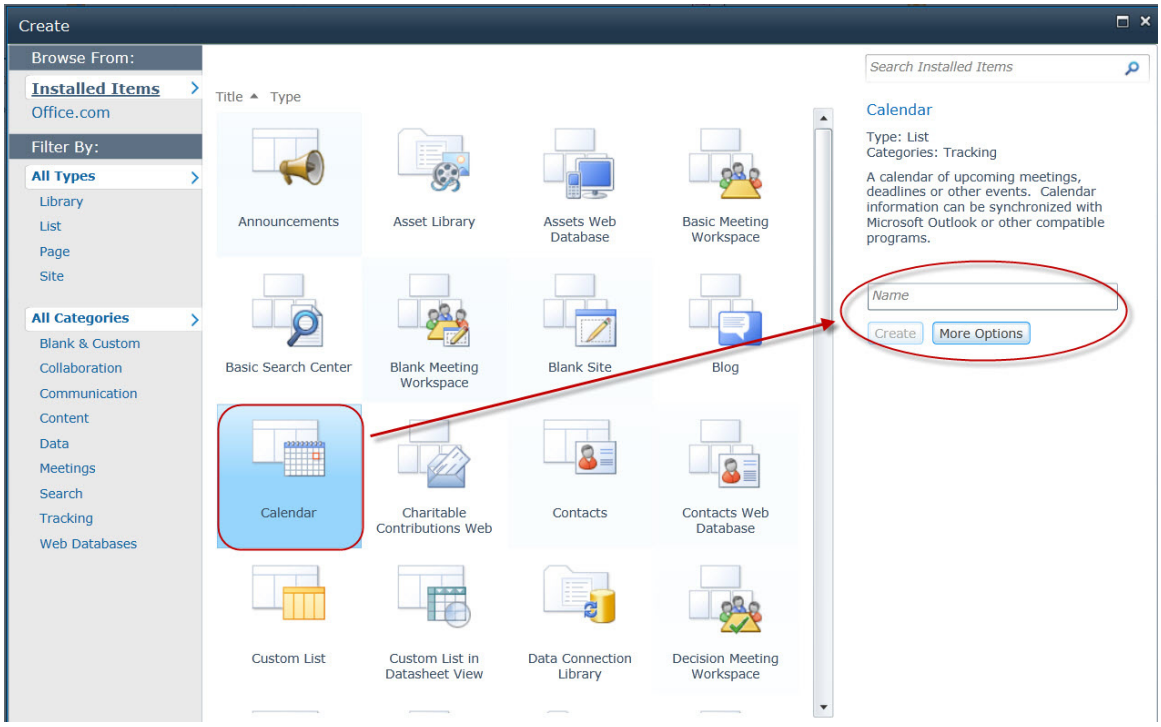

Figure 6-91 *Creating a New Calendar List*

3. Provide a description and decide if this List will appear in the Quick Launch menu.

   There is an additional option to specify whether this calendar will be utilized as a group calendar. A group calendar will allow adding multiple users to a calendar, such as team members and room availability calendars at the same time. This is very helpful in scheduling meetings or creating deadline dates.

   Another similar calendar feature is overlaying calendars. This allows different calendars from different sites within a site collection to be viewed at the same time.

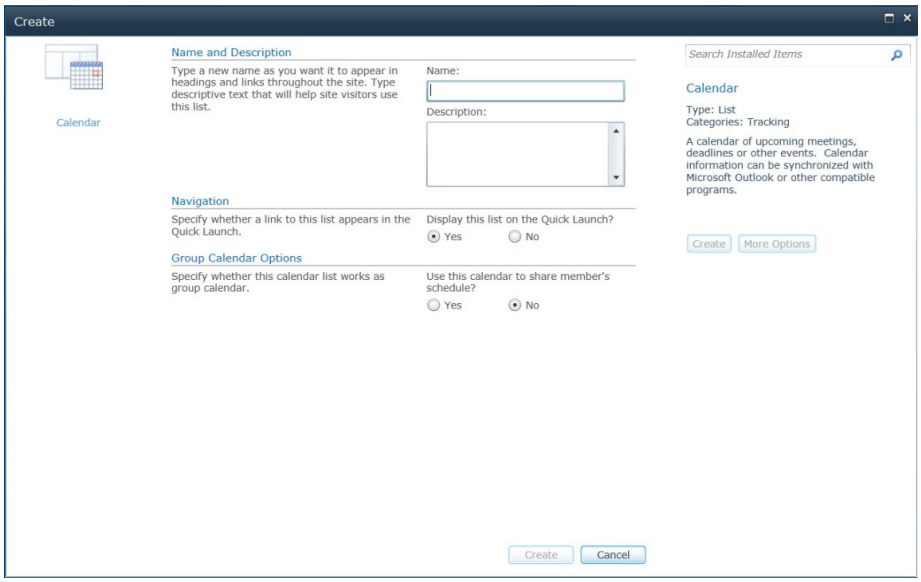

Figure 6-92 *New Calendar List Form*

4. Click **Create**.

Creating a Calendar Item

1. Navigate to the desired calendar either via the **Quick Launch** menu, or by **All Site Content**.
2. In the **Events** tab, **New** group, click **New Event**.

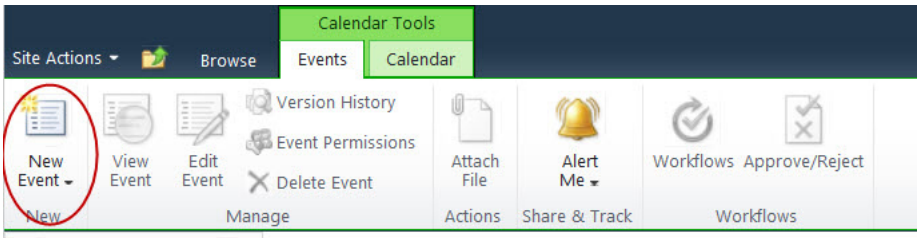

Figure 6-93 *Adding a New Calendar Item*

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3. Complete the Form.

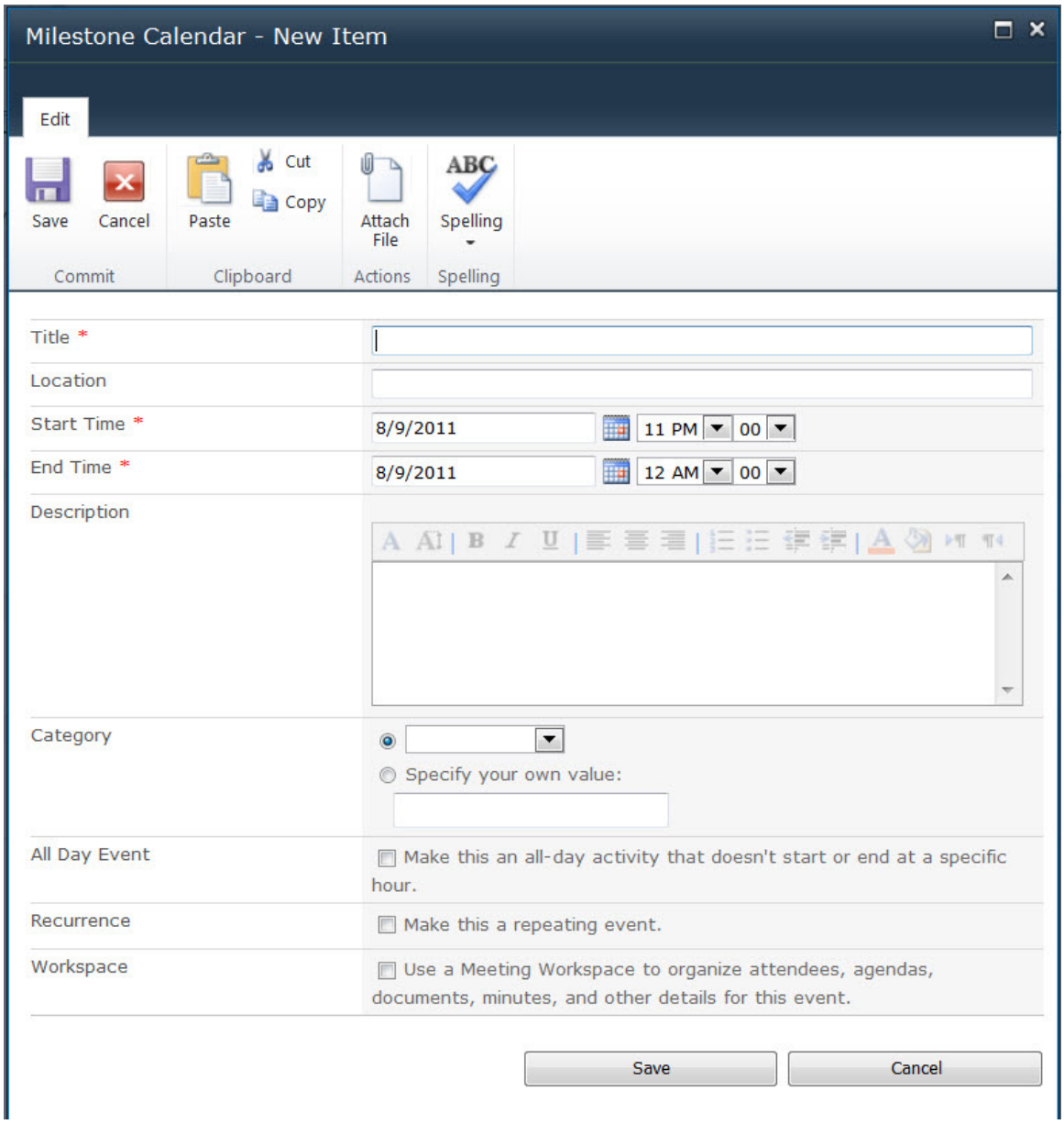

Figure 6-94 *Individual Calendar Event Form*

These calendar events function similarly to Outlook calendar events. Not only can you name the event, identify a location, date, start and end time, but you can also create recurring events.

4. Click **Save**.

Modifying Calendar List Views

Even though a Calendar can look like a traditional Calendar:

Figure 6-95 *Calendar View*

Remember that this is just another list – rows and columns of data. So you can easily modify the view to a table format.

1. In the **Calendar** tab, **Manage Views** group, click the dropdown arrow next to **Current View:** and select the desired view.

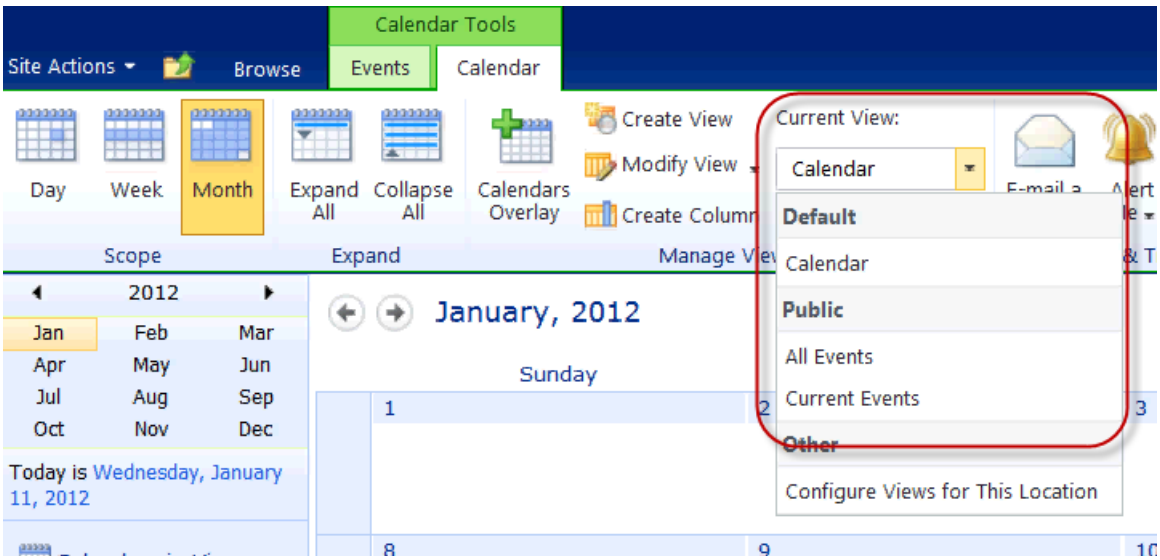

Figure 6-96 *Changing Calendar Views*

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All Events (Or Current Events to filter out past events) are additional options.

Title	Location	Start Time	End Time
Event 1		12/15/2011 12:00 PM	12/15/2011 1:00 PM
Team Status Meetings NEW	Deschutes Conference Room	1/5/2012 10:00 AM	2/2/2012 11:00 AM
Vendor Meeting NEW	Multnomah Room	1/10/2012 1:30 PM	1/10/2012 2:00 PM
Milestone Report Due NEW		1/20/2012 12:00 AM	1/20/2012 11:59 PM
Executive Team Meeting NEW	Smith Rock Conference Room	1/24/2012 2:00 PM	1/24/2012 3:00 PM

Add new event

Figure 6-97 *Calendar View as a List*

6.6.7 Working with Contact Lists

A contacts list is exactly that – a list of people that shows their contact information, such as their company, business and home phone, email address, and more. This is a great feature on a Team Site as team member information can be located in one easy to access place. Another use of a contact list can be for Vendor information pertinent to the team's work.

Creating a Contact List

To create a Contact List:

1. Click **Site Actions**, **More Options**.

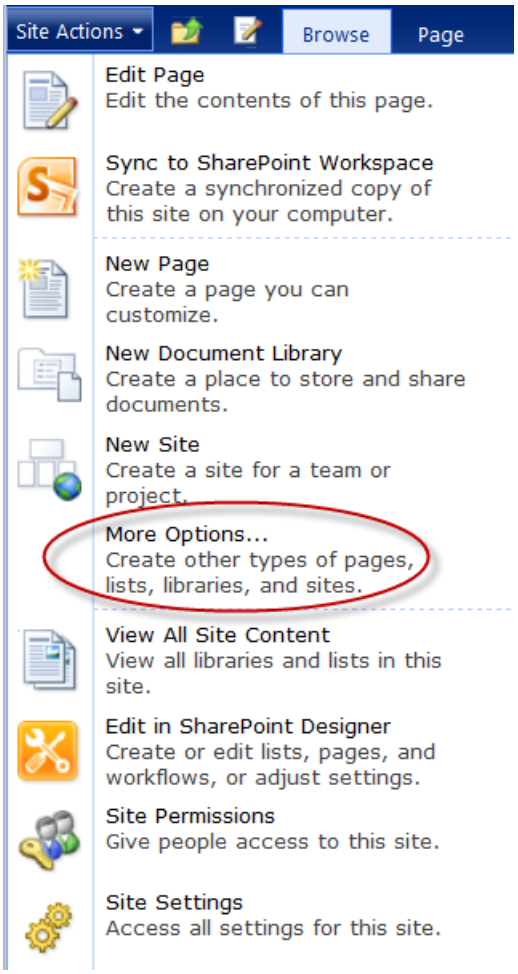

Figure 6-98 *Site Actions Menu > More Options*

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2. Select **Contacts** from the List menu. Name the List. Click **More Options**.

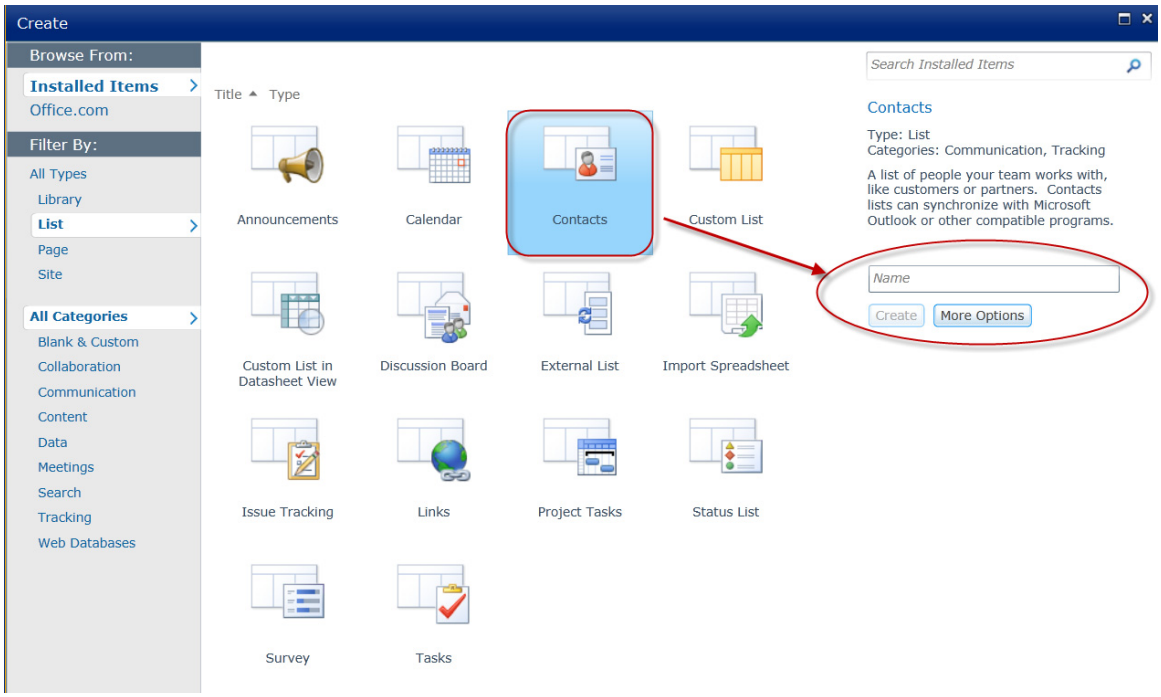

Figure 6-99 *Creating a New Contact List*

3. Provide a description and decide if this List will appear in the Quick Launch menu.

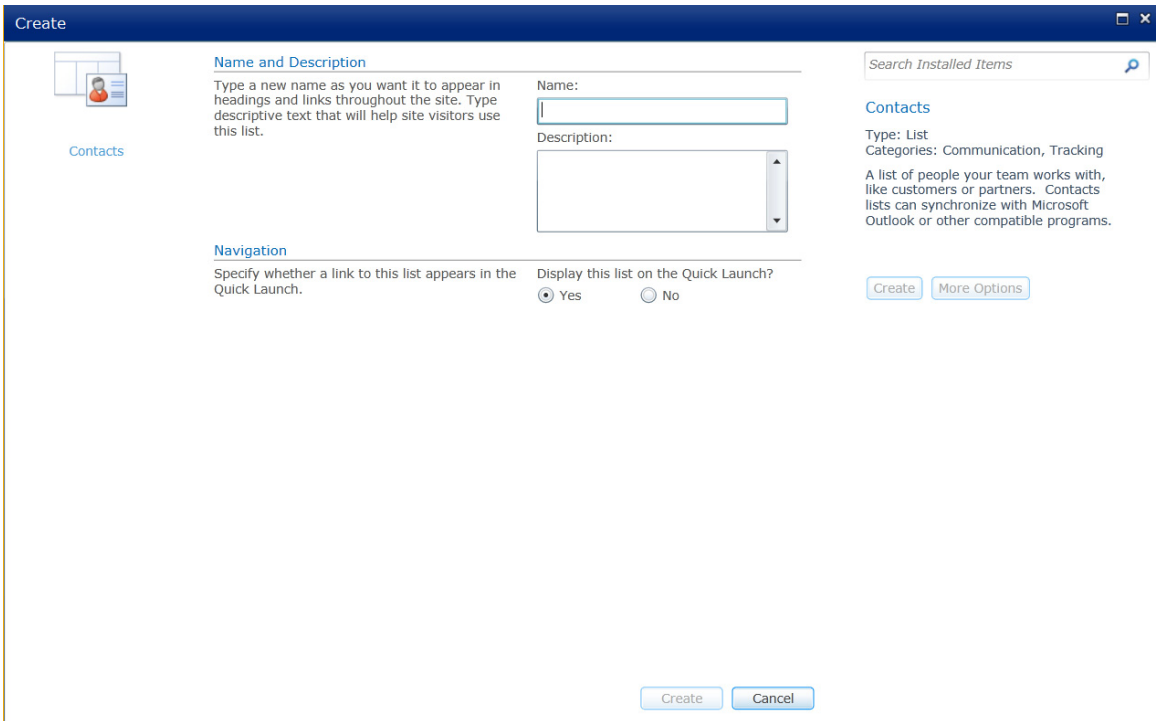

Figure 6-100 *New Contact List Form*

4. Click **Create**.

Creating a New Contact

1. Navigate to the desired **Contact List** either via the **Quick Launch** menu, or by **All Site Content**.
2. Click **Add new item**. A new window will open.

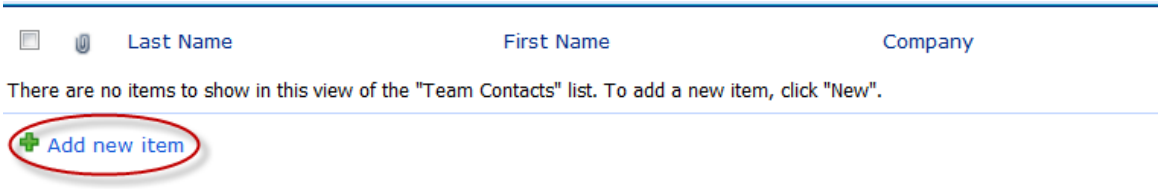

Figure 6-101 *Adding a New Contact*

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3. Complete the Form.

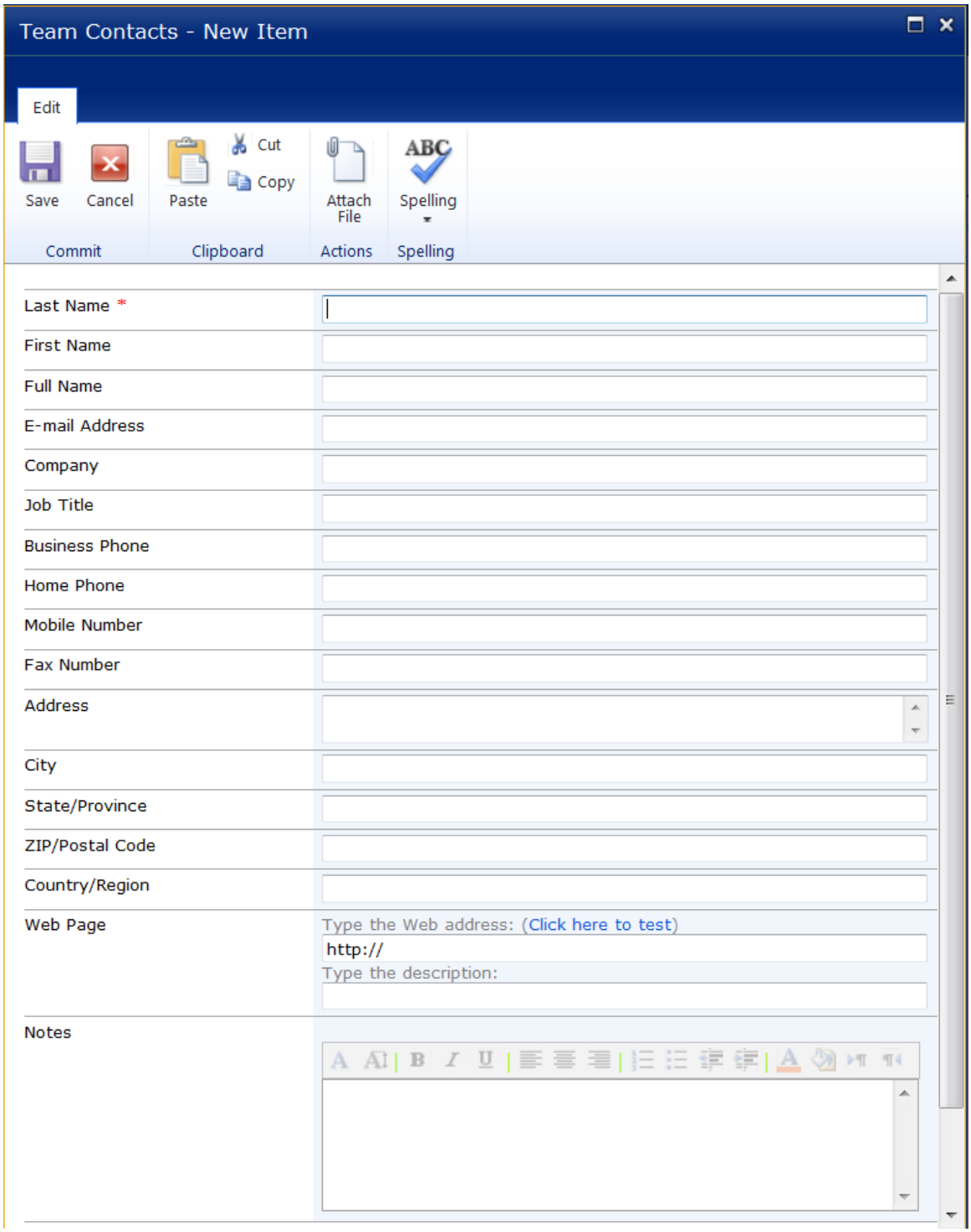

Figure 6-102 *Individual Contact Form*

4. Click **Save**.

6.7 Additional Collaboration Options

SharePoint provides two more unique out of the box features helpful for team collaboration.

One is a special type of site for Blogs. And the other is a special type of library for Wiki Pages.

6.7.1 Working with Blog Sites

Earlier discussion boards were introduced as an interactive way to get feedback and engage a team in dialogue aimed at brainstorming or problem solving. Another feature with similar characteristics is a Blog.

