

# SharePoint 2010 Building Business Solutions with SharePoint

Amanda Perran, Shane Perran, Jennifer Mason, Laura Rogers

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## SharePoint® 2010

#### **BUILDING BUSINESS SOLUTIONS WITH SHAREPOINT**

Amanda Perran Shane Perran Jennifer Mason Laura Rogers



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—Jennifer Mason

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—Laura Derbes Rogers

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Jennifer Mason has dedicated the last seven years to working with SharePoint. She started out as an intern focused on SharePoint and eventually began working as a full-time SharePoint consultant. She is currently working as a SharePoint Consultant with the Senior SharePoint911. Her focus has been on strategy, project planning, project management, governance, and best practices for implementing business solutions usina SharePoint Technologies. She has worked with a range of companies at different points in the life cycles of their SharePoint implementation. She is passionate SharePoint, and loves using the out-of-the-box features to bring immediate ROI to the organization. Jennifer is involved in the SharePoint community and is one of the founding members of the Columbus Ohio SharePoint Users Group (BuckeyeSPUG). You can learn more about Jennifer by viewing her blog at <a href="http://sharepoint911.com/blogs/jennifer">http://sharepoint911.com/blogs/jennifer</a>. You can follow Jennifer on Twitter as @jennifermason.



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SharePoint by using the out-of-the-box capabilities without writing code. She specializes and trains others in SharePoint workflows, data view web parts, and InfoPath. Laura is a regular speaker at several different SharePoint conferences, sharing her SharePoint loves ideas on bloa http://sharepoint911.com/blogs/laura, and has recorded a set of screencasts about data view web parts. Laura is a graduate of Louisiana State University, and currently resides in Birmingham, Alabama with her husband, Chris, and two lovely daughters. You can follow Laura on Twitter as @ WonderLaura.

## About the Technical Editors

**Martin WP Reid** is a systems analyst at the Queen's University of Belfast, one of the leading U.K. universities. In addition to administrating large SharePoint systems, Martin is particularly interested in SharePoint as an end-user tool to help information workers get the job done without having to wade through technical manuals. Martin is currently working on a 30,000 user SharePoint 2007 system. Martin has authored several technical books, including *Microsoft SharePoint 2007 for Office 2007 Users*, published by Wrox. He has been a technical editor on many technical books for Wiley.

**Charlie Lee** is a SharePoint Subject Matter Expert working for Capgemini UK. He also runs a web application development consultancy specializing in SharePoint services and contributes to the SharePoint community whenever he can. He has a wealth of experience with real-life issues with WSS 3.0, MOSS 2007, SharePoint Foundation, and Server 2010. He lives and works in the U.K. with his beautiful wife and two amazing children.

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We are excited to have Jennifer Mason and Laura Derbes Rogers join us on this book. It is an honor and a pleasure to share a title with such talented individuals. We are so happy to have you each onboard with us for this book and look forward to any future opportunities to work together again.

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—Amanda and Shane Perran

**WRITING A TECHNICAL BOOK** has been a longtime dream of mine. It is one of the things that I have always had on my "list" of things I had wanted to accomplish throughout my career. Along the way, so many different people have invested in my future and I wouldn't be who I am without their influences.

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—Jennifer Mason

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my colleagues at SharePoint911. You all are family to me, and I truly enjoy working with you. The personalities in this company are awesome, and we always have so much fun together.

—Laura Derbes Rogers

# Introduction

MICROSOFT SHAREPOINT SERVER 2010 has improved and changed dramatically over previous versions of the product. The capabilities of the platform have expanded greatly, with significant enhancements made to the Web Content Management, Social Media, Business Connectivity, and Records Management features of the platform. However, the value of this tool to an enterprise will depend primarily on the ability of individuals in the organization to understand the features and capabilities of the platform and effectively map those to specific business requirements.

This book is designed to mentor and coach business and technical leaders in an organization on the use and configuration of SharePoint to address critical information management problems. It gives detailed descriptions and illustrations of the product's functionality and also includes realistic usage scenarios to provide contextual relevance and a personalized learning experience to the reader.

# Who This Book Is For

The mission of this book is to provide extensive knowledge to information workers and site managers that will empower them to become SharePoint Application champions in their organizations. This book should be the premiere handbook of any active or aspiring SharePoint expert.

To complete the exercises in this book, you should have a basic comfort level using Microsoft Office client applications to create content, and a general understanding of how to interact with a website through the browser. This book is intended as a starting point for any SharePoint 2010 user, whether that user has never used SharePoint before or has

some familiarity with a previous version and just wants to understand the differences with the new release.

# **What This Book Covers**

SharePoint 2010 represents the latest release of Microsoft's portal and collaborative technology platform. This book covers in detail many of the features of Microsoft SharePoint Server 2010 that will assist you in creating an effective collaboration, content management, business intelligence, business process, or social media solution for your organization. It addresses core functionality that has existed in SharePoint within previous versions as well as new concepts that have been introduced in this latest release.

# **How This Book Is Structured**

This book covers the essential elements of using and configuring SharePoint 2010 as an effective tool for business. Each chapter focuses on a dedicated topic and provides hands-on exercises to assist with your learning experience. The following is a short summary of each chapter of this book.

