

SharePoint 2010 Building Business Solutions with SharePoint

BEGINNING SHAREPOINT® 2010

INTRODUCTIO	N	xxix
CHAPTER 1	Getting Started with Microsoft SharePoint Server 2010	
CHAPTER 2	Working with SharePoint Lists	
CHAPTER 3	Working with Libraries.	
CHAPTER 4	Managing and Customizing Lists and Libraries	
CHAPTER 5	Working with Workflow	
CHAPTER 6	Working with Content Types	
CHAPTER 7	Working with Web Parts	
CHAPTER 8	Sites and Workspaces	
CHAPTER 9	Branding and the User Experience	
CHAPTER 10	User Management, Audiences, and Profiles	
CHAPTER 11	Personalization and Social Networking	
CHAPTER 12	Forms Management	
CHAPTER 13	Getting Started with Web Content Management	
CHAPTER 14	Records Management	
CHAPTER 15	Business Connectivity Services	
CHAPTER 16	Business Intelligence and Insights	
CHAPTER 17	Working with Search	
CHAPTER 18	Implementing a Governance Framework	
APPENDIX A	Installing SharePoint Server 2010	
	-	
APPENDIX B	Exercise Solutions	/ 13
INDEX		

BEGINNING SharePoint® 2010

BEGINNING

SharePoint® 2010

BUILDING BUSINESS SOLUTIONS WITH SHAREPOINT

Amanda Perran Shane Perran Jennifer Mason Laura Rogers



Beginning SharePoint® 2010: Building Business Solutions with SharePoint

Published by
Wiley Publishing, Inc.
10475 Crosspoint Boulevard
Indianapolis, IN 46256
www.wiley.com

Copyright © 2011 by Wiley Publishing, Inc., Indianapolis, Indiana

ISBN: 978-0-470-61789-2

ISBN: 978-1-118-02191-0 (ebk) ISBN: 978-1-118-02190-3 (ebk) ISBN: 978-1-118-02288-7 (ebk)

Manufactured in the United States of America

10987654321

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at http://www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: The publisher and the author make no representations or warranties with respect to the accuracy or completeness of the contents of this work and specifically disclaim all warranties, including without limitation warranties of fitness for a particular purpose. No warranty may be created or extended by sales or promotional materials. The advice and strategies contained herein may not be suitable for every situation. This work is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If professional assistance is required, the services of a competent professional person should be sought. Neither the publisher nor the author shall be liable for damages arising herefrom. The fact that an organization or Web site is referred to in this work as a citation and/or a potential source of further information does not mean that the author or the publisher endorses the information the organization or Web site may provide or recommendations it may make. Further, readers should be aware that Internet Web sites listed in this work may have changed or disappeared between when this work was written and when it is read.

For general information on our other products and services please contact our Customer Care Department within the United States at (877) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

Library of Congress Control Number: 2001012345

Trademarks: Wiley, the Wiley logo, Wrox, the Wrox logo, Programmer to Programmer, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates, in the United States and other countries, and may not be used without written permission. SharePoint is a registered trademark of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners. Wiley Publishing, Inc., is not associated with any product or vendor mentioned in this book.

For Dylan... May you stay forever young!

—Amanda and Shane Perran

For Dr. Metzgar, thanks for being that teacher who I will never forget because the lessons you taught are so applicable to my everyday life.

—Jennifer Mason

For Charlotte and Kristen, you are the most wonderful and sweet little girls, and I love you with all my heart.