A Blog (a term blending the word “Web” and “Log”) is an electronic column or journal. Normally blogs are written by one person (often referred to as a Blogger) up to a team of a few people. The topics usually have a theme and can be diverse in topic from someone’s personal travels to business or technology topics. They contain entries that provide commentary on the theme or topic and normally allow for feedback on the topic. The blog author, or blog team, can then respond and engage in dialogue. Blog articles are typically archived and the public has access to this archive.

In a team environment, Team Site blogs can lend themselves to education and knowledge transfer for the team. Usually a blog is a more controlled environment than the more open discussion board. Blogs can also be used to disseminate organizational information, such as a blog written by the CIO or President of an organization.

SharePoint provides an out of the box site for a blog.

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Creating a Blog

To create a Blog Site:

1. Click **Site Actions**, **More Options**.

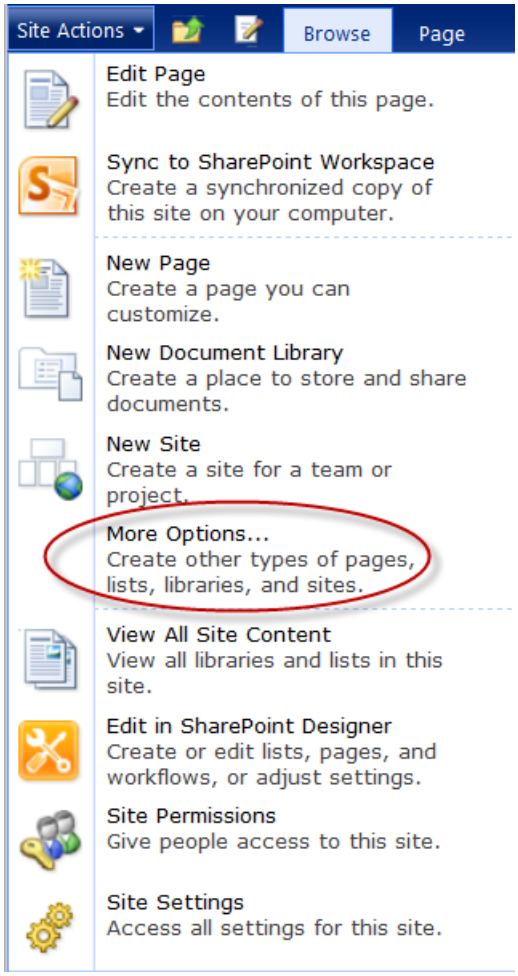

Figure 6-103 *Site Actions Menu > More Options*

2. Select **Blog** from the Site menu. Name the List. Click **More Options**.

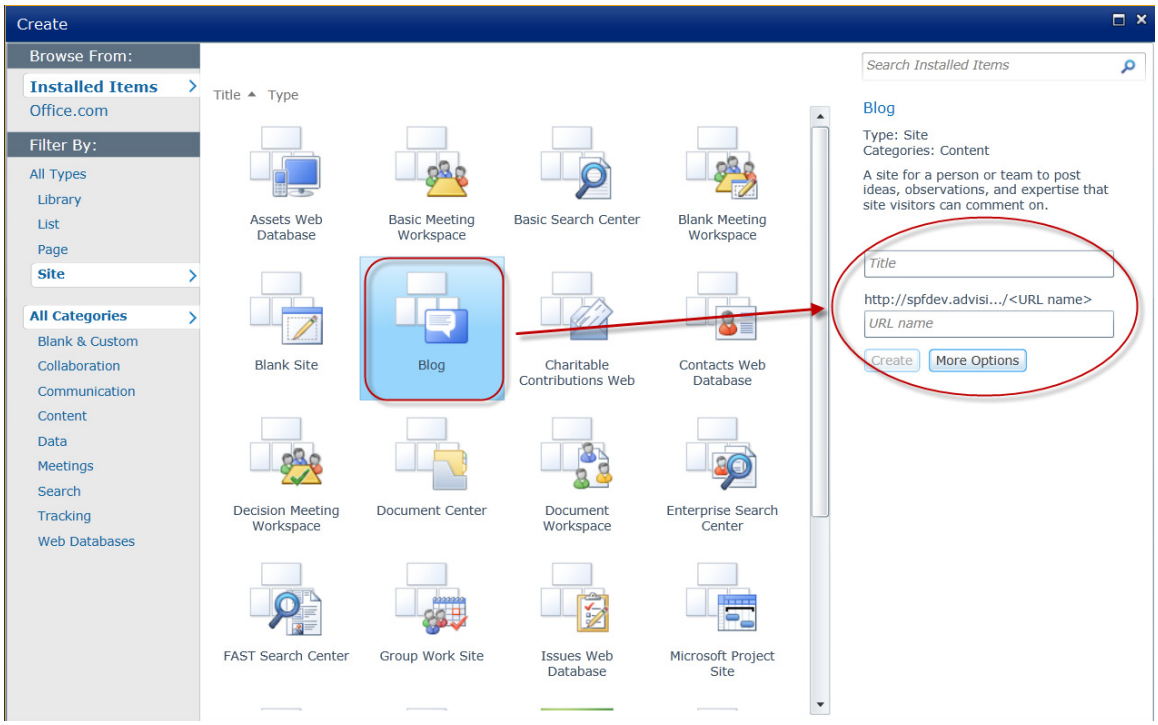

Figure 6-104 *Creating a New Blog*

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3. Provide a description and decide if this Site will appear in the Quick Launch menu. There are also additional options for creating an URL address, how permissions will be handled, and some additional navigation opens such as creating a tab across the Top Link Bar of the Parent Site.

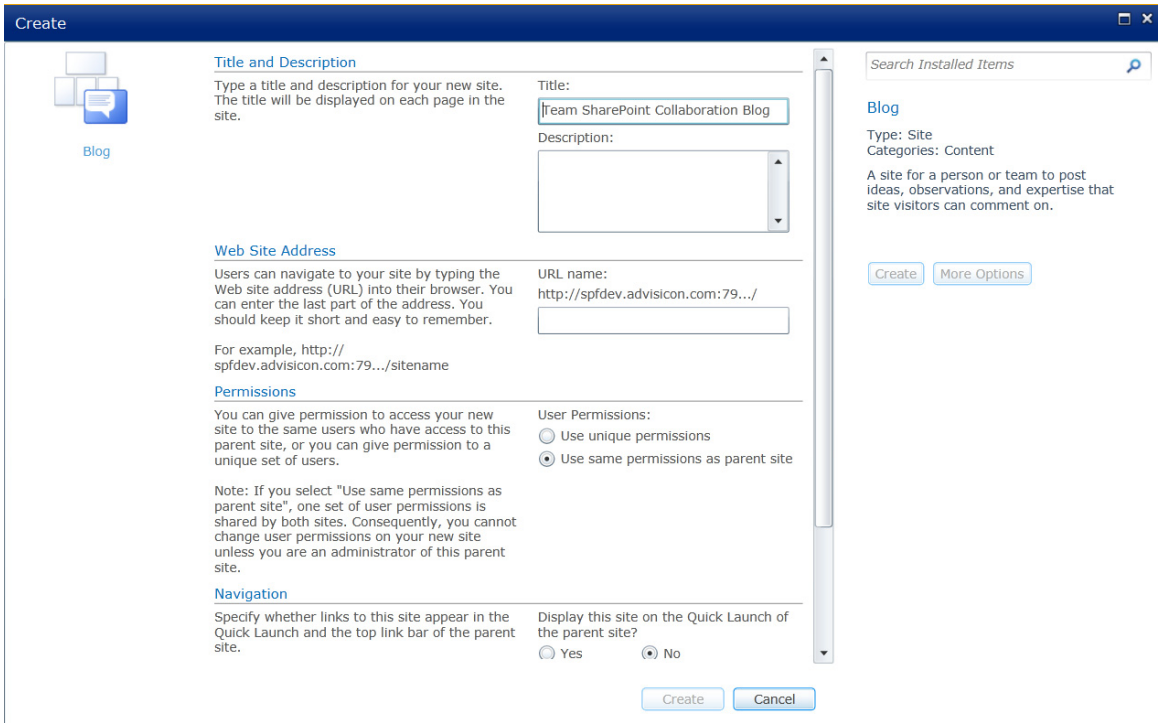

Figure 6-105 *New Blog Form*

4. Click **Create**.

Creating a Blog Entry

The blog template provides a user all the functions requisite to begin and maintain the blog.

Figure 6-106 *Blog Landing Page*

There are customizable Categories available as well as an Archive feature. On the top right side are the controls to create a new entry, manage entries and manage comments.

Creating a Blog Entry in Microsoft Word

Blog entries can easily be created in Microsoft Word and uploaded directly to a SharePoint blog site. This allows for creating entries offline and syncing them to the blog when connected to the Internet again.

To create a blog in Microsoft Word:

1. Open a New Microsoft Word document and select **Blog Post** as a template.

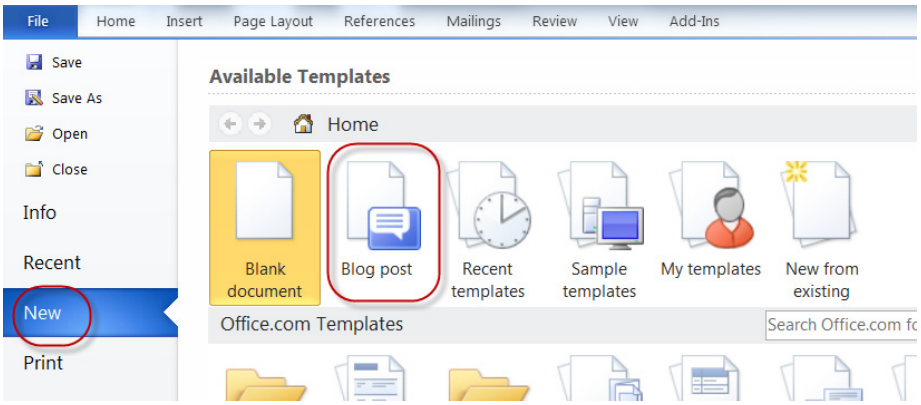

Figure 6-107 *Creating a New Blog Post Document in Microsoft Word*

2. Click **Create**.

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If this is the first time you are creating a blog post in Microsoft Word, you will need to register the Blog Account with Microsoft Word.

3. Click **Register Now** on the Register a Blog dialogue box.

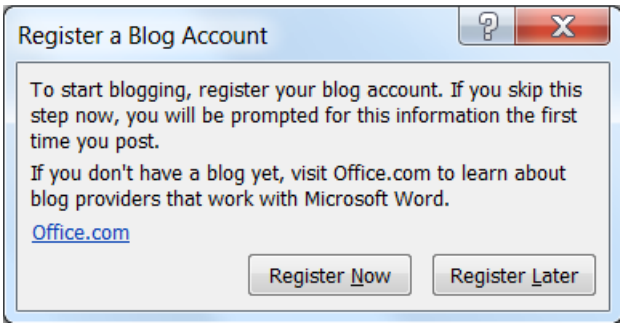

Figure 6-108 *Register a Blog Account Dialogue Box*

4. In the blog dropdown menu, select **SharePoint Blog**.

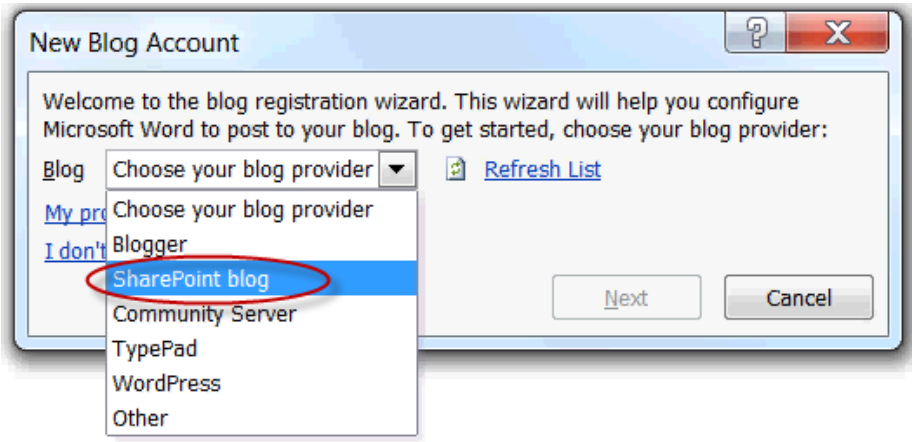

Figure 6-109 *Choosing Blog Provider*

This next step is very important. It will avoid picture upload issues in the future, so make sure and complete this step!

5. Paste the URL for the desired blog in the Blog URL box.

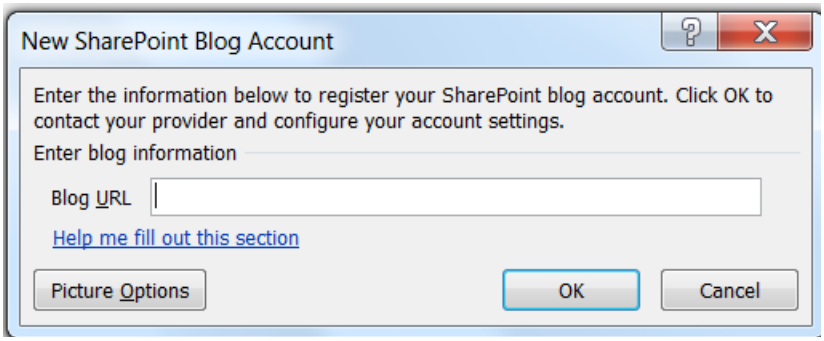

Figure 6-110 *Entering Blog URL*

6. Click **Picture Options**.

This next step is very important. It will avoid picture upload issues in the future, so make sure and complete this step!

7. Select **SharePoint Blog** as the Picture provider. Click **OK**.

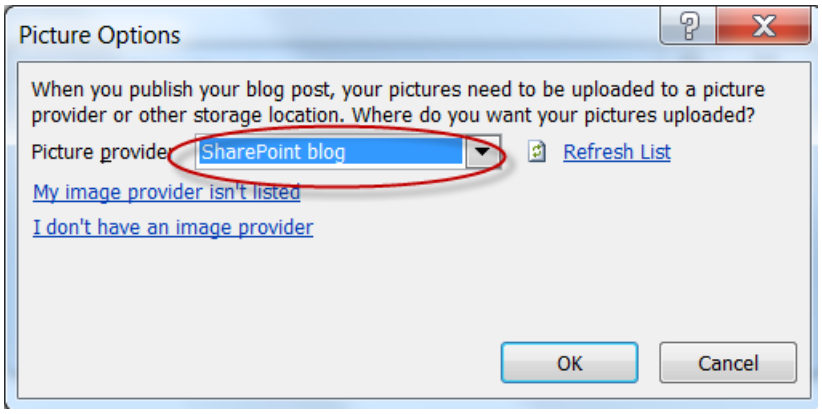

Figure 6-111 *Entering Picture Provider*

A dialog box should appear stating that the account registration was successful

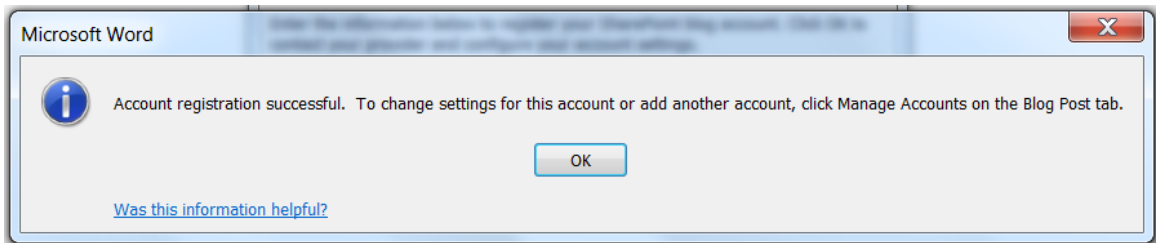

Figure 6-112 *Successful Account Registration*

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8. Click **OK**.
9. Create the blog entry.

   The template will already provide a place for the Blog Title. By creating the entry in Microsoft Word the author can have the functions of the program available to them, including inserting pictures.
10. When the entry is complete, in the **Blog Post** tab, **Blog** group, click **Publish**.

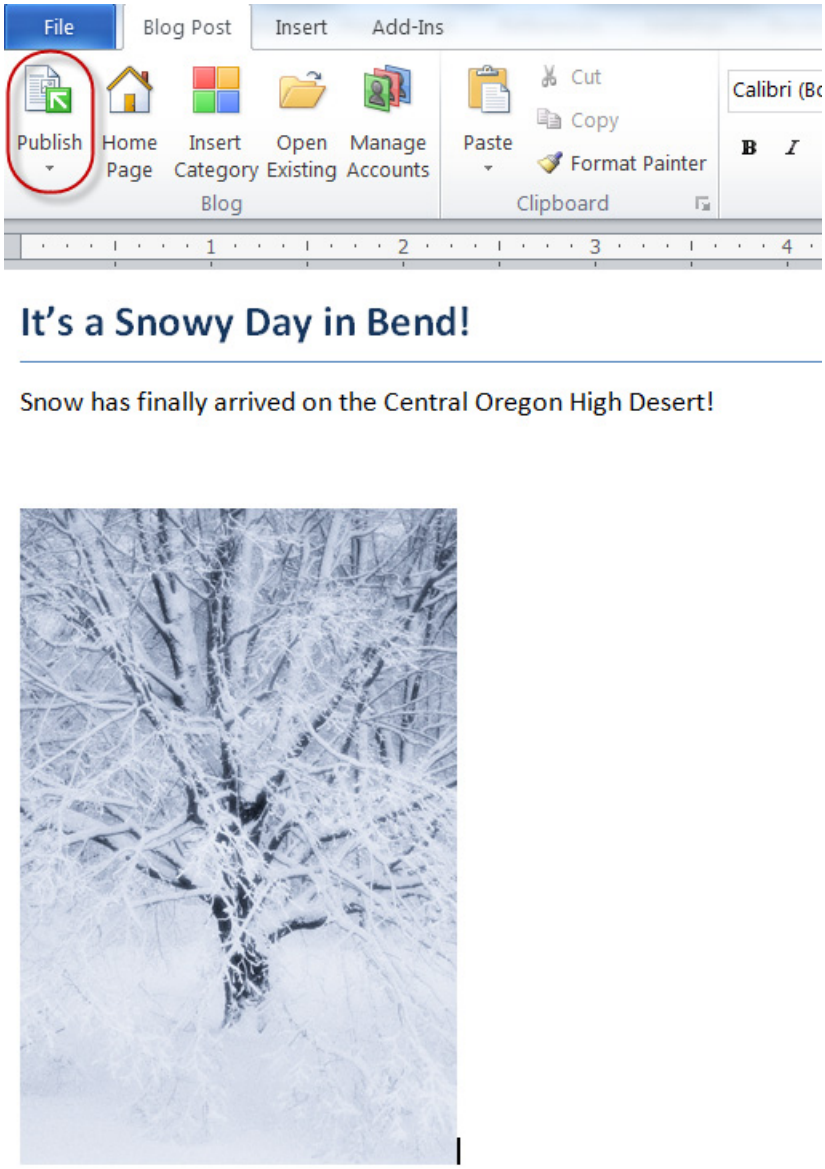

Figure 6-113 *Publishing Entry from Microsoft Word*

A publishing confirmation will appear above the blog title in the Microsoft Word document.

Figure 6-114 *Publishing Confirmation in Microsoft Word*

11. Refresh the SharePoint blog site.

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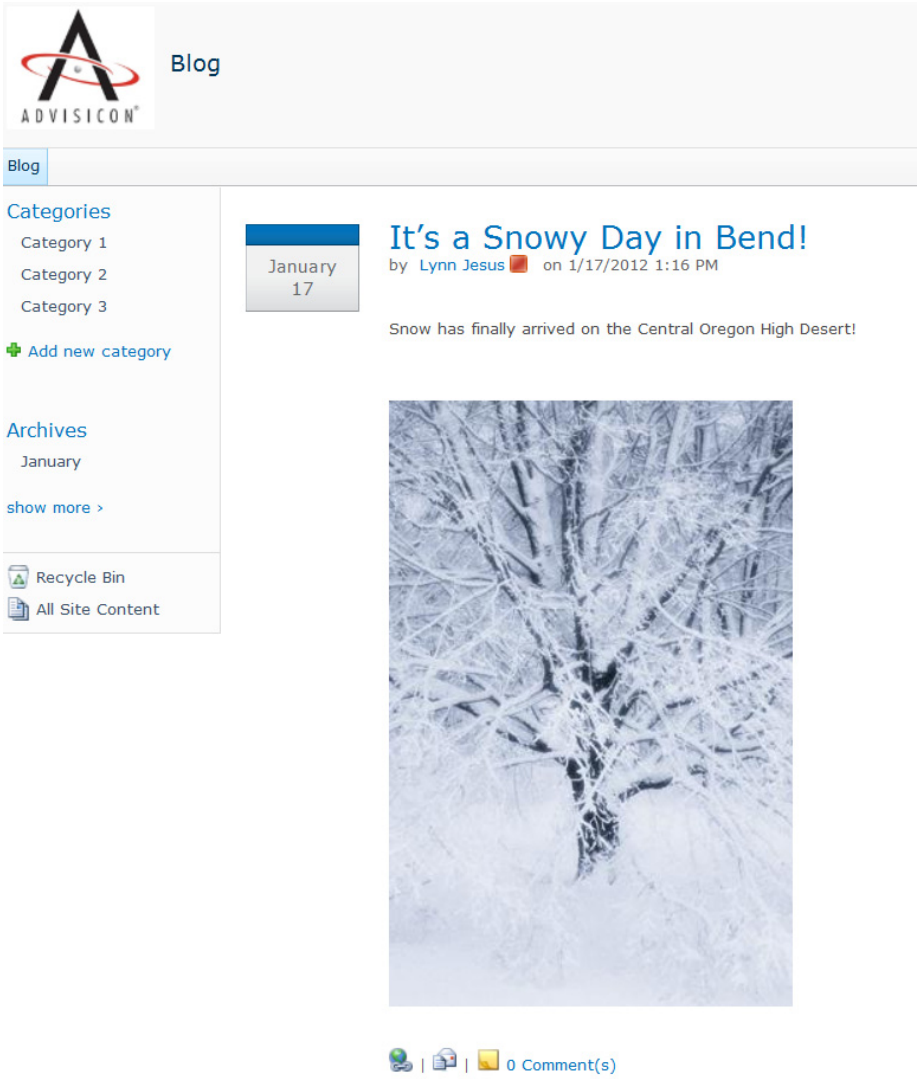

Figure 6-115 *Completed Blog Entry on SharePoint Site*

Managing Blog Entries

Just as it is important to monitor feedback on discussion boards, it is equally important to manage feedback on blogs.

Note that the default layout provides the functionality of providing Comments, and also sharing the entry via a Link or Email.

6.7.2 Working with Wiki Pages

Understanding Wikis

Wiki pages are actually a special type of library. Wiki pages are related pages of information contained in a customizable library. It is a set of pages that hold text, pictures, and links that can be viewed and edited allowing for a high level of team collaboration.

Wiki in Hawaiian means “fast” or “quick.” A Wiki is similar to a virtual white board allowing teams to quickly collaborate and capture emerging ideas. Unlike blogs that have more controls in place, participants are usually open to not only add content, but revise current content.

A typical use of a Wiki is brainstorming and problem solving around a piece of code. The team can add and take away from the proposed coding language and also add pages, links, and images to serve as supporting documentation.

Carrying on the white board image, Wikis are not usually carefully crafted and laid out. They are usually filled with different text, text colors, and generally can look like a random collection of words and ideas, just like a white board after a brainstorming session.

