

ISHAI SAGI

SharePoint® 2010

HOW-TO



SAMS

SharePoint® 2010 How-To

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CHAPTER 1

About Microsoft SharePoint 2010

IN THIS CHAPTER

- ▶ What Is Microsoft SharePoint 2010?
- ▶ Difference Between SPF and SharePoint Server
- ▶ What Is a Site?
- ▶ What Is a Personal Site?
- ▶ What Is a Ribbon?
- ▶ What Is a List?
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- ▶ What Is Managed Metadata?
- ▶ What Are Versions?
- ▶ What Does Check-in/Check-out Mean?
- ▶ What Is a Workflow?

What Is Microsoft SharePoint 2010?

SharePoint is a Microsoft platform that allows people to build websites. SharePoint 2010 is the fourth version of SharePoint from Microsoft, and it is also known as SharePoint v4 or Microsoft Office SharePoint Server 2010. It is very different from the versions that came before it.

SharePoint allows people to create websites with different content and different purposes. Its many built-in features and components make it a comprehensive solution that can fit many needs.

One common use of SharePoint in organizations is to create sites that are used for team collaboration. These collaborative sites, also known as *team sites* or *group work sites*, enable team members to better work with one another. They can use the site to share documents, assign tasks, track team events on a shared web calendar, and much more. This use is known as a *team collaboration system*.

Many companies use SharePoint for their central document storage, replacing network folders. This use is known as an *electronic document management system*.

Another common use is as a corporate portal where the corporate employees can go and download forms, read corporate news, fill in surveys, and search for documents. This use is known as an *electronic content management system* or an *intranet*.

Finally, some companies choose the SharePoint platform as the platform for their Internet sites—where visitors from around the world can visit the company's website and read about the company's products, register for events, and do whatever it is the site has been configured to allow them to do. This use is known as a *web content management system*.

This variety of possible uses of SharePoint indicate the flexibility of the SharePoint platform. It is highly customizable—which means that one SharePoint site (for example, the one shown in Figure 1.1) may look entirely different from another SharePoint site (such as the one shown in Figure 1.2). This book shows mostly basic SharePoint sites (sites that have not been customized), and the sites that you will be using may look significantly different. It is important to keep that in mind when following the instructions in this book, as some of the things mentioned in this book and shown in the figures may differ from site to site.

The SharePoint platform is also known as SharePoint Foundation. This book uses *SPF* when referring to a SharePoint site that is built based on this platform.

The SharePoint product family has other products that can be added on top of SPF to enhance the sites in different ways. One of these products is called SharePoint Server, and even that has two versions—standard and enterprise—each adding more features. Often the term *SharePoint* is used to refer to either SPF or to the two extended versions SharePoint Server—and this can be a bit confusing.

Because the SharePoint Server products are extensions of SPF, sites built using those products have all the capabilities of SPF sites, but with extra features. Some of the differences between SharePoint Server and SPF are explained in the following section.

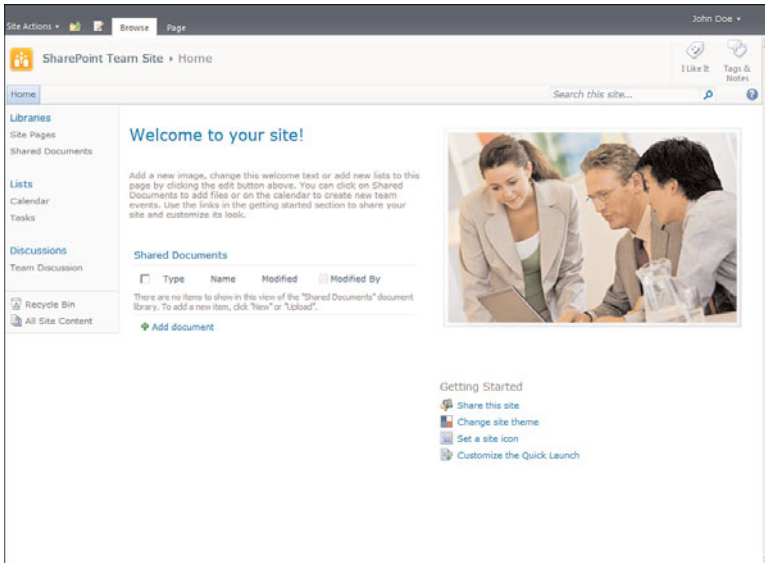


FIGURE 1.1
A standard SharePoint site.

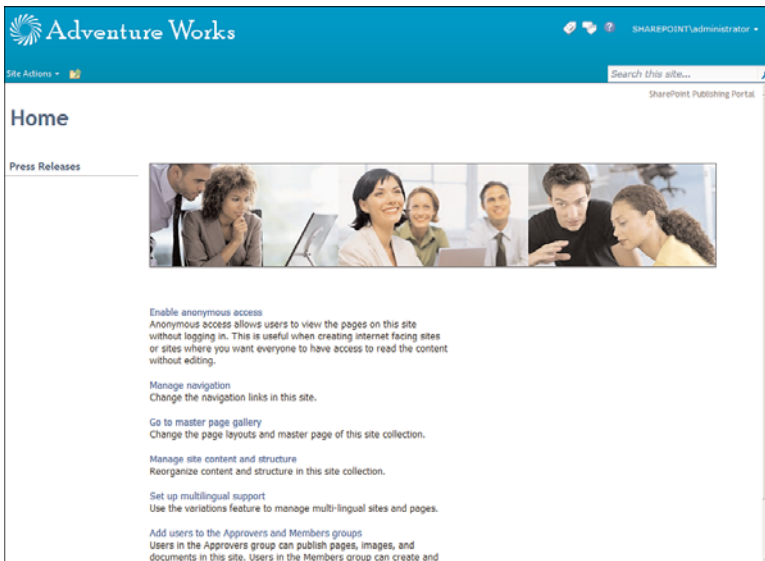


FIGURE 1.2
A customized SharePoint site.

SharePoint sites have many built-in features that make them useful, flexible, and customizable—features such as security management, lists of information, document libraries (places to store and manage files and documents), views, alerts, and searches. All these and more are explained in this chapter.

Difference Between SPF and SharePoint Server

As mentioned earlier in this chapter, SharePoint Server is an extension of SPF. SharePoint Server sites have features that are not available in SPF sites, and they enjoy all the features of SPF sites.

SPF sites work well for collaboration sites. Such a site gives groups of people the ability to upload and download documents, use discussion boards, assign tasks, share events, and use workflows. However, SPF does not have enough features to be a good platform for a corporate portal or for a corporate search solution. SharePoint Server offers extra features that upgrade SPF into a platform that can serve a corporation with enterprise searching (searching from one location across all the sites that corporate has and on documents and external systems that are stored in other locations, not just in SharePoint). It also has features for storing details about people and searching on them, and it enables employees to have their own personal sites where they can store documents (instead of on their machines). SharePoint Server has many more features related to business intelligence and business processes and forms. (For more information about personal sites, see “What Is a Personal Site?” later in this chapter, and see Chapter 5, “Social Networking, Personal Sites, and Personal Details in SharePoint Server.”)

Finally, SharePoint Server has a publishing feature that enables site managers to create publishing sites where it is easy to author pages (as opposed to documents) and publish them using workflows. This is very important for large corporations that want to, for example, publish corporate news using an approval workflow or build an Internet site where every page must go through a special approval process.

What Is Microsoft FAST Search?

FAST is an optional component of SharePoint Server that an organization can have installed on top of SharePoint. It adds further intelligence to the regular SharePoint search experience by enhancing the search options and how the search results are returned. If FAST is installed on a SharePoint site, you see more options than you would normally get in SharePoint. Chapter 4, “Searching in SharePoint,” provides some examples of these options.

