

# SharePoint 2010 User's Guide

*Learning Microsoft's  
Business Collaboration Platform*



Seth Bates and Tony Smith

Apress®

## **SharePoint 2010 User's Guide: Learning Microsoft's Business Collaboration Platform**

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# Contents at a Glance

- Contents..... iv**
- About the Authors..... xv**
- About the Technical Reviewer ..... xvi**
- Acknowledgments ..... xvii**
- Introduction ..... xviii**
  
- Chapter 1: Introduction to SharePoint Technologies ..... 1**
- Chapter 2: Sites..... 7**
- Chapter 3: SharePoint Server 2010 ..... 67**
- Chapter 4: List Concepts ..... 119**
- Chapter 5: Lists ..... 187**
- Chapter 6: Libraries ..... 239**
- Chapter 7: Workflow and Information Management Policies ..... 315**
- Chapter 8: Pages and Web Parts..... 349**
- Chapter 9: Personalization Features..... 381**
- Chapter 10: Enterprise Office Services ..... 401**
- Chapter 11: Document Management Solutions..... 411**
- Chapter 12: Project Collaboration Solutions ..... 439**
- Chapter 13: Dashboards and Reporting Solutions ..... 457**
  
- Index..... 469**

# Contents

<b>Contents at a Glance</b> .....	<b>iii</b>
<b>About the Author</b> .....	<b>xv</b>
<b>About the Technical Reviewer</b> .....	<b>xvi</b>
<b>Acknowledgments</b> .....	<b>xvii</b>
<b>Introduction</b> .....	<b>xviii</b>
■ <b>Chapter 1: Introduction to SharePoint Technologies</b> .....	<b>1</b>
What Is Microsoft SharePoint 2010? .....	2
Uncovering the Evolution of SharePoint .....	3
Exploring What's New in SharePoint 2010 .....	4
Understanding the Value of SharePoint 2010 .....	5
Knowing the Building Blocks .....	5
■ <b>Chapter 2: Sites</b> .....	<b>7</b>
Understanding Sites .....	8
Understanding Site Layouts.....	10
Using Team Sites, Document Workspaces, and Group Work Sites .....	10
Using Meeting Workspaces .....	17
Using Blog Sites.....	24
Navigating Sites.....	26
Navigating Through Sites .....	27
Navigating Within Team Sites, Document Workspaces, and Group Work Sites .....	27

Navigating Within Meeting Workspaces ..... 29

Navigating Within Blog Sites ..... 29

Navigating Through Sites Using Mobile Devices ..... 30

**Using the Ribbon..... 31**

**Creating Sites ..... 31**

    Creating Subsites ..... 32

    Creating a New Document Workspace from a Document in a Site ..... 33

    Creating Advanced Sites Using Office ..... 34

**Managing Site Security..... 37**

    Managing SharePoint Groups ..... 38

    Changing Permission Inheritance for a Site ..... 41

    Managing Permission Levels ..... 42

    Managing Site Collection Administrators ..... 45

**Changing Site Details ..... 45**

    Updating the Site Title, Description, URL, and Logo ..... 46

    Customizing Navigation Options ..... 46

    Updating Site Themes ..... 52

    Resetting Site Definitions ..... 52

    Configuring Regional Settings for a Site..... 53

    Deleting Sites ..... 54

**Managing Site Templates ..... 54**

    Creating Site Templates ..... 55

    Activating and Deactivating Site Templates ..... 56

    Editing Site Templates ..... 56

    Deleting Site Templates ..... 57

**Searching SharePoint Foundation Sites ..... 57**

    Working with Search Results ..... 58

    Managing Site Search and Offline Availability..... 58

**Using Usage Reports ..... 58**

    Using Site Usage Reports ..... 59

Using Site Collection Usage Statistics .....	60
Viewing Site Hierarchy .....	61
<b>Managing Site and Site Collection Features .....</b>	<b>62</b>
Managing Site Features.....	62
Managing Site Collection Features.....	63
<b>Using the Recycle Bin .....</b>	<b>63</b>
Viewing Items in the Recycle Bin .....	64
Restoring Items from the Recycle Bin .....	65
Deleting Items from the Recycle Bin .....	65
<b>Using SharePoint Designer for Site Management.....</b>	<b>65</b>
<b>Managing Help Information .....</b>	<b>66</b>
<b>■ Chapter 3: SharePoint Server 2010 .....</b>	<b>67</b>
<b>Understanding SharePoint Server Portals .....</b>	<b>67</b>
Publishing Portal.....	67
Enterprise Wiki .....	72
<b>SharePoint Server Navigation Enhancements .....</b>	<b>74</b>
Navigation Bar .....	74
Site Actions Menu.....	74
Quick Launch.....	76
Navigation Management.....	76
<b>Using SharePoint Server Search.....</b>	<b>78</b>
Performing Simple Searches .....	78
Performing Advanced Searches .....	78
Working with Search Results .....	80
Working with Search Scopes.....	80
Using Search Keywords and Best Bets .....	82
Setting Searchable Columns .....	84
Changing Search Settings .....	84
<b>Managing Site Look and Feel .....</b>	<b>84</b>
Defining the Welcome Page .....	85