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Creating a Wiki

To create a Wiki:

1. Click **Site Actions**, **More Options**.

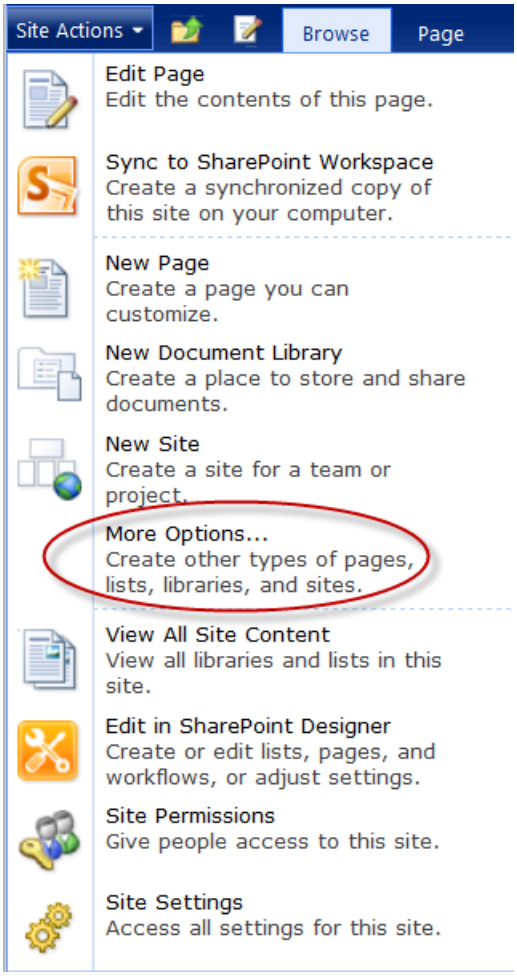

Figure 6-116 *Site Actions Menu > More Options*

2. Select **Wiki Page Library** from the Site menu. Name the List. Click **More Options**.

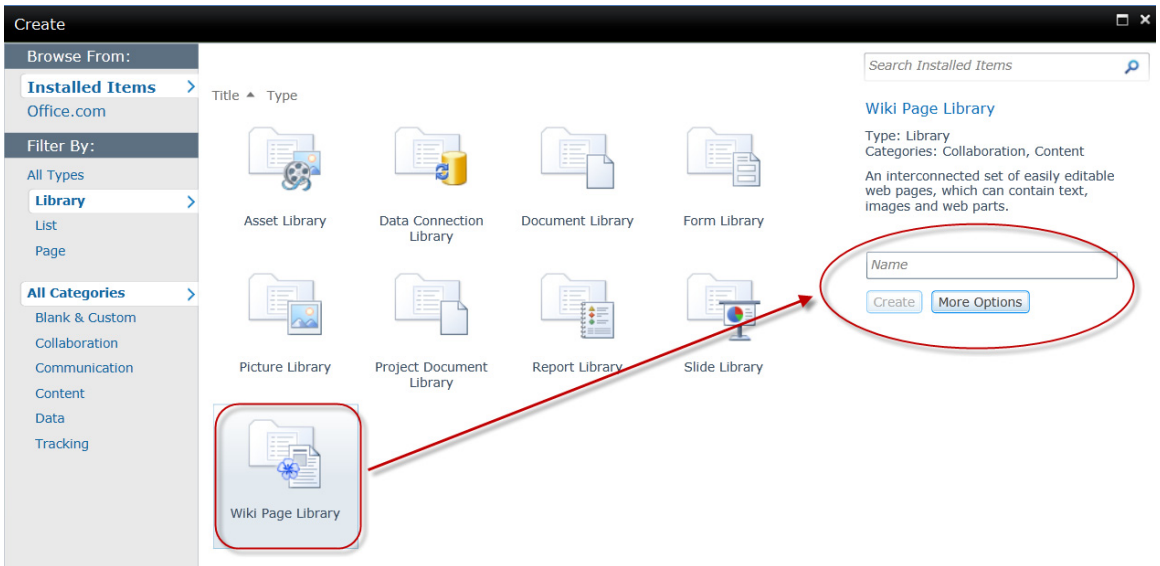

Figure 6-117 *Creating New Wiki Page Library*

3. Provide a description and decide if this List will appear in the Quick Launch menu.

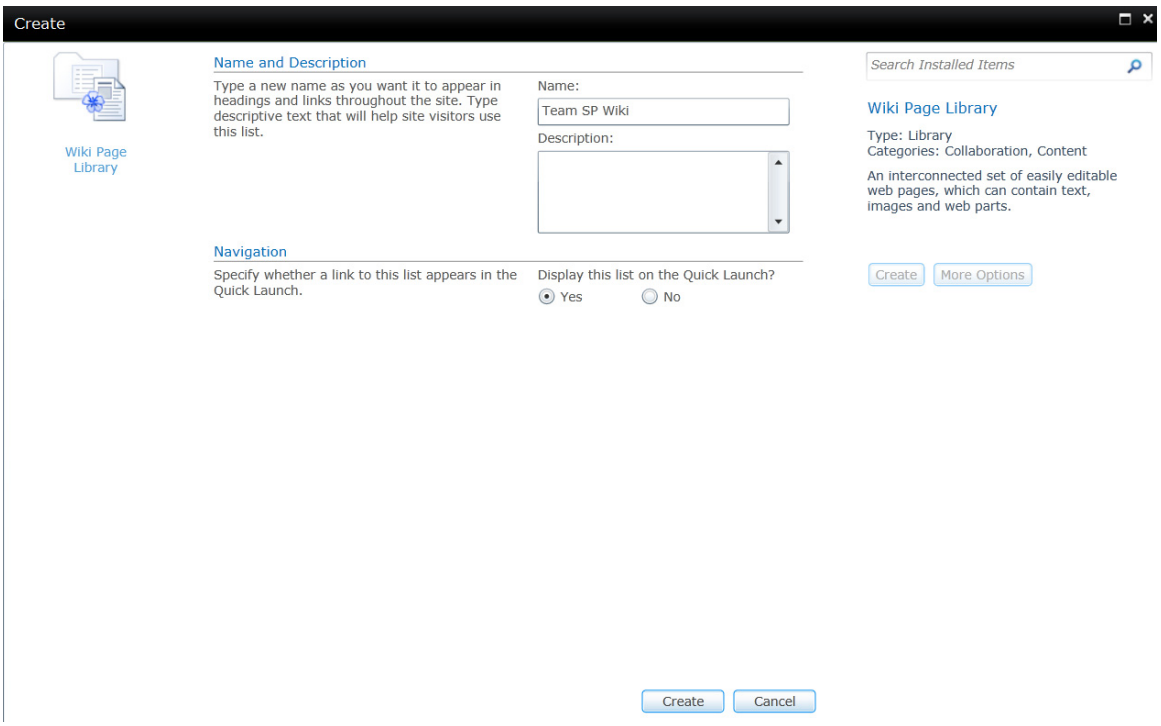

Figure 6-118 *New Wiki Library Form*

4. Click **Create**.

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Creating Wiki Pages via Links

A main benefit of Wikis is that they can be utilized by teams for quick brainstorming and problem solving. Often a problem may be time critical and although additional pages should be added for additional documentation to support the solution, the user does not have the time to go into another program, or search to create this additional documentation in that very moment.

By adding double brackets ([[…]]) around text in an existing Wiki page, a new link will be created that will lead to a new page. The user can then come back at a more convenient time and complete the supporting documentation.

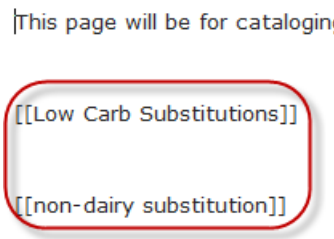

Figure 6-119 *Creating Links to Additional Pages as Placeholders*

Once the Wiki page is saved, links will be created for the future creation of the pertinent pages.

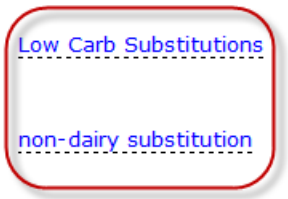

Figure 6-120 *Created Links on Wiki Page*

6.7.3 Custom Lists

Although SharePoint provides you with many built-in lists, the information you may want to add to the site might not be appropriate for those lists. In these cases you will want to create a new custom list.

A custom list is simply a list that has no pre-defined format, except for a Title. It is a blank slate for creating a special List.

Creating a Custom List

1. Click **Site Actions**, **More Options**.

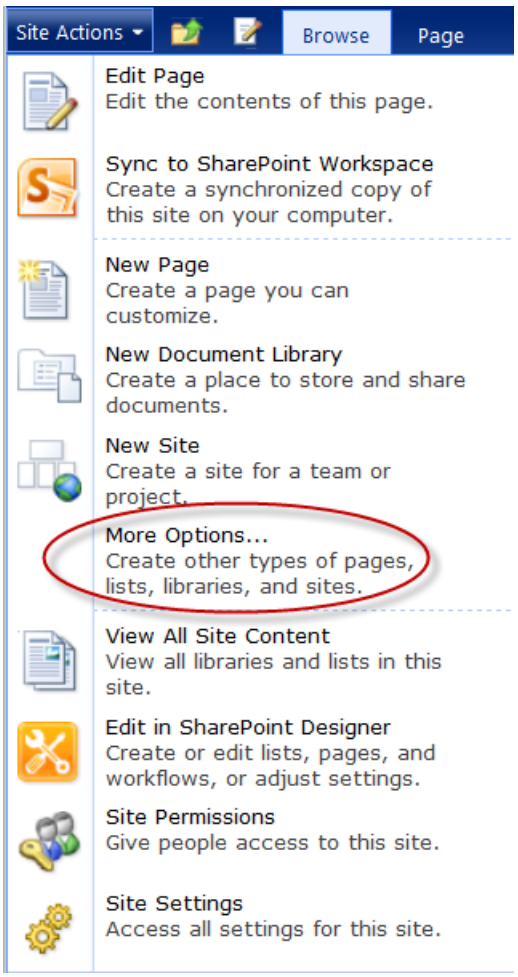

Figure 6-121 *Site Actions Menu > More Options*

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2. Select **Custom List** from the List menu. Name the List. Click **More Options**.

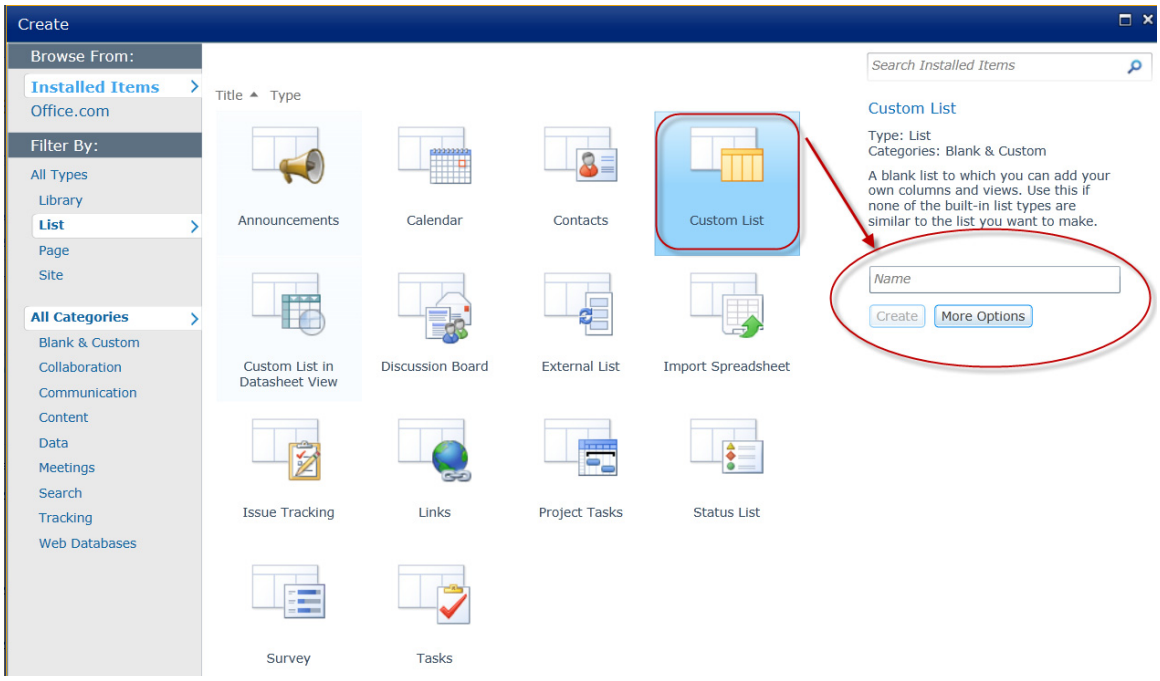

Figure 6-122 *Creating a New Custom List*

3. Provide a description and decide if this List will appear in the Quick Launch menu.

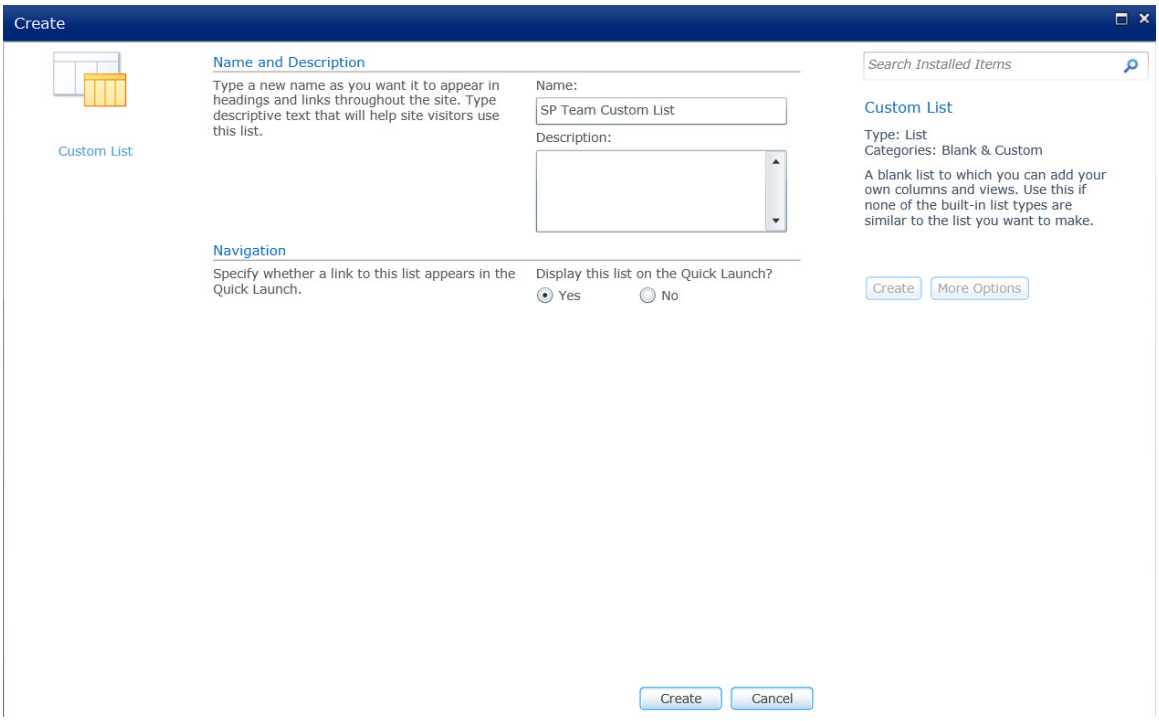

Figure 6-123 *New Custom List Form*

4. Click **Create**.

Customizing the List

Customization of this blank slate is easily accomplished. Customization can be done in InfoPath or SharePoint Designer.

1. In the **List** tab, **Customize List** group, click the appropriate choice in the Customize List group.

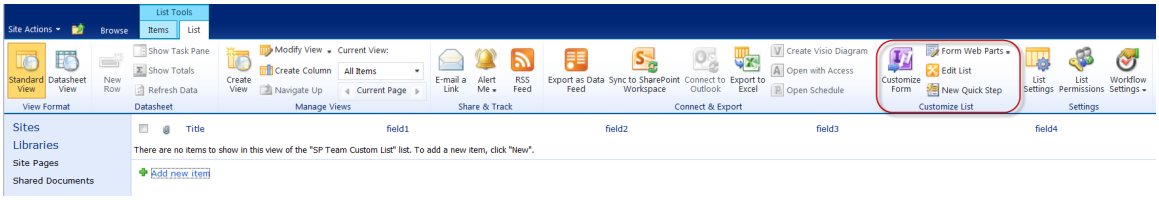

Figure 6-124 *Customizing List*

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6.8 Key Points to Remember

- A list is simply rows and columns of data. SharePoint provides multiple out of the box lists to assist teams. Some of these lists are announcements, tasks, contact lists, surveys and calendars.
- A library is list, but offers extended features to its contents and allows a mechanism for grouping similar or related items together.
- Folders can be utilized in libraries, but a better practice is to utilize metadata to provide the necessary mechanism to surface pertinent data.
- In creating lists and libraries, a user's permission level will control what actions they can take in creating and modifying these objects.
- An Issues Tracking list can be utilized for managing risks as well as issues.
- SharePoint integrates with Microsoft Office to enable users to create blog entries offline, then sync to the team site at a later time.
- Using double brackets ([[….]]) will create a link to a new page in a Wiki library.

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Chapter 7

Customizing SharePoint Sites

"Learn to say no. It will be more useful to you than learning to read Latin."
~ Charles Spurgeon

7.1 Overview

Upon completion of this chapter, the participant will be able to:

- Set a theme to a site.
- Create and utilize views.
- Edit a page modify the layout of web parts.
- Learn how to use and set alerts.

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7.2 Site Settings: Modifying Your SharePoint Site

One of the areas that can provide a great deal of control over is the ability to manage and modify your SharePoint site settings. This is important to know where and how to utilize this for maximizing SharePoint functionality. SharePoint also allows site management without the requirement of knowing code.

7.2.1 Working with Site Settings

The Site Settings page is the central page for all settings, options, and tools. This is where permission and security settings, look and feel site settings, site administration, as well as galleries that show site content can be accessed.

To access Site Settings:

1. In the **Site Actions** Menu, select **Site Settings**.

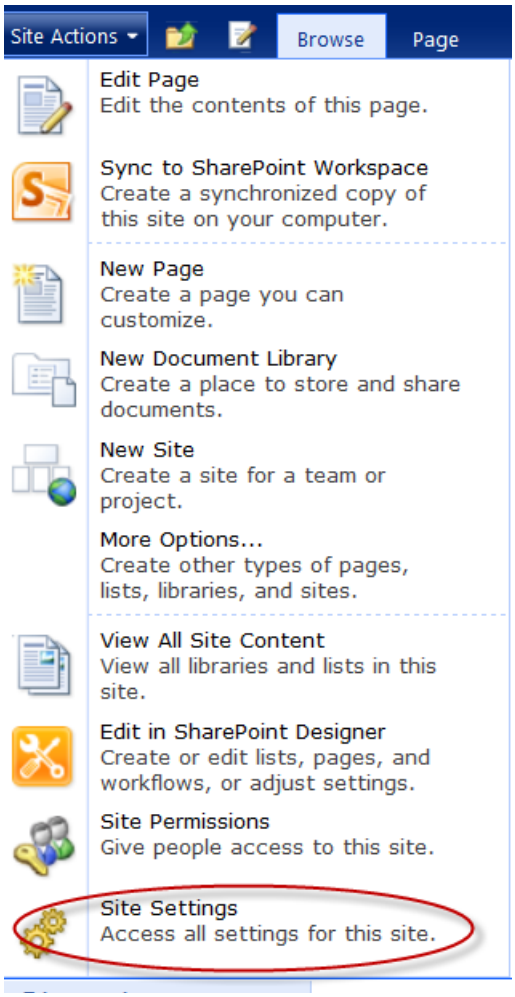

Figure 7-1 *Site Actions Menu > Site Settings*

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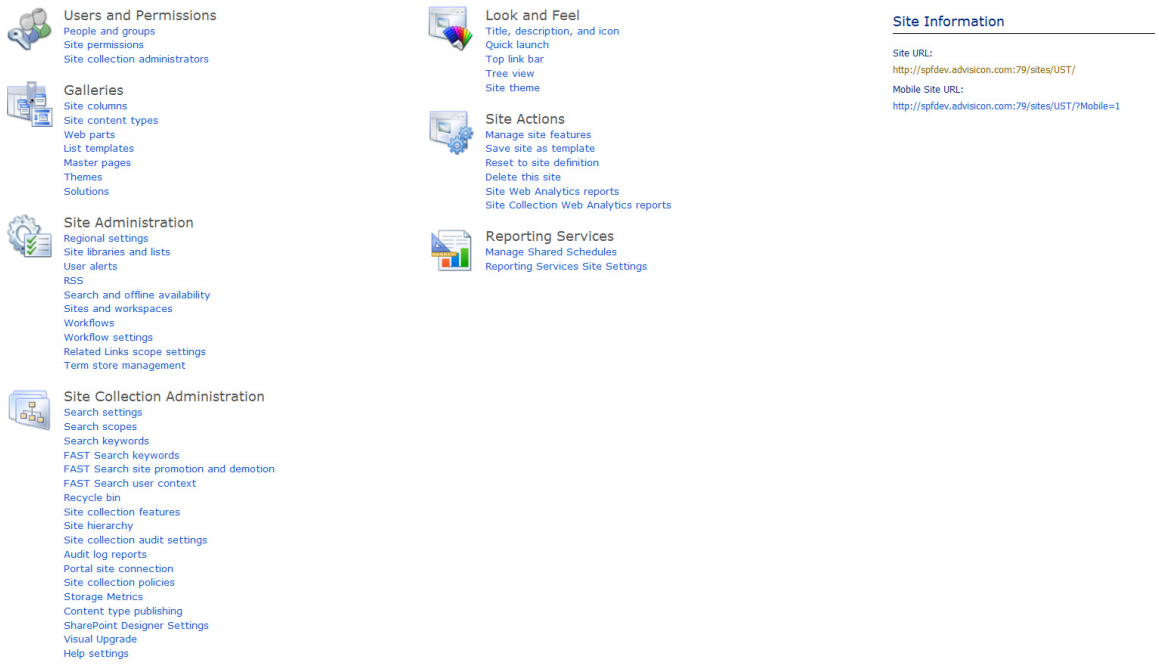

Figure 7-2 *Site Settings Main Page*

7.3 Setting a Theme

One of the easiest ways to differentiate your site is to utilize a site template theme. This is where users can quickly apply and create some different look to SharePoint sites.

7.3.1 Choosing Different Themes

When you create a new workspace, Windows does not apply a theme. The default settings will be used unless you designate a theme.

While a best practice is to maintain a similar site layout to decrease ramp up time for new users to a new site, is can be helpful to apply different themes to differentiate between different departments, or different business units.

1. Navigate to the Site Settings main page. In the Look and Feel section, select **Site theme**.

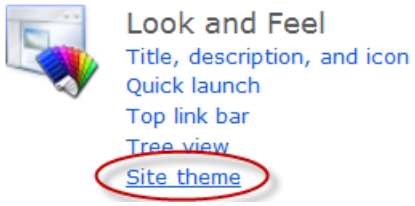

Figure 7-3 *Site Settings > Look and Feel > Site Theme*

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2. Select the desired theme.

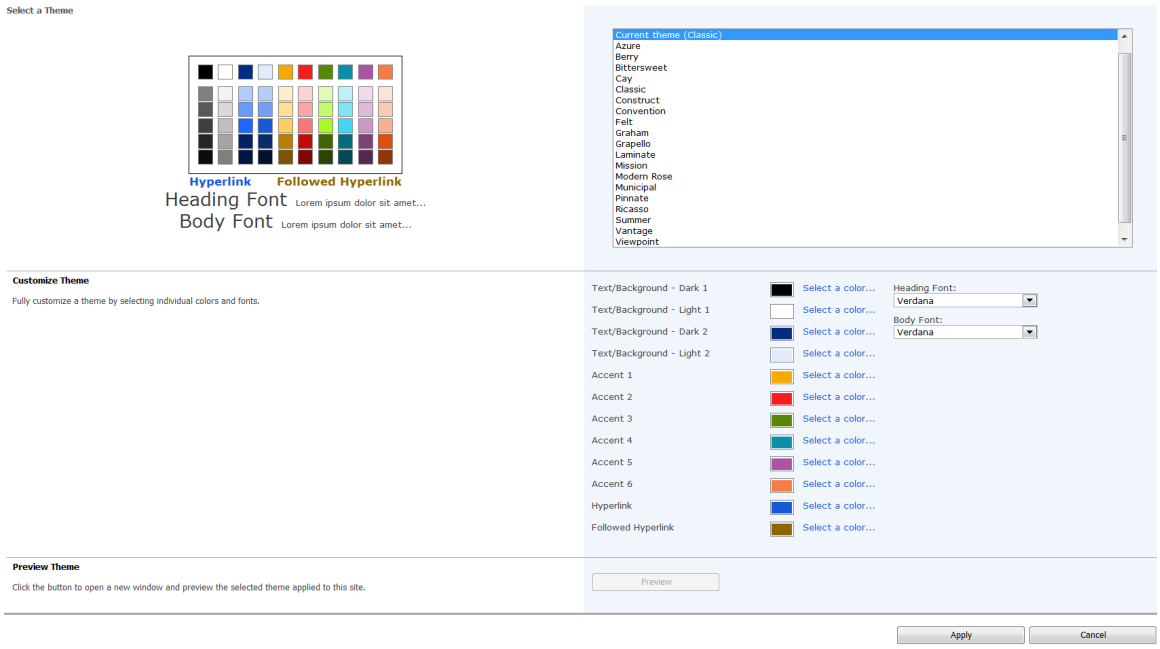


Figure 7-4 *Site Theme Option Page*

3. By selecting **Preview**, the theme can be viewed before making any changes formally.

4. Select **Apply**.

Modifications can be made to pre-defined themes, such as changing specific color applications or fonts. If modifications are desired to be kept, the revised theme can be saved to the Theme gallery for future re-use.

7.4 Designing Your Site or Workspace

SharePoint provides the ability to design sites that will map and meet the needs of teams.

7.4.1 Working with Views

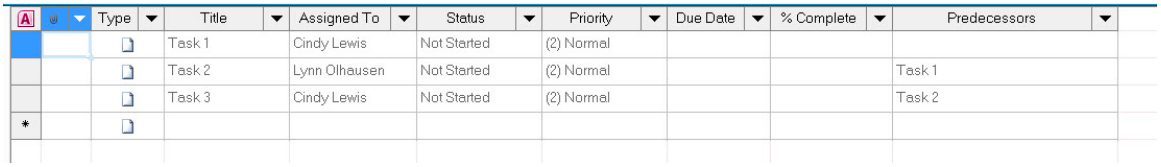
Views can be manipulated to display only certain or pertinent data. This is an easy way to display content per specific preferences. By modifying the view, the data itself is not altered; only the way it is displayed is altered.

Datasheet View

The datasheet view is helpful as it allows modification of multiple items at once. For example, you can modify data in a specific column for all items in a list rather than modifying each item separately.

To view the Datasheet View:

1. Navigate to the desired list either via the **Quick Launch** menu, or by **All Site Content**.
2. In the **List** tab, **View Format** group, click **Datasheet View**.