—Laura Derbes Rogers

CREDITS

ACQUISITIONS EDITOR

Paul Reese

SENIOR PROJECT EDITOR

Adaobi Obi Tulton

TECHNICAL EDITORS

Martin Reid Charlie Lee

PRODUCTION EDITOR

Daniel Scribner

COPY EDITOR

Foxxe Editorial Services

EDITORIAL DIRECTOR

Robyn B. Siesky

EDITORIAL MANAGER

Mary Beth Wakefield

FREELANCER EDITORIAL MANAGER

Rosemarie Graham

ASSOCIATE DIRECTOR OF MARKETING

David Mayhew

PRODUCTION MANAGER

Tim Tate

VICE PRESIDENT AND EXECUTIVE GROUP

PUBLISHER

Richard Swadley

VICE PRESIDENT AND EXECUTIVE PUBLISHER

Barry Pruett

ASSOCIATE PUBLISHER

Jim Minatel

PROJECT COORDINATOR, COVER

Katie Crocker

PROOFREADER

Word One, New York

INDEXER

Robert Swanson

COVER DESIGNER

Michael E. Trent

COVER IMAGE

© Trevor Fisher/istockphoto.com

ABOUT THE AUTHORS



AMANDA PERRAN is a Microsoft Most Valuable Professional for Microsoft SharePoint Server located in St. John's, Newfoundland and Labrador. She has been working as a consultant and trainer with SharePoint since the release of the first version of the product in 2001. Amanda is a regular speaker and presenter at user group meetings, webcasts, and Microsoft events on topics such as Microsoft SharePoint,

InfoPath, and Project Server. She is the co-founder of SharePoint Nation, www.sharepointnation. org, which is a virtual user group for SharePoint. You can follow her on Twitter as @amandaperran.



SHANE PERRAN is a Microsoft Most Valuable Professional for Microsoft SharePoint Server located in St. John's, Newfoundland and Labrador. He has been designing online user experiences for over 15 years. His strong passion for visual presentation, web standards, and usability has paved the way for a successful transition into the SharePoint Products and Technologies space where, over the past seven years,

Shane has become highly involved and recognized in the SharePoint customization space. He is the co-founder of SharePoint Nation, www.sharepointnation.org, which is a virtual user group for SharePoint. Shane's SharePoint Customization Blog at www.graphicalwonder.com is a popular stop for customization enthusiasts across the globe. You can follow Shane on Twitter as @shaneperran.



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 Senior SharePoint Consultant with the team at SharePoint911. Her focus has been on strategy, project planning, project management, governance, and best practices for implementing business solu-

tions using SharePoint Technologies. She has worked with a range of companies at different points in the life cycles of their SharePoint implementation. She is passionate about 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 http://share-point911.com/blogs/jennifer. You can follow Jennifer on Twitter as @jennifermason.



LAURA DERBES ROGERS is a Senior SharePoint Consultant at SharePoint911. Her background is in server administration, and she has been an MCSE for 11 years, working in SharePoint for the last 6 years. She is enthusiastic about accomplishing business solutions in 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, loves sharing ideas on her SharePoint blog at 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.

ACKNOWLEDGMENTS

IT IS COMMON FOR AUTHORS to thank their spouses or partners for their understanding and support during the book-writing process. In our case, this was a project by a husband-and-wife team, which meant that the late nights, deadlines, and missed holidays were spent together, side by side, for better or worse. Of course, we would have it no other way.

We would like to thank our families for their love, support, and encouragement throughout this book and all the other challenges and surprises that life can bring.

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.

As always, we would like to thank Jim Minatel for introducing us to the Wrox team so many years ago. Thank you to Paul Reese for spearheading this project and for always keeping things moving along. Thank you to Adaobi Obi Tulton for your constant grace under pressure and excellent editing skills. It was an extreme pleasure to work with you on this project and we hope our paths cross again. Thank you to Martin Reid and Jeri Freedman for your diligence and attention to detail throughout the editing process. Each of your talents contributed significantly to this project and we are so very grateful to each of you.

Finally, to Dylan. Thank you for constantly being that light at the end of the tunnel and helping to always keep life in perspective.

-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.

First, I would like to thank my family for investing so much into my education and supporting me through many different changes and moves. Mom and Dad — I wouldn't be what I am today without you and I am blessed to have you in my life. Bob and Jane — thanks so much for being my "other parents"; your support means more than I could ever thank you for!

Dr. Metzgar, thanks so much for all the encouragement, knowledge, wisdom, and friendship you gave me while I was at Liberty. You taught me so many things that I can honestly say I still apply on a daily basis. I definitely wouldn't be here without your support and investment.