How to Tell Whether a Site Is Based on SPF or SharePoint Server

There is no way to tell just by looking whether a site is hosted on a server that has SharePoint Server installed. Customizations that a company might have developed may cause an SPF site to look as if it has some extensions that come with SharePoint Server. On the other hand, customizations can cause a SharePoint Server site to look simpler; for example, it might remove the SharePoint Server–specific links that help identify a site as a SharePoint Server site.

However, there is one thing you can look for in most SharePoint sites to determine with a fair degree of certainty whether a site is SharePoint Server or SPF: You can look for

the My Site link under the name drop-down at the top of the screen (see Figure 1.3). If you see that link, you are viewing a site that is running on a server with SharePoint Server. Not having the link does not necessarily mean that the site does not have SharePoint Server, however, because the administrator can choose to disable that functionality.

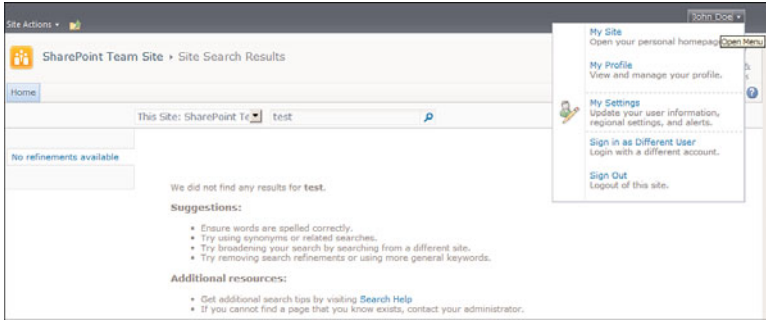


FIGURE 1.3
The My Site link under the Name drop-down.

Additional differences between the two versions will become clear as you go through this book. Many topics in this book indicate that they are valid only in SharePoint Server, and you can usually find whether they are available by trying to perform the task described.

What Is a Site?

The structure of SharePoint sites (sometimes referred to as *webs*) is very different from the structure of typical Internet sites that contain only pages. In SharePoint, a site can house more than just pages. It is a container that holds lists and libraries (discussed later in this chapter), and it can have other sites under it.

For example, a corporate portal might have a home site called SharePoint Intranet that contains information that people see when they browse to that site. That portal also might have a subsite called Human Resources that stores forms such as travel requests, expense claims, and other forms. The two sites are linked because the Human Resources site is under the SharePoint Intranet site. The two sites may share some attributes, such as security (who is allowed to do what in the sites) and navigation (so that visitors to the sites can navigate between the sites), but they have separate contents—for example, different pages, libraries, and lists, as shown in Figures 1.4 and 1.5.

Every SharePoint site is a member of a site collection. As the name implies, a site collection is a collection of sites. Every site collection has a single site as its root site, and other sites can be built under the root site. A site collection has some attributes that are common to all the sites in that collection (for example, some search settings, a Recycle Bin for deleted items).

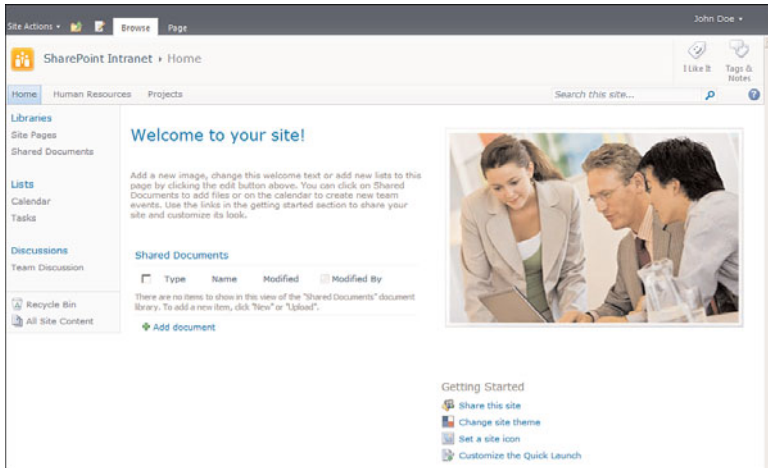


FIGURE 1.4

A site that has subsites. Human Resources and Projects are subsites of the site SharePoint Intranet site.

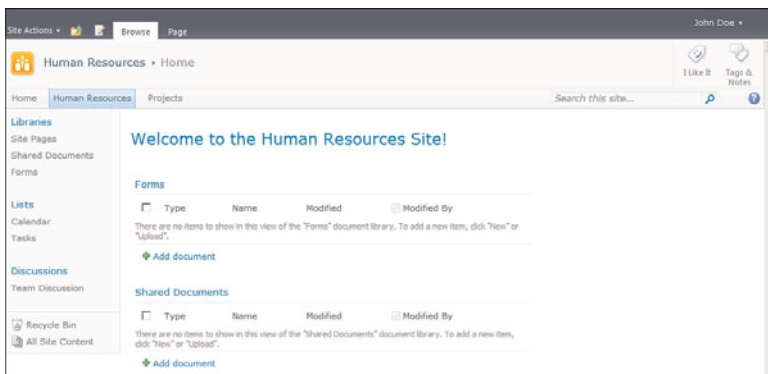


FIGURE 1.5

A site that is a child site. The Human Resources site is under the SharePoint Intranet site.

What Is a Personal Site?

A personal site is a site that belongs to a specific user and is used to show user information that belongs, personally, to that user. The user can upload documents to a personal document library in the personal site, and only that user will be able to see and manage these documents. The personal site is also a place where users can manage their personal favorite items and comments that they have tagged throughout SharePoint or even outside SharePoint (see “What Is Tagging?” later in this chapter). The personal site has special pages with information that might be important to track. A user can track information by using newsfeeds that tell you what your colleagues are up to. In addition, users can run searches and stay up-to-date on those subjects. In

addition, the personal site is usually the place from which users can modify their personal details in the corporate directory.

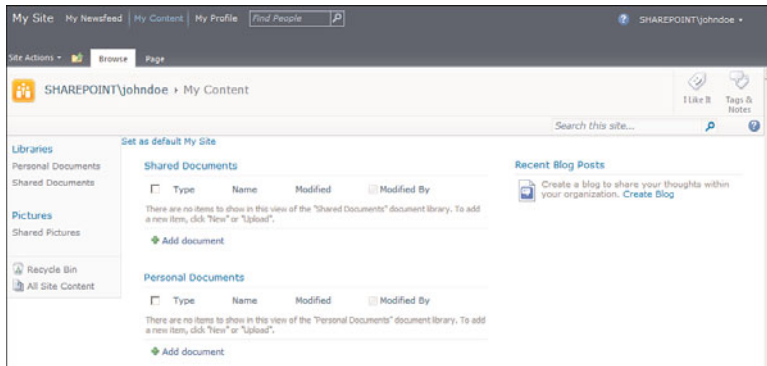


FIGURE 1.6

A personal site showing the content of the site.

A personal site usually has components that display information targeted specifically to that user. For example, it might have components that show the user's e-mail, or upcoming meetings from the person's calendar, and a list of documents the user has recently worked on and tasks assigned to the user.

For more in-depth information about the personal site and what you can do in it, see Chapter 5.

NOTE As mentioned earlier, personal sites are available only with SharePoint Server, not with SPF.

What Is a Ribbon?

As part of the Microsoft Office product family, SharePoint 2010 uses a design concept called a ribbon to display different menus and buttons, depending on what you are looking at. It is important to know how to use the ribbon so you can move around in a site and perform actions in it.

This book covers many different actions available in different ribbons. Part II, "Solutions for Authors and Content Managers," explains how to author content, and Part III, "Solutions for Site Managers," explains how to manage websites. Although these tasks use the ribbon heavily, it is also important for readers who do not need to author information to be familiar with the ribbon concept to avoid getting lost. As you will see in Chapter 2, "Finding Your Way Around a SharePoint Site," and Chapter 3, "Solutions Regarding Files, Documents, List Items, and Forms," you use the ribbon to perform many types of navigational actions on documents and list items.