Type	Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors
	Task 1	Cindy Lewis	Not Started	(2) Normal			
	Task 2	Lynn Olhausen	Not Started	(2) Normal			Task 1
	Task 3	Cindy Lewis	Not Started	(2) Normal			Task 2

Figure 7-5 *Datasheet View*

You can also control some aspects of the columns, similar to Excel.

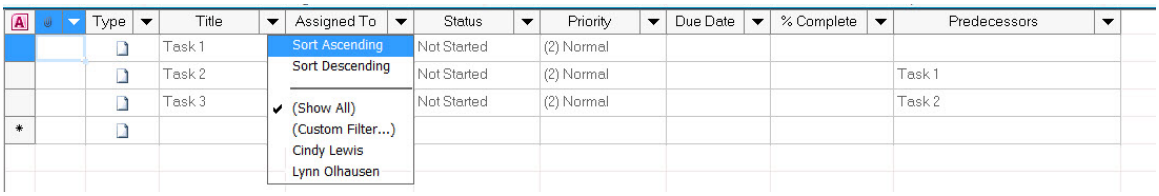


Figure 7-6 *Working within the Datasheet View*

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Explorer View

The Explorer view allows viewing content within the Internet Explorer browser. This is helpful as you can easily drag and drop items into a library.

To open Explorer view:

1. Navigate to the desired library either via the **Quick Launch** menu, or by **All Site Content**.
2. In the **Library** tab, **Connect & Export** group, click **Open with Explorer**.

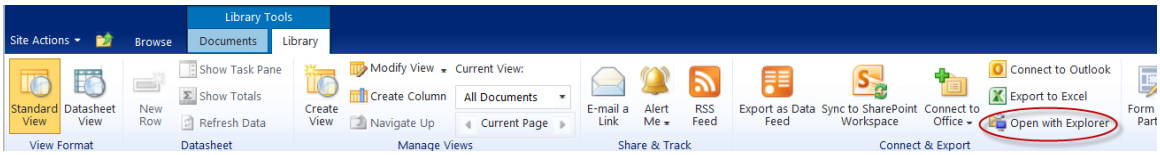

Figure 7-7 *Explorer View in the Ribbon*

3. A window opens on the desktop allowing for easily management of library data. Now items can be easily dragged and dropped to the Explorer view window from the desktop.

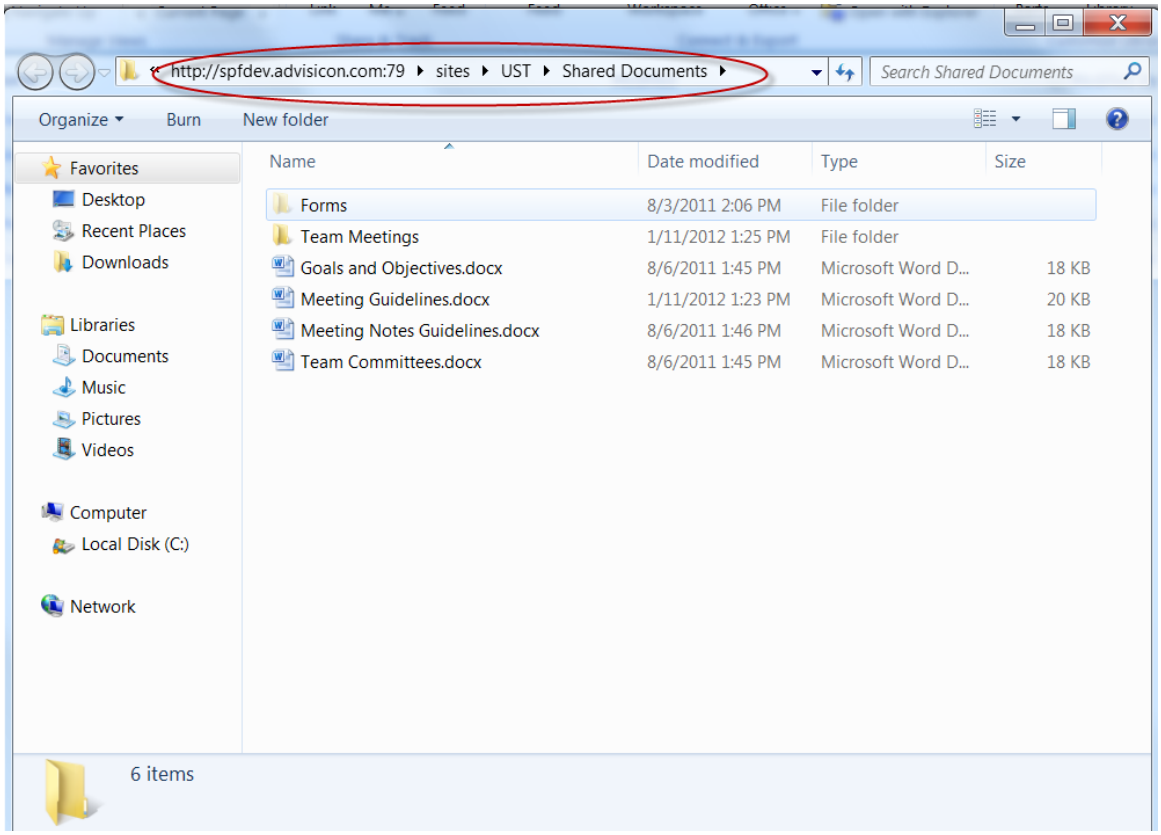

Figure 7-8 *Explorer View Window*

7.4.2 *Modifying a View*

SharePoint has many columns already configured out of the box. Adding a column to a view is easily done. For example, perhaps instead of hovering over the green arrow to see who has checked out a document, a column is created to more easily display that information.

To Modify a View:

1. Navigate to the desired library or list either via the **Quick Launch** menu, or by **All Site Content**.
2. In the **Library** or **List** tab (depending on if you are in a library or list), **Manage Views** group, click **Modify View**. A window will open up giving multiple options.

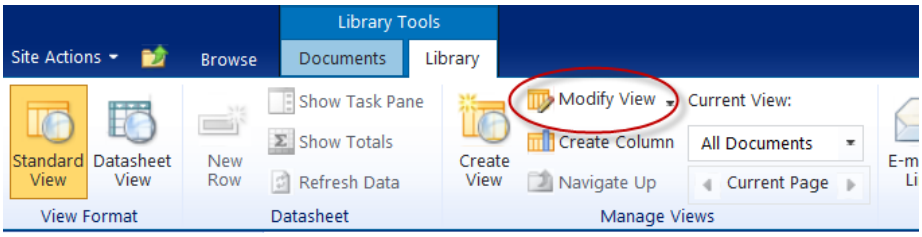

Figure 7-9 *Modify View in the Ribbon*

3. In the **Columns** section, click the checkbox(es) next to the desired columns to be added to the view.

   Note that you can easily reposition the order of how the columns appear by simply reordering them numerically on the right.

   In the example above, click **Checked Out To**.

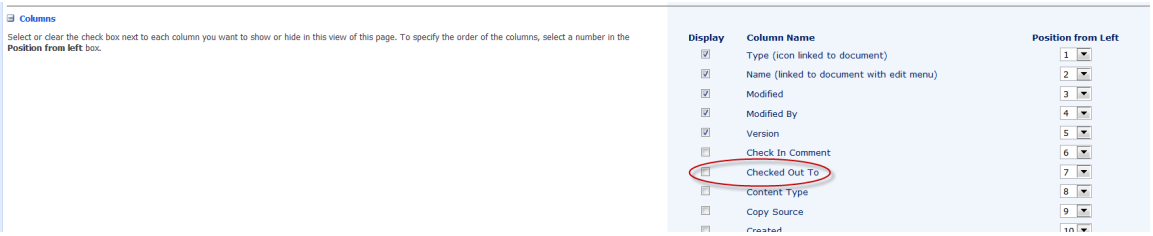

Figure 7-10 *Modifying Columns*

4. Click **OK**.

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7.4.3 Creating a Column

Creating columns is an easy way to display data that has not come out of the box.

To create a column:

1. Navigate to the desired library or list either via the **Quick Launch** menu, or by **All Site Content**.
2. In the **Library** or **List** tab (depending on if you are in a Library or List), **Manage Views** group, click **Create Column**. A window will open up giving multiple options.

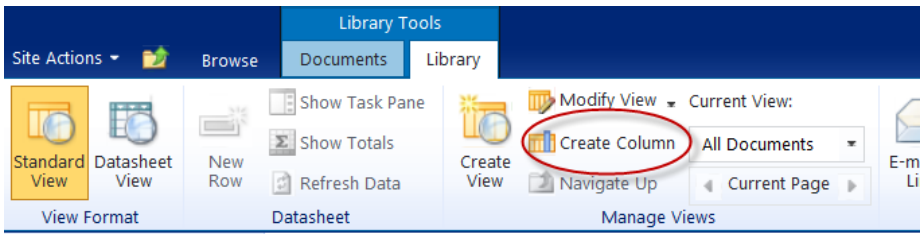

Figure 7-11 *Create Column in Ribbon*

Depending on the type of column desired (Single Line of Text, Choice, Yes/No Checkbox, etc.) SharePoint will modify the form to fit the column type options.

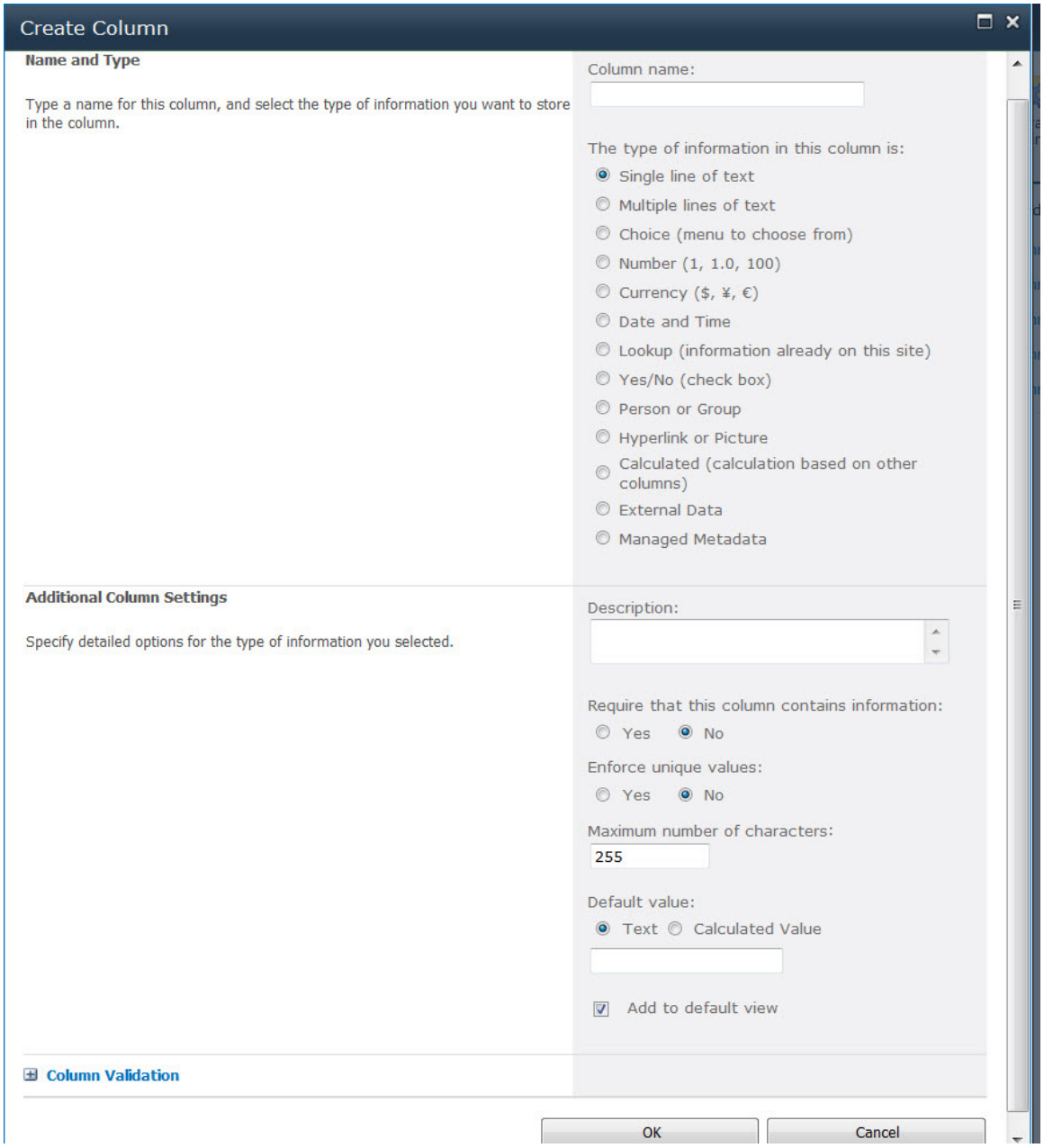

Figure 7-12 *Create Column Form*

3. Complete the Form. Click **OK**.

   Once a column has been created, it is available to be added to a view in Modify View.

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7.4.4 Creating a View

By creating views, data can be manipulated to display only desired data. Creating views will make it easier to view the specific information repeatedly and eliminate the necessity of manipulating a view over and over again.

To Create a View:

1. Navigate to the desired library or list either via the **Quick Launch** menu, or by **All Site Content**.
2. In the **Library** or **List** tab (depending on if you are in a Library or List) in the **Manage Views** group, click **Create View**.

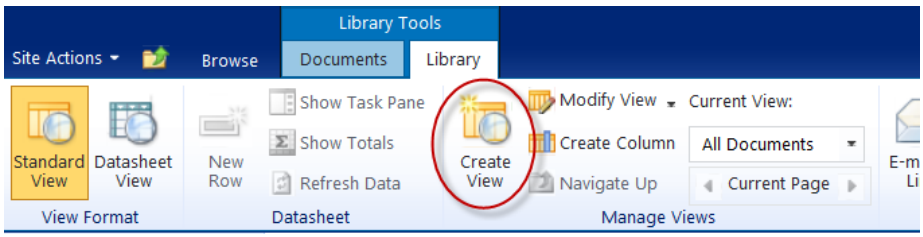

Figure 7-13 *Create View in the Ribbon*

3. There are several types of view formats that can be created. Click the appropriate choice. Note that there are some already existing view formats, such as By Due Date listed at the bottom.

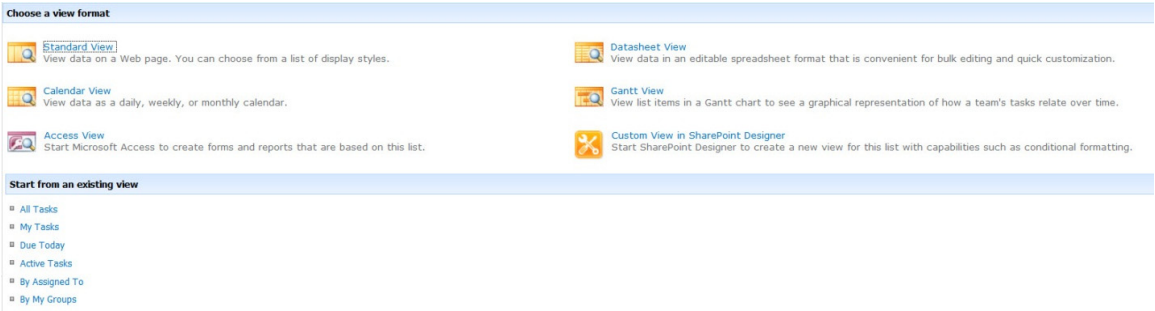

Figure 7-14 *Creating a New View*

4. A view form will open enabling the user to type a name for the new view. Fill out the form to create the view desired.
5. Click **OK** to save the view.

> There is an option to make the view a Personal view or a Public view. A Personal view is only available to the user that created it. A Public view is available to all users to apply.

7.4.5 Data Arrangement in Views

Data can also be arranged to appear a certain way. The most common ways are:

Sort

Each column can be sorted using the dropdown menu from the header column. For example, data can be arranged by Modified Date with most recent dates first. Data can also modify the view by stacked sorting (e.g., first sort by Modified By and then by Modified Date). This will display data in a specific order.

Figure 7-15 *Sorting Data in a View*

Filter

Views can be modified by applying specific filters. For example, data can be displayed so only tasks that are not completed are visible. The data on tasks that are completed is filtered out making the uncompleted tasks easy to view.

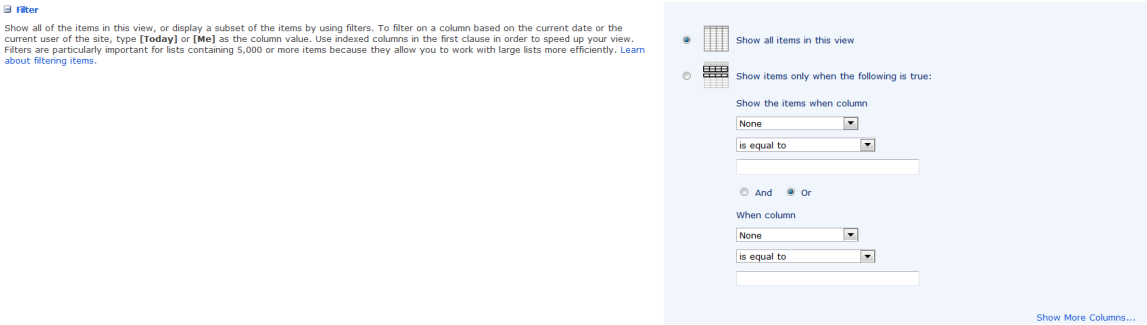

Figure 7-16 *Filtering Data in a View*

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Group

Grouping allows data to be displayed by similar groups. For example, the view can display all tasks that are completed together and all tasks that are uncompleted together.

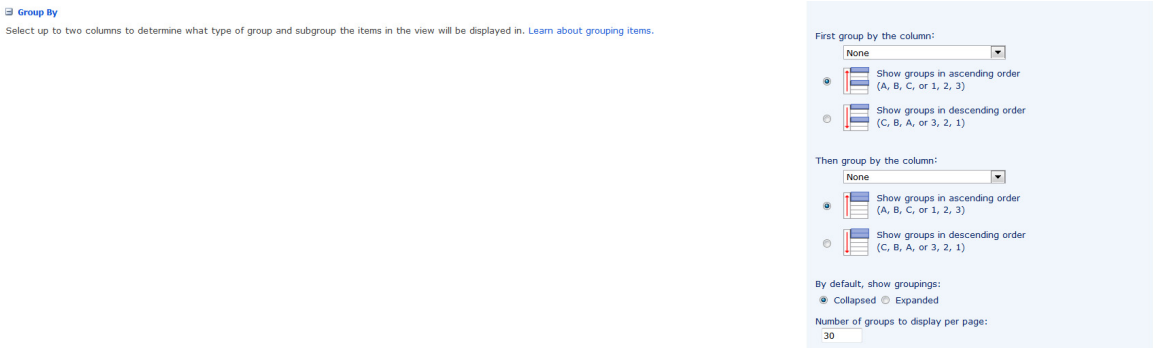

Figure 7-17 *Grouping Data in a View*

7.5 Customizing Site Appearance

Sites can be modified to showcase different data sets. This is accomplished through web parts. This will affect what information appears in the body of the web site page.

7.5.1 Modifying Web Parts on a Page

Adding a Web Part

To choose which web parts will appear on a page:

1. In the **Page** tab, **Edit** group, select **Edit Page**.

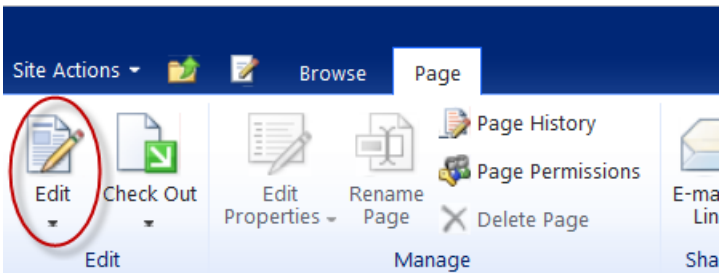

Figure 7-18 *Edit a Page in the Ribbon*

2. Select the position of the desired location for the web part by right clicking in the area. In the **Insert** Tab, **Web Parts** group, click **Web Part**.

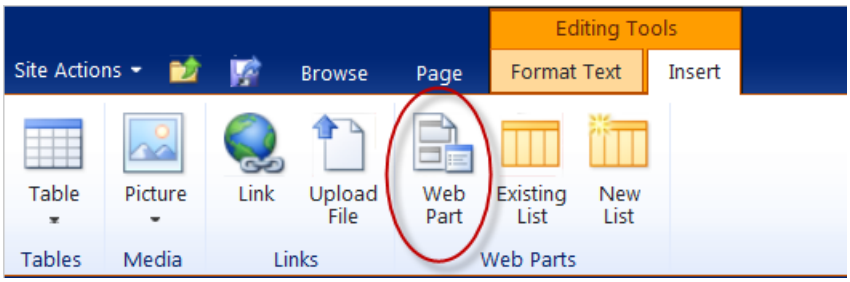

Figure 7-19 *Inserting a Web Part in the Ribbon*

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3. Select the desired web part from the available menu.

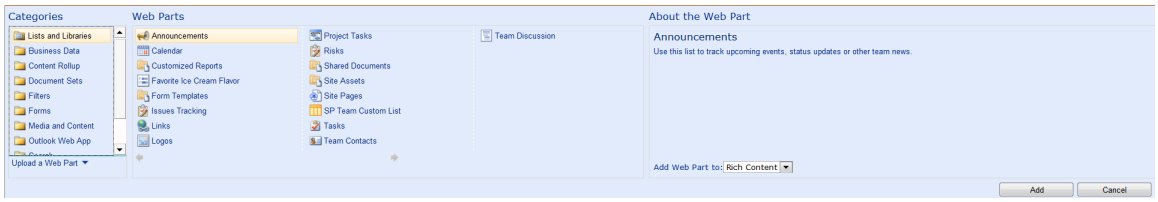

Figure 7-20 *Adding Web Part Menu*

4. Click **Add**.

Modifying a Web Part

To modify a web part:

1. In the **Page** tab, **Edit** group, click **Edit Page**.

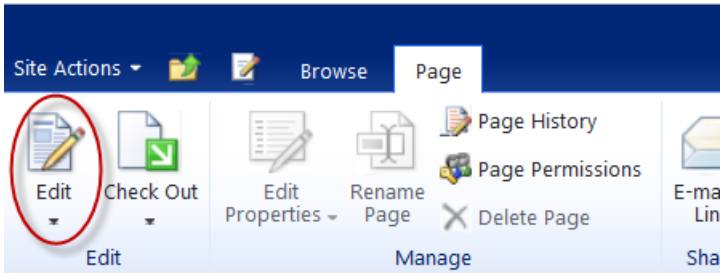

Figure 7-21 *Edit a Page in the Ribbon*

2. In the upper right corner of the web part, hover until a dropdown arrow appears. Select **Edit Web Part** from the dropdown menu.

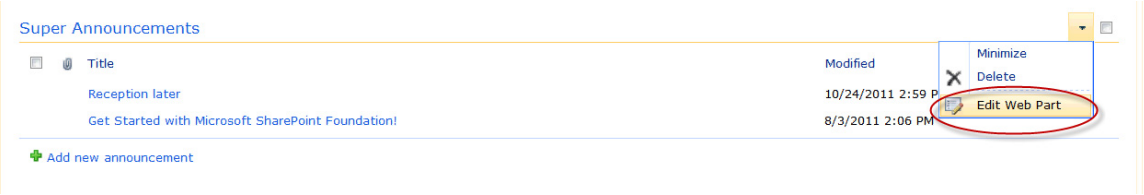

Figure 7-22 *Edit Web Part Drop Down Menu*

3. From the available menu that appears on the right side of the page, select the desired modifications. From this menu you can change the appearance of the web part, the location of the web part, and so on.

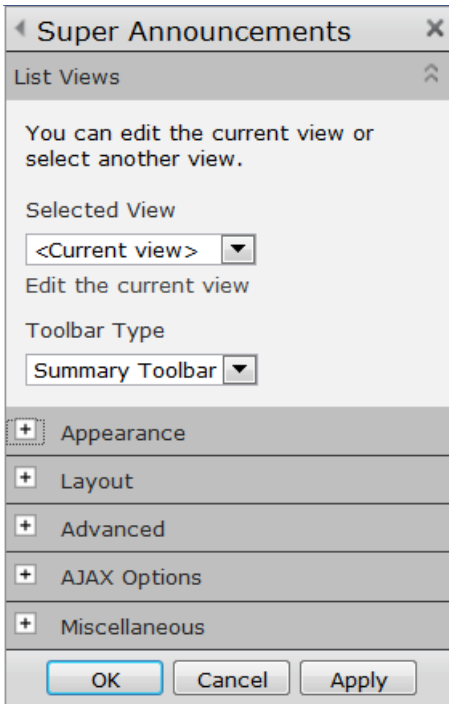

Figure 7-23 *Modifying Web Part Menu*

4. When finished making modifications click **OK**.

Deleting a Web Part

1. In the **Page** tab, **Edit** group, select **Edit Page**.

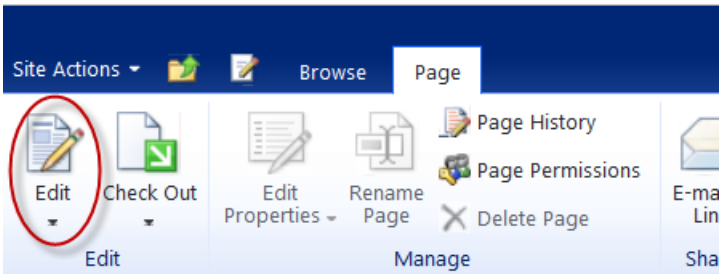

Figure 7-24 *Edit a Page in the Ribbon*

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2. In the upper right corner of the web part, hover until a dropdown arrow appears. Select **Delete** from the dropdown menu.

