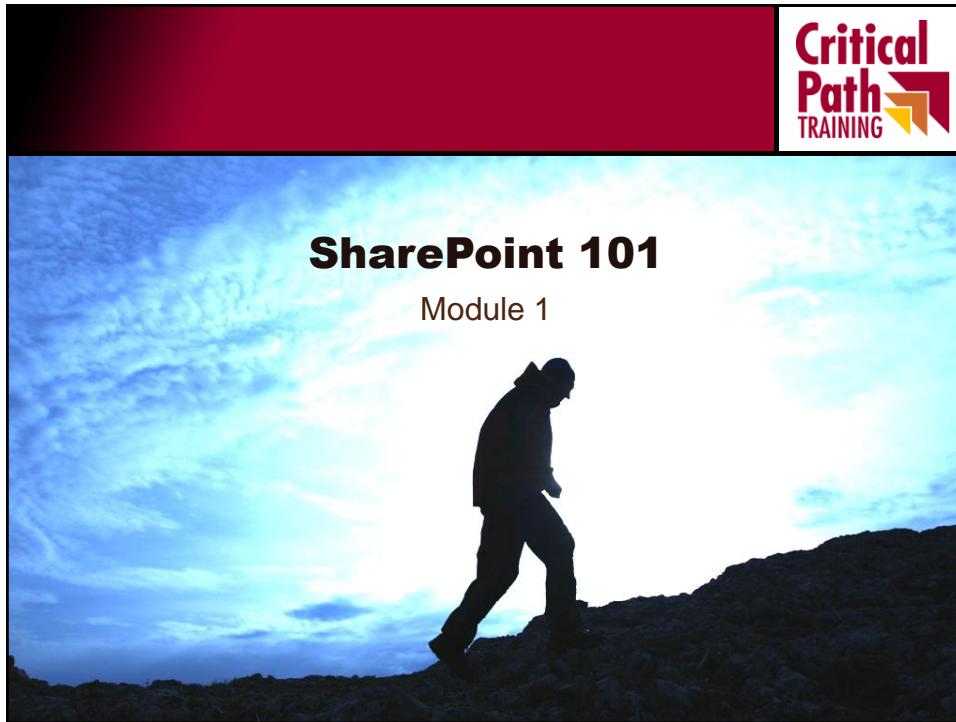


SBU201: Business Users Guide to SharePoint 2007

Schedule of lectures

1. SharePoint 101
2. Storing Data in Lists and Utilizing Web Parts
3. Document Management
4. Advanced List Management
5. Creating and Securing SharePoint Sites
6. Creating a Consistent Navigation
7. Organizing and Governing the Portal Information
8. Web 2.0
9. Configuring and Customizing Search
10. Managing Meetings with Meeting Workspaces
11. Enterprise Features
12. Publishing Features

Revision: v3.0



The background image shows a silhouette of a person walking up a rocky hill against a backdrop of a blue and white cloudy sky.

SharePoint 101

Module 1

Critical Path TRAINING

Agenda

- What is SharePoint
- Ideas and Examples of Uses
- Commonly Used Terms
- WSS vs. MOSS



Student Questionnaire

- What's Your Name?
- What Company are you with?
- What is your current experience with SharePoint?
- What is the one question you came to class wanting the answer to?



What is this SharePoint thing?

- A solution for:
 - Document Management
 - Collaboration
 - Sharing and Publishing Information (Internet)
 - Enterprise Search
 - Business Intelligence (Dashboards)
 - Business Processes and Electronically creating and storing Forms
- What are your plans for SharePoint?



Have I seen it before?

- Check out typical collaboration environment
- Check out public websites
 - www.sharepoint911.com
 - www.sqlpass.org
 - www.paulmitchell.com
 - www.hedkandi.com
 - www.ocps.net
 - www.directenergy.com



Commonly Used Terms

Term	Definition
MOSS	Microsoft Office SharePoint Server
WSS	Windows SharePoint Services
Central Administration	Where settings are configured that affect the entire SharePoint Server
Shared Services	Centrally reusable common services.
Site Collection	A container made up of sites, which share administrative settings.



Commonly Used Terms

Term	Definition
Site	A grouping of lists and libraries around a common topic. The site uses pages to display the content.
Page	An area for displaying the lists and libraries created on a site.
Document Library	An area to create, store, and manage files on a site.
List	An area to store, create, and manage items on a site. Think of a database.



The Great SharePoint Story

- Where did SharePoint come from?
 - V1 – STS and SPS 2001
 - V2 – WSS v2 and SPS 2003
 - V3 – WSS v3 and MOSS 2007
- There is no such thing as SharePoint 2007
 - However, people often say the term out loud
 - Term represents related technologies not a product



Windows SharePoint Service 3.0 (WSS)

- WSS often referred to as a “free” product
 - Licensed as part of Windows 2003 Server (Win2K3)
 - Win2K3 CAL applies to sites running on WSS
- WSS is platform for building web-based solutions
 - Storage and Web Presentation
 - Authorization/User management
 - Interface to the Windows Workflow Foundation
 - APIs, Web Services that can be extended
 - Collaboration Tools and features



Collaboration with WSS

- WSS provides Collaboration Tools
 - Collaboration templates for lists and libraries
 - Provides basis for collaboration across teams
- Team Site can be designed with...
 - Document Libraries (file sharing)
 - Lists (calendars, contacts, links)
 - Surveys, discussion forms
 - Web 2.0 (RSS, wikis, blogs)



Demo: WSS v3 Team Site

- Walkthrough of basic collaboration site

MOSS 2007

- Microsoft Office SharePoint Server 2007
- Requires both a per server license and CALs
- Usage:
 - Organization and aggregation (Intranet site)
 - Publishing controlled sites (Internet site)
- Has reusable, centrally managed services

Where did MOSS come from?

- A collaboration of several Microsoft technologies
 - WSS (collaboration)
 - SPS 2003 (aggregation)
 - CMS 2001 (web publishing)
- Opens doors for standardizing of one technology



There are several options to choose from

- Two Main Choices
 - MOSS 2007 Standard
 - MOSS 2007 Enterprise



MOSS 2007 Standard

- Some key features
 - Portal template for building your intranet
 - User Profiles, Social networking and My Sites
 - Site Directory for organizing sites in the enterprise
 - Rollup web parts for aggregating info
 - Enterprise search
 - Publishing features
 - Built in Workflows
 - Records Management



MOSS 2007 Enterprise

- Everything from standard edition plus
 - BDC
 - Forms Server
 - Excel Services
 - More web parts



Forms Server 2007

- Can be bought separate from MOSS
- Licensed per server + CALs
- Unlimited Internet edition available



SharePoint Server for Search

- Purchase MOSS search functionality standalone
- Comes in two flavors:
 - Standard - index up to 500,000 items
 - Enterprise - index unlimited items
- No BDC
- Licensed per server, no CALs



MOSS 2007 Internet Edition

- Same features as MOSS Enterprise.
- Allows unlimited NON EMPLOYEE access
- Licensed per server, no CALs



Demo!

- Walkthrough the MOSS 2007 implementation



Class Outline

- Day 1
 - SharePoint 101
 - Lists and Web Parts
 - Document Management
- Day 2
 - Advanced List Management
 - Sites and Security
 - Navigation



Class Outline Cont.

- Day 3
 - Information Architecture and Governance
 - Web 2.0
 - Search
- Day 4
 - Meeting Workspaces
 - Enterprise Features
 - Building a Portal





Storing Data in Lists and Utilizing Web Parts

Module 2



Agenda

- Creating Custom Lists to Store and Collect Data
- Determining the Metadata to collect
- Using Views to present the data
- The Web Parts-Lists Relationship



Everything is a list

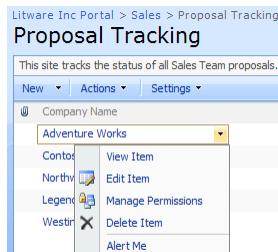
- Lists are used to store information
- Think of them as a database table
- They are very easy to customize
- Experience is always the same

Litware Inc Portal > Sales > Proposal Tracking
Proposal Tracking

This site tracks the status of all Sales Team proposals.

Company Name	# of Hours Requested	Amount Proposed	Date RFP Due	Region	Status
Adventure Works	8	\$25,000.00	2/1/2008	East	Accepted
Contoso	11	\$40,000.00	3/1/2008	East	Submitted
Northwind Toys	21	\$125,000.00	6/5/2008	West	In Process
Legend Manufacturing	15	\$95,000.00	4/22/2008	East	Accepted
Westin Labs	35	\$200,000.00	3/1/2008	West	Rejected

Change List Item Settings on the Drop Down



Types of list

- Varies by site template and version of SharePoint

Create

KPI List

A KPI list is used to track and display a set of goals. Colored icons are displayed to communicate the degree to which the goals have been achieved.

Libraries	Communications	Tracking	Custom Lists	Web Pages
<ul style="list-style-type: none"> □ Document Library □ Form Library □ Wiki Page Library □ Picture Library □ Report Library □ Translation Management Library □ Data Connection Library □ Slide Library 	<ul style="list-style-type: none"> □ Announcements □ Contacts □ Discussion Board 	<ul style="list-style-type: none"> □ Links □ Calendar □ Tasks □ Project Tasks □ Issue Tracking □ Survey 	<ul style="list-style-type: none"> □ Custom List □ Custom List in Datasheet View □ Languages and Translators □ KPI List □ Import Spreadsheet 	<ul style="list-style-type: none"> □ Basic Page □ Web Part Page □ Sites and Workspaces □ Publishing Page

Metadata and Columns

- Metadata is data about data
 - It allows you to capture information about an item or document. The information will make it easier to search, sort, filter, and group.
- Want more metadata?
 - Add a column

Litware Inc Portal > Sales > Proposal Tracking
Proposal Tracking

This site tracks the status of all Sales Team proposals.

New | Actions | Settings

Company Name
Adventure Works
Contoso
Northwind Toys
Legend Manufacturing
Westin Labs

Create Column
Add a column to store additional information about each item.
Create View
Create a view to select columns, filters, and other display settings.
List Settings
Manage settings such as permissions, columns, views, and policy.

Using views to present the data

Litware Inc Portal > Sales > Proposal Tracking > Settings > Create View
Create View: Proposal Tracking

Use this page to create a view of this list.