Managing Page Layouts and Site Templates.....	85
Managing Master Pages and Style Sheets .....	87
<b>SharePoint Server Site Templates .....</b>	<b>87</b>
Visio Process Repository Template .....	88
Enterprise Wiki Template .....	89
Document Center Template.....	90
Records Center Template .....	92
Business Intelligence Center .....	93
Personalization Site Template .....	94
Enterprise Search Center .....	96
Basic Search Center Template .....	98
FAST Search Center Template.....	99
Publishing Site Template.....	99
Publishing Site with Workflow Template.....	101
Web Databases Templates .....	102
<b>Managing Site Content and Structure.....</b>	<b>102</b>
<b>Managing Usage Reports and Auditing.....</b>	<b>105</b>
Site Usage Reports .....	105
Site Collection Web Analytics Reports.....	108
Site Collection Auditing .....	110
<b>Working with Site and Site Collection Features.....</b>	<b>112</b>
Site Features .....	113
Site Collection Features.....	113
<b>Managing Content Variations.....</b>	<b>114</b>
Variation Labels .....	115
Translatable Columns.....	117
Variation Logs.....	117
<b>Using Managed Metadata.....</b>	<b>117</b>
Term Store Administrators .....	117
Managing Term Sets .....	118

<b>■ Chapter 4: List Concepts .....</b>	<b>119</b>
<b>Creating Lists.....</b>	<b>119</b>
<b>Working with Lists .....</b>	<b>121</b>
Adding, Editing, and Deleting Items .....	121
Filtering and Sorting the List .....	123
Using Views .....	124
Faster Data Manipulation Using the Datasheet .....	125
Folders.....	126
Versions.....	127
<b>Managing Lists .....</b>	<b>129</b>
General Settings .....	129
Content Approval .....	133
Security .....	135
Managing Columns.....	137
Managing Views .....	154
Creating a List Template.....	164
Deleting the List.....	165
<b>Advanced List Concepts .....</b>	<b>166</b>
Site Columns .....	166
Content Types.....	170
RSS Feed Settings .....	176
<b>Advanced Office Integration .....</b>	<b>179</b>
Exporting SharePoint Lists to Excel.....	179
Creating Custom Lists Using Excel .....	181
Advanced Datasheet Features.....	182
Using Lists Offline.....	184
Managing Lists with Access .....	185
<b>■ Chapter 5: Lists .....</b>	<b>187</b>
<b>Using Communications Templates .....</b>	<b>188</b>
Announcements.....	188
Contacts.....	190



Discussion Board.....	194
Circulations.....	196
<b>Using Tracking Templates .....</b>	<b>198</b>
Links .....	198
Calendar .....	200
Tasks .....	210
Project Tasks .....	214
Issue Tracking .....	217
Survey.....	219
Agenda .....	224
<b>Using Custom Lists .....</b>	<b>224</b>
Decisions .....	225
Objectives .....	225
Text Box.....	226
Things to Bring .....	227
External Lists .....	228
<b>Additional Meeting Workspace List Concepts .....</b>	<b>228</b>
Lists for Meetings in Series.....	228
Attendees .....	229
<b>Using Additional Lists with SharePoint Server 2010 .....</b>	<b>231</b>
Status List.....	231
<b>Integrating Further with Office .....</b>	<b>237</b>
<b>■ Chapter 6: Libraries .....</b>	<b>239</b>
<b>Document Library .....</b>	<b>240</b>
Creating Document Libraries.....	240
Working with Document Libraries .....	241
Managing Document Libraries .....	253
<b>Form Library .....</b>	<b>263</b>
Creating Form Libraries.....	264