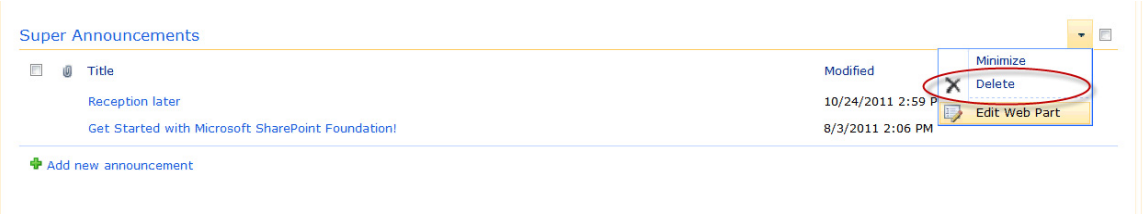

Figure 7-25 *Delete Web Part Drop Down Menu*

3. A warning dialog box will open asking for confirmation to delete the web part. Click **OK**.

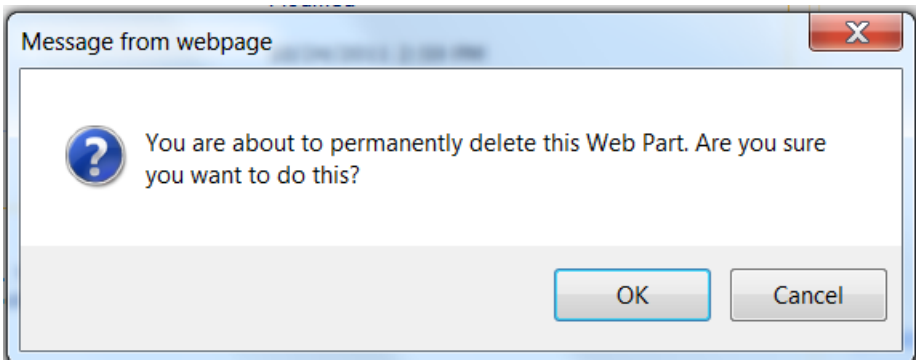

Figure 7-26 *Deletion Confirmation Dialogue Box*

7.5.2 Organizing and Moving Web Parts

Web parts are laid out in what are called Zones. These zones are defined when the site is created. SharePoint 2010 allows you to customize the layout of the web parts in your site.

To move web parts from one zone or another, in the **Page** tab, **Edit** group, click **Edit Page** and simply drag and drop the web part to the desired location.

Closing or Hiding Web Parts

General end users should not hide or close web parts on sites. Even though web parts may not be visible when hidden or closed they are still a part of the page. This means that each hidden or closed web part must still load when the page is opened, despite the fact that they cannot be seen.

This can lead to overburdening the site and slowing performance. It can also quickly become a complicated process to uncover many hidden web parts to restore performance to the site.

It is highly recommended that the SharePoint administrator disable this option for end users.

Minimizing Web Parts

Web parts can be minimized to expand screen real estate. These web parts are still visible to the end user via the header. Web parts can easily be minimized and restored by clicking the arrow in the top right of the header and choosing the appropriate option.

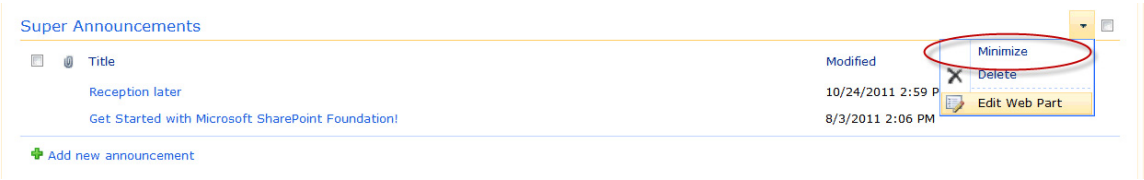

Figure 7-27 *Minimize Web Part Drop Down Menu*

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7.5.3 Personalizing a Web Site

Individual users can personalize their own site home page. This will allow users to create a home page that fits their work own habit processes.

To personalize a web site:

1. In the user menu (upper right corner of the web site), choose Personalize this page.

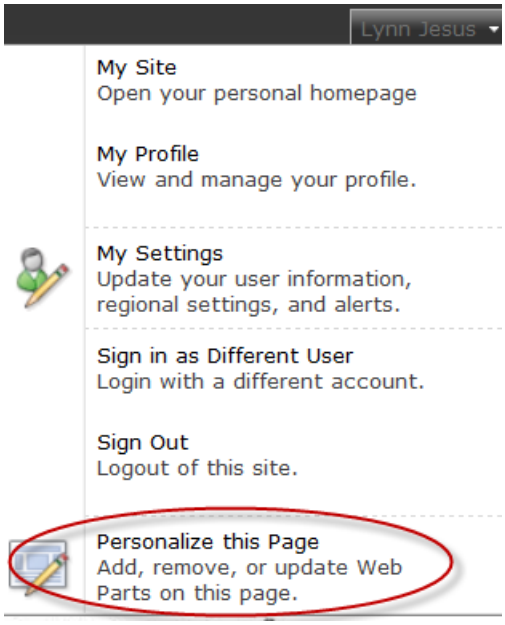

Figure 7-28 *Personalize This Page from User Drop Down Menu*

Modifications can be made as described earlier in this chapter.

7.6 Working with Alerts

Alerts will notify users when an item has been added, deleted, modified, or updated. Automating notification of changes can be especially helpful in time management, so the item does not have to be manually checked for modifications.

Alerts can be created on a granular level – for instance from a library level, folder level or even a single item, such as a document, level.

7.6.1 Creating an Alert

1. Navigate to the desired item.
2. In the in the appropriate tab, (usually the tab will be the List tab, Library tab, or even Document tab, depending on which item the alert is for), **Share & Track** group, click **Set alert on this…** from the **Alert Me** dropdown menu.

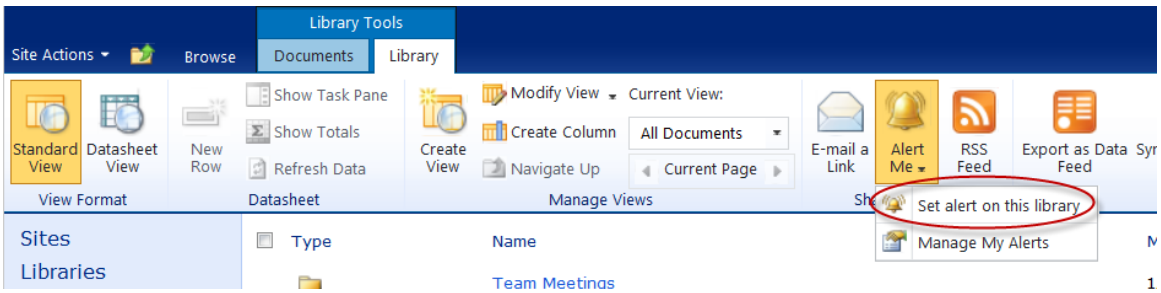

Figure 7-29 *Setting Alerts in the Ribbon*

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3. Complete the Form.

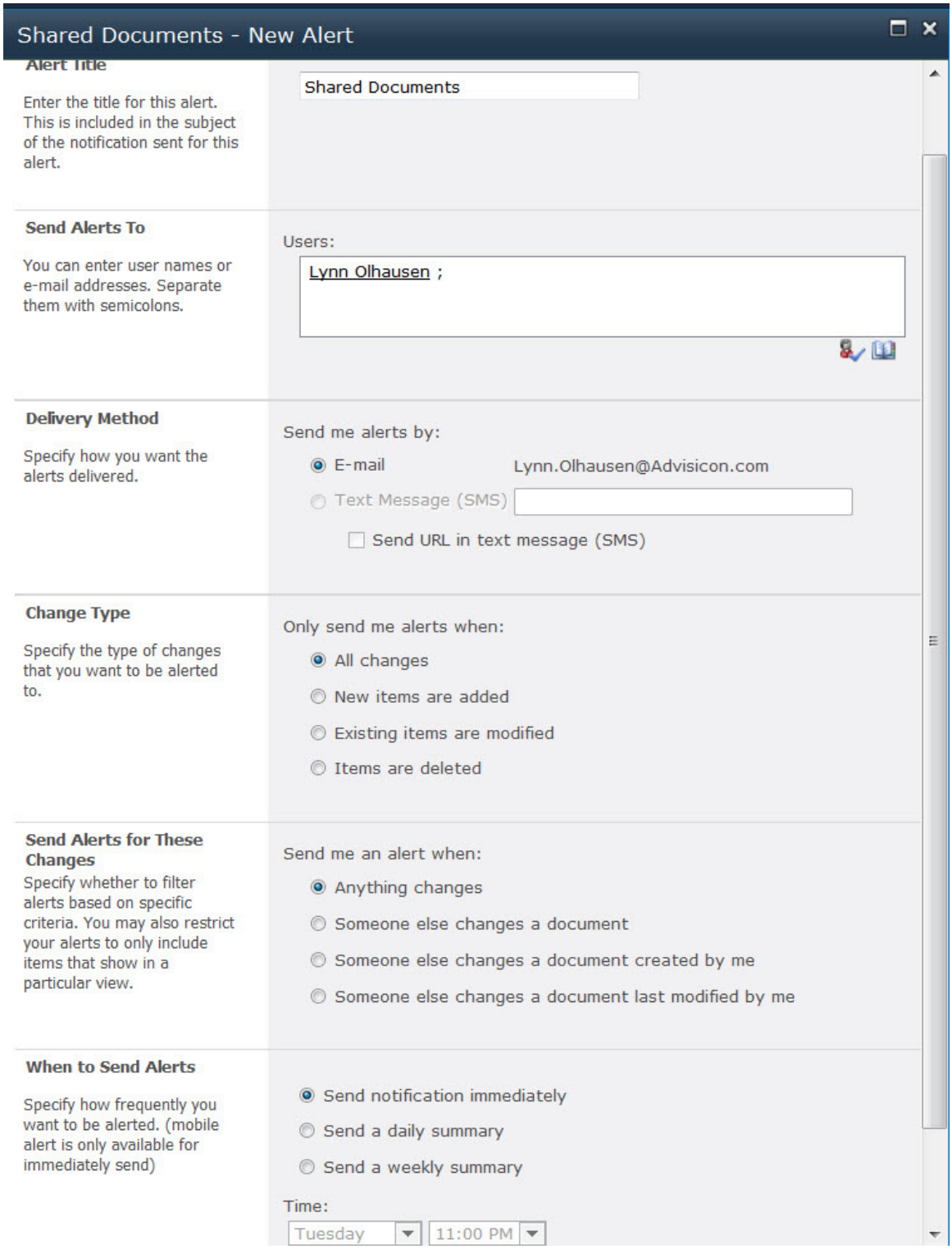

Figure 7-30 *New Alert Form*

There are several items to help manage the alert:

- **Delivery Method** – alerts can be sent via email or text message.
- **Change Type** – alerts can be sent for specific types of changes, such as all changes, or when existing items are modified.
- **Send Alerts for These Changes** – alerts can be scheduled by certain criteria, such as all change, or when another user modifies a document last modified by the user.
- **When to Send Alerts** – SharePoint can manage alerts from any change to alerting on a weekly basis and sending the alerts at a specified day of the week and time.

4. Click **OK**.

> Caution must be used when setting Alerts. Make sure Alerts are set for only desired content. Remember that an Alert can be for a single document or an entire List tor Library. If the Alert is specified for any changes and it was mistakenly applied at the Library level, Alerts will be sent anytime any document is modified in the entire Library. This can overwhelm a user's mailbox very quickly.

7.6.2 Managing Alerts

1. In the **List** or **Library** tab (depending if you are in a List or a Library) **Share & Track** group, click **Manage My Alerts** from the **Alert Me** dropdown menu.

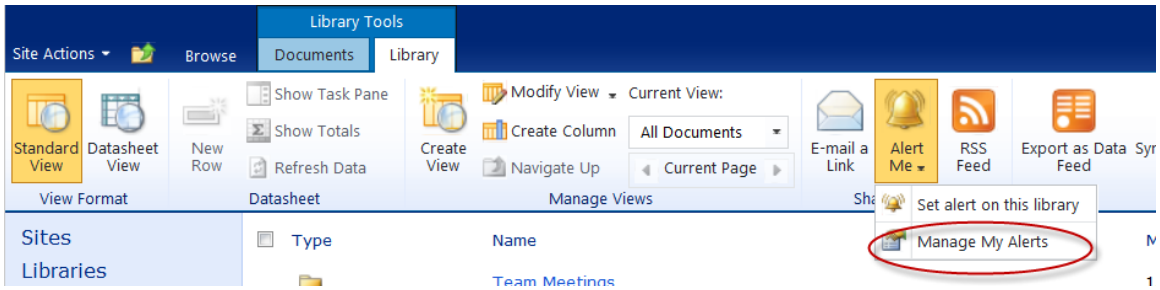

Figure 7-31 *Managing Alerts in the Ribbon*

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2. A window will open that will allow the user to add Alerts or delete Alerts as needed.

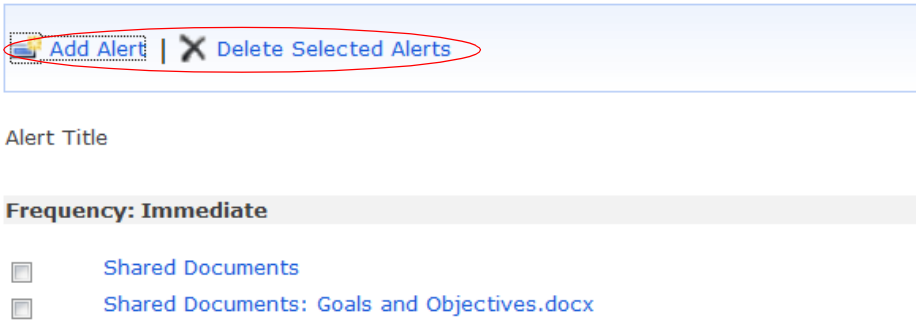

Figure 7-32 *Managing Alerts Menu*

If someone else has put you on an alert list, but you can't access the site to turn it off, you'll have to contact the person to get access to the site since they don't have a way to access the alerts for you. You must go to the location of an alert to delete it, even if it's on someone else's site.

SharePoint will alert the user on exactly what it was configured to send the alert on. Be careful that the end user is applying the alert at the correct level. If a user wanted to be alerted anytime something in a specific folder changed, but set it on the library - then they will get alerted each time anything is changed in anything in the entire library. This can lead to disruptive alerts.

7.7 3-State Workflow

Workflows create automated process that assist in efficiency. Replacing manual processes can save a lot of time for teams. SharePoint workflows will move items along a work flow process automatically driving the process effortlessly for the team.

To add a workflow:

1. In the **List** or **Library** tab, **Settings** group, click the dropdown arrow next to **Workflow Settings** and click **Add a Workflow**.

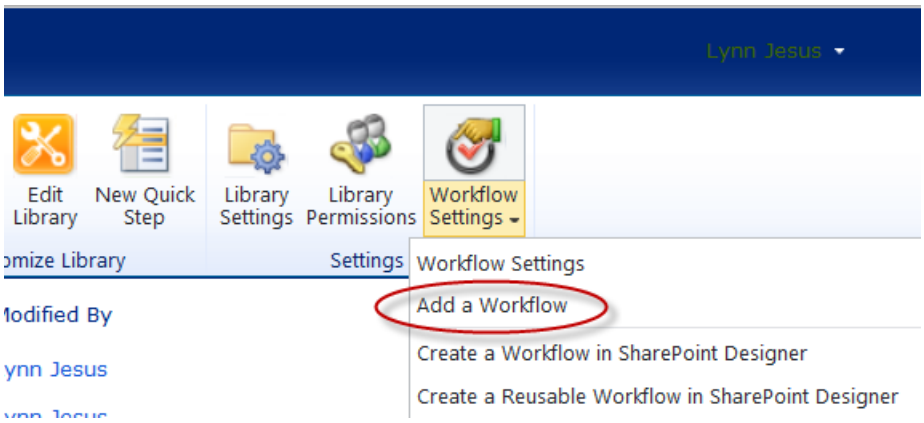

Figure 7-33 *Add a Workflow in the Ribbon*

2. Complete the workflow form page by page by clicking **Next**.

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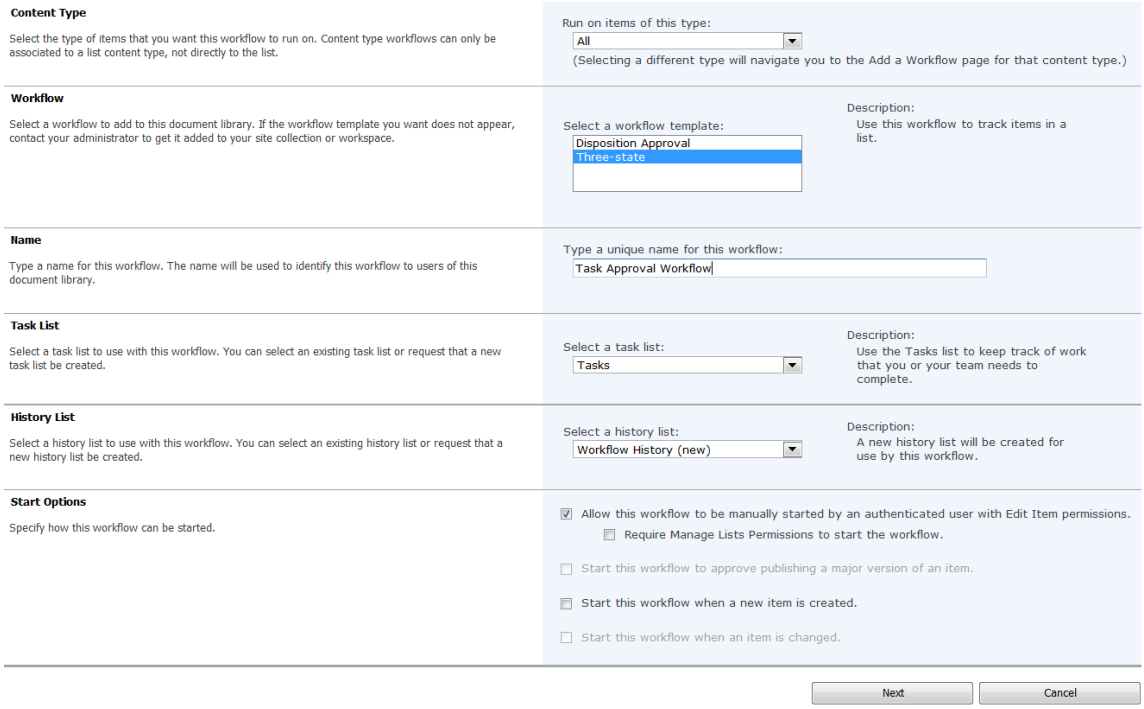

Figure 7-34 *Workflow Form*

3. Click **OK**.

SharePoint Foundation contains one 3-state workflow out of the box. Any additional workflows will need to be created in SharePoint Designer. SharePoint Server however, has many different types of workflows out of the box.

7.8 Key Points to Remember

- A theme can be applied to a site. Often organizations will impose a site template outlining the layout of the site, but themes can different between departments or business units.
- A Datasheet view allows for modification of multiple items in a list at the same time, rather than opening each individual list item.
- Customizing views is a quick way to surface pertinent data. Views can be customized through adding columns, reordering columns and applying grouping, filtering and sorting.
- Views can be made Personal which is visible only to the end user, or Public and available to anyone who has the appropriate permissions to access the site.
- By personalizing the web page users can modify how their page appears to match their own work habits and processes. This personal view is visible only to the user.
- Alerts can be utilized to notify users of changes to items on the site. These alerts are easily customized and can be applied to a library, list, folder or individual item.

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Chapter 8

Customization with SharePoint Designer

"You were born an Original, don't die a copy."
~ John Mason

8.1 Introduction to SharePoint Designer

Though much customization of the SharePoint user interface can be completed via the browser-based functions, more complex designs and solutions can be created through SharePoint Designer (SPD). This powerful utility is free for download trough the Microsoft Download Center website. Using SPD one can create web parts, custom data views, web pages, web sites, and more.

This next chapter will provide the basic know-how to navigate through the SPD interface, as well as how to create and publish web parts, custom data views, and custom pages. This book will only cover the primary and elementary functions of SPD 2010 as they relate to customizing a SharePoint Foundation environment.

8.1.1 SharePoint Designer 2010 User Interface

Like all Microsoft Office 2010 products, SPD relies heavily on the new Office ribbon to expose functionality and options. Users of SPD 2007 and users new to Office 2010 may find themselves looking for commands upon their first use. When in doubt, look to the ribbon!

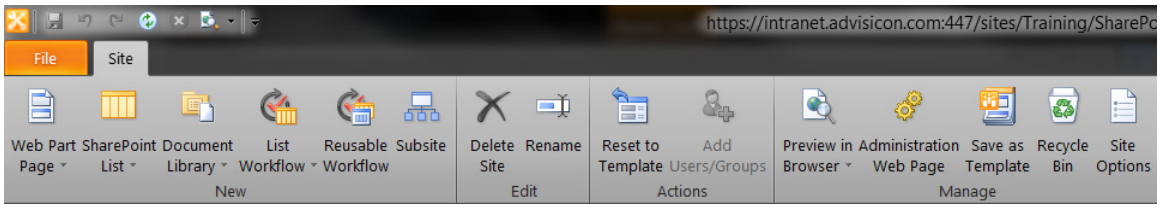

Figure 8-1 *The SharePoint Designer 2010 Ribbon*

Another new change to SPD 2010 is the addition of the Office 2010 backstage. Upon opening SPD from the Start Menu this is the first thing that you will see. This view can also be reached at any time by clicking on the **File** tab.

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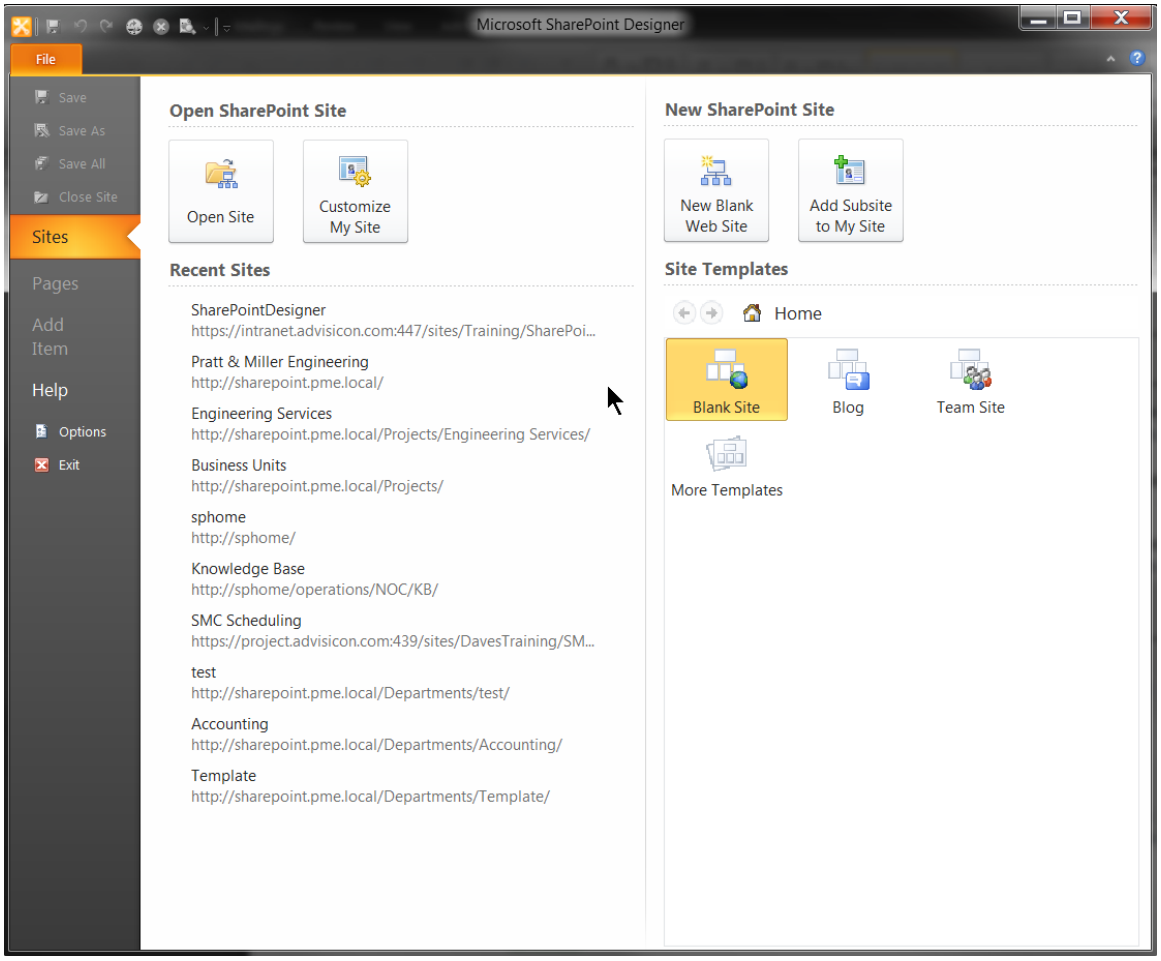

Figure 8-2 *The SharePoint Designer 2010 Backstage landing page*

When opening SPD from the START MENU you are presented with four basic options.