Name
Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

Audience
Select the option that represents the intended audience for this view.

View Name:

Make this the default view
(Applies to public views only)

View Audience:

Create a Personal View
Personal views are intended for your use only.

Create a Public View
Public views can be visited by anyone using the site.

Columns
 Sort
 Filter
 Group By
 Totals
 Style
 Folders
 Item Limit
 Mobile

- ## Metadata vs. Folders
- A fun debate
 - Folders
 - Traditional way of organizing content
 - Very easy for users
 - Metadata
 - New hip way to organize
 - Requires users to input data
 - Allows better search relevance
 - More flexible for creating views
 - SharePoint lists support both

Actions Menu

The screenshot shows the 'Proposal Tracking' list page with the 'Actions' menu open. The menu includes options like 'Edit in Datasheet', 'Export to Spreadsheet', 'Open with Access', 'View RSS Feed', and 'Alert Me'. A preview pane on the right shows a table of proposal data.

List Settings Menu

The screenshot shows the 'Customize Proposal Tracking' settings page. It includes a 'List Information' section with name, web address, and description fields. Below are three tabs: 'General Settings', 'Permissions and Management', and 'Communications'. Under 'General Settings', there are checkboxes for 'Title, description and navigation', 'Versioning settings', 'Advanced settings', and 'Audience targeting settings'. Under 'Permissions and Management', there are checkboxes for 'Delete this list', 'Save list as template', 'Permissions for this list', 'Workflow settings', and 'Information management policy settings'. Under 'Communications', there is a checkbox for 'RSS settings'.

Demo!

- Manipulate out of the box list
- Folders & Metadata
- Create a view
- Create a custom list

The screenshot shows the 'List Information' page for a 'Contacts' list. At the top, there's a yellow bar with the title 'Customize Contacts'. Below it, the 'List Information' section displays the list's name ('Contacts'), web address ('http://portal.tpg.local/Lists/Contacts/AllItems.aspx'), and a description about managing information for customers or partners. There are three tabs at the bottom: 'General Settings' (selected), 'Permissions and Management', and 'Communications'. Under 'General Settings', there are several options like 'Title, description and navigation', 'Versioning settings', and 'Audience targeting settings'. Under 'Permissions and Management', options include 'Delete this list', 'Save list as template', 'Permissions for this list', 'Workflow settings', and 'Information management policy settings'. A 'Columns' section below lists available columns in the list.

Web Parts

- The basis of building the user experience
- Control that can be added to a page
- 2 “types” of Web Parts
 - List view Web Parts
 - Functional Web Parts

List View Web Parts

- List view WPs display SharePoint Lists
- Every time you create a new list you get a new Web part

HR Work Site > Shared Documents
Shared Documents

Share a document with the team by adding it to this document library.

New ▾ | Upload ▾ | Actions ▾ | Settings ▾

View: All Documents ▾

Type	Name	Modified	Modified By	Even or Odd
Word Document	Document 1	9/30/2007 8:03 PM	Alan Admin	Odd
Word Document	Document 2	9/30/2007 8:04 PM	Alan Admin	Even
Word Document	Document 3	9/30/2007 8:01 PM	Alan Admin	Odd

List 

Web Part 

Shared Documents

Type Name Modified Modified By Even or Odd

Word Document	Document 2	9/30/2007 8:04 PM	Alan Admin	Even
Word Document	Document 1	9/30/2007 8:03 PM	Alan Admin	Odd
Word Document	Document 3	9/30/2007 8:01 PM	Alan Admin	Odd

Add new document

Functional Web Parts

- Does Work
- Examples
 - Display data from a database, RSS feed, or user input
 - Transform the look of the page
 - Perform a search
- Lots of 3rd party and free web parts available
- Different SharePoint SKUs = different WPs

Demo!

- List Web Parts
- Functional Web Parts

 Add a Web Part





Document Management

Module 3



Agenda

- Storing Documents and files in SharePoint
- Versioning and Content Approval
- Configuring Required Check Out
- Office Client Integration
- Utilizing the Slide Library



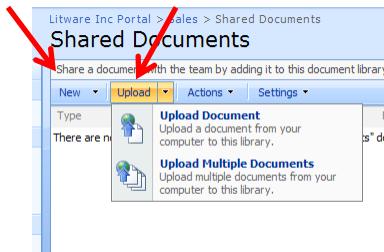
The Document Library

- A special list template for storing documents



Adding Documents to the Library

- Documents can be created or uploaded



Keeping History with Versioning

- Create both major (published) and minor (draft) versions
 - Allows for record keepings and reverting back to previous versions
- Versioning is turned off by default
 - When turning it on, set quotas
- Determine who has the ability to see minor versions



Content Approval

- Ensure content is correct and appropriate with content approval
- It is a built in workflow
- Options are located in Versioning Settings
- Members in the Approvers group will have the availability to approve files



Turning on Required Checkout

- Users will be required to check out a document before they can edit.
- Other users can still view the file in read only mode
- Owner/Administrator of the library can take control of checked out documents

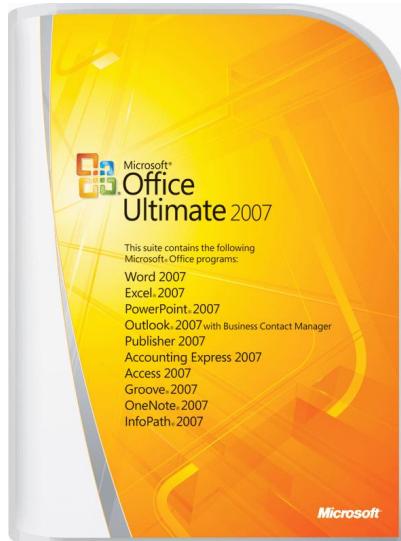


Demo

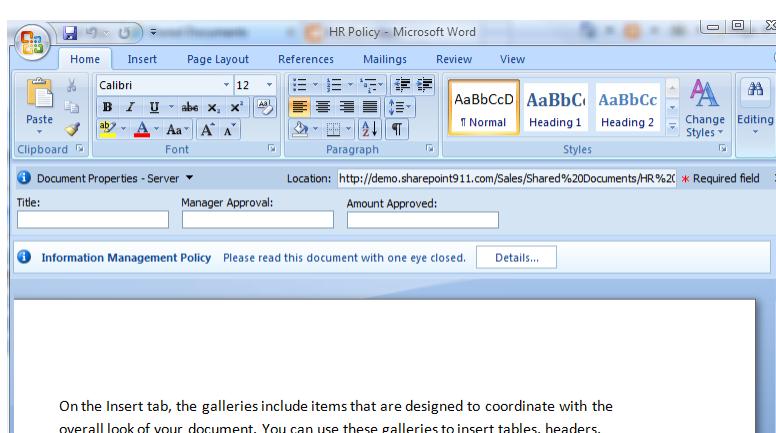
Creating and configuring a document library



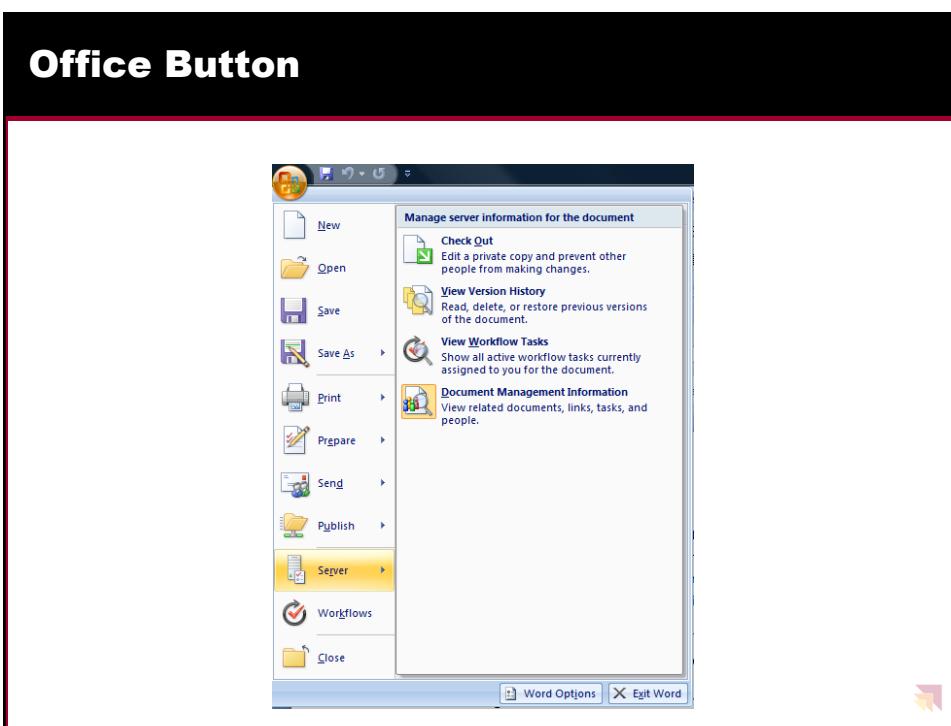
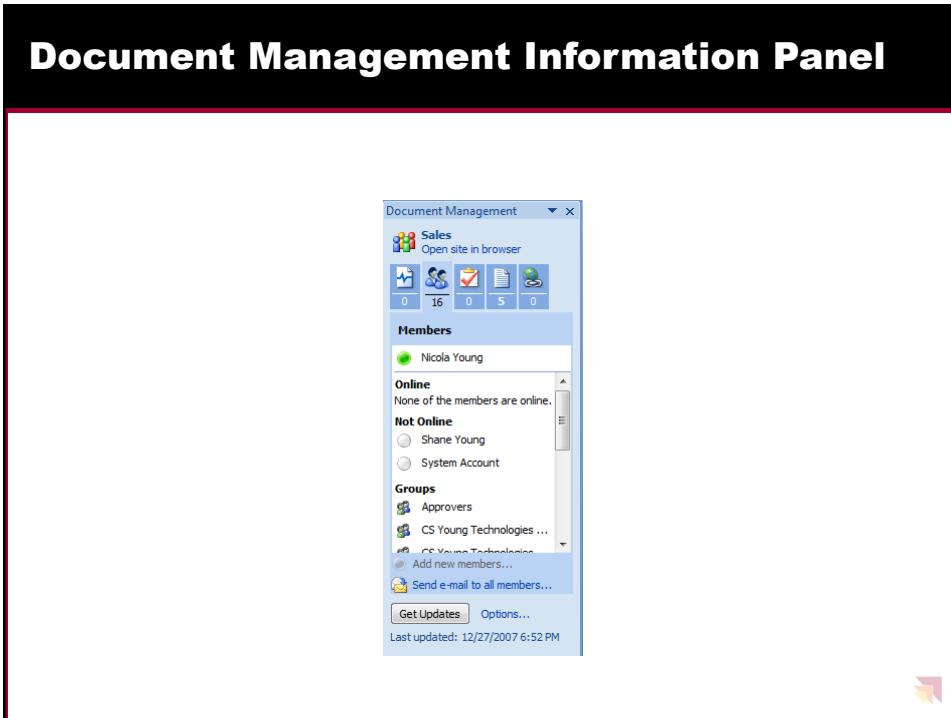
Integration between SharePoint and Office 2007