Shane and Nicola — you two might be the best people in the world to work for! Thanks so much for all you have done for me. I don't think it would be possible to work with a better group of people than the ones I work with at SharePoint911. I thank each of them for all the support they give me.

Laura, Shane, and Amanda, this is has been a great experience and I am honored to have written alongside you. I am looking forward to working together again on future projects.

Finally, I would like to thank the team at Wrox that helped bring this project together. Paul Reese for inviting me to join this project and Adaobi Obi Tulton for all the hard work you have done to get this book ready to go. You have shown great patience and understanding, which has been appreciated! Thanks also to Martin Reid and Jeri Freedman for all your efforts throughout the editing process. I hope that we will all be able to work together again in the future.

-Jennifer Mason

WORKING ON THIS BOOK has been quite an experience, and there are several people who I would like to thank. The major influencers in my life exist on both the personal and the professional sides.

First of all, my husband, Chris, has been amazing and supportive. His sarcasm and wit have always kept me laughing despite any book-deadline stresses. Speaking of family, I thank my daughters for always been so loving, smart, delightful, and happy. I love my sweeties! Thanks to my parents, Greg and Caroline, who have always been encouraging and supportive, and to my artist brother, Clark, and his family.

Thank you so much to Jennifer Mason for being a brilliant and driven businesswoman and friend, and thanks to Shane and Amanda Perran for being so inspiring to work with. Thanks for including me in this endeavor; it has been amazing. You three are such outstanding SharePoint gurus, and I sincerely look forward to spending more time with you and joining you in any future endeavors that may arise.

Of course, I would also like to extend my thanks to the Wrox team, especially Paul Reese and Adaobi Obi Tulton. It has been a pleasure working with all of you on this adventure of a book. I think you all have been wonderful and professional, and I hope that we cross paths again soon.

Lastly, I would like to thank those of you in my life who have been part of the path that I have taken to become a SharePoint professional, in chronological order. Thanks, Susan Cargile, for assigning me the task of first installing SharePoint in 2004. Who knew, right? Bill English, Brett Lonsdale, and Mark Miller, you have been major influences on me and the direction that my career has gone. Last, but certainly not least, I'd like to thank Shane Young and all of 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

CONTENTS

INTRODUCTION	xxix
CHAPTER 1: GETTING STARTED WITH MICROSOFT SHAREPOINT SERVER 2010	1
Introducing SharePoint	1
What Is Portal Technology?	2
Why Does an Organization Invest in Portal Technology?	2
What Is SharePoint 2010?	3
Comparing SharePoint Foundation	_
and SharePoint Server	4
SharePoint Foundation Primary Benefits	4
SharePoint Server Primary Benefits	7
SharePoint Components Overview	10
The Ribbon	10
SharePoint Lists	10
SharePoint Libraries	11
Web Parts	12
Workflow	12
Content Types	13
Sites, Workspaces, and Site Collections	14
Enterprise Features	17
Summary	19
CHAPTER 2: WORKING WITH SHAREPOINT LISTS	21
Understanding List Elements	21
Discovering SharePoint List Column Types	22
Understanding the Standard List Templates	24
Understanding the Contacts List	27
Understanding the Announcements List	29
Understanding the Tasks List	30
Understanding the Project Tasks List	31
Understanding the Issues List	32
Understanding the Calendar List	34
Understanding the Links List	36
Understanding Discussion Lists	36
Exploring Survey Lists	38