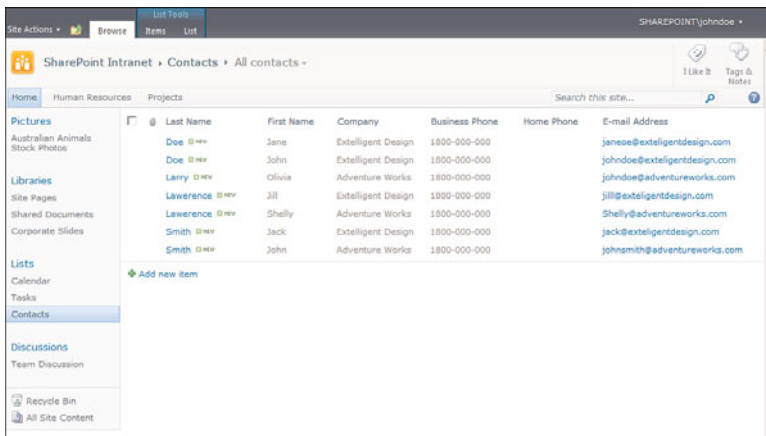
What Is a List?

A SharePoint list is a container for information, similar to a very simple database or spreadsheet. Using a list is the most common way to manage information in a SharePoint site.

In a list, data is gathered in rows, and each row is known as a *list item*. A list can have multiple columns—also known as *properties*, *fields*, or *metadata*. So a list item is a row with data in those columns.

For example, a list of contacts (shown in Figure 1.7) may have the following columns:

- ▶ First Name
- ▶ Last Name
- ▶ Company
- ▶ Phone



Last Name	First Name	Company	Business Phone	Home Phone	E-mail Address
Doe	Jane	Extelligent Design	1800-000-000		jane@extelligentdesign.com
Doe	John	Extelligent Design	1800-000-000		john@extelligentdesign.com
Larry	Olivia	Adventure Works	1800-000-000		john@extelligentdesign.com
Lawrence	Jill	Extelligent Design	1800-000-000		jill@extelligentdesign.com
Lawrence	Shelly	Adventure Works	1800-000-000		shelly@adventureworks.com
Smith	Jack	Extelligent Design	1800-000-000		jack@extelligentdesign.com
Smith	John	Adventure Works	1800-000-000		johnsmith@adventureworks.com

FIGURE 1.7

A contacts list with sample data.

These columns may have the following list items:

- ▶ First Name: John
- ▶ Last Name: Doe
- ▶ Company: Extelligent Design
- ▶ Phone: 1800-000-000

Lists can be used in many cases. For example, you might use lists for links, tasks, discussions, announcements, or events. In SharePoint, users can create lists and columns. Lists can be used for almost anything that can be described by a group of columns.

The information in lists can be displayed on pages in a SharePoint site. For example, if the site manager wants to display a list of links on the site, that manager can add a web part (See “What are Web Parts?” later in this chapter) that shows that list, as detailed in Chapter 9, “Authoring Pages.”

Different lists can have different security settings. For example, list managers can define who is allowed to add items to a list, who is allowed to edit items, who is allowed to read the items, and so on. Similarly, each list item can have its own security settings, so different list items can be visible to different people. For example, an item that is a link to a restricted site can have security settings that prevent users who don’t have access to that site from seeing it.

In some lists, you can attach files to list items—very much like attachments in e-mail. For example, in a contacts list, you could attach to each contact a picture and a resume. Or in a list of tasks, you might attach documentation of what needs to be done to the task.

A list can hold different types of content, as explained later in this chapter, in the section “What Is a Content Type?”

For information on how to interact with lists, see Chapters 6, “Creating and Managing Files, List Items, and Forms in SharePoint,” and 7, “Creating Lists and Document Libraries.”

What Is an External List?

An external list is unlike other SharePoint lists. Strictly speaking, it is not a SharePoint list at all because it doesn’t store information inside it. An external list is a view on external data—that is, data that is contained not within SharePoint but in external databases and systems.

When you add external lists to SharePoint sites, they are displayed in an interface that looks almost exactly like a regular SharePoint list. An external list also allows most of the same interactions with the items in the list that are offered with a regular SharePoint list. This book does not cover external lists because they are an advanced feature of SharePoint 2010 that is created and configured by developers while usually looking and feeling the same as regular lists for you, the end user.

What Is a Document Library?

A document library is a special instance of a list, in which every list item is a file, as shown in Figure 1.8. Files can be Microsoft Office documents, Adobe Acrobat documents (PDF files), or any other type of file that the system administrator allows. This book often refers to document libraries as simply *libraries*.

Most of the attributes of lists exist in document libraries. In fact, lists and document libraries are similar in many ways. However, each item in a document library is a file. Therefore, when creating a new item in a document library, you need to either upload a file or create one. This process is explained in Chapter 6.

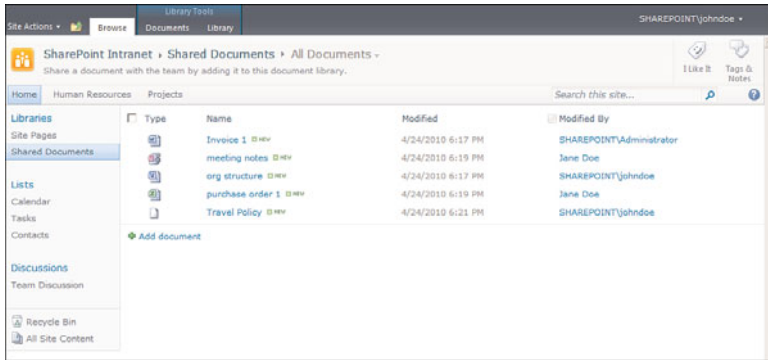


FIGURE 1.8

A sample document library with several types of documents.

Additionally, unlike in lists, in document libraries, each row can hold only one file. There isn't an option to attach more files to the row. Essentially, the file itself *is* the row.

Also, because a file can be downloaded, visitors to document libraries have different options available to them when browsing a document library than they have with lists.

Because document libraries and lists have so much in common, many instructions throughout this book apply to both. Where appropriate, the text makes clear that the instructions are for both. For example, the section “Add a Column to a List or Document Library” in Chapter 7 covers both document libraries and lists because the principle of how to create them is the same.

Several special document libraries templates are available in SharePoint. These templates are designed for specific types of content, but they are essentially document libraries. Some of these special cases are described later in this chapter.

What Is a Wiki Page Library?

A wiki page library is a special instance of a document library that is designed to store web pages. On those web pages, you can display different types of content—text, images, videos, and web parts. (For more information on web parts, see “What are Web Parts?” later in this chapter.)

What Is a Form Library?

A form library is much like a document library, but it is supposed to host only Microsoft InfoPath forms. Microsoft InfoPath is electronic form-creation software that integrates with SharePoint. Forms created with InfoPath can be published to SharePoint form libraries, and users can then fill out these forms.

With SharePoint Server, you can load some InfoPath forms without having Microsoft InfoPath installed on your machine. In this case, the form opens in a browser, as a web

form. If you have a program that can edit InfoPath forms, such as Microsoft InfoPath 2007 or Microsoft InfoPath Filler 2010, the form opens in that program.

If your company uses InfoPath for creating forms, you might want to learn how to read forms that are in form libraries, as explained in Chapter 3. You also might want to learn how to fill forms, as explained in Chapter 6. (This book does not cover creating Microsoft InfoPath forms.)

What Is an Asset Library?

An asset library is a special instance of a document library that is specially designed to store digital assets such as images, audio files, and videos.

This kind of library (shown in Figure 1.9) can be used as a repository for media files that will be used throughout the SharePoint environment—for example, corporate logos, training videos, and podcasts.

