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Microsoft SharePoint consultant



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by Vanessa L. Williams



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About the Author

Vanessa L. Williams is a professional web consultant based in Indianapolis. She has developed web-based solutions for a long time, specializing in ASP.NET and SharePoint for the past five years.

Dedication

For Mom, who's not here anymore, and Simone, who is.

Author's Acknowledgments

Writing these books is always a whirlwind tour of SharePoint's functionality. There's just never enough time to explore it all. Toward that end, I relied on many people to help pull together this book.

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You can reach me online at www.sharepointgrrl.com.

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Bonus Chapter 3: Access Services On the Web

Introduction

With everyone connected via internal networks and externally with the Internet, more organizations are using websites — both inside and outside their organizations. Think about where you work. Your company probably has at least one website on the Internet, and probably several more, such as a brochureware site, an e-commerce site, and product microsites.

Internally, Human Resources may have its own self-service portal. Your department may have a website for posting documents to share with others. Another group may post reports to a site. Nowadays, websites are ubiquitous.

Websites have some really great things to offer. They're *standards-based*, which means it's easy for them to talk to each other. They're easy to search. They can be visually stunning or plain Jane. They require nothing more than a browser to interact with — even on a mobile phone!

Microsoft SharePoint Server 2010, the product, and SharePoint Online, its cloud-based cousin, take advantage of the best of the web to help you be more productive at work. Not just you, but also your coworkers, department, division, and even your Information Technology (IT) department.

Take everything you know about websites and then add to that the ability to manage and search documents, publish reports and business information, track contacts, display information from other databases, and collaborate using blogs, wikis, and discussion boards. You can use SharePoint's websites to store, track, secure, and share all the stuff you do at work.

Do you know how to create web pages? Do you know how to create links from one page to the other? Do you know how to configure a website for search and document storage? With SharePoint, you can do all these things without any technical skills.

And that's what this book shows you how to do. SharePoint 2010 is intended to be a self-service environment, and this book helps you get the most out of the platform.

No, Really, What Is SharePoint?

Maybe you're a whiz at Word or a spreadsheet jockey with Excel. Going forward, you're going to have to be just as good at Microsoft SharePoint to get the most out of your desktop Office client applications. Microsoft is continuing to

integrate functionality once locked up in client applications, or not available at all, with SharePoint. For example, using SharePoint 2010 with Office 2010, you can create an online gallery of your PowerPoint slides, display interactive spreadsheets in web pages, or reuse information from your company's databases in Word documents. You can even use Visio 2010 to automate your business processes using SharePoint.

Officially, Microsoft represents SharePoint 2010 as a “business collaboration platform for the Enterprise and web.” *SharePoint* is a set of different products from Microsoft that allows businesses to meet their diverse needs in the following domains:

- ✔ **Collaboration:** Use SharePoint's collaboration sites for activities, such as managing projects or coordinating a request for proposal.
- ✔ **Social networking:** If you work in a large company, you can use SharePoint as a Facebook for the Enterprise experience that helps you track your favorite coworkers and locate people in expertise networks.
- ✔ **Information portals and public websites:** With SharePoint's web content management features, you can create useful self-service internal portals and intranets, or you can create visually appealing websites that are actually easy for your business users to maintain.
- ✔ **Enterprise content management:** SharePoint offers excellent document- and record-management capabilities, including extensive support for metadata and customized search experiences.
- ✔ **Business intelligence:** SharePoint is an ideal platform for providing entrée into your organization's business analysis assets. You can use insightful dashboards that allow users to get the big picture at a glance and then drill down to get more detail.
- ✔ **Business applications:** Use SharePoint to host sophisticated business applications, integrate business processes' backend databases and your SharePoint content, or simply use SharePoint as the means to present access to your applications.

The functionality I discuss in the preceding list is delivered by two core products and one service:

- ✔ **SharePoint Foundation 2010** is the underlying software platform that delivers all the building block functionality of SharePoint. That includes lists, libraries, web pages, websites, and alerts. SharePoint Foundation is licensed as a Windows Server 2008 component. In other words, as part of a properly licensed Windows Server 2008, you also get all the functionality of SharePoint Foundation 2010.
- ✔ **SharePoint Server 2010** is a set of applications that uses the building blocks of SharePoint Foundation 2010 to deliver all the functionality

mentioned earlier. SharePoint Server is licensed as several separate products, each one offering a batch of functionality. When using SharePoint internally, you have at least a standard license that grants you access to use search, portals, social networking, and some content management features. You also need an enterprise license if you intend to use SharePoint's advanced content management, business intelligence, and business application features.