Document Information Panel



A screenshot of a Microsoft Word document titled "HR Policy - Microsoft Word". The ribbon tabs visible are Home, Insert, Page Layout, References, Mailings, Review, and View. The Home tab is selected. A red arrow points to the "Document Properties" button in the top left corner of the ribbon. Below the ribbon, there is a "Document Properties - Server" dropdown menu, a "Title:" field, a "Manager Approval:" field, and an "Amount Approved:" field. A tooltip for the "Information Management Policy" is displayed, stating: "Please read this document with one eye closed." At the bottom of the screen, a note says: "On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers," followed by a small red arrow pointing right.

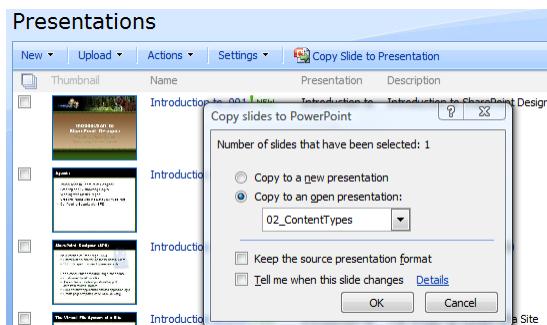


Outlook 2007 Integrations

- Allows users to take content offline
- Outlook is always open, why not interact with it here
- Connect:
 - Calendars
 - Task lists
 - Document Libraries
 - Discussion Boards
 - Contact lists



Slide Library



Demo!

Office Integration and Slide Libraries





Advanced List Management

Module 4



Agenda

- Receiving Notifications with Alerts
- Easier Management of Changes with Site Columns
- Content Types
- Displaying Data using the Content Query Web Part
- Managing processes with Workflow



What are alerts?

- Allow for notification of changes to lists or libraries.
- Email will be sent to user depending on the preference of the alert
- Owners of the site can assign alerts to users, members can only sign themselves up for alerts



Setting up Alerts

Alert Title Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.	<input type="text" value="announcements"/>
Send Alerts To You can enter user names or e-mail addresses. Separate them with semicolons.	Users: <input type="text" value="Nicola Young"/>  
Change Type Specify the type of changes that you want to be alerted to.	Only send me alerts when: <input checked="" type="radio"/> All changes <input type="radio"/> New items are added <input type="radio"/> Existing items are modified <input type="radio"/> Items are deleted
Send Alerts for These Changes Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: <input checked="" type="radio"/> Anything changes <input type="radio"/> Someone else changes an announcement <input type="radio"/> Someone else changes an announcement created by me <input type="radio"/> Someone else changes an announcement last modified by me <input type="radio"/> An announcement with an expiration date is added or changed
When to Send Alerts Specify how frequently you want to be alerted.	<input checked="" type="radio"/> Send e-mail immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: <input type="button" value="Saturday"/> <input type="button" value="4:00 PM"/>



Site Columns

- Site column is a reusable column definition
 - Site columns can be reused across multiple lists
 - Site columns can be scoped to a site in the Site Column Gallery
 - Site columns are visible within site collection to all child sites
 - Updates to a site column can optionally be pushed out to lists, document libraries and content types to where it has been used.

Configuring Site Columns

New Site Column: CS Young Technologies

Use this page to add a site column.

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)
 Date and Time
 Lookup (information already on this site)
 Yes/No (check box)
 Person or Group
 Hyperlink or Picture
 Calculated (calculation based on other columns)
 Full HTML content with formatting and constraints for publishing
 Image with formatting and constraints for publishing
 Hyperlink with formatting and constraints for publishing
 Summary Links data

Group

Specify a site column group. Categorizing columns into groups will make it easier for users to find them.

Put this site column into:

Existing group: Custom Columns
 New group:

Additional Column Settings

Specify detailed options for the type of information

Description:

Demo

Creating and Updating Site Columns



Content Types

- Reusable collection of settings that are applied to a piece of content.
- Examples of Content Types
 - Proposals for software projects
 - Requires client assignment
 - Requires review by legal department
 - Customer presentation
 - Requires client assignment
 - Requires review by art department



Content Types: The Settings

Site Content Type: Document

Site Content Type Information

Name:	Document
Description:	Create a new document.
Parent:	Item
Group:	Document Content Types

Settings

- Name, description, and group
- Advanced settings
- Workflow settings
- Delete this site content type
- Document Information Panel settings
- Information management policy settings
- Manage document conversion for this content type

Columns

Name	Type	Status	Source
Name	File	Required	
Title	Single line of text	Optional	Item

Add from existing site columns
 Add from new site column
 Column order

Allowing for Multiple Content Types

Litware Inc > Sales > Calendar

Calendar

Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.

New Actions Settings

Event
Create a new meeting, deadline or other event.

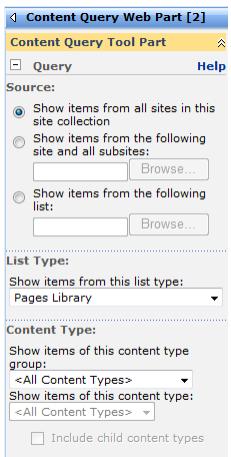
Announcement
Create a new news item, status or other short piece of information.

Meeting

	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1						
2						
3						
4						
5						
6						
7						
8						
9						

Content Query Web Part

- Used to display a dynamic view of content



The screenshot shows the 'Content Query Tool Part' configuration interface. It includes sections for 'Source', 'List Type', and 'Content Type'. Under 'Source', there are three radio button options: 'Show items from all sites in this site collection' (selected), 'Show items from the following site and all subsites', and 'Show items from the following list'. Each option has a 'Browse...' button. Under 'List Type', there is a dropdown menu set to 'Pages Library'. Under 'Content Type', there is a 'group:' dropdown set to '<All Content Types>' and a 'Show items of this content type:' dropdown also set to '<All Content Types>'. A checkbox for 'Include child content types' is present.

Demo

Creating a Content Type and Using the Content Query Web Part

What Can Workflow do for your company?

- Business Process Management
- Create Structure
- Reliability
- Records Management



Out-of-the-Box Workflows

	Description
Approval	Routes the content for approval. You can setup this workflow as serial or parallel plus preset the approvers.
Collect Feedback	Routes the content for feedback. When the workflow completes all the feedback is sent to the originator of the workflow.
Collect Signatures	Rather than just sending content for approval, this workflow requires digital signatures on the content. This workflow requires the Office 2007 client and can only be initiated from a client application.
Disposition Approval	This workflow works with the records management capabilities of SharePoint. It allows you to manage document expiration and retention.
Group Approval (available in some languages)	To support hierarchical approvals, this workflow presents a hierarchical control to select the approvers and stamping rather than signatures for approval.
Translation Management	This workflow is used with the Web content management features of SharePoint to support a translation workflow for content to multiple languages.
Three-state (Included in Windows SharePoint Services; works with Issue Tracking list or any list with a Choice column with 3 values)	This workflow ships with Windows SharePoint Services and is a simple issue tracking workflow that shows status of active and resolved issues.



Taking the next step

- SharePoint Designer Workflows
 - Easy to use Wizard
 - Create more dynamic workflows
 - Not easy to reuse
- Visual Studio Workflows
 - Very customizable
 - Can reuse
 - Ability to attach to Content Types



Demo!