- Open a SharePoint Site
  - Open Site
  - Customize My Site
- Go to a recently viewed Site
- Create a new SharePoint Site
  - New Blank Web Site
  - Add Subsite to My Site
- Site Templates
  - Various Site Template Choices

8.1.2 Verifying SharePoint Foundation SPD Settings

In order to get complete functionality out of SPD, SharePoint Foundation must be configured to allow it. Only site collection administrators are able to change or verify the site collection's SPD settings. The following steps can be used to verify that the site collection is setup and ready for supporting SPD.

1. Log into the top level site of the collection as a Site Collection Administrator.
2. In the **Site Actions** menu, click **Site Settings**.
3. In the Site Collection Administration section select **SharePoint Designer Settings**.

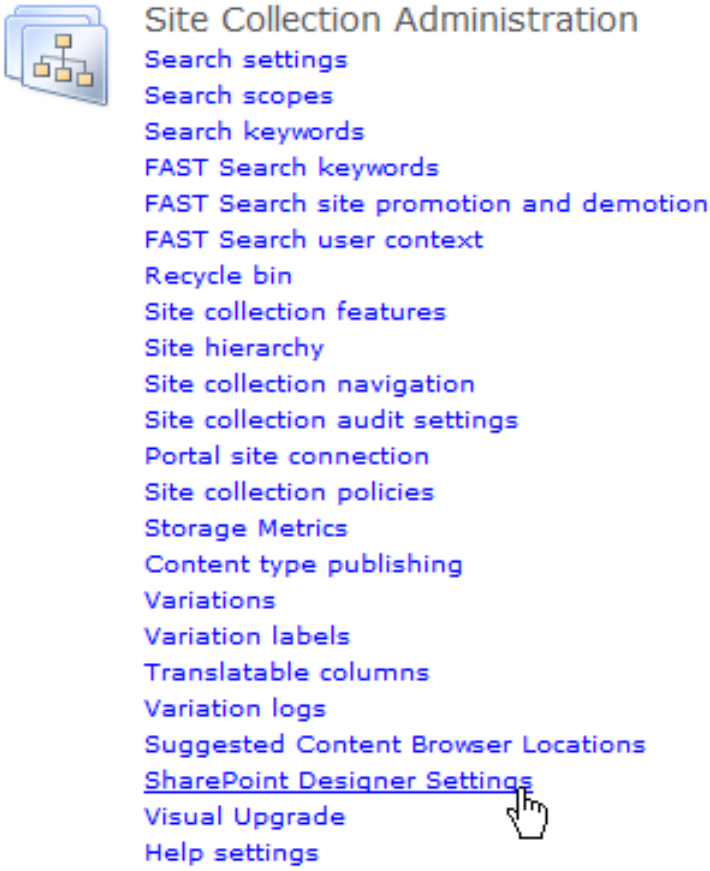

Figure 8-3 *Under the Site Collection Administration Settings section is where to find the SharePoint Designer Server Settings*

4. Verify that all four of the checkboxes are selected and click **OK**.

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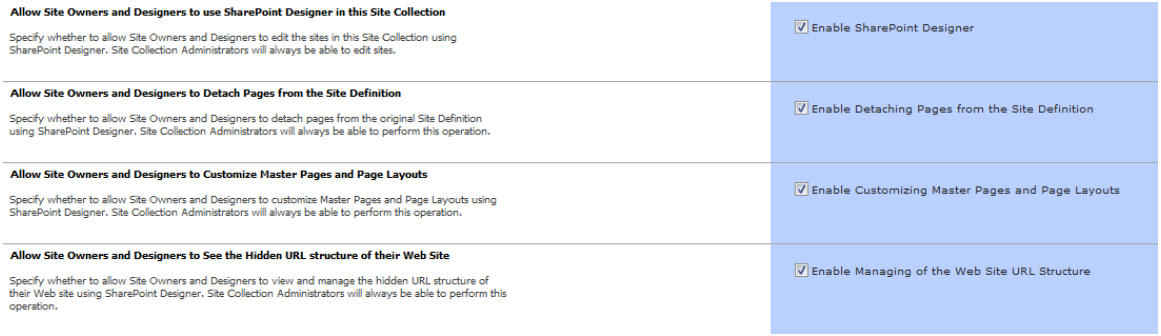

Figure 8-4 *The SharePoint Designer Server Settings page*

An easy way to determine if the site is setup for full SPD functionality is to open the site through SPD. If the **Navigation** – **Site Object** pane has **Master Pages**, **Site Groups**, **Subsites**, and **All Files** objects listed, then all access and server configuration settings are set up properly.

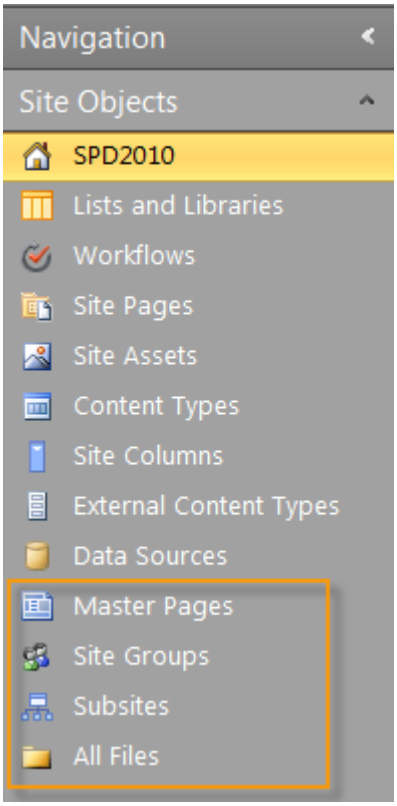

Figure 8-5 *Notice the box highlighting the lower section of the SharePoint Designer navigation pane*

8.1.3 Opening SPD from a SharePoint Site

To quickly and easily connect SPD to a SharePoint site for customization or administration:

1. In the **Site Actions** menu, select **Open in SharePoint Designer**.

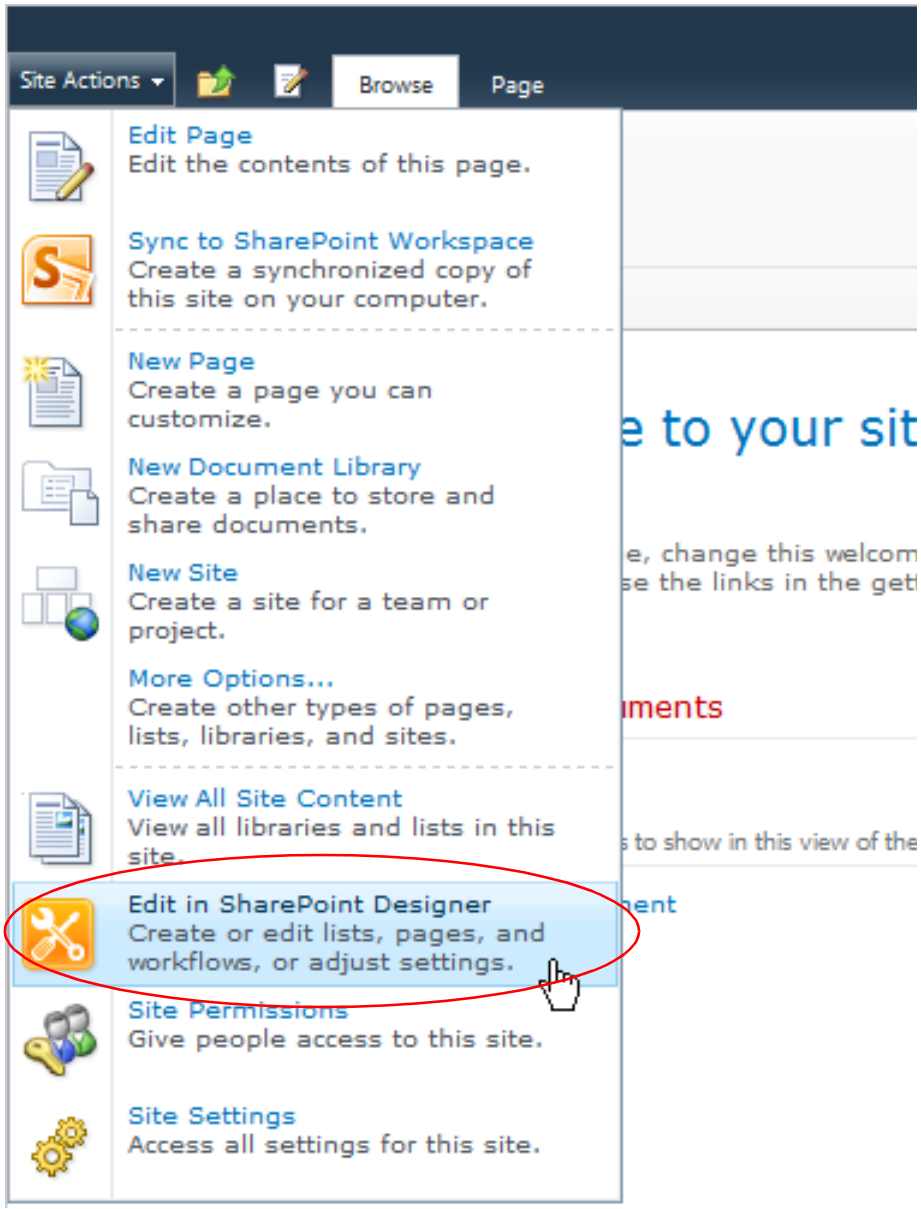

Figure 8-6 *Opening a page for editing with SPD 2010 through the site actions menu*

The functionalities presented by SPD are controlled by the permissions of the connecting user. For example, if a user has only contributor rights to a site, minimal functionality and no administrative functions are available in SPD. This allows administrators to control the functions available at a granular

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level, helping to secure and protect the site from unwanted configuration changes while still providing a rich environment for customization.

For all functions and procedures to follow it is assumed that the connection to the SharePoint site is made with full administrative rights.

When opening SPD in this manner you are presented with the SITE tab view.

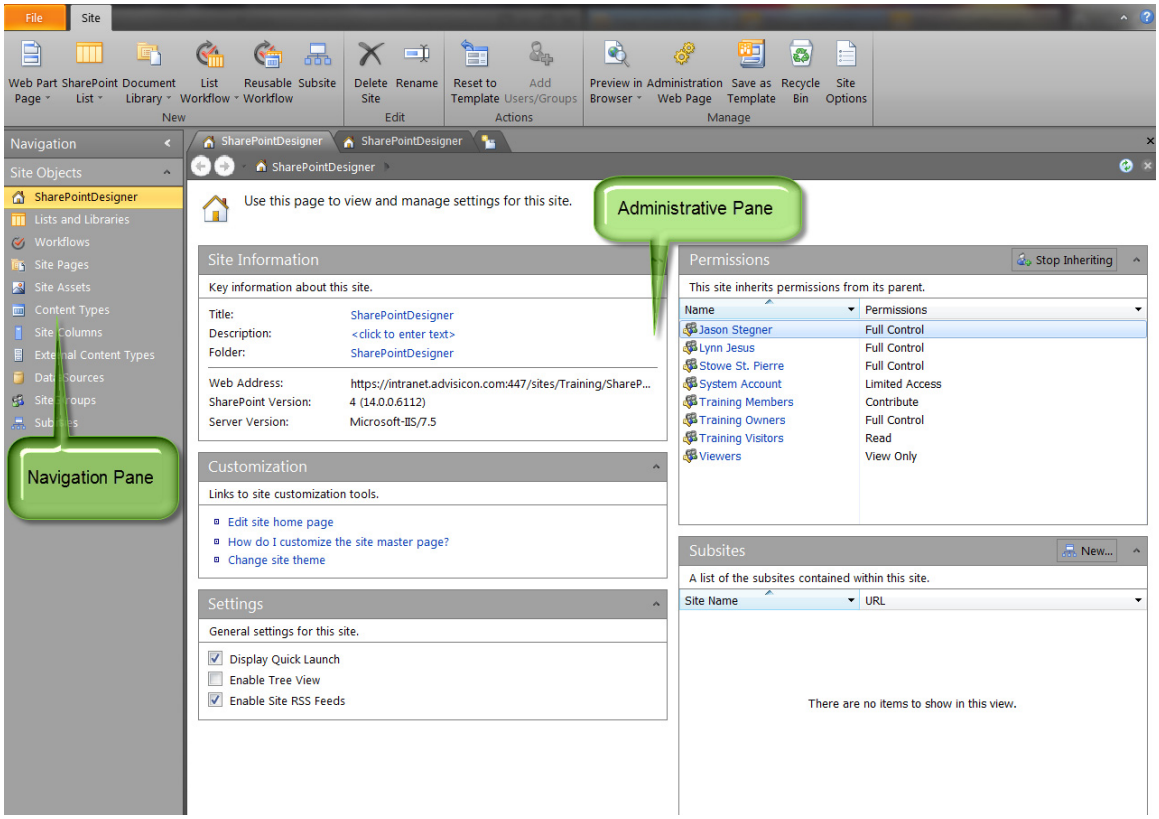

Figure 8-7 *Selecting items in the navigation pane opens functions in the ribbon*

The navigation pane provides an organized view of all available SharePoint components and features associated with the site. Clicking on the different items initiates the ribbon and the associated commands for the selected object. The image below demonstrates the ribbon commands available when the Lists and Libraries object in the navigation pane is selected.

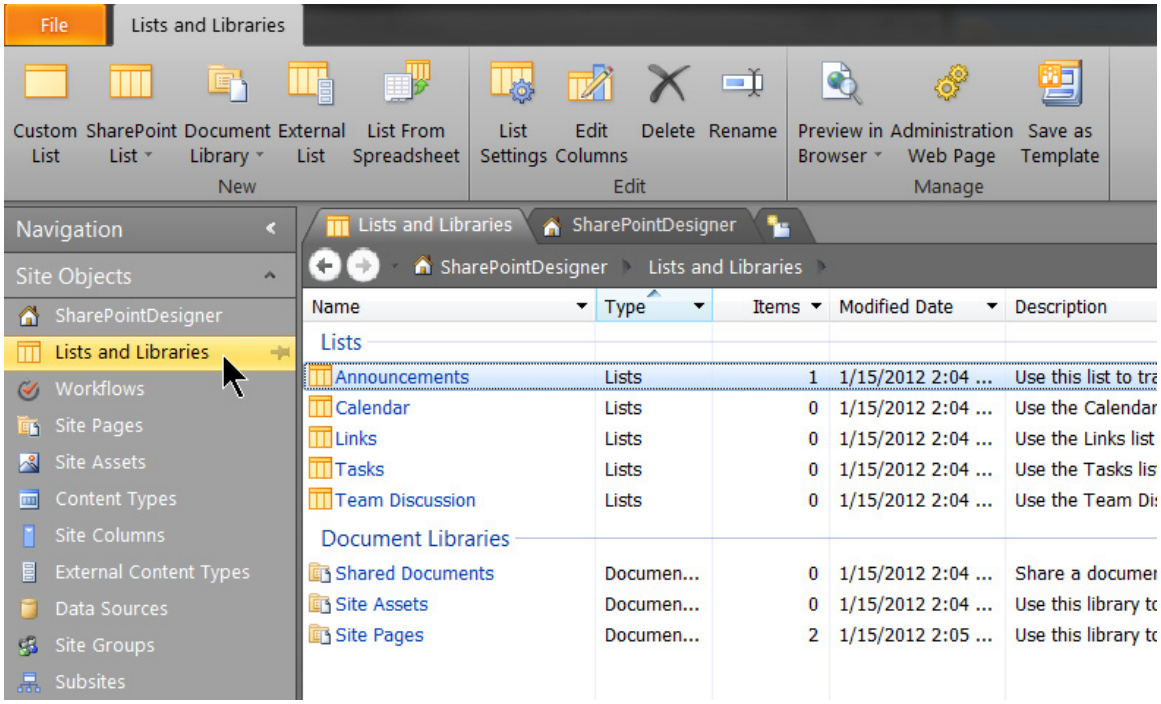

Figure 8-8 *When selecting the Lists and Libraries object in the navigation pane you are presented with all lists and libraries in the presently connected site*

8.1.4 Creating Content with SPD

The following section will demonstrate how to create the following SharePoint Foundation items using SPD 2010:

- Sites and Subsites
- Pages
- Data View Web Parts
- Custom Workflows

Creating Sites and Subsites with SPD 2010

Creating a SharePoint site through SPD is a simple and intuitive process. For all procedures following it is assumed that full administrative rights are granted and that SPD is connected to the top level site of a SharePoint Foundation server.

1. To begin, click the **File** tab and select **Sites**.

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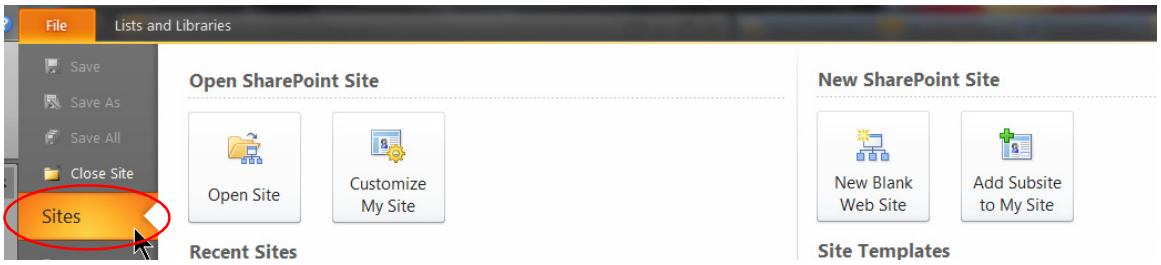

Figure 8-9 *The SPD 2010 backstage when the sites tab is selected*

2. Choose **Team Site** from the **Site Templates** section.

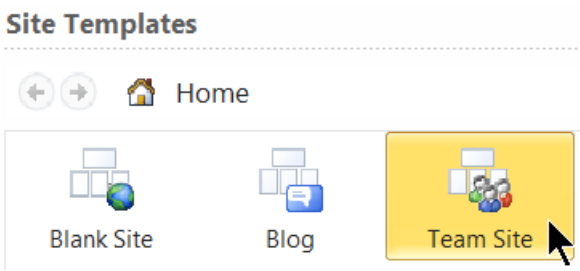

Figure 8-10 *Site templates presented by the SPD backstage*

3. Enter the desired URL by appending the new site name to the end of the top level site as demonstrated below. Substitute your server and site names for the text pointed out by the yellow arrows.

   Click **OK** and allow SPD to complete the site creation process. During this process various dialog boxes are presented to show the status of the background site creation procedures.

Figure 8-11 *Enter a site name. Try to avoid any spaces or non-alphanumeric characters*

4. A new SPD window will open to the **Properties and Settings** page of the newly created site. All customizations going forward will occur on this site. By default the title will be that of the Template type chosen; in this example the title “Team Site.”

   Click on the blue “Team Site” in the **Site Information** panel and enter the desired site title. Click **Save** to commit the title change. This will be displayed in the Banner of the Home page of the site.

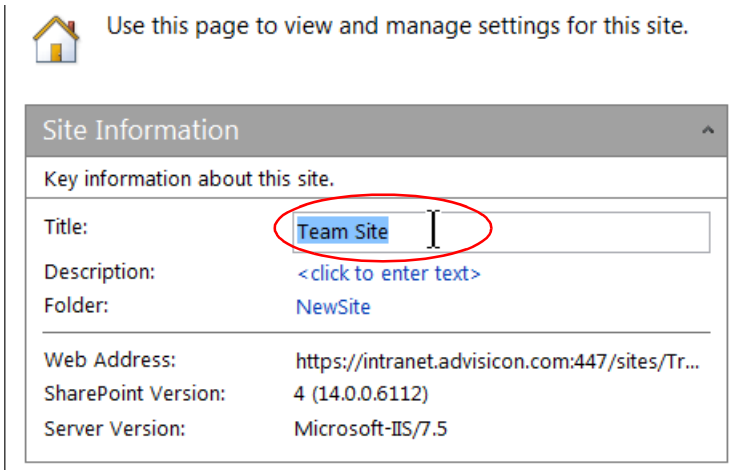

Figure 8-12 *Change settings such as the Site Title and Description on the site information panel*

5. To create a subsite follow the above procedures and simply append the subsite address to the end of the URL entered in STEP 3.

   Alternate Subsite Creation method:

   1. On the **Site** tab you may also select the **New Site** button in the **Subsites** panel.
   2. Choose the appropriate template from the list and enter the desired address.
   3. Click **OK** to complete the subsite creation process.

Creating SharePoint Pages with SPD 2010

The following procedures are being completed in the site created in the previous section.

SPD can create different types of SharePoint and Web-based pages and files. These file types and page types include:

- Web Part Page

  A SharePoint page based off of the site Master page that contains sections for adding web parts. These pages do not utilize the left navigation or “Quick Launch” menu. This provides extra usable page width making this style of page well suited for reports and dashboards.

- Simple .Aspx Page

  A simple .aspx web page that is not based off of the site Master page. This type of page will contain no SharePoint formatting or content when first created. This type of page is most commonly used for supporting custom developed .Net-based web applications. It could then be utilized in web parts or to support background site and application functions.

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- Master Page Based .Aspx Page

  This .aspx page type is built off of the site Master page. Using the Master page as the starting point creates a customizable page containing all of the SharePoint content and formatting that is the site default. It includes the Quick Launch menu as well as all other basic navigation components. Any part of this page may be customized as desired.

- HTML Page

  Simple HTML pages contain no SharePoint objects or content. They are often created and used in Page Viewer, or Content Editor web parts. They may also be utilized to provide a framework for different types of images and formatting content.

- CSS

  Cascading Style Sheets (CSS) allow for rich visual customization of SharePoint. They can be utilized to manipulate all visual aspects of the user interface.

- Javascript

  SharePoint Foundation features such as the ribbon and pop out dialog boxes rely heavily on Javascript for function. SPD can create and edit Javascript files. Intellisense scripting assistance helps speed up, and simplify the development process.

Of the above page types Web Part and Master Page Based Page creation procedures will be demonstrated.

Web Part Page Creation:

1. While on the **Site** tab highlight the top level object in the **Site Objects** pane. This will activate the ribbon with basic creation and administrative functions

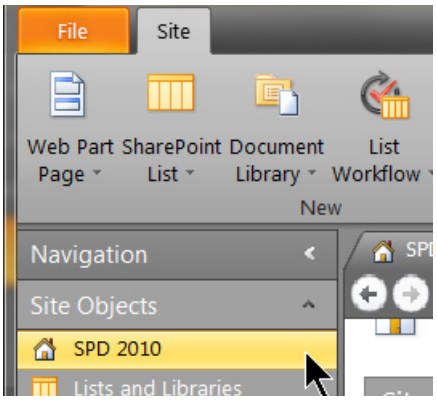

Figure 8-13 *Click the top level object to activate different create functions in the ribbon*

2. In the **Site** tab, **New** group, click the dropdown arrow next to **Web Part Page**. This will unfold to provide the various web part page layouts. Click on the layout of your choice to create the page.

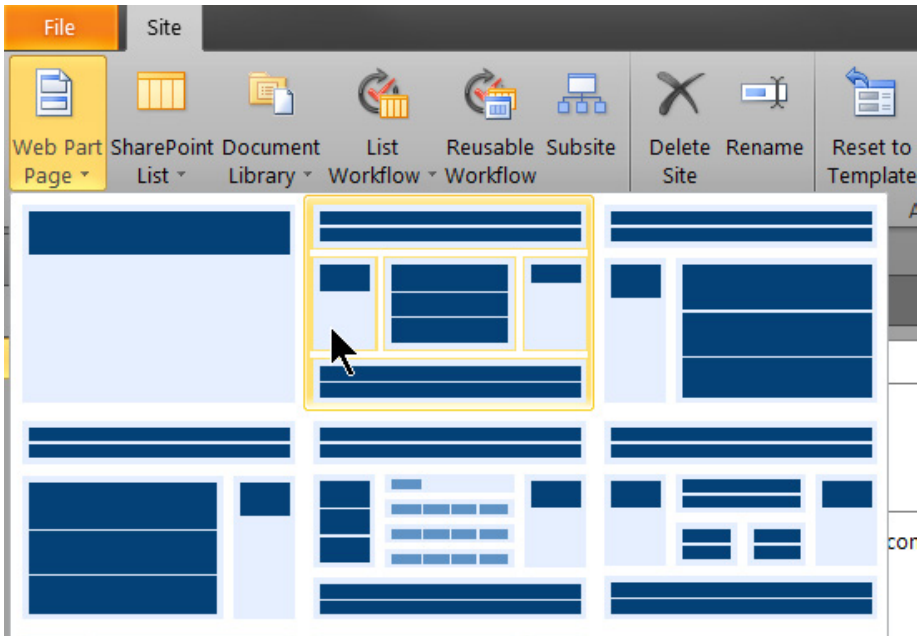

Figure 8-14 *Select a web part page layout from the drop down menu*

3. Enter a name for the page in the **New Web Part Page** dialog box. This will become the page URL so best practice dictates that no spaces or non-alphanumeric characters are used for this property. The default location for new pages is the **SitePages** library. If another suitable library is available on the site it will be displayed in the drop down list.

4. Click **OK** to create the page.

Be sure to click **Save** to commit the new page to the site!