Working with Form Libraries .....	264
Managing Form Libraries .....	268
<b>Picture Library .....</b>	<b>270</b>
Creating Picture Libraries .....	270
Working with Picture Libraries .....	270
Managing Picture Libraries .....	280
<b>Wiki Page Library .....</b>	<b>281</b>
Creating Wiki Page Libraries .....	281
Working with Wiki Page Libraries.....	282
Managing Wiki Page Libraries .....	286
<b>Report Library .....</b>	<b>287</b>
<b>Data Connection Library .....</b>	<b>288</b>
<b>Slide Library.....</b>	<b>288</b>
Creating Slide Libraries .....	289
Working with Slide Libraries .....	289
Managing Slide Libraries.....	294
<b>Asset Library.....</b>	<b>295</b>
Creating Asset Libraries .....	295
Working with Asset Libraries.....	295
Managing Asset Libraries .....	297
<b>Advanced Library Concepts .....</b>	<b>298</b>
Document Sets .....	298
The Document ID Service .....	303
<b>Advanced Office Integration .....</b>	<b>304</b>
Open and Save As Integration .....	304
Shared Workspace and Document Management Task Panes .....	306
Accessing Offline Documents by Connecting Libraries with Outlook .....	308
Creating Form Libraries Using InfoPath Form Publishing.....	310
Additional Advanced Office Integration .....	313

<b>■ Chapter 7: Workflow and Information Management Policies .....</b>	<b>315</b>
<b>Workflow.....</b>	<b>315</b>
Managing Workflows.....	324
SharePoint Server 2010 Workflows.....	327
Workflow with SharePoint Designer.....	330
<b>Records Management.....</b>	<b>332</b>
Record Declaration Settings.....	333
Using Records.....	335
<b>Information Management Policies.....</b>	<b>336</b>
Policy Features.....	336
Site Collection Policy.....	340
Site Content Type Policy.....	342
List and Library Policies.....	343
Policy Columns in Views.....	347
<b>File Plan Reports.....</b>	<b>347</b>
<b>■ Chapter 8: Pages and Web Parts.....</b>	<b>349</b>
<b>Pages.....</b>	<b>349</b>
Web Part Pages.....	350
Publishing Pages.....	355
Pages.....	361
<b>Web Parts.....</b>	<b>364</b>
Adding Web Parts to Pages.....	364
Managing Web Parts on Pages.....	366
Exporting and Importing Web Parts.....	372
Standard Categories and Web Parts.....	374
Further Customization.....	378
<b>■ Chapter 9: Personalization Features.....</b>	<b>381</b>
<b>Alerts.....</b>	<b>381</b>
Subscribing to an Alert.....	382

Receiving an Alert .....	388
Managing Your Alerts .....	389
Removing Alerts for Other Users .....	390
<b>My Site.....</b>	<b>391</b>
My Newsfeed Page.....	391
My Content Page .....	391
My Profile Page.....	392
<b>Tags and Notes.....</b>	<b>396</b>
<b>Personalization Sites .....</b>	<b>397</b>
Personalizing Content.....	397
Integration with My Site .....	399
<b>Logon Management.....</b>	<b>399</b>
Signing Out of the Portal .....	399
Signing In as a Different User.....	399
<b>■ Chapter 10: Enterprise Office Services .....</b>	<b>401</b>
<b>Excel Services.....</b>	<b>401</b>
Publishing to Excel Services.....	402
Using Content Published through Excel Services .....	404
<b>Form Services.....</b>	<b>406</b>
Creating and Submitting a New Form from a Form Library.....	406
Submitting a New Form Using the InfoPath Form Web Part.....	408
<b>Visio Services .....</b>	<b>408</b>
Publishing to Visio Services.....	408
Accessing Visio Services Published Content from the Document’s Context Menu .....	409
Accessing Visio Services Published Content using the Visio Web Access Web Part.....	410
<b>■ Chapter 11: Document Management Solutions.....</b>	<b>411</b>
<b>Document Management Overview.....</b>	<b>411</b>
Document Creation .....	412