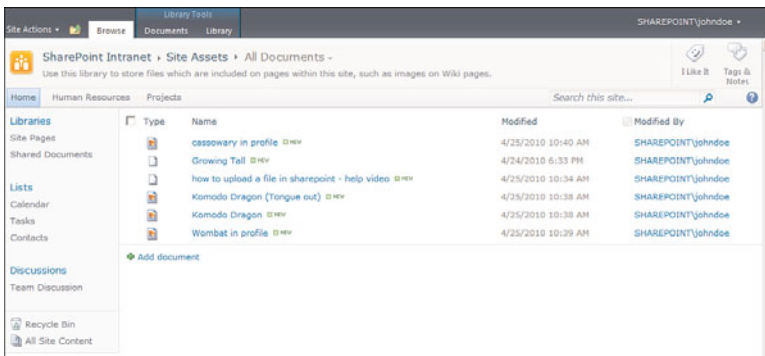


FIGURE 1.9

A sample asset library with a music file, a video file, and several stock photos to be added to pages in the site.

For more information on using the asset library as a repository for images and media files, see Chapter 9, “Authoring Pages.”

What Is a Slide Library?

A slide library is a special type of library that has features not available in other types. This library type (shown in Figure 1.10) is designed to help people in an organization collaborate to create PowerPoint presentations by sharing slides. One user can allow other users to import those slides into their presentations.

For more information about using slide libraries, see Chapter 6.

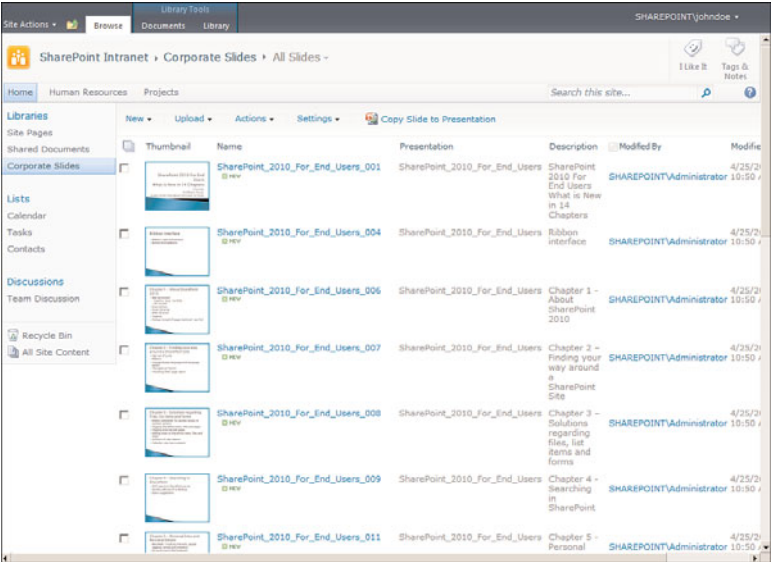


FIGURE 1.10
A slide library with multiple slides available for reuse.

What Is a Picture Library?

A picture library is a special type of a document library that is dedicated to images. A picture library is useful for sharing photos with other people. For example, you can have a picture library as your stock photo repository, as shown in Figures 1.11 and 1.12.

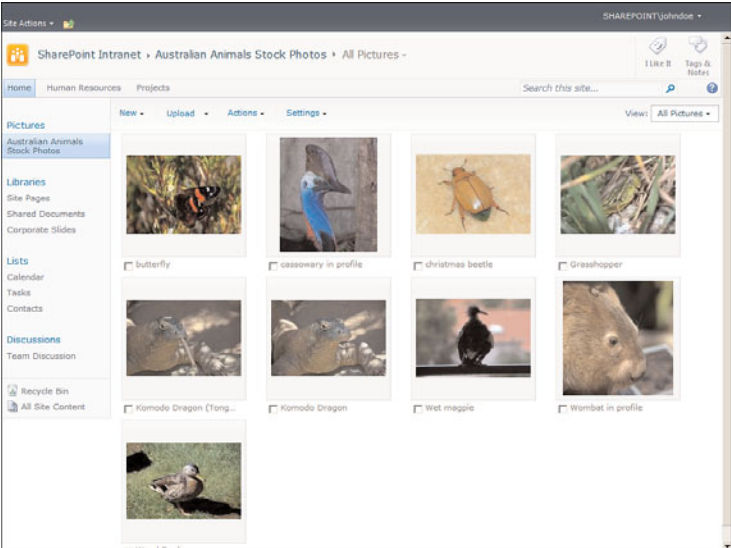


FIGURE 1.11
A picture library showing thumbnails of the pictures in it.

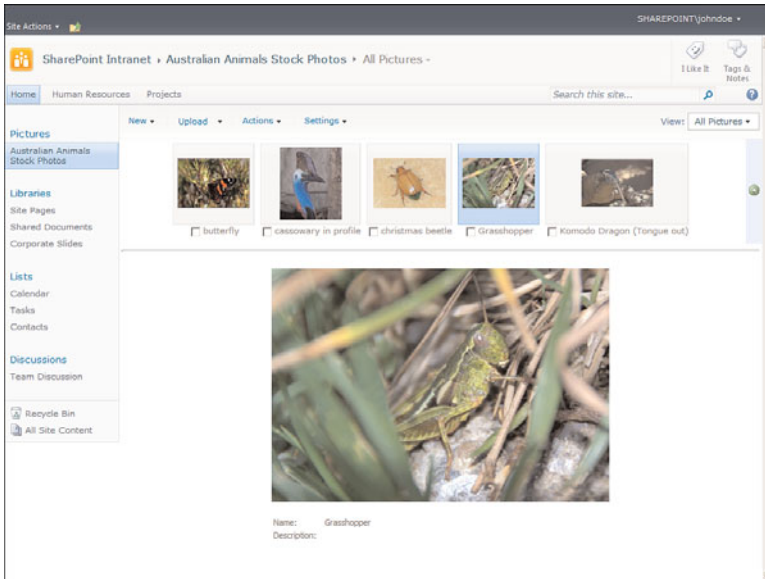


FIGURE 1.12

A picture library showing a filmstrip of the pictures in it.

A picture library includes special views that show the images as thumbnails, as in Figure 1.11, or as a film strip, as in Figure 1.12.

For more information about adding images to a picture library, see Chapter 6.

What Is a View?

Using views is a useful way for a list manager to create different ways to show the information in a list or library. Different views may show different columns and have different sorting and filtering, grouping, and styles.

In SharePoint, views can be either public or private:

- ▶ **Public**—The list's or library's managers create public views, and these views are available to anyone to use.
- ▶ **Private**—Users create private views. Only the user who created a private view can use that view. You may, for example, create a private view and customize it to show the information that you usually need to find the items or files that you usually work with.

Chapter 8, “Creating List Views,” covers creating views in more details. Chapter 3 covers how to switch between views.

There are several types of views in SharePoint. Most of the views that you will see are the standard tabular views that resemble printed worksheets—with column headers and values in rows but no ability to edit the data directly. However, some special

view styles show the information in the list in different ways. For example, the Datasheet view allows directly editing the data, and a Calendar view shows items as part of a calendar.

A Calendar view shows the items in a list based on dates that are set on the items. Other views include the Gantt view and the Datasheet view. The Gantt view is similar to the Calendar view: It shows information based on dates in the list items' properties. The Datasheet view is a Microsoft Excel–like view that allows copying and pasting of data into the list or library. These types of views are covered in detail in Chapter 8.

Let's look at an example of a possible difference between two views. One view for an announcement list may show the title of the announcement and the date that the announcement was changed (see Figure 1.13). A different view of the same list may show the body of the announcement and the date on which it will expire (see Figure 1.14).