- ✔ **SharePoint Online** is a cloud-based service offered by Microsoft that allows you to create much the same SharePoint experience as you can with either SharePoint versions installed on a local server, but you don't have to install and maintain it. It can come bundled with an Office 365 monthly subscription, giving you access to hosted e-mail, calendaring, and conferencing with Microsoft Exchange and Microsoft Lync, or you can buy a SharePoint Online monthly subscription on its own.

Additional licensing is required to use SharePoint in Internet scenarios unless you have SharePoint Online, which comes with a built-in, Internet-facing website. Microsoft offers additional products to enhance the search experience.

I approach SharePoint with the following model:

- ✔ **Product:** SharePoint is a product with a lot of features, even in SharePoint Foundation. I always explore how SharePoint works without any customization when I'm deciding how to approach a solution.
- ✔ **Platform:** I like to view SharePoint as a platform. SharePoint provides everything you need to deliver a robust business solution. It provides security, logging, and most of the other "plumbing" required to deliver web-based solutions.
- ✔ **Toolkit:** Finally, I view SharePoint as a set of components and controls that I can mix and match to provide a solution. Almost everything you see on a web page in SharePoint can be reused on the pages you create. I mean *everything*, even menus and buttons.

From a technical perspective, I view SharePoint as

- ✔ **Database-driven:** SharePoint uses SQL Server to store your content. That means you can get your content out of the database in XML format. Given the flexibility of XML, the sky's the limit in terms of what you can do with that content. Don't be tempted to query the SQL Server directly. SharePoint 2010 provides a set of well-documented services that you can use to query SharePoint.
- ✔ **ASP.NET:** Everything you may know about ASP.NET applies to SharePoint. SharePoint is essentially a reference architecture.
- ✔ **A web application:** Emphasis on *web*. Everything I know about building solutions for the web applies to SharePoint.

Who Should Read This Book

This book is intended for power users and site stewards who need to be productive in SharePoint, and also technical users who are looking to get a good introduction to SharePoint.

Others who may benefit from this book include

- ✔ **Developers:** This isn't a development book, but the best SharePoint developers are those who understand the product. This book explains just that. I deliver 100 percent of SharePoint solutions without writing any server-side code. I don't think server-side code is bad, but I don't believe it's the place to start when designing a SharePoint solution.
- ✔ **IT professionals:** This isn't a book that explains how to stand up a SharePoint server farm. However, this book helps you understand what features your end users may want to see in a SharePoint farm that you architect or support.
- ✔ **Managers:** If you manage a department or business unit, you need to understand how to get the most out of SharePoint. If your company has made significant investments in SharePoint deployment, it'd be a shame if you didn't know how to leverage that investment.

How to Use This Book

This book is a *reference*: You don't have to read it cover to cover. Because many of the features in SharePoint are dependent on other features, I point you to related chapters in the book when appropriate.

Foolish Assumptions

Because SharePoint is such a huge topic, I have to make some assumptions about your configuration and starting knowledge, such as

- ✔ **You have some version of SharePoint 2010 installed.** Microsoft usually has a pre-built evaluation version of SharePoint available on its download site. Doing all the scenarios covered in this book requires an Enterprise Edition license of SharePoint 2010. If you're interested in SharePoint Online, you can also sign-up for a free 30-day trial.
- ✔ **You're a contributor or ideally, you're a *site collection administrator*, which means you have full control over your site.** Of course, many

of the scenarios in this book require only that you be a contributor. So long as you know who your site collection administrator is, you can ask that person for elevated permissions.

- ✓ **Ideally, you have a sandbox or test environment where you can try different scenarios.** Your company probably has an environment where it can easily stand up a sandbox. Don't be afraid to ask. I don't recommend using your production environment to perform some of the scenarios in this book, such as customizing page layouts.
- ✓ **Many of the scenarios in this book assume your implementation includes My Site.** Unfortunately, many companies try to avoid using this feature. In SharePoint 2010, My Site is an integral component for many features. I strongly advise utilizing My Site.