Creating a Workflow





Creating and Securing SharePoint Sites

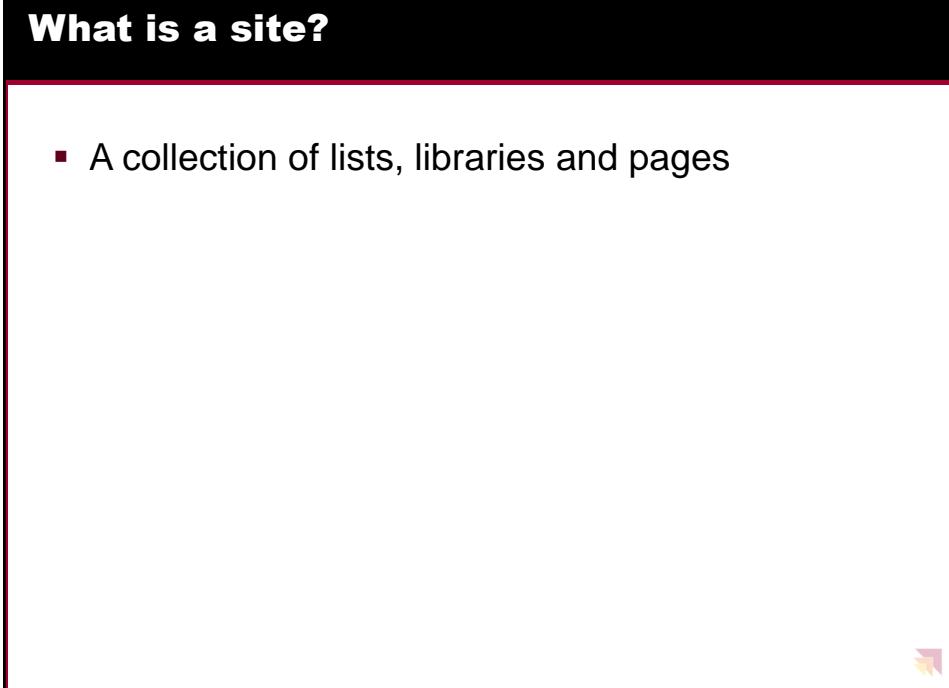
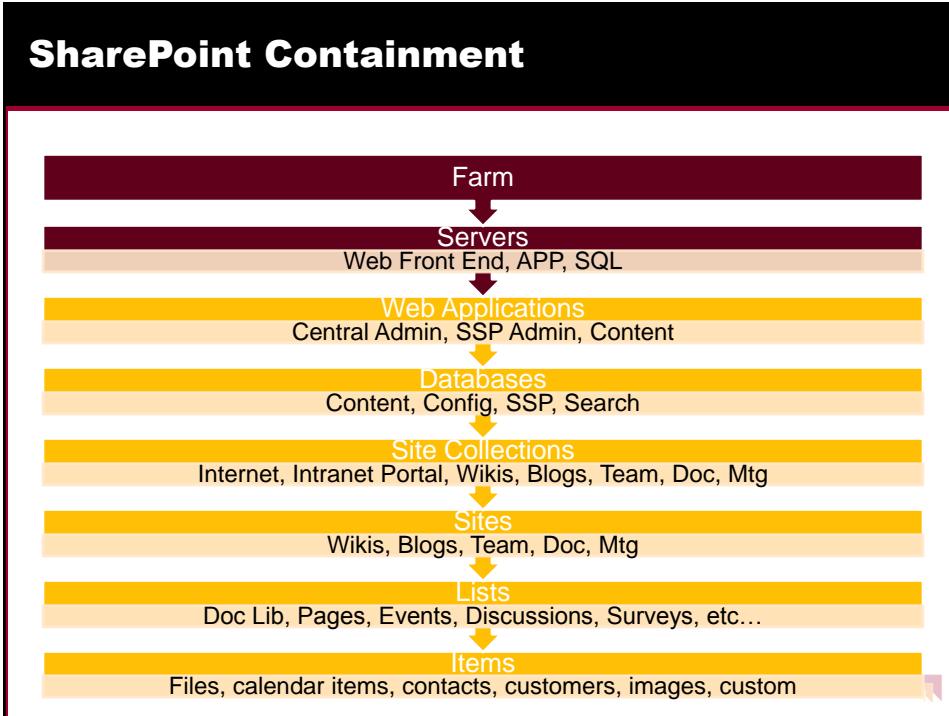
Module 5



Agenda

- Sites & Site Collections
- Templates
- Site Security





What is a site collection?

- Simply, a collection of sites.



Site Collections

- Why are they important?
 - Separation of security
 - Level of ownership
 - Administration
 - Can have quotas
 - Sharing between sites confined to



Assign a template

- Sites are just containers
- Needs to have a template applied
- Different SKUs = Different OOTB Templates



WSS Templates

Select a template:

Collaboration Meetings
Team Site
Blank Site
Document Workspace
Wiki Site
Blog

Select a template:

Collaboration Meetings
Basic Meeting Workspace
Blank Meeting Workspace
Decision Meeting Workspace
Social Meeting Workspace
Multipage Meeting Workspace



MOSS Standard Templates

Select a template:

- Collaboration Meetings Enterprise Publishing

Team Site
Blank Site
Document Workspace
Wiki Site
Blog

Select a template:

- Collaboration Meetings Enterprise Publishing

Basic Meeting Workspace
Blank Meeting Workspace
Decision Meeting Workspace
Social Meeting Workspace
Multipage Meeting Workspace

Select a template:

- Collaboration Meetings Enterprise Publishing

Document Center
Records Center
Site Directory
Search Center with Tabs
My Site Host
Search Center

Select a template:

- Collaboration Meetings Enterprise Publishing

Collaboration Portal
Publishing Portal

MOSS Enterprise Templates

Select a template:

- Collaboration Meetings Enterprise Publishing

Team Site
Blank Site
Document Workspace
Wiki Site
Blog

Select a template:

- Collaboration Meetings Enterprise Publishing

Basic Meeting Workspace
Blank Meeting Workspace
Decision Meeting Workspace
Social Meeting Workspace
Multipage Meeting Workspace

Select a template:

- Collaboration Meetings Enterprise Publishing

Document Center
Records Center
Site Directory
Report Center
Search Center with Tabs
My Site Host
Search Center

Select a template:

- Collaboration Meetings Enterprise Publishing

Collaboration Portal
Publishing Portal

Getting Started

- Intranet/Portal = Collaboration Portal
- Internet Site = Publishing Portal
- Project/Department Work Site = Team Site

- Not required just the usual choices



The Collaboration Portal

- Great for those intranets
- Many readers/few contributors
- Publishing features: great for static slow to change sites
- Search center is ready to go
- Built-in Web Parts focused on targeting and ease of use



Publishing Portal

- Starting place for building pages
- Publishing features put you in control of content
- Has approval workflow setup on pages
- Add your custom master page and ready to go



Team Site

- Start collaborating now
- Edit the page; see the results
- Ready for lots of contributors



Reusing Sites

- Save site as template
- Available from Site Settings
- Works for all sites except publishing sites
- Can choose to include content or not
- Default template limit 10 MB
 - Change via command line
 - Change to max of 500 MB
- Does not save security settings



Getting users logged in

- Most environments use accounts from Active Directory
 - Same account you log into your computer or email with
- Adding external users?
 - Possible to use forms based authentication against an LDAP store.
 - This can include simple repository like a SQL database
 - Now these users do not require AD accounts



Site Security

- Can be broad or granular
- Inheriting permissions makes admin life easy
- Granted by applying permission levels to groups
- Can use AD groups directly
- Can use SharePoint Groups
 - AD groups can be assigned to SP groups
- Can assign permissions directly to an AD user
 - BAD! Management nightmare



SharePoint Groups

- 3 main groups to consider
 - Owners – Full Site Control
 - Member – Add/Edit/Delete in existing list
 - Visitors – Read access only
- Custom Groups can be created
 - All Groups are available throughout the entire site collection



Permission Levels

- 9 available OOTB (MOSS) 5 (WSS)
- Set default list permissions
- Set site and personalization permissions (not available otherwise)
- Don't modify instead create your own



Site Collection Administrators

- Separate group for full control in entire collection
- Site Collection Owners automatically added
- Special administrative menu

Team Site Collection

Site Collection Administration

- Recycle bin
- Site collection features
- Site hierarchy
- Portal site connection

Site Collection Administration

- Search settings
- Search scopes
- Search keywords
- Recycle bin
- Site directory settings
- Site collection usage reports
- Site collection features
- Site hierarchy
- Portal site connection
- Site collection audit settings
- Audit log reports
- Site collection policies
- Site collection output cache
- Site collection cache profiles
- Site collection object cache
- Variations
- Variation labels
- Variation logs
- Translatable columns

Collab Portal Collection



Demo!

- Security walk through time

The screenshot shows the 'People and Groups' page for the 'The TPG Portal Members' group. The left sidebar lists various SharePoint groups, with 'The TPG Portal Members' highlighted. The main content area displays a single user entry for 'Mary Member'. The interface includes standard SharePoint navigation elements like 'New', 'Actions', and 'Settings' at the top.



Creating a Consistent Navigation

Module 6



Agenda

- Creating a Consistent Navigation
- Using the Audience Targeting feature
- Displaying the hierarchy throughout the Table of Contents Web Part
- Utilizing the Site Directory

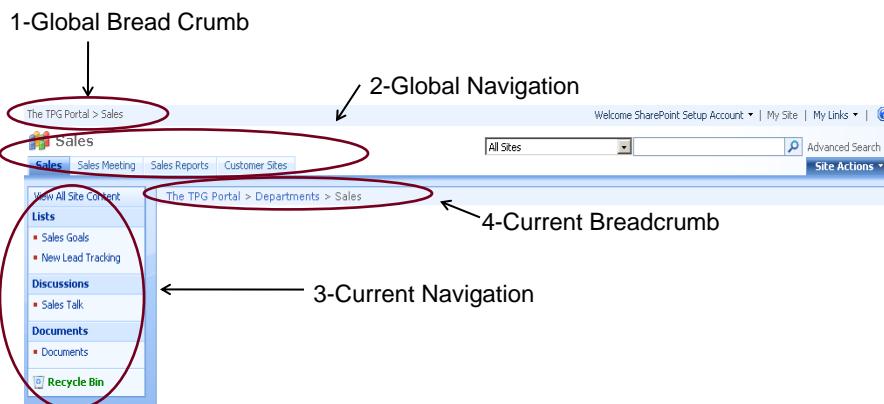


Navigation

- The key to finding things on the site
- Very flexible
 - Targeting
 - Security trimming
 - Open in new window
 - Fly-outs
- Navigation Elements
 - Global Navigation
 - Current Navigation
 - Global Breadcrumb
 - Current Site Breadcrumb



Picture worth 1000 words?



Global Navigation

- Also called Horizontal Nav or Top Link Bar
- Should make this as consistent as possible
- Inherits from parent site by default
- Modify
 - Site Actions > Site Settings > Modify Navigation



Current Navigation

- Called Quick Launch bar and Left hand Nav
 - Important since product varies name
- Provide links that are relevant to current site
- Customizable same as Global
- Can be disabled through site admin



Breadcrumbs

- Self maintaining
- Global is updated when you break global nav
- Current just shows your path on the site



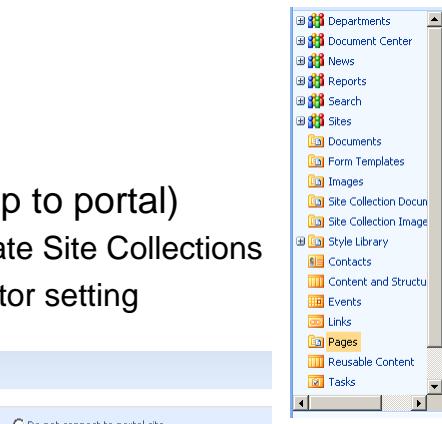
Other nav

- Tree view
 - Looks cool
 - No settings
- Portal site connection (up to portal)
 - Key for connecting separate Site Collections
 - Site Collection Administrator setting

Portal Site Connection

Portal Configuration

To connect to a portal site, enter the URL and a friendly name for the portal.