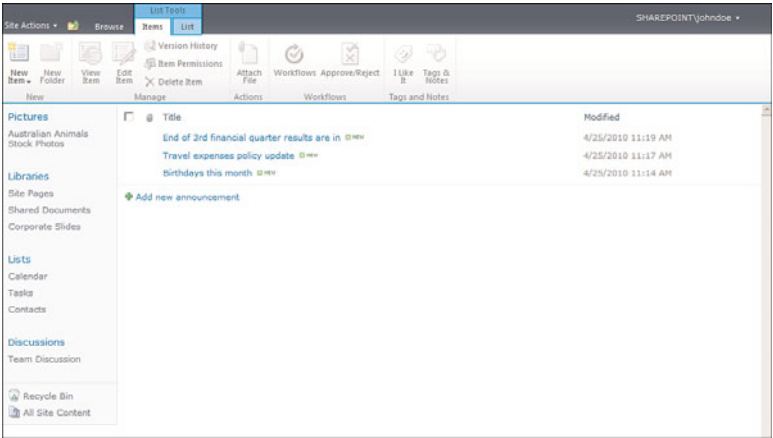


FIGURE 1.13
An announcement list in a view that shows the Title and Modified columns.

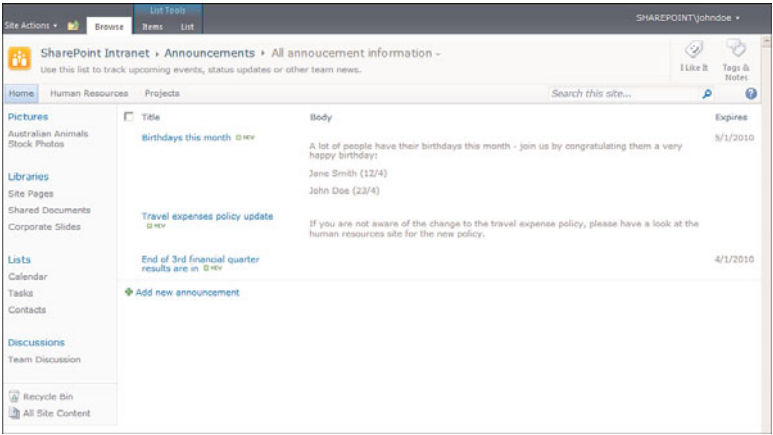


FIGURE 1.14
An announcement list in a view that shows the Title, Body, and Expires columns.

If you have multiple announcements, you can have different views sort the announcements differently. For example, one might sort by the title of the announcement and the other might sort by the modification date. Figure 1.14 shows a view sorting the announcements by their creation date (with the one created first on top). Figure 1.15 shows a view that sorts on the title of the announcement.

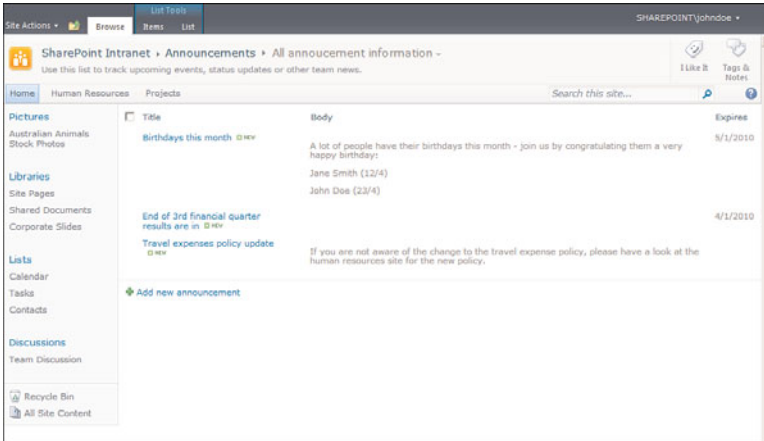


FIGURE 1.15

The announcement list in a view that sorts by the title.

Some views change the style in which the items are displayed. For example, Figure 1.16 shows the announcement list with a different style, called boxed style.

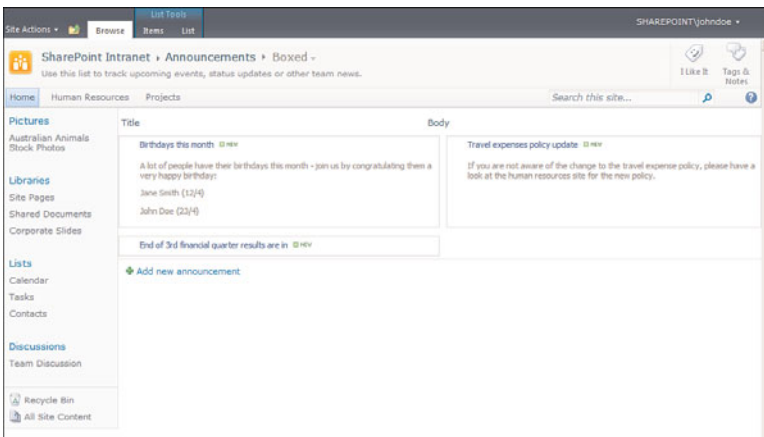


FIGURE 1.16

The announcement list shown with the boxed style.

An announcements list may have a filter applied to it to show only items that have not expired (refer to Figure 1.14). Other views can be configured not to have that filter. If you are viewing a list and the item you are looking for is not showing, consider the possibility that the current view is configured to filter that item.

Finally, some views may display the data grouped by one column, as shown in Figure 1.17. In such cases, you can view the groups and expand a group to see the items within the group. For example, in a contacts list, a view may be set up to group the contacts by their company names. This way, you can expand the view for a specific company.

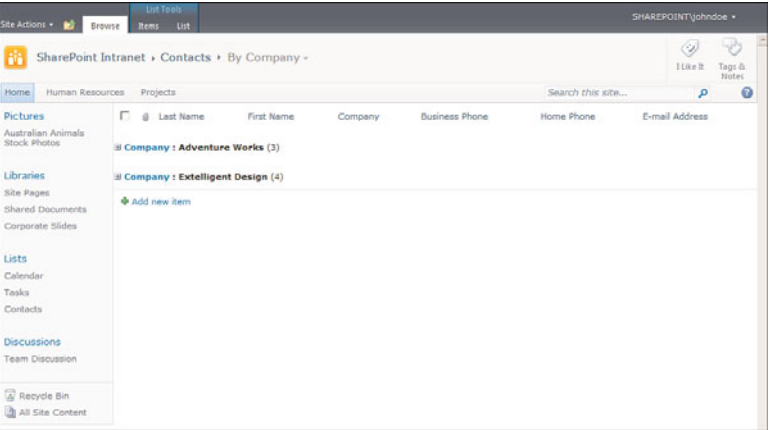


FIGURE 1.17
A contacts list, grouped by company.

To see the items in a group, click the + sign next to the group name or on the group field's name that shows up as a link (in this example, the Company: link). The group expands, showing you the items that belong to that group (see Figure 1.18).

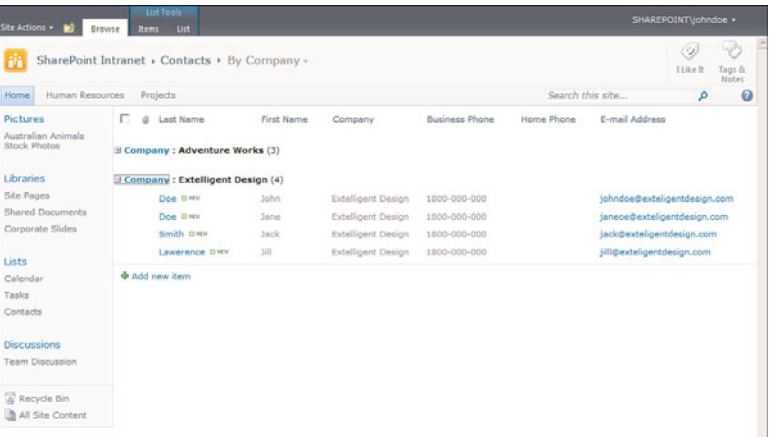


FIGURE 1.18
A contacts list grouped by company, with Extelligent Design expanded.