Understanding the Status List Understanding the External List Working with Lists Working with List Content Summary	40 41 41 41 57
CHAPTER 3: WORKING WITH LIBRARIES	59
Understanding Libraries and Documents Creating and Managing Documents in a Library Updating and Sharing Documents Review Document Version History Understanding SharePoint Library Templates Document Libraries Form Libraries Wiki Page Libraries Picture Libraries Data Connection Libraries Slide Libraries Summary	59 62 69 79 82 83 85 86 90 97 98 103
CHAPTER 4: MANAGING AND CUSTOMIZING LISTS AND LIBRARIES	107
Creating an Environment That Reflects Your Business Best Practices for Building a Dynamic System for Managing Content Ensure Your Changes Add Value Follow Similar Processes and Practices Provide Guides and Descriptions Working with Columns Exploring List Column Types Single Line of Text Multiple Lines of Text Choice Number Currency Date and Time Lookup Yes/No Person or Group Hyperlink or Picture Calculated (Calculation Based on other Columns) External Data Managed Metadata	108 109 109 110 110 112 113 114 116 116 118 119 120 120 120 121 122

What Are Site Columns?	124
When to Use a List-Centric Column versus a Site Column	129
Creating and Customizing Views	129
Working with the Standard View	130
Setting Up a Gantt, Calendar, or Datasheet View	134
Working with Access Views	139
Working with Custom Lists and Libraries	142
Custom List Basics	142
Managing Version Control	148
Managing Document Templates	149
Summary	152
CHAPTER 5: WORKING WITH WORKFLOW	155
Understanding Workflow	155
Initiating Workflows	156
Initiation Forms	156
Steps	156
Conditions and Actions	156
Workflow Associations	156
Working with Workflow Templates	157
Approval Workflow	157
Approval Workflow Tasks	161
Disposition Approval Workflow	162
Collect Feedback Workflow	162
Three-State Workflow	162
Collect Signatures Workflow	163
Web Analytics Workflows	164
Web Analytics Alerts	164
Web Analytics Reports	165
Creating Custom Workflow Solutions	165
Getting around the List of Workflows	166
New	166
Edit	166
Manage	166
Getting around the Workflow Settings	167
Save	167
Edit	167
Manage	167
Variables	167
The Content Section	168
Workflow Information	168

Customization	168
Settings	169
Start Options	169
Forms	169
Editing a Workflow	169
Conditions	170
Actions	171
Core Actions	171
Document Set Actions	172
List Actions	173
Relational Actions	174
Task Actions	175
Utility Actions	176
Impersonation Steps	176
Custom Ribbon Buttons	177
Variables and Parameters	178
Sending Emails	183
Workflow Tasks and History	185
Tasks	185
Task Process Designer	185
History	188
Office Client Integration	188
Visualization With Visio Premium 2010	188
InfoPath Forms and Workflows	191
Workflows in the Back Stage View	191
Workflow Administration	192
Workflow Status	192
Workflow Information	192
Tasks	192
Workflow History	192
View Workflow Reports	193
Editing Workflows	193
Deleting Workflows	193
Summary	194
HAPTER 6: WORKING WITH CONTENT TYPES	197
Content Types Overview	197
The Anatomy of a Content Type	200
Name and Description	200
Parent Content Type	200
Group	200
Template	201
•	