No Publishing Feature – Nav Changes

- Instead of Site Settings > Navigation use
 - Site Settings > Top link bar
 - Site Settings > Quick Launch

Look and Feel

- Master page
- Title, description, and icon
- Navigation
- Page layouts and site templates
- Welcome page
- Tree view
- Site theme
- Reset to site definition
- Searchable columns

Look and Feel

- Title, description, and icon
- Tree view
- Site theme
- Top link bar
- Quick Launch
- Save site as template
- Reset to site definition



Demo!

Walk through navigation



Audience Targeting

- Allows for the creation of a personalized experience
- The Sales Manager sees:



- While the Accounting Manager sees:



What Can be Targeted?

- Navigational Links on the Top Link Bar and Quick Launch Bar
- Web Parts
- Using the Content Query Web Part, you can target:
 - List items
 - Documents

Who can be targeted?

- SharePoint Groups
- Active Directory Security Groups
- Active Directory Distribution Groups
- Global Audiences
 - Created in Central Administration
 - Based on user profile information from active directory



Demo

Audience Targeting



Table of Contents Web Part

▪ Used to show items below a site

Table Of Contents Web Part		
Lists	A blog	Wiki Test
» announcements		
Documents	Data View Test Site	Nielson Demo Site
» TEST1		» Filter Page
Document Center	Event Planning	Cincy Class
» test one two three four		
News	Sales	cincy2
» Sample News Article	SharePoint Designer Demo	SP360
» News Archive	Team Site	
» Cov News	» tester	
» Senior Dance		
» Thornton Welcome		
Reports		
» test		
Search		
» Advanced Search		
» People Search		
» Search Results		
» People Results		
Sites		
» Site Map		
» Sites In Category		
» Top Sites		

Demo

Table of Contents Web Part

Site Directory

The Site Directory is a catalog of sites that can be grouped into categories. To submit a site to the Site Directory, please choose either "Create Site" or "Add Link to Site" on the top-right corner of this page.

Contact Details

[Click here to add or modify a contact](#)

Categories | Top Sites | Site Map

Division	Region	Tasks and Tools
Information Technology	Local	Top Tasks
Research & Development	National	
Sales	International	
Finance		

Site Directory Cont.

- Defining the Site Directory
- Site Directory can be required
 - Site Collection Setting

Site Directory Settings

Site Directory Location
Please enter the relative path to the Site Directory where you would like to capture all new sites. Example:/SiteDirectory

Site Directory Path

[Click here to test](#)

Site Creation Metadata
Specify what information is required to be filled in by new site creators.

Enforce listing new sites in Site Directory
 No site categories are mandatory.
 One site category is mandatory
 All site categories are mandatory

Site Collection Creation
Specify site collection creation from the site directory. New site collections will not inherit permissions and navigation, but can be managed in separate databases.
Note: You must enable self-service site creation from Central Administration to create new site collections.

Create new site collections from Site Directory

Buttons

OK Cancel

Tabs of the Site Directory

- Categories

- Top Sites

- Site Map



Adding a Site to the Site Directory

- Site Creation Page

Site Categories

Users can find your site listed in the site directory under a particular category. Select a category appropriate for your site.

List this new site in the site directory

Division:

- Information Technology
- Research & Development
- Sales
- Finance

Region:

- Local
- National
- International

- Can Manually Add
 - Add a Link
 - Add a list item to the Sites List

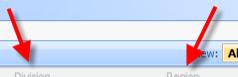


Customizing the Site Directory

- Categories are columns on the Sites list
 - To customize, add new columns or customize existing Division and Region columns

Sites

Use the Sites List to store links to sites and site categories.					
New	Actions	Settings	Owner	Division	Region
Puggle Site	http://demo.sharepoint911.com/SiteDirectory/puggle		Research & Development	International	Pending
Pugsley Blog	http://demo.sharepoint911.com/SiteDirectory/pugsleyblog			Pending	Pending
Setup MySite	Setup MySite				Pending



Demo

Creating and Customizing the Site Directory





Organizing and Governing the Portal Information

Module 7



Agenda

- Taxonomy
- Governance Committee
- Planning for the SharePoint Project



What is taxonomy?

- Think back to biology class
 - Kingdom, Phylum, Class, Order, Family, Genus, Species
- For portal purposes it is the classification and organization of the content
 - Document, HR, Policy, 2007, Time Off Request



Why is the taxonomy so important?

- The portal is going to be a wasted project if the users cannot find the information that has been stored there.
- Don't forget search
 - 50% of users navigate
 - 50% of users search



Types of taxonomies

- Business units
 - Try to avoid the org chart
- Subject
 - Hard to create universal subject headings
 - Ex. Yellow Pages
- Functional
 - Based on the business' functions



Methods for creating taxonomy?

- Card sorting & Software
- Industry based templates
- Design team



Card Sorting Technique

- Using members from the different stakeholders, separate content into cards and then sort into a logical manner and place headings on the content
- Then observe the findings of several different users to see where the organization overlaps



Industry Based Templates

- Depending on your industry there may be taxonomy templates already available.
- It is best to take the template and mold it into your business's culture.



The design team

- Stakeholders (all the way down to users)
- Information Architects
- Planning committee



Determining the Content

- Combine team knowledge with interviews
 - Can be surveys or even log parsing
 - Take all of the opinions you can get
 - Don't feel obligated to use their ideas



Site Owners

- Responsible for content of site
- New Site
 - No Owner – No Site



The Governance Committee

- Look at your taxonomy team for members
- Committee has responsibilities
 - Establishing policies
 - Change control
 - New development
 - Scope of control
 - Meeting to discuss portal
 - Communicating SLAs to users
 - Enforcement of policies



Define Success

- What is success?
- Different for everyone
 - Could be usage?
 - Ability to shutdown a file server or app?
 - New functionality?
- What were your goals for SharePoint?

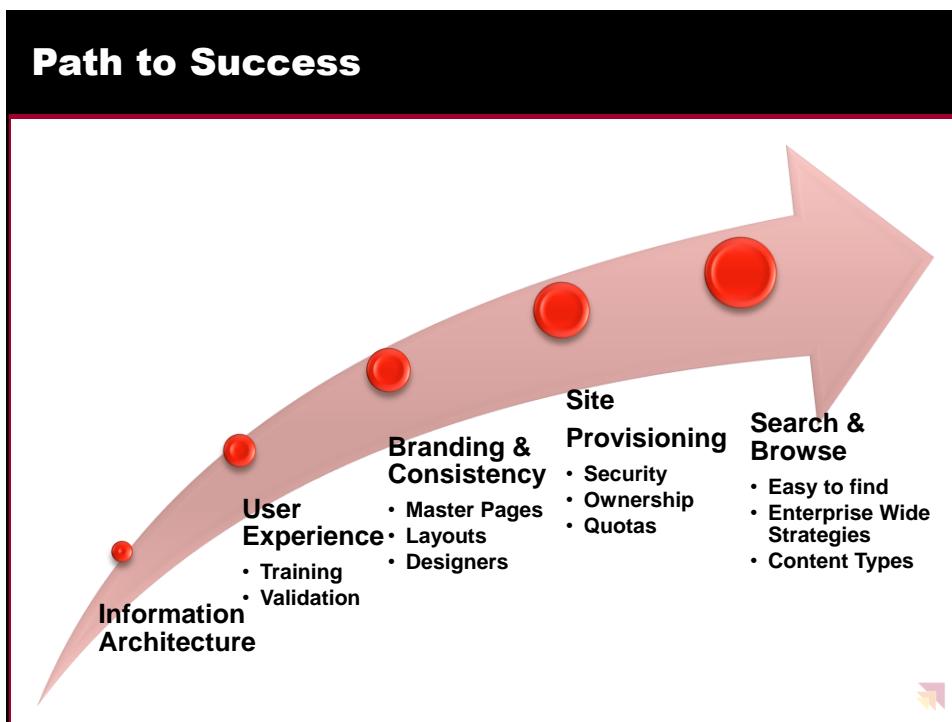
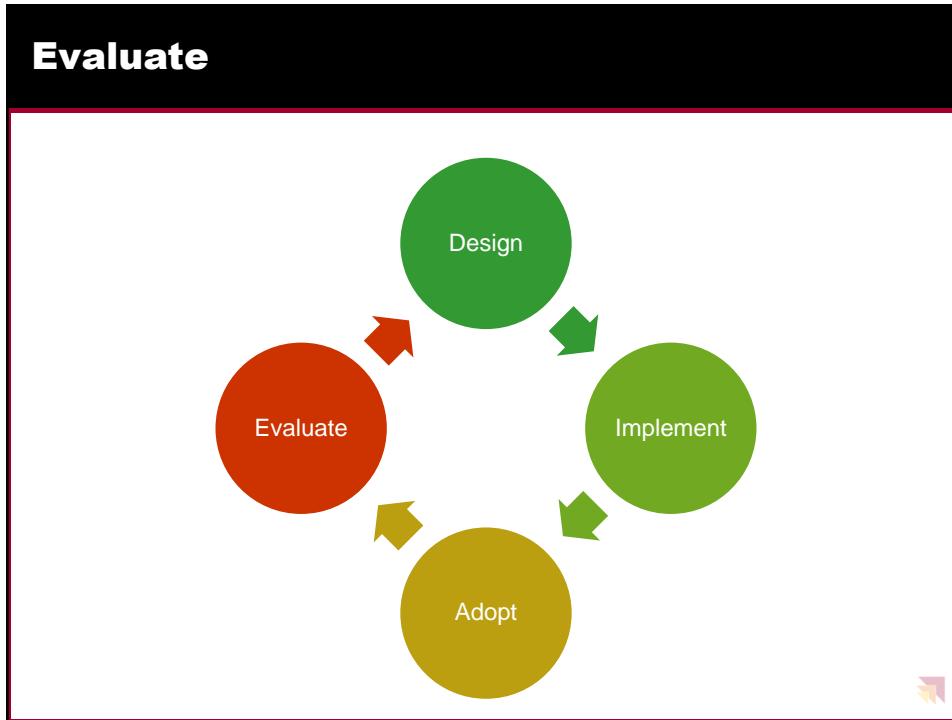


Define Goals Early

Goals

- They should be clearly stated
- They should be tied to business objectives
- They should be quantifiable







Web 2.0

Module 8



Agenda

- What is Web 2.0?
- Blog Site Template
- Wiki Site Template
- Incorporating RSS



What is Web 2.0?