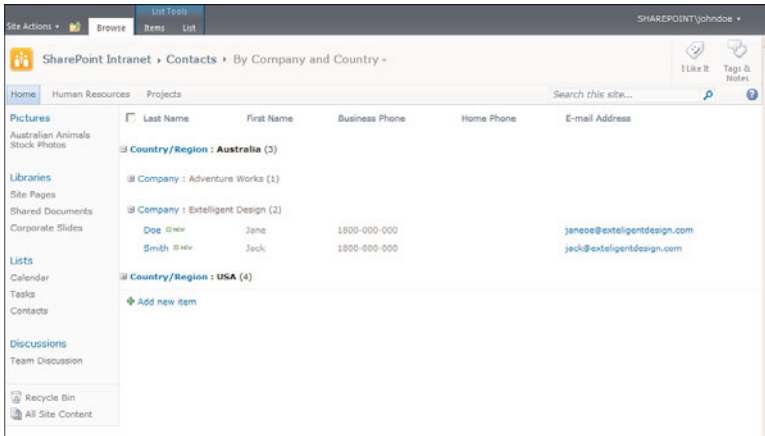


FIGURE 1.19

A contacts list, grouped by country and then by company, with Australia and Extelligent Design expanded.

SharePoint supports up to two grouping levels (for example, by country and then by company, as in Figure 1.19).

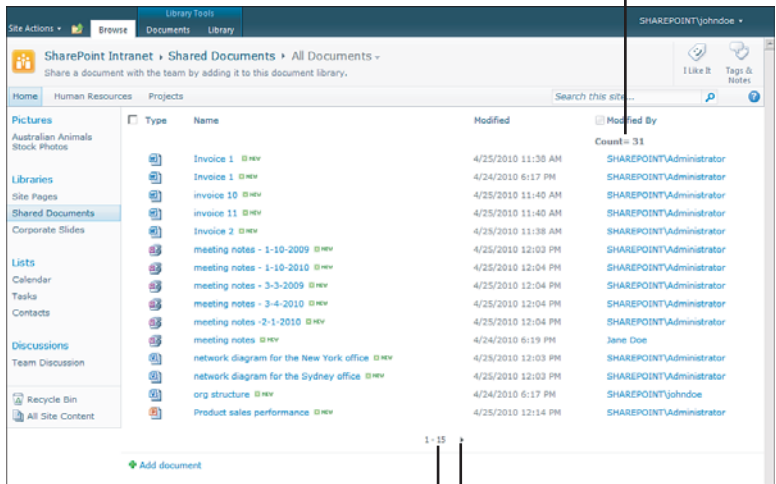
As mentioned earlier, picture libraries have their own special views that show the pictures that are in the library as either thumbnails or filmstrips of the pictures.

Some views support paging. *Paging* is a common method in websites used to show large amounts of data without overloading the page. Using paging, the data in a list or library is split into pages, with each page showing only a certain number of the items. The user can navigate back and forth between the pages, using the paging buttons at the bottom of the page or the paging button in the Library ribbon or List ribbon. (See Figures 1.20 and 1.21.)

For example, suppose you have a document library that contains 1,000 documents. Showing all the documents to the user at once might cause the page loading time to be quite slow, and a user might have difficulty finding a particular document. A more sensible approach would be to display the files in batches of 15 (for example), which makes it easier for the reader to see what information is available on the page. This is true even if you don't have thousands of documents! As your document library or list grows to have more and more files or rows, you will want to separate them into pages, as shown in Figures 1.20 and 1.21.

Finally, advanced users can create custom views by using Microsoft SharePoint Designer. Custom views can look totally different from anything that is available for regular views. This book does not cover the use of SharePoint Designer. The book *SharePoint Designer 2010 Unleashed* by Kathy Hughes (Sams Publishing) is a good resource that explains the many uses of SharePoint designer to achieve more complex tasks than the ones described in this book, including creating custom views.

Total number of files in the library

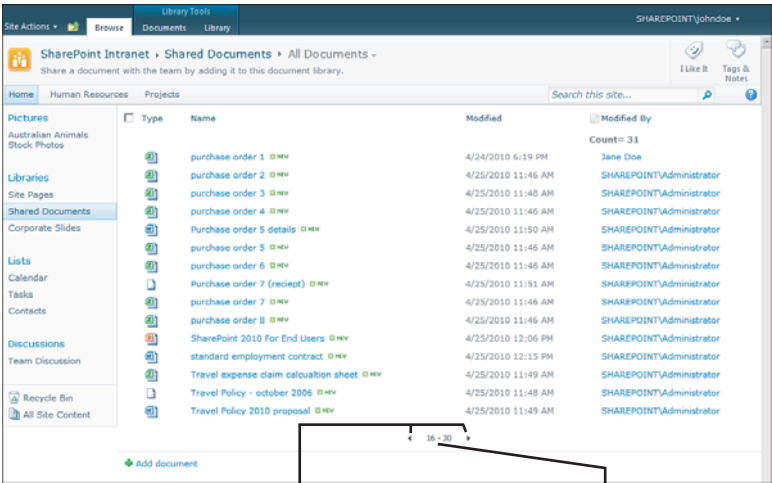


The numbers indicate what documents appear; in this case, the first 15 documents appear.

Use the paging control to navigate between pages.

FIGURE 1.20

The first page of a view of a document library with 31 documents, showing the first 15 documents.



Use the buttons to navigate to the next and previous pages.

Page showing the documents from 16 to 30

FIGURE 1.21

The second page of the view shows the next 15 documents.

What Are Web Parts?

Web parts are the building blocks of pages in SharePoint. They are components that show data, and they can be placed in certain regions of a page—known as web part zones. A page can hold many web parts, in different zones or in the same zone. They may be one under another in some zones and side-by-side in other zones.

For example, to show on the home page of a site the contents of a list of links, you can use a web part that displays the content of a list. The web part in Figure 1.22 is one that you have already seen in this chapter—it is the web part that shows views of lists and libraries.

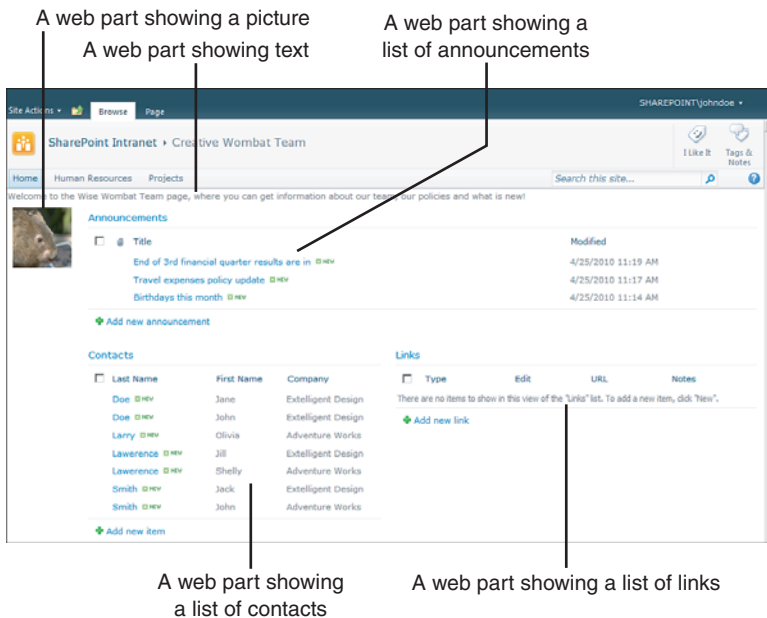


FIGURE 1.22

Different web parts on a page.

SharePoint developers can develop web parts, and the data and functionality that web parts offer to visitors of a SharePoint site is limited only by what developers can create.

The following are some other examples of how web parts could be used:

- ▶ To show search results (see Figure 1.23)
- ▶ To show a picture
- ▶ To show the users of a site
- ▶ To show the content of a site

Although web parts are a part of SharePoint, they can show information that is from outside SharePoint. For example, a special web part may be developed to show

information from a corporate application for timesheets or project management. The web part can even offer interaction with the data, allowing users to modify data in the corporate application. In this case, the data itself is not in SharePoint. However, such web parts usually have to be developed, and most of the web parts that come with SharePoint out of the box are used to display data that is stored in SharePoint.

