

Microsoft SharePoint

Building Office 2007
Solutions in VB 2005



Scot Hillier

Microsoft SharePoint: Building Office 2007 Solutions in VB 2005

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To Nan, for 20 years

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About the Author

■ **SCOT HILLIER** is an independent consultant and Microsoft Most Valuable Professional (MVP) focused on creating solutions for information workers with SharePoint, Office, and related .NET technologies. He is the author of ten books on Microsoft technologies. When not writing about technology, Scot can often be found presenting to audiences ranging from developers to C-level executives. Scot is a former naval submarine officer and graduate of the Virginia Military Institute. Scot can be reached at scot@shillier.com. Support for his books can be found at <http://www.sharepointstuff.com>.

About the Technical Reviewer

■ **JIM BROADDUS** is a developer and heads the SharePoint project for Geller & Company, a financial outsourcing solutions firm based in New York City, where he has worked for almost seven years. Jim has also taught Java, the JDBC, and object-oriented programming in C++ at Columbia University's CTA Program. Prior to joining Geller, Jim worked for more than 20 years as a performer in NYC. He finally decided to try his hand at his one other passion, computer languages, and hasn't looked back since, having just completed his master of science degree in computer science at DePaul University in Chicago. However, none of this would mean much at all without his wife, Johanna, and son, Andrew, who are the wind in his sails. Both of them deserve medals, having endured countless nights of techno-speak, occasionally punctuated by indecipherable babbling when Jim gets something to work.

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Thanks to everyone.

Introduction

With SharePoint now in its third release, many developers and users are well familiar with its core functionality. However, this version of SharePoint is truly astonishing in its scope. Not only does this version have the familiar sites, documents, and lists, but it also supports vast new capabilities in content management, document management, records management, and business intelligence. Along with these capabilities, this version of SharePoint has many new ways to integrate data and create customized solutions. For me, the combination of business-oriented capabilities and advanced solution-development techniques has always been the basis of my enthusiasm for SharePoint. In fact, this is the perspective that I have tried to bring to this book; I want to combine business needs and technical skills to create solutions that truly impact business. You can be the judge of how well that vision has been reached.

Who This Book Is For

Many years ago, I asked a colleague what professional developers wanted in a book. He responded simply “Code they can steal.” I have never forgotten this advice and it has been the foundation of every book I have written since. This book is therefore targeted squarely at the intermediate to advanced developer in a corporate environment with a pending SharePoint project. Readers do not have to have any prior experience with SharePoint to be successful with this book. However, readers should be well-versed in .NET development with VB.NET to get the most out of the book. Furthermore, readers should be ready to make a commitment to this book. I have constructed the book with the intent that it be read cover to cover. I have also defined a development environment in Chapter 2 that I use throughout the book. The bottom line is that this book should be thought of as a technical training course as opposed to a reference manual. If you approach it that way, you will get the maximum benefit.

How This Book Is Organized

I began my technical career training professional developers in Visual Basic 3.0. As a result, my writing style and chapter organization reflect a training class. Each chapter in the book begins with an explanation of the appropriate foundational concepts followed by practical exercises to reinforce the explanation. A brief description of each chapter follows.

Chapter 1: SharePoint Business Solutions

This chapter is an overview of SharePoint solutions from a business perspective. Although this is a technical book, this chapter will help you understand and consider the environment into which your solutions will be deployed. This is some light reading before you get started.

Chapter 2: SharePoint Overview, Planning, and Installation

This chapter is the foundation for the entire book. In this chapter you will learn the planning and installation considerations for SharePoint. Additionally, you will set up a development environment that can be used throughout the book. You should not skip this chapter because its information is assumed throughout the rest of the book. Plan on spending a few days with this material to properly set up your SharePoint environment.

Chapter 3: SharePoint Fundamentals

This chapter provides an overview of the fundamental capabilities of SharePoint. You'll use this information to get a fully functional SharePoint farm and create your first sites. You'll also learn about new capabilities in this version that specifically target weaknesses from previous versions of SharePoint.

Chapter 4: SharePoint Shared Services

This chapter completes the configuration of critical services within your SharePoint farm. You'll configure and use search, profiles, audiences, Excel Services, and the Business Data Catalog. This chapter is mandatory for anyone working with the Microsoft Office SharePoint Server (MOSS).

Chapter 5: SharePoint Content Development and Management

This chapter covers the new content management capabilities of SharePoint. You'll learn how to add new pages to sites and manage the deployment process. This chapter also shows you how to create and apply themes, master pages, and style sheets. If you want to customize the look of SharePoint, this chapter will show you how.

Chapter 6: SharePoint Document, Form, and Records Management

This chapter covers all of the integration points between SharePoint and documents, forms, and records. You'll learn the basics of metadata and how to interact with it. You'll also learn how to deploy forms in libraries and through the new InfoPath Forms Services technology. Finally, you'll set up a records library and apply retention policies to archived documents.

Chapter 7: SharePoint Custom Features and Workflows

Customization of SharePoint begins in earnest with this chapter. Here, you'll learn how to create your own custom features for adding items to menus, adding new administrative pages, making changes to the infrastructure, and receiving event notifications. This chapter also covers how to create workflow solutions with both the SharePoint Designer and Visual Studio.

Chapter 8: SharePoint Business Intelligence Solutions

This chapter focuses on creating dashboards within the new Report Center. You'll learn how to create scorecards with stoplights to represent key performance indicators (KPI) and how to integrate Excel spreadsheets to show data. This chapter also shows how to integrate SQL Analysis Services and SQL Reporting Services with SharePoint.

Chapter 9: SharePoint and Microsoft Office

This chapter covers all of the different ways to create solutions with Office 2007 products. You'll learn how to create add-ins for Office and make them part of a SharePoint solution. You'll also learn about the new open XML file formats and how they can be integrated with SharePoint.

Chapter 10: SharePoint Web Parts

This chapter provides complete coverage of creating and deploying web parts in SharePoint. You'll learn about the web part life cycle and how to code the new ASP.NET 2.0 web parts that are used by SharePoint. You'll also learn how to create web parts that can be connected together to act as filters. Finally, you'll learn to create solution files for deploying web parts to the SharePoint farm.

Chapter 11: Programming SharePoint Services

This chapter provides the fundamentals you'll need to get started programming against the SharePoint object model and web services. You'll learn the basics of accessing SharePoint programmatically and manipulating site information, user information, lists, and libraries. This chapter also covers the Microsoft Single Sign-On service.

Chapter 12: SharePoint Operations and Administration

This chapter provides all of the foundational information you will need to properly administer a SharePoint farm. You'll learn how to back up and restore a farm, get reports, and monitor the infrastructure. You'll also learn how to improve SharePoint performance with caching mechanisms.