Document Retention .....	413
Document Consumption .....	413
Document Update and Expiration .....	413
<b>Challenges of Document Management.....</b>	<b>414</b>
<b>Needs for Document Management.....</b>	<b>415</b>
<b>SharePoint Document Management Solutions .....</b>	<b>416</b>
RFP Response Requirements .....	416
SharePoint Solution Components .....	417
RFP Response Process Definition.....	417
SharePoint Environment Layout .....	419
RFP Response Process Walk-Through .....	428
<b>Benefits of SharePoint Document Management Solutions .....</b>	<b>435</b>
<b>Tips for Creating Effective Document Management Solutions .....</b>	<b>436</b>
<b>■ Chapter 12: Project Collaboration Solutions .....</b>	<b>439</b>
Project Collaboration Overview.....	439
Challenges of Project Collaboration.....	440
Needs for Project Collaboration .....	441
SharePoint Project Collaboration Solutions .....	442
Service Plan Offering Development Project Requirements .....	442
Project Process Definition .....	443
Configuring the SharePoint Environment Layout.....	444
Service Plan Project Process Walk-Through .....	451
Benefits of SharePoint Project Collaboration Solutions .....	455
Tips for Creating Effective Project Collaboration Solutions .....	456
<b>■ Chapter 13: Dashboards and Reporting Solutions .....</b>	<b>457</b>
Dashboards and Reporting Overview .....	457
Challenges of Reporting .....	458

<b>Needs for Reporting.....</b>	<b>458</b>
<b>SharePoint Dashboard and Reporting Solutions.....</b>	<b>459</b>
Sales Dashboard Requirements .....	459
SharePoint Solution Components .....	460
Dashboard Process Definition .....	460
SharePoint Environment Layout .....	460
Sales Dashboard Processes Walk-Through.....	466
<b>Benefits of SharePoint Dashboard and Reporting Solutions.....</b>	<b>467</b>
<b>Tips for Creating Effective Dashboard and Reporting Solutions.....</b>	<b>467</b>
<b>Index.....</b>	<b>499</b>

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– Tony Smith

# Introduction

SharePoint 2010 is the next stage in the evolution of the SharePoint technology platform. SharePoint 2010 expands on the previously provided SharePoint platform by extending existing capabilities and introducing new capabilities to make it easier and more cost effective to create business collaboration solutions. We have seen many situations where SharePoint is introduced and individuals struggle to leverage these resources because they are not aware of all the capabilities available or how to leverage them to gain the most value possible. This book was an outcome of this need and can serve as a reference for people working within a SharePoint environment.

The goal of this book is to deliver a resource to all levels of SharePoint users. Beginners will be provided with the information they need to most effectively use the capabilities provided. Intermediate users will be given the information they need to manage their SharePoint resources. Advanced users will be provided the foundation needed to build business solutions using SharePoint's capabilities. We have incorporated our experiences working with a variety of organizations and knowledge of the product into an easily understood format for learning about SharePoint 2010, which we hope will enable you to gain the in-depth knowledge you need to effectively use and manage these tools.

## Who This Book Is For

The goal of this book is to provide the knowledge necessary for anyone to effectively use Microsoft's SharePoint 2010 platform. Whether you have not yet used SharePoint, have used previous versions, just started using the basic features of SharePoint 2010, or have been using it for a long time, this book provides the information you need to work effectively with the capabilities of SharePoint 2010.

If you want to learn about these capabilities in a detailed yet understandable format, this book is for you. Being a user guide, this book does not require you to have any programming knowledge. It does assume you have a basic understanding of navigating web sites. Some of the more advanced topics require prior working knowledge of Microsoft Office applications such as Word and Excel.

## How This Book Is Structured

The chapters in this book are organized into two groups. Chapters 1 through 10 offer the fundamental knowledge of SharePoint 2010 that users need to successfully utilize the capabilities provided by the platform. This group of chapters can be used as an end-to-end reference guide, allowing you to easily look up specific SharePoint topics. It also includes step-by-step instructions, figures, tables, and examples. The capabilities described in these chapters are important and act as the building blocks for the solutions described in the second group of chapters.

The second group, Chapters 11 through 13, presents business solutions commonly deployed through SharePoint. Each of these chapters contains an example scenario that will help you understand the potential challenges of the solution, along with the benefits that SharePoint provides. The scenarios also include the necessary steps for creating these solutions within a SharePoint environment.

## **Chapter 1: Introduction to SharePoint Technologies**

This chapter introduces you to SharePoint Foundation 2010 and SharePoint Server 2010. It contains an explanation of the technology and its uses, benefits, and related terminology.

## **Chapter 2: Sites**

This chapter contains the details you need to understand the capabilities of sites and workspaces. We will focus on those capabilities making up the core of SharePoint Foundation 2010, which is the foundation of SharePoint 2010 solutions. Security, content, structure, and search capabilities are all covered using detailed examples.

## **Chapter 3: SharePoint Server 2010**

This chapter focuses on additional core components and capabilities introduced into sites as part of SharePoint Server 2010. It contains the details you need to use these additional capabilities and describes how they are incorporated into the SharePoint environment. Here we will discuss the additional templates introduced with SharePoint 2010, enterprise searching, layout and navigation management, and reporting and auditing.