Workflow	205
Site Columns	208
Document Information Panel Settings	211
Information Management Policies	215
Document Conversion	216
Base Content Types	217
Business Intelligence Content Types	217
Content Organizer Content Types	217
Document Content Types	218
Document Set Content Types	219
Folder Content Types	224
Group Work Content Types	224
List Content Types	224
Page Layout Content Types	226
PerformancePoint Content Types	226
Publishing Content Types	227
Special Content Types	227
Managing Content Types	227
Enabling Content Type Management on a Library	227
Managing Multiple Content Types in a Library	229
Managing Content Types across Site Collections	231
Summary	233
CHAPTER 7: WORKING WITH WEB PARTS	233
CHAPTER 7: WORKING WITH WEB PARTS	237
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts	
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page	237 237
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages	237 237 237
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages	237 237 237 238
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part	237 237 237 238 238
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance	237 237 237 238 238 239
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part	237 237 238 238 239 240
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced	237 237 238 238 239 240 240
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout	237 237 238 238 239 240 240 241
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced Removing Web Parts The Web Part Checkbox	237 237 238 238 239 240 240 241 242
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced Removing Web Parts	237 237 238 238 239 240 240 241 242 243
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced Removing Web Parts The Web Part Checkbox Exporting and Importing Web Parts	237 237 238 238 239 240 240 241 242 243 243
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced Removing Web Parts The Web Part Checkbox Exporting and Importing Web Parts Connect Web Parts	237 237 238 238 239 240 240 241 242 243 243 244
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced Removing Web Parts The Web Part Checkbox Exporting and Importing Web Parts Connect Web Parts About the Out-of-the-Box Web Parts	237 237 238 238 239 240 241 242 243 243 244 246
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced Removing Web Parts The Web Part Checkbox Exporting and Importing Web Parts Connect Web Parts About the Out-of-the-Box Web Parts List and Library Web Parts	237 237 238 238 239 240 241 242 243 243 244 246 246
CHAPTER 7: WORKING WITH WEB PARTS Using Web Parts Adding a Web Part to a Page Wiki Pages Web Part Pages Configuring a Web Part Appearance Layout Advanced Removing Web Parts The Web Part Checkbox Exporting and Importing Web Parts Connect Web Parts About the Out-of-the-Box Web Parts Web Part Views	237 237 238 238 239 240 241 242 243 243 244 246 246

Business Data Web Parts	249
Chart Web Part	249
Excel Web Access	251
Status List	252
Indicator Details	252
Visio Web Access	253
More Business Data Web Parts	254
Content Rollup Web Parts	254
Content Query	254
Relevant Documents	256
RSS Viewer	256
Summary Links	257
Web Analytics	257
WSRP Viewer	258
XML Viewer	258
Table of Contents	258
Document Set Web Parts	258
Document Set Contents	259
Document Set Properties	259
Document ID	259
Media and Content Web Parts	259
Content Editor	259
Image Viewer	260
Media Web Part	260
Page Viewer	262
Picture Library Slideshow	262
Silverlight Web Part	262
OWA Web Parts	262
Form Web Parts	262
HTML Form Web Part	263
InfoPath Form Web Part	263
Social Collaboration Web Parts	264
Contact Details	264
Site Users	264
User Tasks	264
Social Computing Web Parts	264
Filter Web Parts	264
Choice Filter	265
SharePoint List Filter	265
Current User Filter	265
Date Filter	265
Page Field Filter	265

Query String (URL) Filter Text Filter SQL Server Analysis Services Filter Filter Actions Search Web Parts XSLT List View Web Parts The Web Part Gallery Summary	265 266 266 266 268 268 268 268
CHAPTER 8: SITES AND WORKSPACES	271
Site Collections and Sites	271
Understanding the Boundaries	271
Managing Site Collections and Sites	278
Features	279
Managing Content and Structure	280
View All Site Content	280
Site Hierarchy	280
Site Content and Structure	281
Managing Permissions	284
SharePoint Designer Settings	284
Help Settings	285
Site Analytics	285
Managing Navigation	286
Things to Note about Navigation	291
Working with Content across Sites	292
Understanding the Templates	293
Site Collection Templates	293
Collaboration Templates	294
Meetings Templates	295
Enterprise Templates	296
Publishing Templates	297
Custom Templates	297
Web (Subsite) Templates	298
Creating Custom Templates	299
Saving a Site as a Template	299
Moving the Template to a New Location	302
Creating Templates for Site Collections	303
Working with Content Offline	303
SharePoint Workspace	303
Summary	306