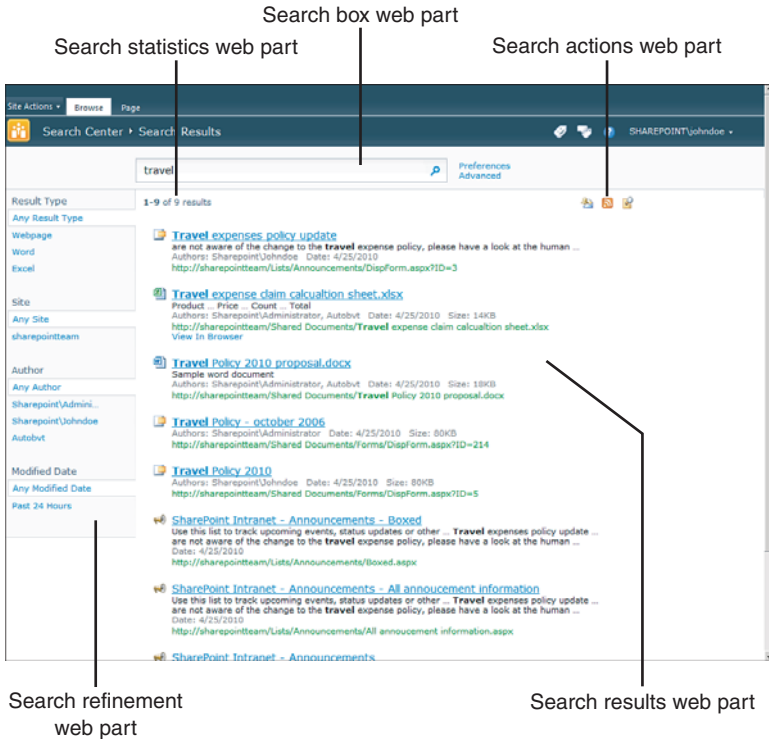


FIGURE 1.23
Search-related web parts.

While web parts might be important building blocks for a SharePoint page, other components also make the pages what they are. Not everything you see on a SharePoint page is a web part, but identifying web parts usually is easy—especially if you have the permissions to edit a page, in which case the page editor shows you the web parts that are on the page, with options to remove them, move them around, and add them.

You will learn to use web parts in Chapter 9.

What Are Alerts?

Using alerts is a great way to be notified by e-mail of changes in lists and libraries or even specific documents or list items.

SharePoint has a built-in alert mechanism that enables users to register for different kinds of alerts. Basically, a user selects the piece of content she wants to be alerted on and requests that SharePoint send her an e-mail when that content changes.

For example, you might use alerts with a document library that is supposed to have documents regarding a specific topic. You might want to know immediately when a new document is added to that document library (see Figure 1.24). As another example, you might want to know when a particular policy document is changed (for example, the corporate travel policy might be very important to people who travel a lot). Alerts enable you to request to be notified when changes like these occur.



FIGURE 1.24

An alert e-mail that is sent when a document has been added to a library.

What Is a Site Column?

A site column is a column for a list or a document library that can be used in all document libraries or lists in the site in which it is created, as well as in the subsites for that site.

A site manager can define a specific column of data once and manage it from a central location instead of creating that column many times in many lists and libraries. In addition, content types can only use site columns. (In lists and libraries, on the other hand, columns can be created separately.)

Using site columns is covered in Chapter 7 and Chapter 13, “Customizing a SharePoint Site.”

What Is a Content Type?

As mentioned earlier in this chapter, lists and document libraries can store different kinds of content, known as *content types*. A site manager can create and manage the content types in a site. The content types are then available in that site and in all the sites under it. The different types of content may have different site columns and/or different settings, such as policies and workflows, associated with them.

Content types can use site columns only for column definitions. This means that to create a content type, you must choose what site columns should be included in that content type.

A simple example of a content type is a list of contacts that stores two types of contacts—an internal contact and an external contact. The Internal Contact content type is used for a contact inside the company—and as such does not need the company property because all internal contacts are from the same company. However, the External Contact content type does require the company property because every contact may be from a different company. Hence, a single list has two different column requirements.

As another example of the use of content types, consider a document library where you store many different types of documents. Some documents are presentations, and some are financial reports, while others are user guides and product whitepapers. The differences between those content types are possibly more than just different columns: The content types can also specify different templates that users should use when creating documents of these types. For example, when creating a presentation, a Microsoft PowerPoint template will be used. When creating a financial report, a user will get a specific Microsoft Excel workbook as a template from which to start. User guides may be from a certain Microsoft Word template, while product whitepapers may be PDF documents. Some of these examples are shown in Figure 1.25, which shows the content type options for creating a new document in a document library.

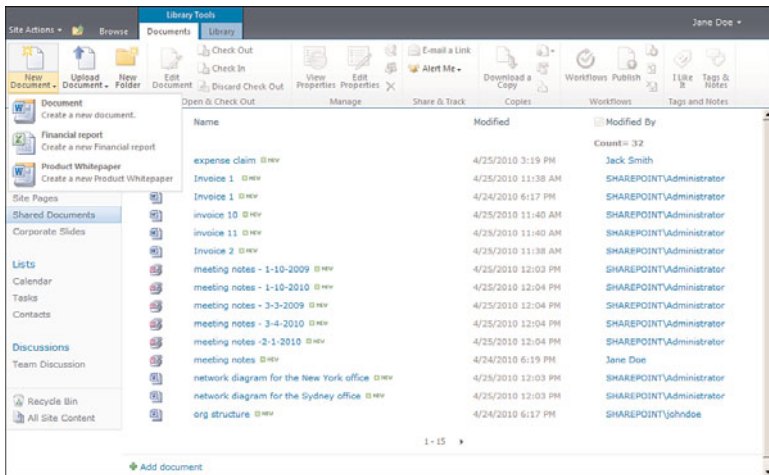


FIGURE 1.25

Choosing a content type when creating a new document in a document library.

Content types can be created in each site, and every subsite under that site can then use the content type. The subsites can either use the content type as it is defined in the parent site or create their own content types.

Content types are hierarchical, which means they can inherit from other content types. For example, the External Contact and Internal Contact content types can both inherit from the Contact content type. This way, if changes are made to the Contact content type (for example, if a property birthday date is added), both child content types may get the update (depending on whether the person who applied the update to the Contact content type chose to apply the update to content types that are inheriting from that content type).

Because the content type of an item or file says a lot about what the item actually is, it is a very important piece of data associated with an item. This makes it very important that authors (that is, people adding information to SharePoint) choose the right content type when creating data in SharePoint. However, sometimes content types are not used. A list may use the basic content type Item or a library may use the content type Document and add columns to the list itself—not impacting the content type itself. This means that all the columns are defined in the list or library and are added to all the items or files in it.

Content types use site columns to define the properties that the files or list items of that content type will have. Site columns are explained later in this chapter, in the section “What Is a Site Column?”

Chapter 7 show how to add and remove a content type to a list or document library.

What Is Tagging?

Tagging is a social web mechanism available in Microsoft SharePoint 2010 Server (not in SPF) that enables you as the user to tag a document or a list item or a even a page—in the SharePoint site or outside it.

You can tag something to help remember it and find it more easily later on.

One tag that SharePoint comes with is the I Like It tag. This tag enables you to signify that you like a document or a page, and then other people can see that you liked it. You can easily find that document or page again by looking at the list of items you’ve tagged as things you like (usually from your personal site).

Tagging isn’t limited to I Like It, however. You can add new tags as shown in Figure 1.26, and you can remove and rename tags. Depending on what the tag manager configured for the site, you might be able to tag objects in your site under different tags.