## **Chapter 4: List Concepts**

This chapter provides the knowledge needed to work with lists within SharePoint. The use and management of custom lists is described in detail. You will also learn about the advanced integration with Office applications that SharePoint's custom lists provide.

## **Chapter 5: Lists**

This chapter contains a detailed look at the lists that are provided by SharePoint for you to use as templates when creating your own lists. The use and management of each list is provided in detail, along with any advanced integration with Office applications that they provide.

## **Chapter 6: Libraries**

This chapter teaches the use and management of libraries within SharePoint. SharePoint libraries provide many collaborative features and are capable of managing a variety of files from Office documents and forms to images and presentation slides. We will discuss these capabilities and the advanced integration available between these libraries and Office applications.

## **Chapter 7: Workflow and Information Management Policies**

In this chapter we will discuss workflow processing and information management policies. The steps needed to define and execute business processes using workflows within the SharePoint environment are detailed in this chapter. This chapter also describes how to configure auditing, expiration, and other policies on the documents and information contained in your SharePoint environment.

## **Chapter: 8 Pages and Web Parts**

Pages and web parts allow for the customization of sites. This chapter uses detailed steps to show you how to customize SharePoint using the various types of pages and the functional components known as web parts.

## **Chapter 9: Personalization Features**

In this chapter, we discuss the personalization features provided by SharePoint. We will discuss alerts, My Site, tagging, content filtering, and targeting content, as well as how to use these capabilities to provide personalized user experiences.

## **Chapter 10: Enterprise Office Services**

This chapter contains details about capabilities made available within SharePoint through enterprise integration with Microsoft Office applications. In this chapter we will discuss Excel Services, Form Services, and Visio Services.

## **Chapter 11: Document Management Solutions**

One of the most common uses for SharePoint is to create document management solutions. This chapter describes the challenges SharePoint document management solutions can address, the benefits you can receive by creating these solutions, and tips to be mindful of when creating these solutions. We will construct a sample document management solution and describe how the solution would be used.

## **Chapter 12: Project Collaboration Solutions**

Using SharePoint to manage projects is another common use of a SharePoint platform. In this chapter, we will describe how to create project collaboration solutions through SharePoint. We will construct a sample solution and describe the benefits that can be received by creating these solutions.

## Chapter 13: Dashboards and Reporting Solutions

SharePoint allows for the creation of central enterprise reporting and analysis solutions. Reports can be easily shared and distributed and analytics can be combined into comprehensive dashboards. In this chapter, we will discuss how to create SharePoint dashboard and reporting solutions. As part of this discussion we will review the common challenges these SharePoint solutions can overcome and the benefits you can receive by creating these solutions. We will also construct a sample dashboard and describe how it would be used!

## CHAPTER 1



# Introduction to SharePoint Technologies

Microsoft SharePoint 2010 is the latest iteration of Microsoft's business collaboration platform. SharePoint provides business users with the tools they need to effectively manage and share information, automate business process, collaborate, and interact with others.

SharePoint is the core server component of the Microsoft Office system. Microsoft's Office system is composed of a collection of applications, servers, and services that all work together to improve individual and team productivity, make information sharing more effective, and facilitate business decision making processes.

The Office system includes many of Microsoft's products such as SharePoint Server, SharePoint Foundation, Word, Excel, PowerPoint, Live Communications Server, and SQL Server. These applications and servers are designed to work together to meet the following goals:

- Provide business users with faster, comprehensive access to actionable information. The goal is to not only provide access to more information but to make it possible to locate the most relevant information allowing people to rapidly respond to business needs.
- Enable individuals to find the most relevant people to work with and allow them to work together effectively. Teams can easily share information regardless of location and across company boundaries.
- Improve individual and team productivity by making it easy to create and manage information and allowing this information to be available as part of related business processes.
- Reduce the costs of providing enterprise-wide business solutions by providing a set of applications and servers that work together and can be combined into business solutions.

Microsoft SharePoint 2010 technologies are core components the Microsoft Office system framework and provide the foundation on which business solutions are built.

In this chapter we will define what SharePoint is, discuss the evolution of the product, and provide an overview of the new capabilities that were added as part of SharePoint 2010.

## What Is Microsoft SharePoint 2010?

Microsoft SharePoint 2010 is the central information sharing and business collaboration platform for the Microsoft Office System. SharePoint 2010 is made up of two main products: SharePoint Foundation 2010 and SharePoint Server 2010.