CHAPTER 9: BRANDING AND THE USER EXPERIENCE	309
Why Organizations Brand	309
Best Practices for Enhancing the User Experience	310
Changing the Site Logo	311
Working with Themes	313
Tips for Success	318
When to Use Themes	319
Working with Master Pages	319
What Is a Master Page?	319
Understanding the Relationship between Master Pages and Style Sheets	
Best Practices for Branding SharePoint	321 333
Summary	333
CHAPTER 10: USER MANAGEMENT, AUDIENCES, AND PROFILES	337
Understanding User Access Management and Personalization	338
What Is the Difference between User Access Management and	
Personalization?	338
How Do Users Log In to a SharePoint Site?	339
Managing Access in SharePoint	342
Understanding the SharePoint Permission Levels	342
Understanding the SharePoint Site Groups	345
Working with Site Groups and Permission Levels	346
Understanding the Different Levels of Access in SharePoint Site-Level Access	354 354
List- or Library-Level Access	356
Item-Level Access	358
Understanding User Profiles	361
Adding and Updating User Profiles	361
Configuring Profile Updates	367
Working with Audiences	367
Membership-Based Audiences	370
Profile Property-Based Audiences	375
Summary	377
CHAPTER 11: PERSONALIZATION AND SOCIAL NETWORKING	381
Personalization Overview	382
Engage People	382
Improve the Search Experience	382
Knowledge Mining	382
The Informal Organization	382
Understanding My Sites	383

My Profile	383
The Overview Tab	384
The Organization Tab	384
The Content Tab	384
The Tags and Notes Tab	386
The Colleagues Tab	386
The Memberships Tab	388
Edit My Profile	389
My Content	391
Blogs	391
Shared and Personal Content	392
Web Parts	392
My Newsfeed	393
My Links	394
Tagging and Note Boards	396
Tagging	396
Tag Profiles	397
Note Boards	398
Manage Content Rating	400
Social Computing Web Parts	402
Tag Cloud	402
Organization Browser	403
Note Board	403
People Search	403
Blogs and Wikis	404
Blogs	404
Wikis	406
Understanding Audiences	408
Targeting Content to Audiences	408
List Items Displayed in a Content Query Web Part	408
Web Parts	408
Web Part Pages	408
Navigation Links	409
Personalization Site Links	409
Publish Links to Office Client Applications	409
Creating Audiences	412
Audience Properties	413
Audience Rules	413
Audience Compilation	413
The Outlook 2010 Social Connector	414
Summary	414

CHAPTER 12: FORMS MANAGEMENT	417	
What Is InfoPath?	418	
Creating and Customizing an InfoPath Form	418	
Core Concepts	426	
Page Design	427	
Controls	428	
Textbox	429	
Rich-Text Box	430	
Selection Listboxes	431	
Date Picker	431	
Checkbox	433	
Option Button	433	
Button	435	
Picture Button	435	
Sections	435	
Other Controls	436	
Data Source	437	
Views	439	
Design Checker	441	
Publish Form Template	442	
Working with Form Templates	443	
Designing a New Form	443	
Publishing a Form Template to a Library	452	
Customizing a Form Template	456	
Advanced Form-Publishing Options	466	
Summary	471	
CHAPTER 13: GETTING STARTED WITH WEB CONTENT		
MANAGEMENT	475	
Web Content Management	475	
Publishing Features Overview	476	
Creating a Publishing Portal	476	
The Publishing Portal's Lists and Libraries	479	
Working with Variations	482	
How Do Variations Work?	483	
Understanding Labels	485	
Managing Translation Workflows	489	
Page Layouts and Content Types	495	
Understanding Document Conversion	505	

Enabling Publishing on a Team Site Summary	512 513
CHAPTER 14: RECORDS MANAGEMENT	517
What Is Records Management?	517
Getting Started with Records Management	518
Key Roles and Responsibilities	518
The File Plan	518
The Classification Plan	520
Implementing a Classification Plan	522
Working with Managed Metadata	523
The Records Repository	530
Archive Approach	530
In-Place Approach	539
Records Retention and Expiration	544
Holds	551
Summary	555
CHAPTER 15: BUSINESS CONNECTIVITY SERVICES	559
Configuring a BCS Application	560
Security Considerations	560
Creating External Content Types	562
Creating External Lists	568
Understanding Profile Pages	569
Understanding Associations	569
Understanding Business Data Actions	570
Working with BCS	571
Accessing BCS Data from Outlook 2010	571
Using BCS Associations	574
Accessing BCS Data from SharePoint Workspace 2010	576
Using the BCS Web Parts	577
Business Data List	577
Business Data Item	579
Business Data Actions	580
Business Data Connectivity Filter	580
Business Data Item Builder	581
Business Data Related List	581
Chart Web Part	581
Using the External Data Column	581