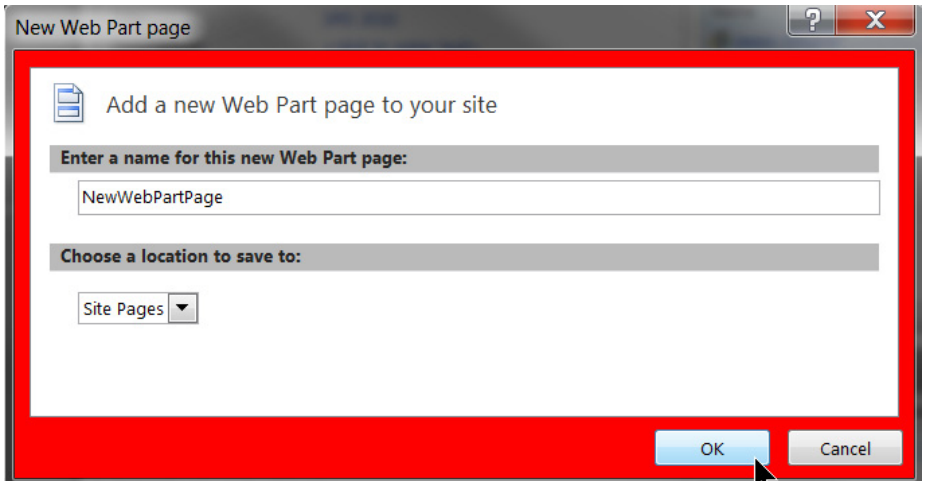

Figure 8-15 *Provide a name for the web part and select the target site directory*

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At this point web parts may be added to the page through both SPD and the web interface.

To add a web part to the page

1. Place the cursor in the desired web part zone (shaded grey).
2. In the **Insert** tab, **Web Part** group, click the dropdown arrow next to **Web Part**. Scroll through the menu and click on the desired web part to add it to the selected web part zone.

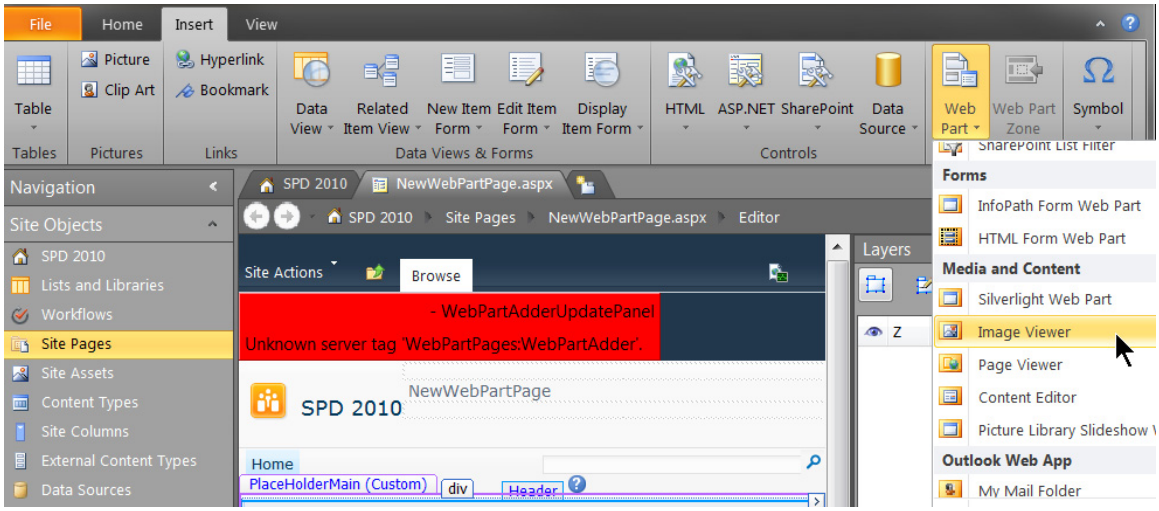

Figure 8-16 *Menu selection options available in the Insert Web Part drop down*

3. Once the web part is added to the page it may be moved to different zones by simply dragging and dropping. Click **Save** to commit the changes to the page.

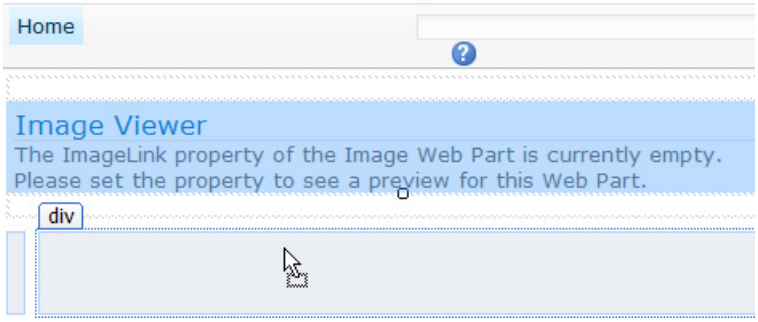

Figure 8-17 *Drag and Drop the web part to the zone of your choice*

Master Page Based .Aspx Page Creation

1. In the **File** tab, click **Add Item**. In the Pages section select the **New Page from Master** choice.

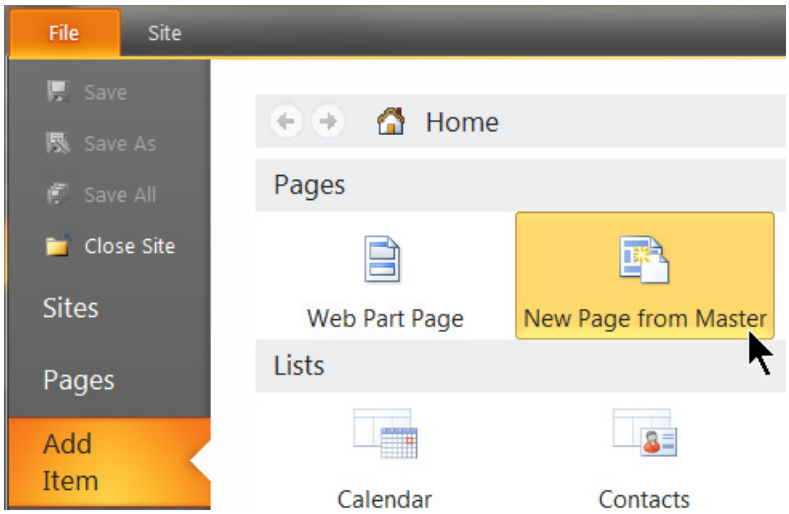

Figure 8-18 *From the Add Item tab select New From Master Page*

2. Select the **v4 master (Default)** option and click **Create**.

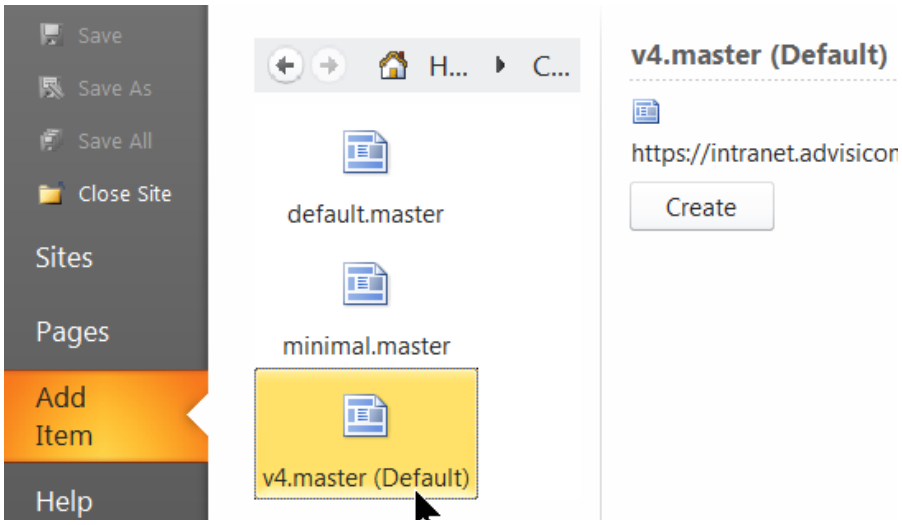

Figure 8-19 *Select the V4.master from the list of master pages*

3. Provide a name for the new page and choose the target library. Click **OK**.

   Before the new page is opened the following dialog box will be displayed. Click **Yes** to edit in advanced mode.

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Figure 8-20 *Click yes to edit the page in Advanced mode*

4. Click **Save**.

To begin customizing an area:

1. Select the tag on the right side of the component and choose **Create Custom Content**. The first area most often customized is the PlaceHolderMain. This area is where the majority of page content will be placed.

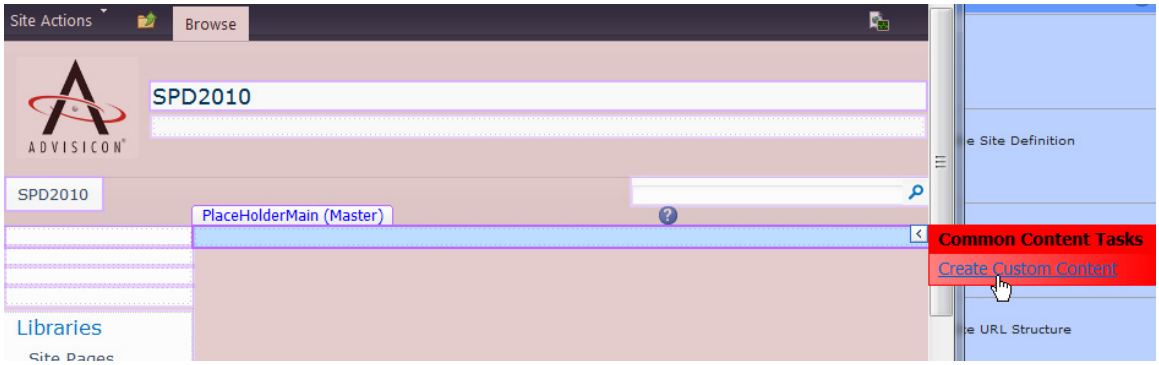

Figure 8-21 *Select Create custom content to begin customizing the page*

2. Place the cursor in the **PlaceHolderMain** box and select the **Insert** tab from the ribbon. Click the **Table** button to draw or insert a layout table.

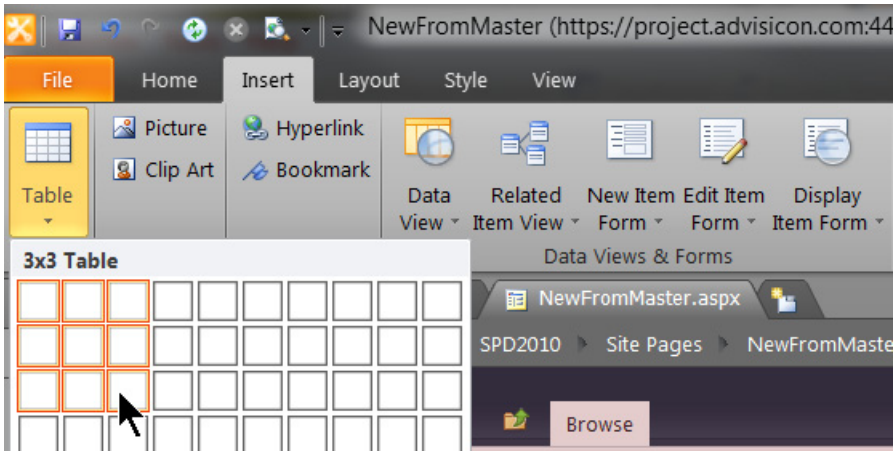

Figure 8-22 *Insert a custom table using the insert table command from the ribbon*

3. To adjust the properties of the table or cells click the object to activate the ribbon and select the **Table Tools Layout** tab. Tools such as **Cell Layout**, and **AutoFit to Contents** can be very helpful in developing well formatted sites and pages.

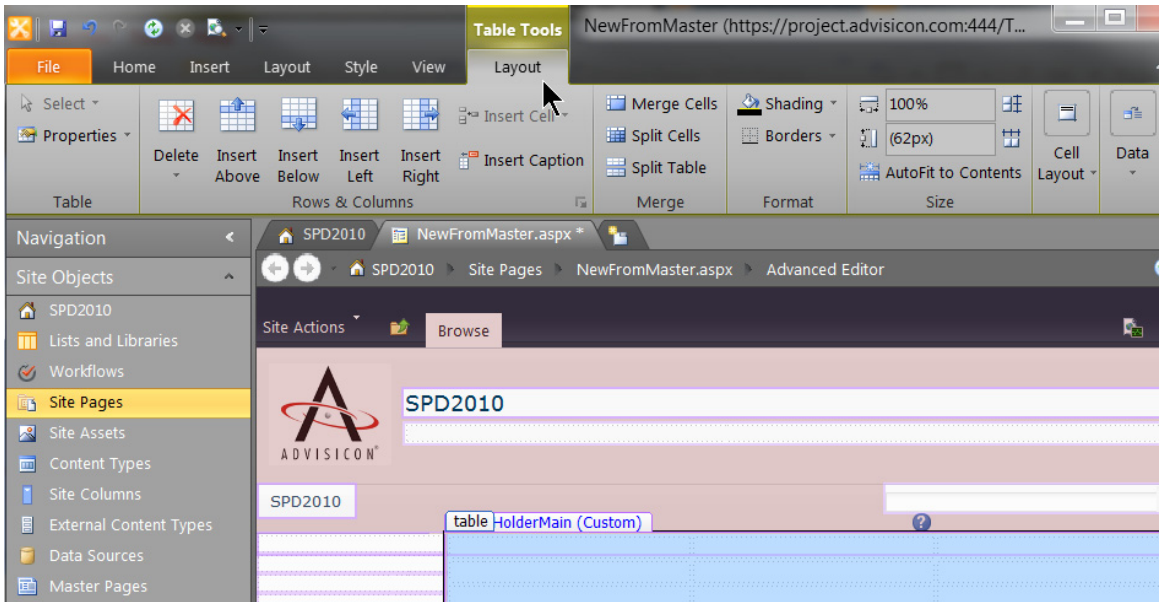

Figure 8-23 *The Table tools tab provides table formatting functions*

4. Select a cell from the table and from the **Insert** tab select **Web Part Zone**. The web part zone component allows for users to edit the zone by adding and removing web parts both in SPD and the web interface.

   When a web part zone is selected the ribbon activates the **Web Part Zone Tools Format** tab. This provides the ability to set essential zone properties such as Zone Title and Zone Layout.

The procedure utilized for adding a web part zone can be performed to add any of the other available SharePoint components and features to the custom page.

Creating Data View Web Parts

Creating custom configured web parts allows for great control of the information displayed while allowing users to easily personalize pages with valuable and relevant information. Custom web parts are the core of any effective dashboard.

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The following section describes the methods necessary to create a custom web part with a pre-configured filter, conditional formatting, and then publish the custom web part to the Site Collection Gallery for other users to utilize.

A SharePoint data view web part can display data from a multitude of different data sources. For this example the data source will be a pre-populated form library containing sample Project risk data. The concepts demonstrated in the following procedures may be applied to any digestible SharePoint data source.

1. Select the web part zone that was created in the section before and select the **Insert** tab of the ribbon.
2. Choose Data Source:

   Select the data view drop down and choose the data source. SPD will take a moment to build the web part and connect to the data source. Once complete the **List View Tools** ribbon controls will activate.

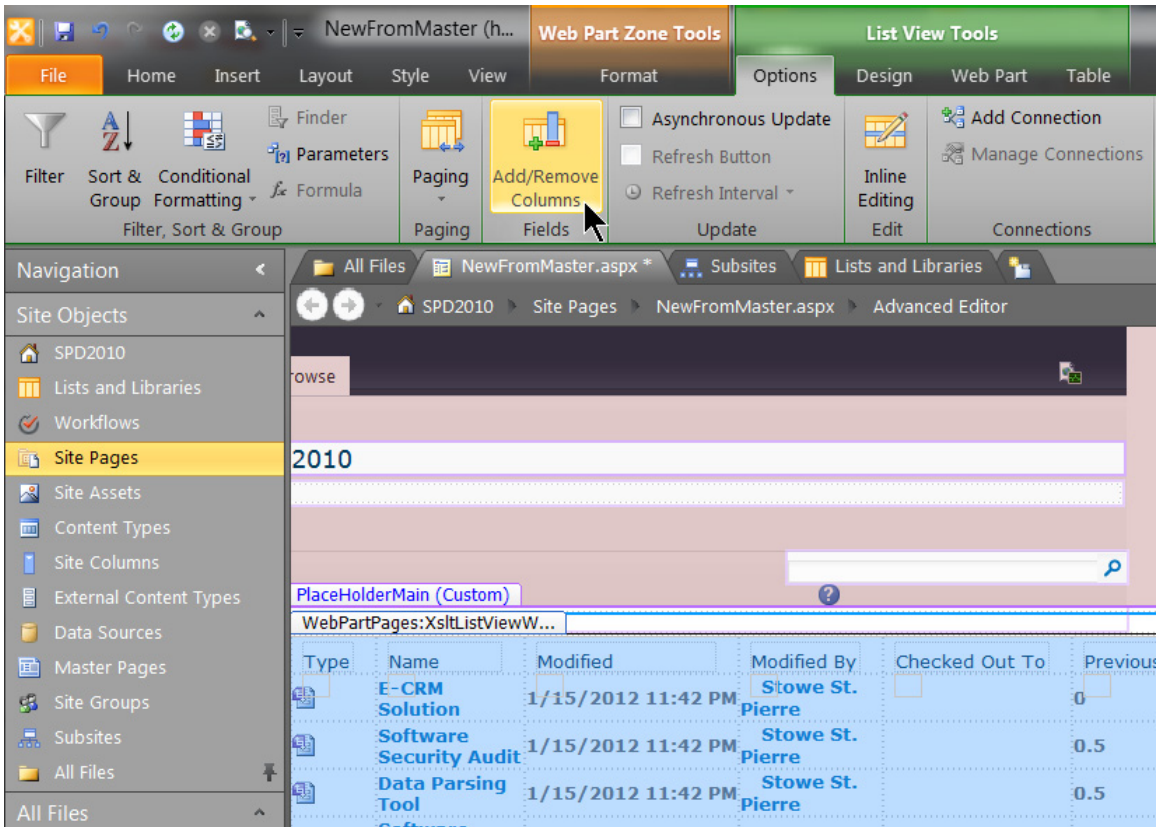

Figure 8-24 *Use the ribbon commands to perform functions such as adding columns*

This tool set will provide the means to choose selected fields, apply filters, apply conditional formatting, set view and query parameters, and other essential functions.

To help in designing the web part, place a check in the **Sample Data** box on the **List View Tools Design** tab on the ribbon!

3. Select Fields:

To select the fields of data to display select the Add/Remove Columns button on the **List View Tools Options** tab of the ribbon. This will bring up the **Displayed Fields** dialog box.

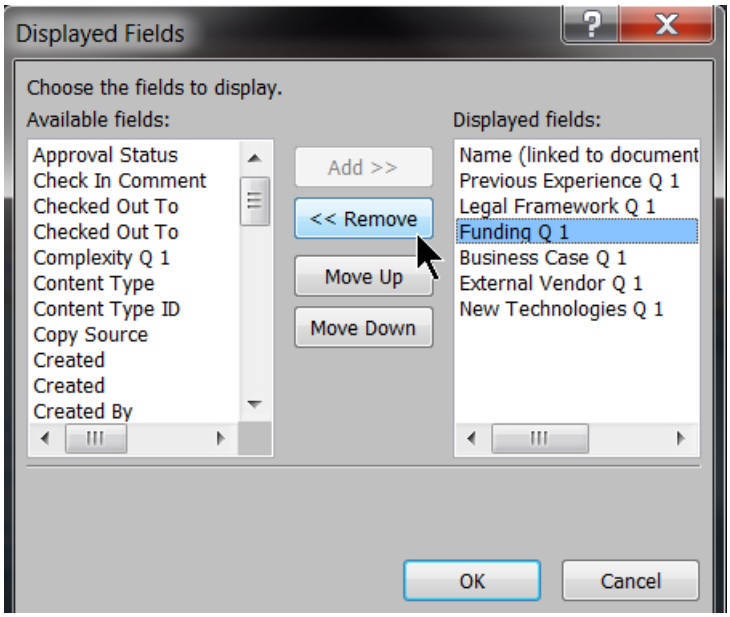

Figure 8-25 *The Display Fields dialog box allows you to control the fields selected and the order in which they are presented*

Add or remove the fields of your choice and adjust their order in the table. Click **OK** to apply the changes.

4. Apply a Filter:

With the data view web part selected choose the Filter button from the ribbon. This will display the **Filter Criteria** dialog box. This box will allow you to set the field or fields which define the criteria of the filter. Once all fields and conditions have been set click **OK** to apply the filter.

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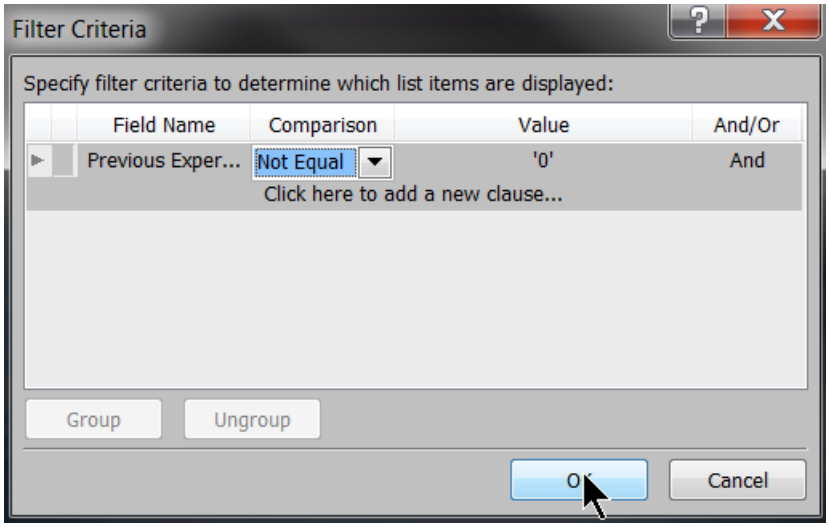

Figure 8-26 *Configure conditions for filters through the Filter Criteria dialog box*

5. Apply Conditional Formatting:

   Conditional Formatting is an excellent way to draw attention to a particular field or item based on the values associated that item. For example, in the data view you may want the **Name** field of an item to turn red and use a bold style when a value or property reaches a certain threshold.

   Highlight the word title in the sample data of the data view web part, or select the title of the first entry in the list.

   On the **List View Tools Options** of the ribbon select **Options** and then select **Conditional Formatting** as demonstrated in the image below, or right click and choose **Conditional Formatting**.