SharePoint Foundation 2010 is the next stage of the product previously called Windows SharePoint Services. Microsoft has renamed the product so that its name better reflects the product purpose and aligns with other Microsoft foundational services. SharePoint Foundation provides the fundamental collaboration services on which the SharePoint platform is built, including these:

- A web-centric information management and presentation platform
- Lists and libraries for storing and managing documents and structured information, such as contacts, links, and announcements
- Security services allowing for Active Directory integrated access management and content security, as well as the ability to extend the environment to use alternative security access providers
- Environment and information management structure that allows for easy resource configuration and management
- Integrated Windows Workflow Foundation services providing the core for creating workflow-centric solutions

Microsoft SharePoint Server 2010 extends the capabilities provided by SharePoint Foundation by introducing additional services. These services, which follow, integrate directly into the SharePoint Foundation platform enhancing the existing environment:

- Full-featured document, record, and web content management
- Data integration, reporting, and analysis
- Form and process integration automation and management
- Application integration
- Enterprisewide search
- People integration and social networking
- Personalized content and alerts

These capabilities are used to create solutions that bring together people, information, systems, and business processes. Microsoft summarizes the wide range of capabilities provided by SharePoint 2010 into the following categories:

- *Sites*: SharePoint is a single platform for providing intranet, extranet, and Internet solutions. These sites and the information within them are accessible through standard web browsers, Microsoft Office programs, and mobile devices.
- *Communities*: One of the key uses of SharePoint is to allow people to effectively work together. Collaboration tools are available allowing teams to work together on efforts. Tools are also provided that enable people to connect and communicate with one another.
- *Content*: SharePoint includes a comprehensive set capabilities for document management, record management, and web content management.

- *Search:* Quickly locating relevant information increases people's overall effectiveness. SharePoint provides enterprise search tools that can be used to search across content, people, and data throughout the enterprise.
- *Insights:* SharePoint allows actionable enterprise data to be incorporated into solutions, making corporate data more broadly available.
- *Composites:* SharePoint is an enterprise solution platform that includes a wide range of tools and interfaces that can be leveraged to create comprehensive, cost-effective business solutions.

The capabilities of SharePoint allow you to create solutions to support your organization's business needs in a way that is cost effective, can be easily managed, and allows the SharePoint environment to become your central system for managing and accessing all enterprise systems and information.

## Uncovering the Evolution of SharePoint

Microsoft's SharePoint technology was first introduced in 2001 with the release of SharePoint Portal Server 2001. This product provided some basic tools designed to allow users to publish and find documents. It allowed for the creation and management of document taxonomies and represented the first step in providing a way to catalog and search for documents across an enterprise.

Microsoft next released SharePoint Team Services, which extended the document and publishing capabilities of SharePoint Portal Server 2001 by providing information collaboration. It allowed groups of individuals to work together to manage documents and lists of information, such as contact lists, event lists, and link lists.

In 2003, Microsoft completely rearchitected SharePoint and released Windows SharePoint Services 2.0 and SharePoint Portal Server 2003 as part of the introduction of the first Microsoft Office system. The focus of these technologies was to provide a foundation for the collection of applications, servers, and services that work together to improve user and team productivity. These products allowed organizations to introduce a variety of collaborative business solutions that would have previously been very difficult and costly to create and maintain.

In 2007, Microsoft released Windows SharePoint Services 3.0 and Microsoft Office SharePoint Server 2007. With the release of these technologies Microsoft extended its Office vision to include the capabilities needed to support the creation of business solutions. These capabilities include content management; collaboration; business information management; workflow; intranet, extranet, and Internet support; and business integration services. With this release, SharePoint became a business productivity platform allowing for the creation of full-featured business applications and the aggregation of information from other applications, data sources, and systems.

With the release of SharePoint 2010, the SharePoint platform has been enhanced to make it easier to create full-featured business solutions and allow the platform to be leveraged as your organization's main platform for document management, reporting, and web content management. The enhancements made include updates to the previously existing collaboration, workflow, business intelligence, and data integration capabilities. This version also introduces new capabilities, including full-featured records management, new Office integration services, global metadata and taxonomy management, and social networking services. SharePoint 2010 connects people and enables them to work together in the most effective ways, which in turn, allows people to respond to business needs by quickly creating business solutions that can be integrated with enterprise business data, tools, and processes.