- A concept of empowering the users to be the authors and creators of content on the web
 - Getting ideas out there and written down
 - Interaction
- Examples:
 - Blogs
 - Wikis
 - Forums



Blogging

- A way to allow users to share their thoughts, best practices, and experiences around their area of expertise
 - Typically, one person or a team of people are the authors
 - Everyone else comments on the particular idea or thought
- Great for:
 - Managers
 - CEO's
 - Geographically spread out teams



Blog Site Template

- Specially configured template for blogging, includes:
 - Categories List
 - Posts List
 - Comments List
- Since the Posts and Comments are separate lists:
 - security can be configured separately
 - Alerts can be placed on each
 - Content Approval or Workflows can be configured



Demo

Creating a Blog Site



Wiki

- A Wiki allows for a method of collecting data and thoughts that are usually invented in email, in phone conversations, or on a white board
- Ideas for use:
 - Knowledge base
 - Project Management Documentation
 - Brainstorming

Wiki Site Template

The screenshot shows a SharePoint wiki site template. The top navigation bar includes links for 'Litware Home', 'Welcome Litware Admin Guy', 'My Site', 'My Links', and a search bar. The main content area features a large title 'Product Knowledge Base' and a sub-section 'Home'. On the left, there's a navigation pane with links for 'View All Site Content', 'Wiki Pages' (which includes 'Home' and 'How To Use This Wiki Site'), 'Recycle Bin', 'Recent Changes' (including 'Home' and 'How To Use This Wiki Site'), and 'View All Pages'. The right side contains a 'Welcome to your wiki site!' message, a 'What is a wiki site?' section, and a 'Wikiwiki' explanation. It also mentions the use of wikis in business environments for recording knowledge. At the bottom, it notes the page was last modified at 12/19/2007 8:55 AM by 'Litware Admin Guy'.

Wiki Pages Library

- Included in Wiki Site, but it can also be added to any site



The screenshot shows a 'Wiki Pages' library interface. At the top, there are navigation links: 'Litware Home > Product Knowledge Base > Wiki Pages'. Below this is a header with 'Wiki Pages' and three dropdown menus: 'New', 'Actions', and 'Settings'. A 'View' dropdown menu is set to 'All Pages'. The main area displays a table with two rows of data:

Type	Name	Modified By	Modified	Created By	Created
Home	Home [NEW]	Litware Admin Guy	12/19/2007 8:55 AM	Litware Admin Guy	12/19/2007 8:55 AM
How To Use This Wiki Site	How To Use This Wiki Site [NEW]	Litware Admin Guy	12/19/2007 8:55 AM	Litware Admin Guy	12/19/2007 8:55 AM

Demo

Creating a Wiki Site

RSS

- RSS-Really Simple Syndication
- Feeds of frequently updated content on the web, can either be a summary or full text
- The feeds need to be aggregated using a feed reader
 - SharePoint has the RSS Viewer Web Part built in
 - Look for the RSS Feed icon  on websites to determine if they have a feed



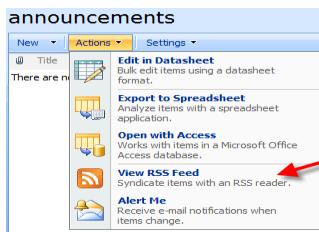
RSS and SharePoint

- Showing relevant RSS feeds on the homepage is a great way to keep the content fresh



The screenshot shows the SharePoint RSS Viewer interface for the CNN.com feed. It displays five news items with titles like "Cold and forgotten", "Fire damages building on White House grounds", and "Fuel efficient cars get presidential boost".

- SharePoint Lists can be converted into feeds



The screenshot shows a SharePoint list titled "announcements". The "Actions" dropdown menu is open, and the "View RSS Feed" option is highlighted with a red arrow. Other options in the menu include "Edit in Datasheet", "Export to Spreadsheet", "Open with Access", and "Alert Me".



Demo

Adding an RSS feed





Configuring and Customizing Search

Module 9



Agenda

- The WSS vs MOSS Search Experience
- Using Scopes to narrow the search
- Utilizing Key Words and Best Bets to help users find the appropriate content
- Tailor the Search Center with Search Web Parts



MOSS Search is Awesome!

- WSS Search is cool too!
- Same technology behind both
- WSS Search only works within the site collection
- MOSS can crawl for just about anything
- Biggest difference?
 - WSS Search just runs
 - MOSS Search has many of configuration options
- Remember MOSS Search and SSP



Feature Breakdown – Content Sources

- WSS – Just your SharePoint Site Collection
- MOSS Standard– All of your SharePoint Sites at once and add things like
 - Exchange Public Folders
 - Other Web Sites
 - File Shares
 - Other SharePoint Sites
- MOSS Enterprise – The BDC baby!



Feature Breakdown – Scopes

- WSS not really – MOSS for sure.
- What is a scope?



All Sites Scope *

SharePoint Sites, Exchange PF, File Shares, Web Sites, Etc

People Scope *

All people

HR Scope

`http://portal.tpg.local/hr
\\server\HR
Exchange PF HR`

F: Drive Scope \\server\share

* Automatically Created Scopes



Search Scopes

- Created at one of two different levels
 - Can be created within context of an SSP
 - Can be created within context of a site collection

Adding Rules to a Search Scope

- Each search scope has one or more rules
 - Rules define criteria to include/exclude content

Other MOSS only features

- Detailed easy to use logs
- Control over relevance
- Crawl Rules
- Easy to grow out farm and off load roles
- Management of properties and advanced search
- Keywords and best bets
- Search center and 11 search web parts
- Detailed search reporting



Keyword/Best bets

- Highly under utilized
- Keyword is what your user is searching for
 - Can assign a definition to display
- Best bet is what you think they want
 - Links to any web url
- Administered by site collection admin



Advanced Search

▪ Built with configurable Web Parts

Advanced Search

Find documents with...

All of these words:

The exact phrase:

Any of these words:

None of these words:

Narrow the search...

Only the language(s): French
 German
 Japanese
 Spanish

Result type

Add property restrictions...

Where the Property... Contains And

Search Center and Search Pages

Search

CS Young Technologies | Document Center | News | **Search** | Accounting | SitesTEST | TOG

All Sites Advanced Search

Search Web Parts

- 9 OOTB web parts including
 - Search Box
 - Core Results
 - High Confidence
 - Statistics
 - Pagination
 - Action Links
 - Matching Keywords and Best Bets
 - Search Summary (Did you mean?)
 - Advanced Search



Search Features

- Duplicate Collapsing
- Hit Highlighting
- Did You Mean?



Possible customizations

- Customize Thesaurus
 - Located at drive:\Program Files\Microsoft Office Servers\12.0\Data\Config
 - Replacement or Expansion sets
 - Eg. Replace “Weirdo” with “Eccentric”
 - Substitution weights and stemming is supported
- Noise Words



RSS Feeds and Alerts on Search Results

The screenshot shows a SharePoint search interface. At the top, there's a navigation bar with links for CS Young Technologies, Document Center, News, Search, Accounting, SitesTEST, and TOG. Below the navigation is a search bar with the term "cow". To the right of the search bar are links for "Advanced Search", "Alert Me", and "RSS". A message indicates "Results 1-8 of 8. Your search took 6.58 seconds." The search results list three items:

- cincy2**
Dog Doc... Dog Food... Dog Food
<http://demo.sharepoint911.com/cincy3> - Shane Young - 12/18/2007
- Thornton**
Dog Food Documents ... Dog Food ... Dog Food
<http://demo.sharepoint911.com/team/thornton> - Shane Young - 12/18/2007
- Nicola Young**
Fat Dog ... Big Dog



Search Reporting

- Available from the SSP
- Two types of reports
 - Search queries
 - Search results
- Great feature for understanding your environment



Demo!

- Everything search





Managing Meetings with Meeting Workspaces

Module 10



Agenda

- Meeting Workspace Template
- Creating Meeting Workspaces
- Reoccurring Meetings
- Series Items
- Meeting Workspace Pages



Meeting Workspace Templates

- Allows for the planning, organization, and documentation of meetings
- Available in both WSS and MOSS
- Templates available:
 - Basic Meeting Workspace
 - Blank Meeting Workspace
 - Decision Meeting Workspace
 - Social Meeting Workspace
 - Multipage Meeting Workspace



Site Creation Page

Litware Home > Create > New SharePoint Site
New SharePoint Site

Use this page to create a new site or workspace under this SharePoint site. You can specify a title, Web site address, and access permissions.

[Create](#) [Cancel](#)

Title and Description

Type a title and description for your new site. The title will be displayed on each page in the site.

Title:

Description:

Web Site Address

Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.

For example, <http://litwareinc.com/sitename>

URL name:

http://litwareinc.com/

Template Selection



A site to plan, organize, and capture the results of a meeting. It provides lists for managing the agenda, meeting attendees, and documents.

Select a template:

[Collaboration](#) [Meetings](#) [Enterprise](#)

- [Basic Meeting Workspace](#)
- [Blank Meeting Workspace](#)
- [Decision Meeting Workspace](#)
- [Social Meeting Workspace](#)
- [Multipage Meeting Workspace](#)



Calendar Creation

- When creating new calendar item, the option to create a meeting workspace is available

Litware Home > Events > New Item
Events: New Item

Title *

Location

Start Time * 12/19/2007 9 AM 00

End Time * 12/19/2007 9 AM 00

Description

All Day Event Make this an all-day activity that doesn't start or end at a specific hour.

Recurrence Make this a repeating event.

Workspace Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

OK Cancel

Outlook Creation

- In Outlook, when a meeting request is sent the user has to option to create a meeting workspace

Meeting Insert Format Text

Meeting Workspace

Create

Demo

Creating a Meeting Workspace

This screenshot shows a SharePoint page titled 'Creating a Meeting Workspace'. The page has a dark header with the word 'Demo' in white. Below the header is a large white content area with a red border. In the center of the content area, the title 'Creating a Meeting Workspace' is displayed in a large, bold, black font. At the bottom right corner of the content area, there is a small yellow and blue logo.