Using BCS Data in Office Applications	583
For the Administrator	586
Searching BCS Data	586 586
Secondary User Profile Data Developing Custom Solutions for BCS	587
Summary	588
CHAPTER 16: BUSINESS INTELLIGENCE AND INSIGHTS	591
Getting Started	592
Excel Services Overview	593
Publishing an Excel Workbook	594
Using the Excel Services Web Parts	600
Toolbar and Title Bar	600
Navigation and Interactivity	601
Standard Web Part Tool Pane Settings	601
Working with Parameters	606
External Data Connections	610
Managing Permissions	610
Chart Web Part	611
Understanding Status Lists	618
Working with Visio Services	621
PerformancePoint Features	625
Getting Started	627
Understanding the Organization	627
Walk before You Run	627
Summary	628
CHAPTER 17: WORKING WITH SEARCH	631
Understanding SharePoint Search	631
Key Terms	632
Content Source	633
IFilter	633
Crawl Schedule	633
Index	633
Query	634
Search Scopes	634
Keywords and Best Bets	634
Federated Search	634
Search Center	634
Working with Search	635

Basic Search	635
Search Default Settings	639
Building Search Queries	640
Boolean Search	640
Prefix Matching	640
Phonetic People Search	640
Suggestions and Did You Mean?	641
Customizing the Search Experience	641
Search Settings	642
Search Scopes	650
Search Keywords	660
Customizing Search Center	663
Search Center	663
Search Web Parts	664
Search Center Tabs	672
Search Services Configuration	677
Search Service Application Configurations	677
Search Analytics	680
Summary	680
CHAPTER 18: IMPLEMENTING A GOVERNANCE FRAMEWORK	683
Governance Overview	683
Your Role in Governance	684
Unique Organizations	684
Realistic Expectations	685
Understanding the Vision	685
Understanding the Pillars of a Governance Framework	686
Key Roles	686
SharePoint Owner	686
SharePoint Infrastructure Administrator	687
SharePoint Solution Architect	688
SharePoint Branding Specialist	688
SharePoint Help Desk	688
SharePoint Developer	689
SharePoint Power Users	689
SharePoint Contributors	689
SharePoint Readers	690
Project and Change Management	690
Project Management	
r roject management	690

Information Architecture and Taxonomy	693
Web Applications	693
Content Databases	693
Sites	694
Webs	695
Lists	695
Items	695
Information Architecture Planning	695
Operations and Infrastructure	697
Communications	698
Training	698
Current Needs	699
Time Sensitivity	699
Development	699
Out of the Box vs. Development	700
Third Party Solutions vs. Development	700
Solutions	700
Best Practices for Effectiveness	701
Working as a Team	701
Communication Is Key	701
Small Steps Are Better Than No Steps	702
Work from a Written Plan	702
Avoiding the Jack of All Trades	702
Summary	703
APPENDIX A: INSTALLING SHAREPOINT SERVER 2010	705
Choosing Your Installation Type	705
APPENDIX B: EXERCISE SOLUTIONS	713
Chapter 1 Exercise Solutions	713
Chapter 2 Exercise Solutions	714
Chapter 3 Exercise Solutions	714
Chapter 4 Exercise Solutions	715
Chapter 5 Exercise Solutions	716
Chapter 6 Exercise Solutions	716
Chapter 7 Exercise Solutions	717
Chapter 8 Exercise Solutions	718
Chapter 9 Exercise Solutions	719
Chapter 10 Exercise Solutions	719
Chapter 11 Exercise Solutions	720

Chapter 12 Exercise Solutions	721
Chapter 13 Exercise Solutions	721
Chapter 14 Exercise Solutions	722
Chapter 15 Exercise Solutions	723
Chapter 16 Exercise Solutions	724
Chapter 17 Exercise Solutions	724
INDEX	725