## Exploring What's New in SharePoint 2010

SharePoint 2010 boasts many new capabilities and updates to existing SharePoint capabilities. Here are some of the most notable updates to existing capabilities:

- *Enhanced wiki capabilities:* Wiki functionality can be added to any site. Wiki pages can contain web content and web parts managed together and organized in any configuration within wiki zones; in previous versions, these elements needed to be managed in separate content and web part zones.
- *Updated mobile access interface:* The mobile access interface has been updated so it no longer just lists the libraries and lists available within the site; it now presents all page details in a form factor that is usable on mobile and handheld devices.
- *Site and content management:* Silverlight management interfaces have been added to make site list and content updating easier. Also, the Office ribbon has been introduced to support site, page, list, and library management.
- *Integrated records management:* Records management capabilities can now be used anywhere within the environment; documents no longer need to be moved to a records management site. Records can now be declared as records in their original source locations anywhere in SharePoint.
- *Search enhancements:* The SharePoint Search feature has been updated to include better relevance management, conversational search queries, social searching capabilities, and the ability to integrate FAST Search with SharePoint.
- *Social networking:* My Site has been updated to allow users to manage content, relationships with others, and professional details. It also allows for professional networking.

New capabilities that have been added as part of SharePoint 2010 include the following:

- *Managed metadata:* The ability to centrally manage metadata has been added. This feature allows you to manage attributes and attribute values that are used throughout the environment.
- *Ratings:* Users of SharePoint content can rate the content, allowing users to easily see how useful materials have been for others.
- *Tags and notes:* Users can tag content to relate it to their needs and processes. By tagging content, users can see how it relates to internal needs and organize and track relevant information. Notes can also be added to further clarify details about the use of site resources and information.
- *Document sets:* A group of documents can be defined as a set allowing them to be managed together. Management of document sets includes sending the full set of documents through a single workflow process instance.
- *Metadata driven navigation:* Navigation hierarchies can be identified within lists and libraries, and these hierarchies can be used to navigate through the available information.
- *Visio services:* Visio diagrams can be presented in SharePoint as web-based diagrams. Visio services can also be used to present data-driven diagrams to be used for graphical visualization of information.

We will discuss the capabilities updated and the new capabilities added to SharePoint 2010 and describe how they can be used to create business solutions.

## Understanding the Value of SharePoint 2010

SharePoint 2010, including both SharePoint Server 2010 and SharePoint Foundation 2010, provides an information management and sharing platform, document and record management platform, workflow platform, business process management framework, and development foundation on which information worker solutions can be created. The building blocks needed to create comprehensive business solutions are available and can be easily assembled into scalable enterprise solutions.

In today's work environment, information management and business processes are often very "people centric." Organizations rely on individuals' knowledge of available information and on manual business processes to address many needs. Therefore, organizations to become dependant on specific individuals to complete certain tasks, and allowing others to participate in these areas becomes difficult. In this model, finding information is challenging. Individuals without knowledge of information that is available often require a significant amount of time to find necessary information or will, in some cases, re-create materials already available. Trying to build solutions to simplify and automate business processes and the information management environment can be costly and difficult to create and maintain.

With the introduction of SharePoint 2010, Microsoft continues to expand the Office System by further extending the information management, collaboration, business process automation, and data integration capabilities. SharePoint 2010 also introduces additional capabilities to allow people to work together more effectively and to create solutions needed to rapidly respond to business needs.

## Knowing the Building Blocks

SharePoint Foundation 2010 and SharePoint Server 2010 include many capabilities that can be combined to create enterprise business solutions:

- *Sites and workspaces* provide a central location to securely consolidate related information of various types and to organize this information to conform to the business needs it supports.
- *Libraries and lists* allow users to manage documents and other types of information.
- *Workflows* allow for managed information to be incorporated into business processes.
- *Records management capabilities* allow you to manage regulated content through the full life cycle of the documents.
- *Alerts* give users the ability to be notified when information has been added or changed.
- *Web parts* allow existing information to be organized and presented appropriately and provide additional business logic and applications that can be incorporated into solutions.
- *Navigation and search capabilities* provide the resources necessary to find relevant information when it is needed.

- *Personalization capabilities* allow users to create and manage their own information and share this information with others, as well as communicate with others in the most effective ways to support business needs.
- *Data integration capabilities* allow users to incorporate corporate data into information sharing and business processes.