- Chapter 1: Getting Started with Microsoft SharePoint Server 2010—This chapter serves as an introduction to SharePoint and lays the foundation for important terminology and concepts explored in the following chapters of the book.
- Chapter 2: Working with SharePoint Lists—This chapter introduces one of the core mechanisms for sharing and organizing content in a SharePoint site. You will review what lists are and how they are used, and then explore the various templates that exist in SharePoint 2010.

- Chapter 3: Working with SharePoint Libraries—
   After reviewing some of the fundamental concepts
   relating to lists, the chapter introduces the other major
   storage mechanism in SharePoint, known as libraries.
   This chapter discusses some of the various templates
   that exist for libraries.
- Chapter 4: Managing and Customizing SharePoint Lists and Libraries—SharePoint templates for lists and libraries provide a great starting point for collaboration and information sharing. This chapter shows how you can extend these base templates to address an organization's specific requirements for a collaborative site or information management tool.
- Chapter 5: Working with Workflow—This chapter discusses the templates that SharePoint provides for workflow, and demonstrates how to create custom workflow solutions using the SharePoint Designer application.
- Chapter 6: Working with Content Types—Most organizations have information and documents, which often utilize consistent templates, processes, and policies each time they are created. Therefore, SharePoint has content types, which allow an organization to package templates and information to ensure that reusable components are rolled out in the organization to enforce consistency and ease of use. This chapter demonstrates what content types are and explores how they can be used through some hands-on examples.
- Chapter 7: Working with Web Parts—Web parts are an important element in SharePoint because they enable teams to present information on their sites to users in many different ways. This chapter explores the various groups of web parts that exist in SharePoint 2010, and gives examples on how specific types of web

- parts can be configured and used to present information in a desired manner.
- Chapter 8: SharePoint Sites and Workspaces—The fundamental components of any SharePoint environment are the sites and workspaces that it contains. These collaborative work areas contain all the components discussed in previous sections and represent how each of those items comes together to provide an effective environment for collaboration, communication, and document management. In this chapter, topics such as site templates and features are covered.
- Chapter 9: SharePoint Branding and User Experience—Many organizations wish to change the look and feel of SharePoint to suit their specific corporate brand. This chapter explores the various options for changing the look and feel of a SharePoint environment as well as best practices for enhancing and improving user experience.
- Chapter 10: Managing User Permissions and Security—Effective management of users is of ultimate importance to any information system. The two primary tiers of effective user management include securing content and personalizing information on the portal. This chapter explains in simple terms how to effectively secure a SharePoint environment at the site level, the list or library level, and down to the unique content items stored on a SharePoint site. In addition, the chapter gives an introduction to personalization to ensure that readers understand how to effectively target information to users in a portal.
- Chapter 11: Personalization and Social Networking—Social networking has been an area of major enhancement in SharePoint 2010. In this chapter, you will learn how to make the most of the social

- networking tools that exist in SharePoint such as My Sites, tags, blogs, wikis, and ratings.
- Chapter 12: Forms Management—Microsoft InfoPath is the ideal companion to SharePoint for many business solutions. This chapter introduces readers to creating simple business applications using Microsoft InfoPath, including creating template parts, creating flexible form interfaces, and connecting to business data.
- Chapter 13: Web Content Management—This chapter provides an overview of the web content management capabilities of the system, including the use of publishing sites and features, the automatic provisioning of multilingual content through variations, and the creation of custom page templates known as page layouts.
- Chapter 14: Records Management—This chapter provides an overview of and introduction to the establishment of a records management practice in your organization using SharePoint 2010. The chapter covers topics including term sets, archive-based records management features, as well as in-place records management features.
- Chapter 15: Business Connectivity Services—This chapter introduces the concept of business connectivity services, explaining important concepts such as security, external content types, and working with business data.
- Chapter 16: Business Intelligence and Insights— This chapter demonstrates how to improve the overall decision making of an organization by providing access to important information, utilizing browser-based worksheets and visual indicators of performance information, and building personalized interactive dashboards.

- Chapter 17: Working with Search—An information system is only useful to an organization if stakeholders can easily access and locate the information it contains. This chapter discusses the search engine capabilities of the SharePoint platform, including methods that improve the search experience through the use of effective queries, configurations, and analytics.
- Chapter 18: Implementing a Governance Framework—This chapter explores the definition of governance as well as the effective steps and best practices toward designing a governance framework for your organization.

# What You Need to Use This Book

To effectively complete the examples in this book, you should have access to a Microsoft SharePoint Server 2010 environment or site collection and have administrative rights to the server. If you do not have administrative rights, your server administrator may have to assist you with some exercises in this book.

You should also have a client computer running either Windows 7 or Windows Vista along with Microsoft Office 2010 Professional or Professional Plus, SharePoint Designer 2010 and SharePoint Workspace 2010. While many exercises can be completed with earlier versions of Office, certain exercises related to workflow, forms, and Excel Services are dependent on features only available in the Professional versions of 2010.

# **Conventions**