How This Book Is Organized

This book groups related SharePoint topics in parts. Each part covers a different aspect of getting the most out of SharePoint.

For the geeks out there:

- ✓ Parts I and II roughly correlate to SharePoint 2010 Foundation.
- ✓ Part III and IV map to SharePoint 2010 Standard Edition.
- ✓ Parts V and VI cover aspects of Foundation, Standard, and Enterprise Edition.

Part I: Collaborating with Team Sites

This part of the book covers all the basics of using team sites. This material is the foundation to much of SharePoint, so if you don't know how to perform the tasks listed here, start in this part:

- ✓ Sharing documents and list items (calendars, tasks, and so on)
- ✓ Creating custom views
- ✓ Keeping track of changes in your team site with alerts, feeds, and using SharePoint workspaces for offline access
- ✓ Working with SharePoint lists and libraries with SharePoint Workspace, which also allows you to take SharePoint content offline

Part II: Taking Your Team Site to the Next Level

In Part II, I show you how to customize your team site to meet your specific collaboration needs. Like Part I, these tasks are foundational to much of SharePoint, so be sure to spend some time in Part II to see how to

- ✓ Use your team site for document management
- ✓ Working with Web Parts and web pages
- ✓ Customizing forms and creating workflows
- ✓ Add content other than documents to your team site
- ✓ Secure your team site and create new sites

Part III: Building Communities

In this part, I show you how to use SharePoint to store and share information about yourself, including

- ✓ How to effectively manage your public profile
- ✓ How to use your My Site to its fullest potential
- ✓ Take advantage of SharePoint's social networking features

Part IV: Portals and Extranets

In this part, I show you how to use SharePoint to host public-facing websites and internal informational portals. Topics include

- ✓ How to use page templates to make it easier for folks to add content
- ✓ How to roll up content to a landing page
- ✓ How to configure site navigation and create a client portal
- ✓ How to create a public site in SharePoint Online

Part V: Managing Enterprise Content

The features I cover in Part V help you extend your collaboration experience beyond your site. In this part, I explain how to use metadata and search to improve the *findability* of your content. I also introduce the content archiving and records management features of SharePoint 2010.

Part VI: Exploring Enterprise Services

In Part VI, I cover the business intelligence features of SharePoint 2010. I also cover the Business Connectivity Services which allow you to incorporate data from external systems into SharePoint 2010. In the last chapter of this part, I cover how you might choose between installing and managing SharePoint on your own server, or if you should take the leap to SharePoint Online/Office 365.

Part VII: The Part of Tens

In this part, I share some parting words of wisdom in the form of two chapters:

- ✓ Ten things you need to think about to make sure your SharePoint site's entire installation keeps running smoothly after deployment
- ✓ Ten ways to get more information on SharePoint

Online Bonus Content

In addition, you can find online bonus content at this book's companion website. Bonus Chapter 1, "Managing Site Assets," Bonus Chapter 2, "Branding Your SharePoint Site," and Bonus Chapter 3, "Access Services" can all be found online at www.dummies.com/go/sharepoint20102efd.

Icons Used in This Book



You find a handful of icons in this book, and here's what they mean:

Tips point out a handy shortcut, or they help you understand something important to SharePoint.



This icon marks something to remember, such as how you handle a particularly tricky part of SharePoint configuration.



This icon is my chance to share with you details about the inner workings of SharePoint. Most of the information you find here pertains to some aspect of SharePoint that requires configuration at the server. That means you can point out the stuff beside this icon to IT and ask them to make SharePoint do that.



Although the Warning icon appears rarely, when you need to be wary of a problem or common pitfall, this icon lets you know.

Where to Go from Here

All right, you're all set and ready to jump into this book. You can jump in anywhere you like — the book was written to allow you to do just that. But if you want to get the full story from the beginning, jump to Chapter 1 — that's where all the action starts. (If you already have a SharePoint server up and running, you might want to jump ahead to Chapter 2, where you can get your hands dirty with some site content.)

Occasionally, we have updates to our technology books. If this book does have technical updates, they will be posted at dummies.com/go/sharepoint2010fd2eupdates.