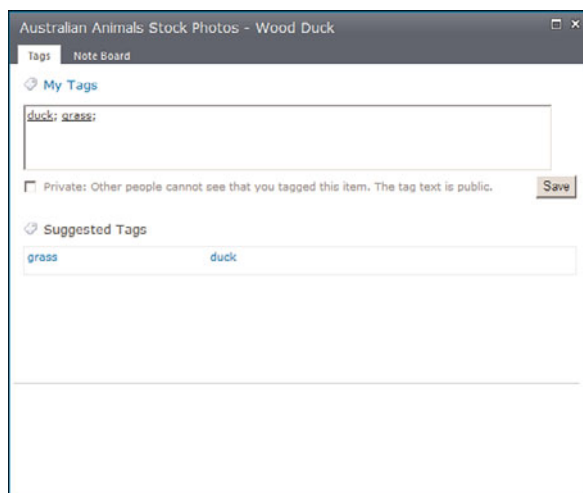


FIGURE 1.26

The duck picture is tagged with two terms—duck and grass—to help users find it based on the terms later on.

You can also add notes to an object, including saying what you like or dislike about it, or any other kind of notes. These notes are displayed to other people who look into the notes that you write, and you can view them as well. You can therefore keep working notes on documents or pages you are working on, without those notes being part of the actual document or page.

Chapter 3 explains in detail how to add tags to content. Chapter 5 explains how to use tags and notes from your personal site to find content you tagged or commented on.

What Is Managed Metadata?

Available only through Microsoft SharePoint 2010 Server (not SPF), managed metadata is a mechanism that enables administrators to create hierarchical term sets that can then be used in document libraries and lists as columns.

A term set is similar to a list that contains items, except that these items can contain more items under them in a hierarchy. For example, if you have a term set called Products, you could have a term for each product that you have in the organization.

By using managed metadata, you can create the list as a hierarchical list, grouping the products into categories (creating terms for the categories and then terms for the products under them) or into product groups, as shown in Figure 1.27.

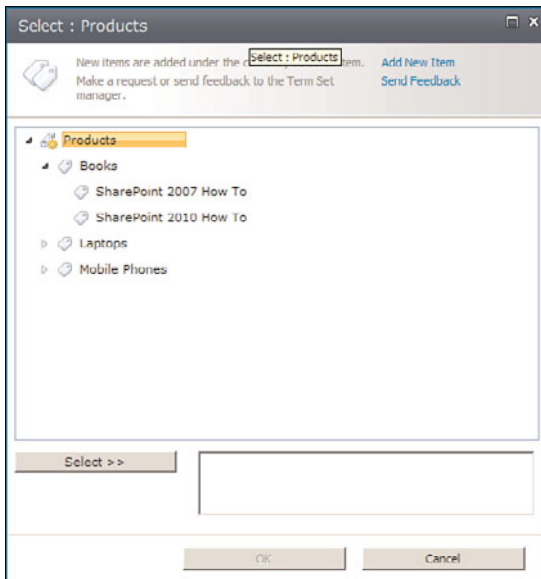


FIGURE 1.27
A managed metadata list of products.

You can then choose whether the terms that are categories (and not products) are available to the users as options. You can therefore allow the users to tag a document as belonging to a category of products (for example, Books), or you can let them tag a document as belonging to a specific product (for example, SharePoint 2010 How To).

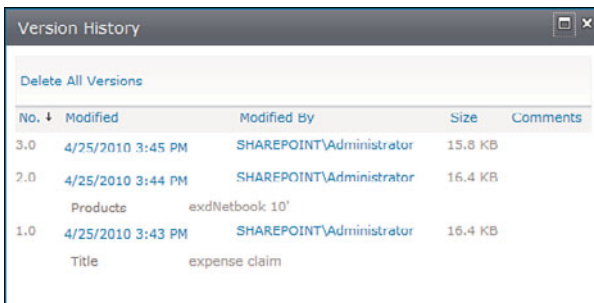
As you can see, managed metadata can be quite useful for tagging and then finding documents and list items. Chapter 7 describes how to create managed metadata columns and how to define term sets for those columns.

What Are Versions?

Document libraries and lists in SharePoint have an option to track versions. This option stores old versions of files or items each time a change is made. For example, if a user

uploads a document, and then another user edits the document and saves it, SharePoint saves the original document as a version of the file. Later, users can look at the version history of the file and choose to open a specific version or restore it (that is, make that version the current one).

SharePoint supports two types of versioning. In the first type, each change is regarded as a major change, and the version numbers go from 1 (the first time a document was uploaded) to 2 (after the first change) and then 3 and 4 and so on as shown in Figure 1.28. In the second type, each change is regarded as a minor change, unless the user specifies that it is a major one. The version numbers go from 0.1 (the first time a document was uploaded) to 0.2 (the first change) and so on, until a user selects the option to perform a major change, and the version number changes to 1.0, and subsequent changes raise it to 1.1, 1.2, and so on.



No.	Modified	Modified By	Size	Comments
3.0	4/25/2010 3:45 PM	SHAREPOINT\Administrator	15.8 KB	
2.0	4/25/2010 3:44 PM	SHAREPOINT\Administrator	16.4 KB	
1.0	4/25/2010 3:43 PM	SHAREPOINT\Administrator	16.4 KB	

FIGURE 1.28
Viewing the lists of versions
for a document.

For information about how to work with versions, see Chapters 3 and 7.

What Does Check-in/Check-out Mean?

Check-in and check-out are common terms in many document management systems, including SharePoint. Their purpose is to prevent conflicts in an environment where multiple people might want to edit the same piece of content (in SharePoint, list items or files) at the same time. The term *check-in* describes the process of adding a new or modified item or file to a document library or a list to replace the previous version. The term *check-out* describes the process of getting a version of a document or list item in a list or library. By checking out an item or a file, a user can prevent others from editing that content. By checking in the item, the user can allow others to edit the content, without needing to worry about overriding changes that others have made.

Usually when an item or a file is checked out to a user, that user can work on that item or file, and other users cannot. Other users must wait for the user to check in the item or file again (that is, perform a check-in) before they can edit the item or file. While the item or file is checked out, other users usually can see only the last version that was checked in; they can't see the changes that the current user has made on the file while it's been checked out.

Pages in SharePoint can be in document libraries—and often are. This means that pages can be checked out and in, allowing page editors to change a page (for example,

add or remove a web part), but the users cannot see the changes until that editor is happy with the changes and checks in the page.

NOTE SharePoint does not require a check-in and check-out on all lists and libraries. This is a setting that the list or library manager can set.

When versioning is activated on a document library or list, a check-in creates a new version. See “What Are Versions?” earlier in this chapter.

What Is a Workflow?

In SharePoint, a workflow is a series of steps—some automatic, some manual—that must be performed as part of a business process for a document or a list item.

For example, the most common workflows for documents are review and approval. Some important documents (for example, contracts) need to go through several steps of approval from different people before they can be officially considered final and published. An example of starting such a workflow is shown in Figure 1.29.

The screenshot shows a web browser window displaying the 'publishing workflow' form in a SharePoint Intranet. The browser's address bar shows 'SharePoint Intranet > Start "publishing workflow": Home'. The page has a navigation bar with links for 'SharePoint Intranet', 'Human Resources', 'Projects', and 'Search Center'. The main content area contains a form with several fields: 'Request' (a text box), 'Due Date for All Tasks' (a date picker), 'Duration Per Task' (a text box), 'Duration Units' (a dropdown menu set to 'Day(s)'), and 'CC' (a text box). Below these fields are 'Start' and 'Cancel' buttons. The form also includes instructional text: 'This message will be sent to the people assigned tasks.', 'The date by which all tasks are due.', 'The amount of time until a task is due. Choose the units by using the Duration Units.', and 'Define the units of time used by the Duration Per Task.'.

FIGURE 1.29
Starting an approval workflow to publish a page.

Another example is pages in a site itself. In some SharePoint environments, each change to a page needs to be approved by the site's manager to make sure the contents of the page comply with the company's policies.

SharePoint enables developers to develop workflows and attach them to documents or list items. End users might be expected to interact with a workflow, either approving documents or items or triggering a workflow to start or stop.

Chapter 11, “Workflows,” covers the common tasks involved with workflows.

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