Managing Reoccurring Meetings

This screenshot shows a SharePoint page titled 'Monthly Update'. The page has a dark header with the title 'Monthly Update' in white. Below the header is a light blue content area. On the left side, there is a sidebar with a calendar view showing dates from December 19, 2007, to January 21, 2008. The date '12/19/2007' is highlighted. The main content area contains several sections: 'Objectives' (with a note about adding new items), 'Attendees' (listing 'Litware Admin Guy' with edit and response links), 'Agenda' (empty), and 'Document Library' (empty). Each section has a 'Add new item' link. At the top of the page, there is a navigation bar with 'This Site: Monthly Update' and 'Site Actions'.

Series Items

Monthly Update > Agenda > Settings > Advanced Settings
List Advanced Settings: Agenda

Item-level Permissions Specify which items users can read and edit. Note: Users with the Manage Lists permission can read and edit all items. Learn about managing permission settings.	Read access: Specify which items users can read <input checked="" type="radio"/> All items <input type="radio"/> Only their own Edit access: Specify which items users can edit <input checked="" type="radio"/> All items <input type="radio"/> Only their own <input type="radio"/> None
Attachments Specify whether users can attach files to items in this list.	Attachments to list items are: <input checked="" type="radio"/> Enabled <input type="radio"/> Disabled
Search Specify whether this list should be visible in search results. Users who do not have permission to see these items will not see them in search results, no matter what this setting is.	Allow items from this list to appear in search results? <input checked="" type="radio"/> Yes <input type="radio"/> No
Share List Items Across All Meetings (Series Items) If you want a list to share the same items for all the meetings in a series, change the items into series items. If you don't change to series items, each meeting displays the list with just the items added for that date.	Change items into series items: <input checked="" type="radio"/> Yes <input type="radio"/> No <small>Note: Once items become series items for a list, you cannot change the setting back.</small>

OK **Cancel**

Meeting Workspace Pages

Monthly Update

Home

Monthly Update > Monthly Predictions

Monthly Update

Date: 12/19/2007 Time: 9:00 AM - 10:00 AM >>
Location: Conference Room Mason
[Go to Calendar](#)

Home **Sales Figures** **Monthly Predictions**

Select a date from the list below:

- ▶ [12/19/2007](#)
- [12/24/2007](#)
- [12/26/2007](#)
- [12/31/2007](#)
- [1/2/2008](#)
- [1/7/2008](#)
- [1/9/2008](#)
- [1/14/2008](#)
- [1/16/2008](#)
- [1/21/2008](#)

[Previous](#) [Next](#)

Demo

Creating a Reoccurring Meeting





Enterprise Features

Module 11



Agenda

- Excel Services Architecture
- Creating Electronic Forms with InfoPath 2007 and Forms Services
- Using the BDC



Why Do We Need Excel Services?

- Common customer requirements/complains
 - Distributing spreadsheets to users creates many copies
 - Excel doesn't play well with the BI dashboard and reporting world
 - It's difficult to protect proprietary information in spreadsheets
 - Incorporating Excel logic into applications is difficult
 - Excel was designed as a desktop application
(read: Excel really stinks as a server-side application)

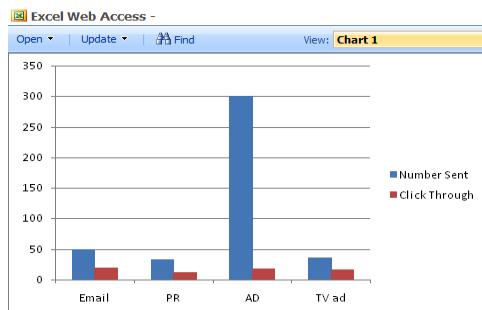


Excel 2007



Excel Web Access Web Part

- Web Part to view Excel workbooks on a page
 - Entire Workbook
 - Specified range of cells
 - Named Items



Key Performance Indicators

- Goals
 - KPIs can be an important instrument in the organization, let's make it easier to create them
 - Use the environment we already know – the portal and team sites
 - Support KPI types from simple to enterprise class
- Types
 - Manually entered
 - SharePoint list
 - Excel workbook
 - SQL Server Analysis Services
- Technologies
 - KPI web part & list
 - Customizable KPI profile page
 - Dashboard template focused on KPIs

KPI Web Parts

Key Performance Indicators

Indicator			Goal	Value	Status
Sales For Month	10	8	▲		
Week 2 Sales	50	33	▲		

KPI Details

▲	Title	Sales For Month
	Description	This is the detail for the month of May in Denver
	Comments	Keep in mind there was a rough a month
	Value	8
	Goal	10
	Warning	5
	Workbook	SampleWorkbook.xlsx
	Value Cell	'I1'C4

Dashboards

- Dashboards are SharePoint pages
- Dashboard pages are in the same document library as spreadsheets and reports
- Types
 - Generic dashboard
 - KPI focused

The screenshot shows a SharePoint dashboard titled "Quarterly Revenue Dashboard". It includes a summary message, a chart titled "Revenue vs. Goals (in Millions)" showing revenue for various regions, and two tables: "Revenue by Month per Product" and "Territory Sales".

Month	Dec '09	Jan '10	Feb '10	Mar '10	Apr '10
Australia	\$16,162	\$17,020	\$14,143	\$17,380	\$16,406
Canada	\$10,200	\$10,500	\$10,800	\$10,500	\$10,200
Germany	\$1,227,360	\$1,362,467	\$1,225,360	\$1,470,220	\$1,412,260
Northwest	\$1,425,495	\$1,425,495	\$1,425,495	\$1,425,495	\$1,425,495
Southwest	\$1,425,495	\$1,425,495	\$1,425,495	\$1,425,495	\$1,425,495
United Kingdom	\$1,425,495	\$1,425,495	\$1,425,495	\$1,425,495	\$1,425,495
Worldwide	\$4,547,492	\$4,447,522	\$4,549,494	\$4,549,495	\$4,244,223

Territory	Sales Person	Order Number	Total Sales	Revenue Contribution
Australia	John Smith	123456	\$10,200,000.00	10%
Canada	David Campbell	123457	\$1,227,360.00	1%
Germany	Chris Johnson	123458	\$1,362,467.00	1%
Northwest	Sarah Hernandez	123459	\$1,425,495.00	1%
Southwest	Emily Williams	123460	\$1,425,495.00	1%
United Kingdom	Mark Wilson	123461	\$1,425,495.00	1%
Worldwide	Paul Parker	123462	\$4,547,492.00	100%

Demo!

Using Excel Services



InfoPath, what is it?

- InfoPath allows users a WYSIWYG way to create electronic forms.
 - All of the forms that are currently created in Word and Excel and then emailed around or printed out.
 - Think: expense reports, vacation request, scheduling forms.
- Once they are created using InfoPath, users can fill them out and the data can be submitted to a database or a SharePoint list



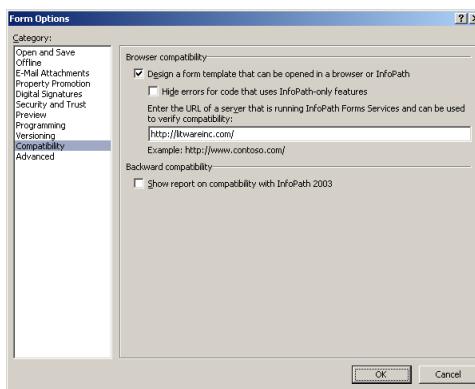
Previous Challenges

- Companies like InfoPath 2003, but...
 - They want better support for offline scenarios
 - They want to have a greater reach (browser-based clients)
 - They want a better code-behind the model
- InfoPath 2007 introduces several improvements
 - Improved offline support through wizard
 - Forms Services extended into InfoPath forms to browse
 - IT People Responsible for the Deployment
 - Code-behind using Visual Studio Tools Applications



Browser-based Forms

- Forms Services provides HTML rendering
 - Forms must be designed using InfoPath 2007
 - Forms must be designed to be browser compatible



Browser-based Rendering

- Browser-based rendering for wide reach
 - The users can fill out the form in the browser
 - Tested with IE, FireFox, Netscape & hand-held devices

The screenshot shows a Microsoft InfoPath Form Services page titled "Litware Lead Sheet". The page contains a form with fields for "Event" (Tech Ed Europe 2006), "Location" (Barcelona), and "Date" (11/6/2006). Below this is a table titled "Leads:" with columns for Name, Phone, and Email. The table contains three rows: Bob Hinkle (Phone: (123)456-6789, Email: a@b.com), Fred Dinkle (Phone: (987)654-3210, Email: c@d.com), and Cindy Sprinkle (Phone: (866)248-1357, Email: e@f.com). There is also a link to "Insert item". The browser window has a title bar "Leadsheets - Windows Internet Explorer" and a status bar showing the URL "http://litwareinc.com/_layouts/FormServer.aspx?ID=...".

Form Library

Vacation Requests

Type	Name	Modified	Modified By	Department	Name	Date Requested	Date Submitted	Number of Vacation Days
File	Joyce.11 NEW	12/29/2007 4:32 PM	Nicola Young	Product XYZ	Joyce Baynes	1/10/2008	12/29/2007	7
File	Nicola.11 NEW	12/29/2007 4:29 PM	Nicola Young	Sales Rep A	Nicola Young	1/3/2008	12/29/2007	7

InfoPath and Workflow

- Once the form is submitted to a form library a workflow can be ran on it.
 - Both OOTB workflows and custom (SharePoint Designer and Visual Studio) workflows can be created



Demo!

Using Form Server

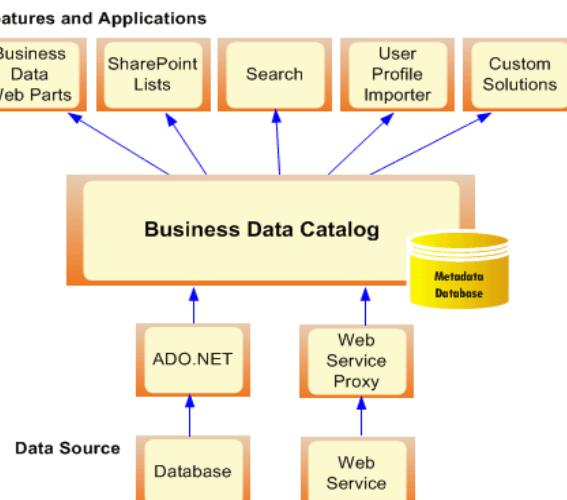


What is so great about the Business Data Catalog?

