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2nd Edition

# Microsoft SharePoint® 2010

## FOR DUMMIES®

### Learn to:

- Administer and customize SharePoint Online
- Move to the cloud and work with Microsoft Office 365
- Take advantage of the newest features
- Get your site up and running and manage it effectively

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# SharePoint® 2010 For Dummies®, 2nd Edition

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## Cheat Sheet

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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](http://www.sharepointgrrl.com).

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# Introduction

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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