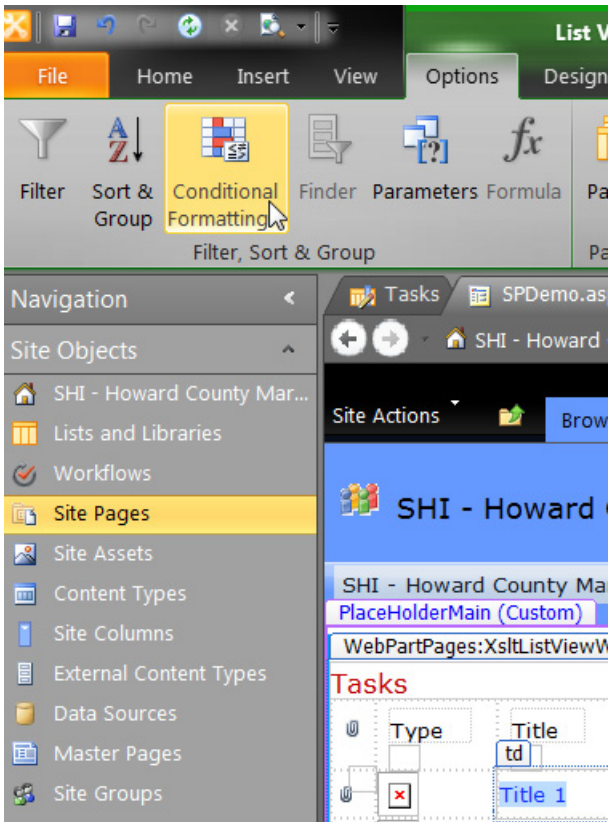

Figure 8-27 *Use conditional formatting to draw attention to specific items*

6. From the **Create** button in the **Conditional Formatting** task pane select **Apply Formatting**.

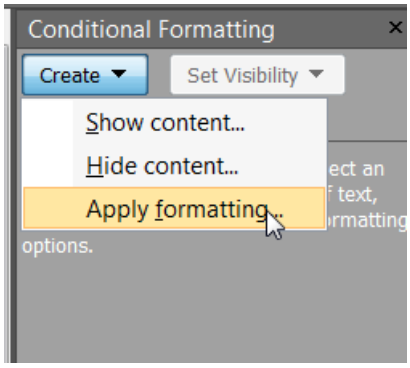

Figure 8-28 *Three options are available when working with conditional formatting*

7. Select the desired conditions to trigger the formatting.

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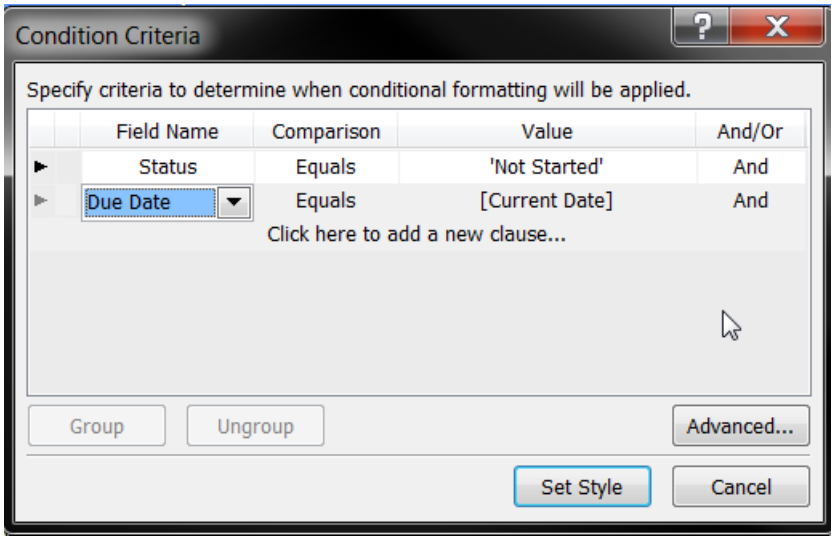

Figure 8-29 *Conditions are configured through the condition criteria dialog box*

8. Click the set style and choose a formatting option.

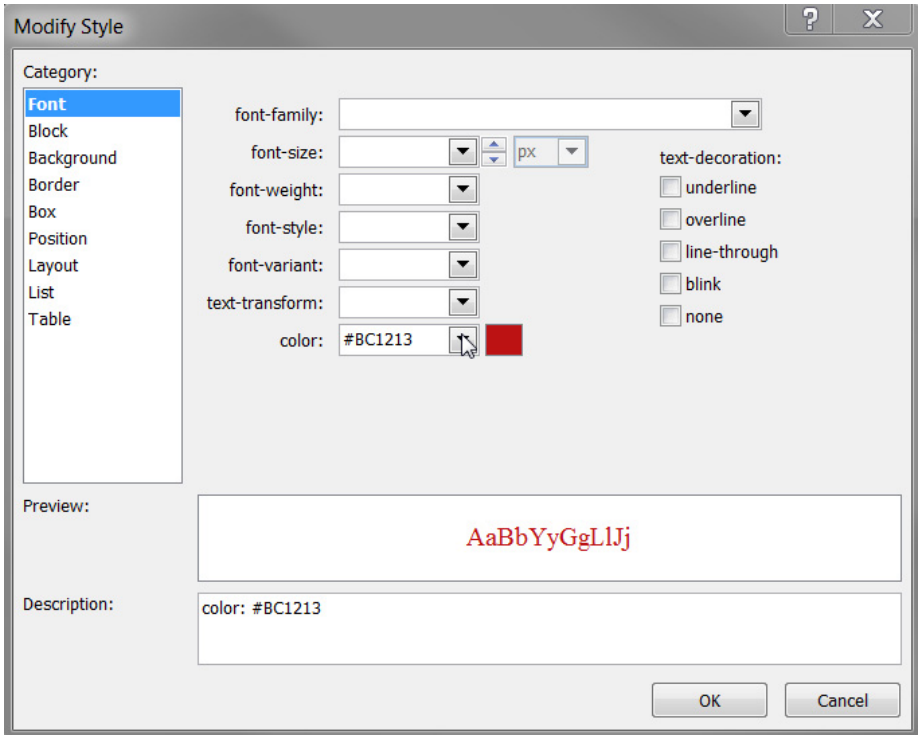

Figure 8-30 *The Modify Style dialog box allows you to configure different formatting options*

9. Select **OK** to close all boxes.

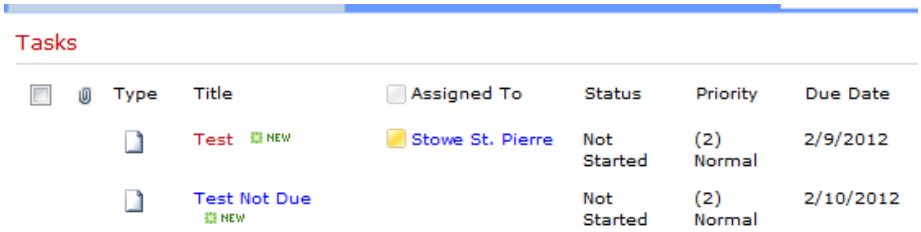

Figure 8-31 *Notice the conditional formatting applied to the list item*

Creating Workflows

SPD 2010 has enhanced the workflow designer by adding additional functionality and a smoother user interface.

This book will only demonstrate how to create a simple list-based workflow in order to help familiarize you with the user interface. To learn how to use the multitude of advanced new workflow options, such as site workflows, and integration with Visio please read Advisicon's Advanced SharePoint Designer book coming soon or visit `http://sharepoint.microsoft.com/en-us/product/related-technologies/pages/sharepoint-designer.aspx`

Creating a list based workflow

1. Open SPD and connect to a Team Site.
2. From the **Site Objects** menu, select **Workflows** and then **List Workflow**.

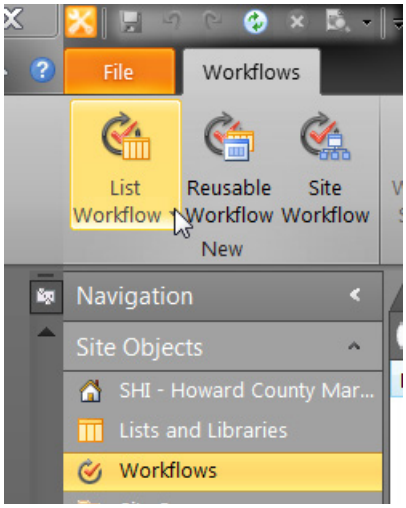

Figure 8-32 *The Workflow ribbon tab displays the different workflow options*

3. Select the **Tasks** list from the scroll down menu, enter a name for your workflow and click **OK**.

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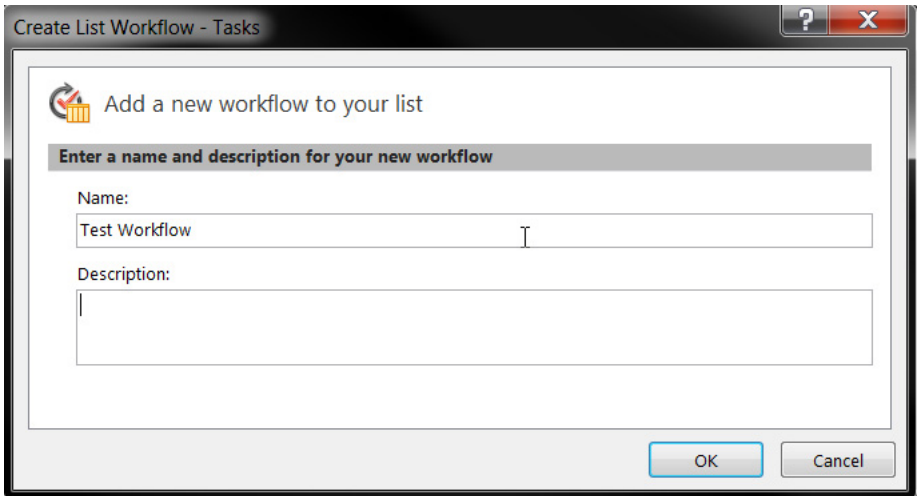

Figure 8-33 *The Create Workflow dialog box*

4. From the workflow ribbon select **Workflow Settings**.
5. In the **Start Options** panel place a check in the box next to **Start workflow automatically when an item is changed**. Click **Save**.

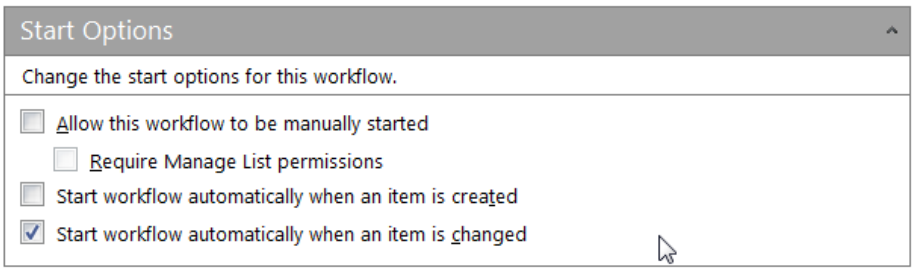

Figure 8-34 *Change the workflow start parameters in the Start Options Panel*

6. Select **Edit Workflow** from the customization panel.
7. Click **Condition** and choose **If current item field equals value**.

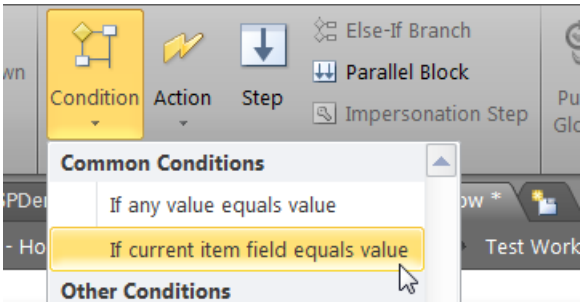

Figure 8-35 *The Workflow Conditions command from the ribbon*

8. Click **Field** and choose **Status** from the list.
9. Click **Value** and select **Completed**.

10. Click **Action** on the insert tab of the ribbon and choose **Set Field in Current item**.

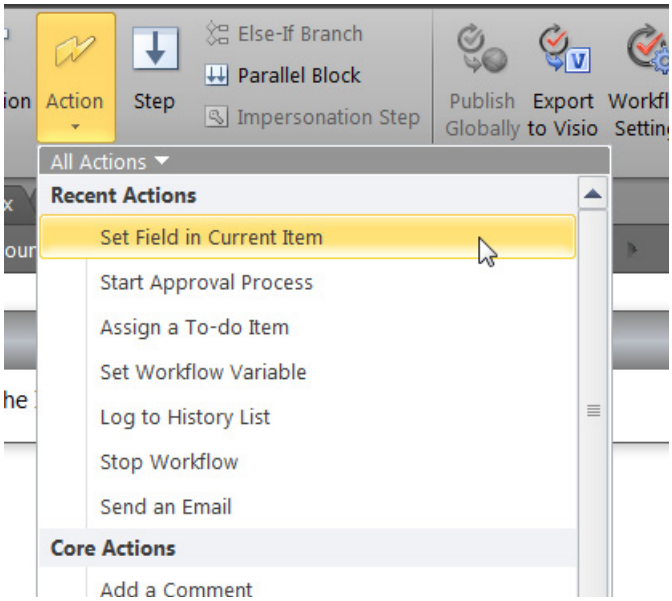

Figure 8-36 *Use the Actions button on the ribbon to create workflow functions*

11. Click **Field** and choose **% Complete**.
12. Enter **1** into the value box. Click **Save**.

Figure 8-37 *The workflow designer work pane*

13. Click **Action** and choose **Stop Workflow**.
14. Click **Message** and type **Workflow Completed**.
15. Click **Check for Errors**.

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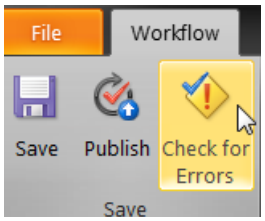

Figure 8-38 *Check for errors in the workflow*

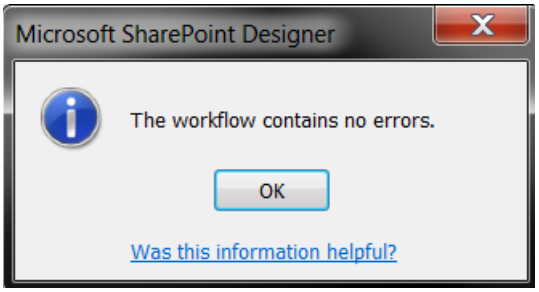

Figure 8-39 *The workflow error check result pane*

16. Click **Publish** to activate the workflow on the list.

    Setting the status of a task will now start the work flow and automatically set the percent complete field to 100%.

The process and steps completed in this chapter merely scratch the surface of what SPD 2010 can do. When used correctly it can completely transform your SharePoint environment in look, feel, and function.

Customization Best Practices

- Never alter the default master pages. Create new master pages and set the site to use the new page.
- Always establish a development environment.
- Create a new page and set it as the home page rather than customizing the default home page.
- When supplying URLs during the page or site creation process always avoid using spaces or non-alpha numeric characters. The site **Title** may contain spaces and other desired characters.

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Chapter 9

SharePoint Integration

9.1 Overview

Upon completion of this chapter, the participant will be able to:

- Describe the benefits of SharePoint's integration with other applications.
- Describe the types of applications with which SharePoint can interact.
- List the benefits of SharePoint's extensibility.

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9.2 SharePoint and Integration

SharePoint has the ability to accommodate integration with other applications. This integration runs the gambit from an innate feature set, such as Microsoft Office, to options for integrating with legacy systems through complex development.

9.3 SharePoint and Microsoft Office

One of the most powerful integration capabilities that SharePoint provides is its capability to seamlessly integrate with the Microsoft Office Client suite of products. This capability provides users the ability to easily interact with SharePoint through the Office 2010 suite of products (such as Word, PowerPoint, Excel, and OneNote) and securely share information in a centralized, and accessible location.

With SharePoint Foundation there is also support for adding Office Web Apps (with additional licensing) that will allow individuals to use applications such as word and excel directly in the internet browser. This functionality provides great functionality for organizations looking to use lightweight client systems and minimize cost while still providing essential functionality in the enterprise.

Gong a step further and upgrading SharePoint Foundation to SharePoint Server Enterprise will provide powerful Business Intelligence capabilities through such components as PerformancePoint Services and Excel Services.

9.3.1 Microsoft Office 2010 Application Integration

Word and SharePoint

The Office suite of products is great friends of SharePoint. There are many synergies in integration with SharePoint.

SharePoint natively uses Word as the default document type for creating a new document from within a document library. Also, Word is already integrated allowing users to save documents directly into SharePoint libraries, without requiring visiting the SharePoint site.

Another integration is through templates. One template built for SharePoint is the Blog template. As described earlier, this Word template connects to the SharePoint blog URL and can synchronize seamlessly. This type of synchronization allows users to work offline and easily upload to SharePoint once connectivity to the Internet is restored.

SharePoint supports the ability to email a link to a document where a user can then modify documents within Word. This integration also supports checking documents in and out directly in Word without requiring a visit to the

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SharePoint site. By working from a link this provides a single source for a file. This creates a high level of data integrity by working from a single point of contact rather than having multiple copies of documents.

Outlook and SharePoint

A large portion of users keep Outlook open during the workday. Being able to manage SharePoint items through outlook helps users streamline their work processes. SharePoint lists can be connected to Outlook which will create an Outlook folder. This empowers a user to manage and track changes and modifications to lists.

Alerts that are configured on SharePoint items, lists and libraries are sent via email in Outlook. These alerts can be configured to notify users immediately upon any change made, daily and weekly. The daily and weekly summaries can be designated for a specific time as well.

Tasks can be integrated with Outlook so users can manage tasks through Outlook. Flags and Categories can also be assigned to SharePoint tasks in outlook. Updates are also bi-directional and will keep the SharePoint list updated with the user's work progress.

PowerPoint and SharePoint

Utilizing the slide library within SharePoint makes integration with PowerPoint easy. Slide decks can also be saved directly from PowerPoint to a SharePoint library without requiring a visit directly to the SharePoint site.

SharePoint supports co-authoring with PowerPoint enabling team members to collaborate at the same time on slides, while storing the deck in a single location.

Project Professional 2010 and SharePoint

A new feature in Project Professional 2010 is that tasks can now be synced with SharePoint 2010. This enables a project manager to synchronize tasks from Project Professional to a task list in a SharePoint site. This will free up the project manager's time as they are no longer responsible for manually updating all the tasks within Project Professional. Team members can update and even create tasks via the SharePoint site. There is a consistency check performed by Project Professional ensuring that the project manager remains in control of updates to the project schedule.

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> You can also manage the fields that sync to the SharePoint list. This means you can customize which fields will track and sync with the SharePoint task list. Custom fields may also be created and then synced with SharePoint.

Project Professional and SharePoint have a synergy for possible task conflicts from any updating through bi-directional updating. If there may be a conflict, Project Professional will ask the project manager which version of an update is desired. Again, leaving the project manager in control of the scheduling and updating of task progress.

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9.4 SharePoint and Active Directory

Active Directory provides a streamlined point of contact to manage users, groups and permissions. Active Directory groups sync to SharePoint groups. This results in easier user management because instead of managing user permissions and access manually item by item, they can be added or removed from a group and then all access is enabled or denied from one central location.

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9.5 Office 365 and SharePoint Online

Office 365 is Microsoft's cloud-based productivity suite. It includes Exchange Online, Lync Online, Office Web Apps, and SharePoint Online. Office 365 provides users a SharePoint environment without the requirement to house physical servers on-premise.

Office 365's service level agreement provides that Microsoft will provide all patches and updates for SharePoint Online. Microsoft provides a money back guarantee if uptime falls below 99.9%.

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9.6 Lync and SharePoint

Lync is Microsoft's communication application. Lync provides instant messaging, VoIP calling, screen sharing and web conferencing within one platform. Lync integrates with SharePoint to provide user presence throughout the site. This means that when a user is looking at a document in SharePoint, they can tell right then if the user if available, busy or away. This helps with time management in seeking assistance or more information on documents if a user can tell immediately if the item owner is available.

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9.7 SharePoint Extensibility

The sky is really the limit with SharePoint's extensibility. Through development, solutions can be customized to meet organizational needs.

SharePoint's object model can provide developers easy access to server communication through scripts. Developers can interact with SharePoint sites via APIs, such as web services, a client API, as well as REST.

SharePoint is also accessible via PowerShell, bringing more scripting access easily to SharePoint.

So as long as you have access to developers, or a large enough budget, SharePoint can be customized to accommodate almost any requirement. This makes SharePoint one of the most flexible and diverse platforms for organizations.

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9.8 Key Points to Remember

- SharePoint provides many integration points to extend capabilities beyond the basic SharePoint site.
- Microsoft Office contains many native integrations for SharePoint from working offline on SharePoint items, to working on tasks in Outlook, to syncing tasks with project Professional.
- Office 365 provides a cloud-based option for SharePoint. This provides accessibility to SharePoint without the requirement of having physical serves on-premise.
- The ability to develop solutions based on the SharePoint platform makes the platform customizable to meet organizational needs.

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Appendix A
Glossary

A

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.

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.
- 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.

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.
- 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

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/`.

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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C

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.

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.

D

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.
- 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.
- 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.

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.

E

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

Enterprise Content Management	According to the Association for Information and Image Management: "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." According to the Microsoft MSDN library: "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.

F

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.

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.

G

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.

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H/I/J

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

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.

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. • 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.

M

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.

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.

N

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

Objects A generic name given to a component or building block of SharePoint.

ODBC See **Open Database Connectivity (ODBC)**.

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

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.

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

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.
- A means of accessing a variable, such as an element in an array or a field in a record.
- 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.

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.
- A single set of data that is displayed horizontally in a worksheet.

S

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.

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

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

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.

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

Web Analytics See **Analytics**.

Web Application
- A container in a configuration database that stores administrative settings and entry-point URLs for site collections.
- 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.

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.

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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.

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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.

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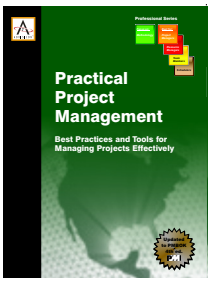
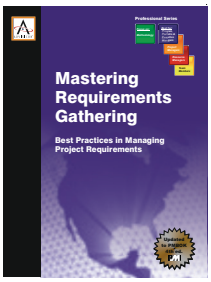
B.2 Training Programs

B.2.1 Advisicon Project Management Courses



Practical Project Management

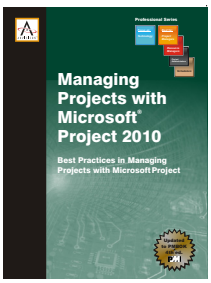
Learn how to manage projects from initiation to close-out. This practical course teaches participants how to successfully initiate, plan, execute, control and close-out projects applying industry best practices. Students will learn project management concepts, helpful standard terminology, and established 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

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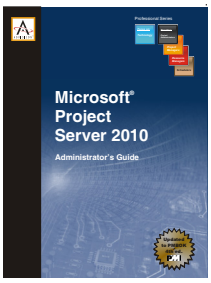
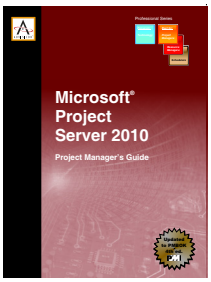
practices, tips and tricks to planning and managing projects with Microsoft Office Project.



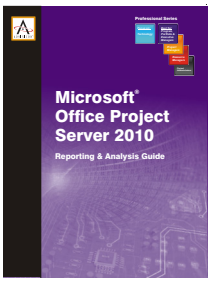
Microsoft Project Server 2010: Administrator

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.



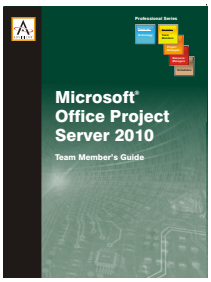
Microsoft Project Server 2010: Project Manager

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.



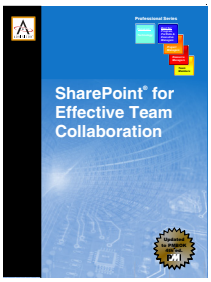
Microsoft Project Server 2010: Reporting and Analysis

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.

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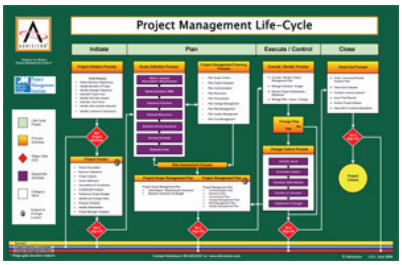
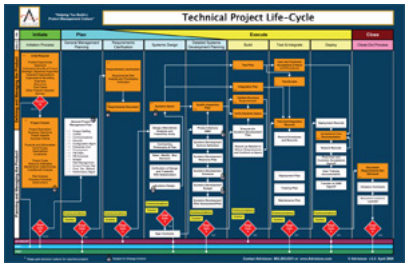
B.3 Advisicon Flowcharts

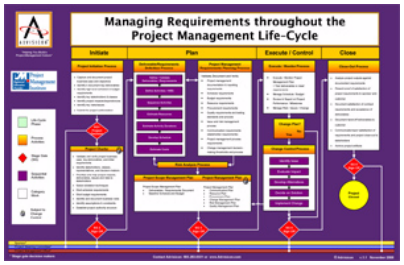
Advisicon has created a very practical set of project management flowcharts to help project managers, PMOs, and project team members plan, collaborate, and track project activities more effectively.



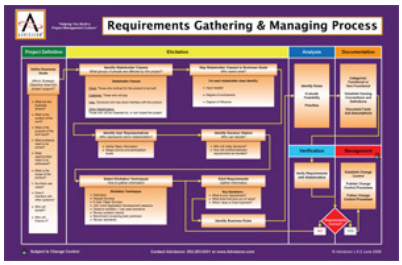
Project Management lifecycle



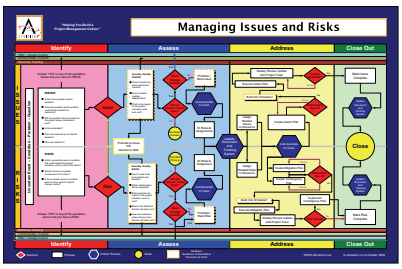
Technical Project lifecycle



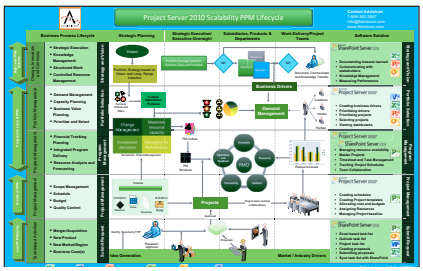
Managing Requirements throughout the Project Management lifecycle



Requirements Gathering & Managing Process



Managing Issues and Risks

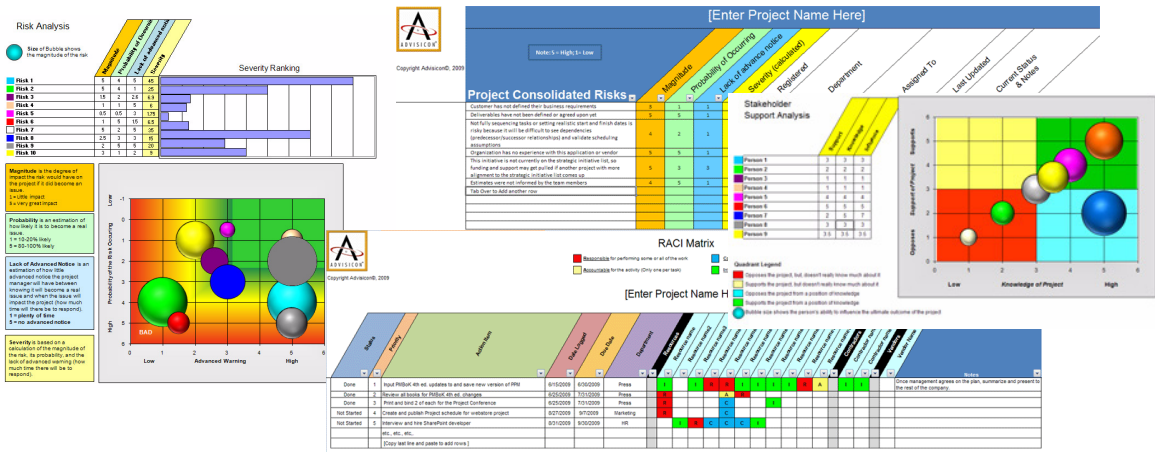


Project Server 2010 Scalability PPM Lifecycle

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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