- Bring into SharePoint, important data, from back end server applications
- Put together a one stop shop for your users
- No need to recreate data that is already being stored somewhere else



BDC Architecture



Connecting Web Parts with Associations

Department List		Employee List					
Actions	Department ID	Employee ID	First Name	Last Name	Job Title	Department	
<input type="radio"/>	1	Engineering	2	Kevin	Brown	Marketing Assistant	Marketing
<input type="radio"/>	2	Tool Design	6	David	Bradley	Marketing Manager	Marketing
<input type="radio"/>	3	Sales	46	Sariya	Hampadoungsataya	Marketing Specialist	Marketing
<input checked="" type="radio"/>	4	Marketing	106	Mary	Gibson	Marketing Specialist	Marketing
<input type="radio"/>	5	Purchasing	119	Jill	Williams	Marketing Specialist	Marketing
<input type="radio"/>	6	Research and Development	203	Terry	Eminizer	Marketing Specialist	Marketing
<input type="radio"/>	7	Production	269	Wanida	Bensoof	Marketing Assistant	Marketing
<input type="radio"/>	8	Production Control	271	John	Wood	Marketing Specialist	Marketing
<input type="radio"/>	9	Human Resources	272	Mary	Dempsey	Marketing Assistant	Marketing
<input type="radio"/>	10	Finance					
<input type="radio"/>	11	Information Services					
<input type="radio"/>	12	Document Control					
<input type="radio"/>	13	Quality Assurance					
<input type="radio"/>	14	Facilities and Maintenance					
<input type="radio"/>	15	Shipping and Receiving					
<input type="radio"/>	16	Executive					

Searching through BDC Applications

Shared Services Administration: SharedServices1 > Search Settings > Content Sources > Add Content Source

Add Content Source

Use this page to add a content source.

* Indicates a required field

Name
Type a name to describe this content source.

Name:

Content Source Type
Select what type of content will be crawled.
Note: This cannot be changed after this content source is created since other settings depend on it.

Select the type of content to be crawled:

- SharePoint Sites
- Web Sites
- File Shares
- Exchange Public Folders
- Business Data

Applications
Select whether to crawl all applications in the Business Data Catalog, or include only selected applications in this content source.
An application may be included in only one Business Data content source.

Select the Business Data Catalog applications to be crawled:

- Crawl entire Business Data Catalog
- Crawl selected applications
- AdventureWorks_HR

Crawl Schedules
Select the crawl schedules for this content source.

Full Crawl

Start Full Crawl
Select "Start full crawl of this content source" and click "Ok" to start a full crawl of this content source.

Start full crawl of this content source

Adding BDC Columns to WSS Lists

Create Column: Colleagues

Use this page to add a column to this list.

Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 10, 100)
 Currency (\$, ., ,)
 Date and Time
 Lookup (information already on this site)
 Yes/No (check box)
 Person or Group
 Hyperlink or Picture
 Calculated (calculation based on other columns)
 Business data

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Type:

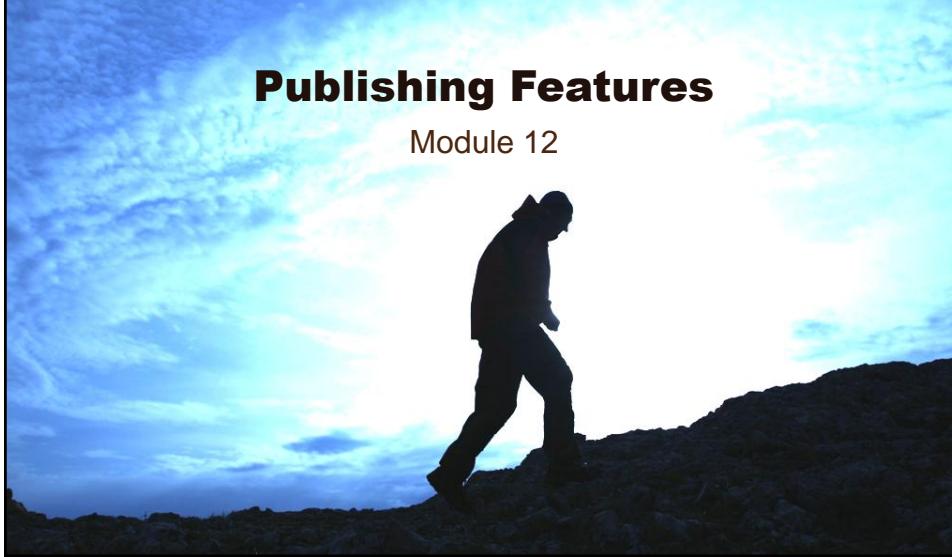
Display this field of the selected type:

Display the actions menu
 Link this column to the profile page

Add a column to show each of these additional fields:
 Department
 Department ID
 Add to default view

Demo!

Using the BDC



**Critical
Path
TRAINING**

Publishing Features

Module 12

Agenda

- Publishing Site Template
- Pages and Page Layouts
- Branding with Master Pages
- Restructuring with Manage Content and Structure



Publishing

- Use the publishing sites to ensure accuracy of information
- Requires changes to be published before users see them
 - Good for making design changes

Publishing Site

The screenshot shows a SharePoint Publishing Site interface. The top navigation bar includes links for Litware Inc, Document Center, News, Publishing (which is selected), Reports, Sales, Search, and Sites. A status message indicates the page is 'Checked Out' and can only be seen and modified by the user. Below the navigation, there's a 'Page Content' section with options to 'Edit Picture' or 'Edit Content'. A note says 'Click here to add new content'. To the left is a vertical navigation menu with links for View All Site Content, Document Center, News, Publishing (selected), Reports, Sales, Search, Sites, and Recycle Bin. At the bottom, there are 'Left Column' and 'Right Column' sections, each with an 'Add a Web Part' button.

Publishing Site with Workflow

- Uses the publishing site template but has workflow turned on
- Light-weight approval workflow is active OOB
 - Based on approval
 - Minor versions need to be approved to become major versions
 - Visitors only see the major (published) versions
- Workflow can be replaced by custom workflow



Publishing Features

▪ Site Collection

 Office SharePoint Server Publishing Infrastructure
Provides centralized libraries, content types, master pages and page layouts and enables page scheduling and other publishing functionality for a site collection.

[Deactivate](#) Active

▪ Site

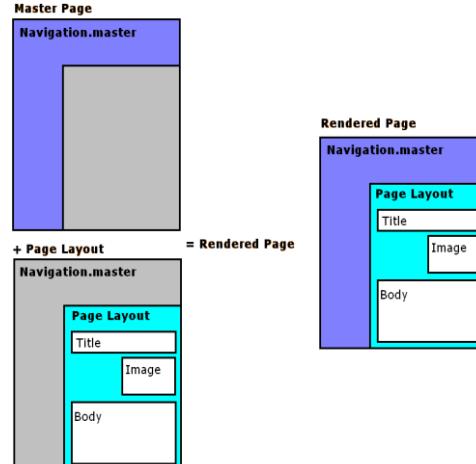
 Office SharePoint Server Publishing
Create a Web page library as well as supporting libraries to create and publish pages based on page layouts.

[Deactivate](#) Active



Page = Master Page + Page Layout

- Master page defines banner and navigation
- Page layout ASPX defines how page content is rendered
- Possible scenario
 - 1-3 Master pages
 - 10-25 Page Layouts
 - 10s of 1000s of Content Pages



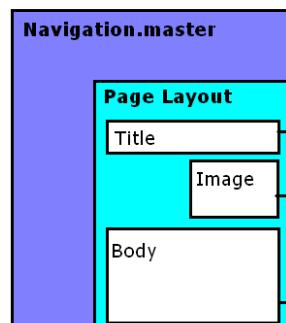
Page Layouts

- Page execution:
- Page URL requested
- Page layout executed in content of page
- Content server controls bind to page fields
- Rendered page returned

Inherited from WSS:

- Versioning,
- Check-in/Check-out
- Content types
- Access control
- Workflow

Rendered Page



Page Content: Documents in WSS document library

FileName	Title	Image	Body	Page Layout Ptr
Article1.aspx	"Some Title"		<HTML>	<@page inherit=".."/>
Article2.aspx	"Better Title"		<HTML>	<@page inherit=".."/>
Article3.aspx	"Your Title"		<HTML>	<@page inherit=".."/>
Article4.aspx	"My Title"		<HTML>	<@page inherit=".."/>

Master Pages

The image displays two side-by-side screenshots of a SharePoint 2007 site. The top screenshot shows the 'Litware Inc' master page, which has a dark blue header with the company logo and a sidebar on the left containing links for Document Center, Human Resources, News, Sales, Search, and Sites. The main content area features a banner for 'Welcome to Microsoft® Office SharePoint® Server 2007' and a 'Get started with the new version of Microsoft Office SharePoint Server 2007:' section. The bottom screenshot shows the 'Adventure Works' master page, which has a light orange header with the company name and a sidebar on the left containing links for Document Center, Human Resources, News, Sample News Article, and News Archive. Both screenshots include a top navigation bar with links for My Site, My Links, Welcome System Account, Site Actions, and a search bar. The right side of both screenshots shows the SharePoint 2007 ribbon interface.

Site Master

- **Site Master**
 - Set at the site level
 - Affects web part pages
- **System Master**
 - Set at the site level
 - Affects list view pages
- **Application Master**
 - Set at the farm level
 - Affects files in /_layouts
 - Stored on file system, should not modify



Manage Content and Structure

Back to 'Litware Inc' Welcome System Account | My Site | My Links |

Site Content and Structure

Refresh all

Litware Inc

- Document Center
- News
- Reports
- Sales**
 - Announcements
 - Calendar
 - Links
 - Proposal Tracking
 - Shared Documents
 - Tasks
 - Team Discussion
- Search
- Sites
- Contacts
- Content and Structure Reports

Sales

Type	Title	Modified	Created By
Announcements	12/30/2007		
Calendar	12/30/2007		
Links	12/30/2007		
Proposal Tracking	12/30/2007		
Shared Documents	12/30/2007		
Tasks	12/30/2007		
Team Discussion	12/30/2007		
default	12/30/2007		

Demo!

Building a Publishing Site