In this book, we will discuss these tools in depth; we'll describe how they are used and combined into business solutions. In the first part of this book, Chapters 2 through 10, we will discuss the components that make up a SharePoint 2010 environment and provide you with the information necessary to effectively work with these components. In the second part of this book, Chapters 11 through 13 we will discuss some of the common solutions created within the SharePoint environment. The solutions we will focus our discussions around include the following:

- *Document management*: Often, the goal of a group of information workers is to create and manage documents. Whether these documents are business plans, budgets, sales presentations, or some other type of business materials, managing the creation and publishing of these items is critical to the success of the business processes they support. Individuals working on materials are often geographically disbursed, yet each needs the same level of access to the materials being created. This creation process also often includes an approval process before the items are considered final, and the final materials often need to be properly categorized and placed in a location where they can be easily referenced in the future.
- *Project management*: When teams are brought together to work on a project, the management of the project significantly impacts its success. All aspects of the project, including the process, communications, deliverables, timelines, and tasks, need to be properly managed to ensure success. All interested parties, including team members, stakeholders, and managers, need visibility into the progress of the project and all associated resources.
- *Business intelligence and reporting*: Managers and other individuals within the organization need on-demand access to corporate information to make decisions, understand the health of the organization, and determine areas of business requiring attention. Dashboards allow for business information in documents and data systems to be brought together and summarized allowing for quick review and easy understanding.

## CHAPTER 2



# Sites

SharePoint Foundation 2010 provides the core document management, list management, workflow, collaboration, and application platform services for a SharePoint environment. SharePoint sites are the foundation on which business solutions based on the Office system store and manage information. Sites provide locations where groups of people can work together and share information. They can also be used to collect team and enterprise knowledge and enable individuals to effectively work with this knowledge. They are also the entry point into business solutions and workflow processes.

As an application development platform, SharePoint Foundation provides many of the building blocks needed to construct business solutions. As part of the Office system, SharePoint Foundation is also tightly integrated with the other Office system products, enabling SharePoint solutions to be easily extended to include a wide range of capabilities.

Several different types of components are available within SharePoint Foundation to store and manage information, facilitate collaboration, and provide workflow, reporting, and other application-centric capabilities. These components include the following:

- *Lists:* SharePoint Foundation includes a variety of standard lists and the ability to create custom lists. Lists are available to facilitate communication and track information. Several of the available lists have extended capabilities that help support their primary purposes. For example, contact lists integrate with Microsoft Outlook to allow them to be used in the same way as contact lists created within Outlook. Lists can also be tailored to meet specific information management needs. We will discuss lists in detail in Chapters 4 and 5.
- *Libraries:* Libraries are available in SharePoint Foundation to manage documents, InfoPath forms, wiki pages, and pictures. The available library types are extended by SharePoint Server 2010 to also include Translation Management, Asset, Data Connection, Report, and Slide libraries. These additional libraries are used to incorporate additional business solution capabilities. We will discuss libraries in more detail in Chapter 6.
- *Workflow:* General workflow capabilities are available within SharePoint Foundation to allow the state of content to be managed through a process. These capabilities are greatly extended in SharePoint Server to allow information to be easily incorporated into business processes. We will discuss workflow in more detail in Chapter 7.
- *Web parts:* A web part is an application component that can be displayed and managed through pages in sites. Web parts can also be introduced that provide application functionality within SharePoint. We will discuss web parts in more detail in Chapter 8.

In this chapter, we will familiarize you with the general layout and structure of sites. We will describe how to navigate through sites and locate information within them, as well as how to create, manage, and maintain sites, including aspects such as site security and navigation options.

## Understanding Sites

Sites provide the information management capabilities, the workflow engine, the collaboration services, and the application platform that make up the foundation of a SharePoint environment. Sites include a variety of components and services that make up the core elements of business solutions. Five different categories of sites are available within SharePoint Foundation for managing and hosting information:

- *Team sites* are designed to facilitate team collaboration. These sites provide the capabilities necessary to allow for information management, sharing, and team collaboration.
- *Document workspaces* are used to facilitate the creation and update of documents. These sites include capabilities needed to allow multiple people to collaborate in the development and management of documents.
- *Group work sites* provide an environment in which a team can be managed through a collaboration effort. These sites include resources necessary to track team member whereabouts, schedule and manage group events, manage team communications, and manage the materials needed by the team.
- *Meeting workspaces* facilitate the management of meetings. These sites include the capabilities necessary to help plan meetings, share information among meeting attendees, organize materials presented during meetings, and track post-meeting action items.
- *Blog sites* are used to post information for comment and discussion. Blog sites allow for the capture and management of discussions around specific topics and the capture of materials related to the topic being discussed.

Additional categories of sites are made available through the introduction of SharePoint Server 2010. We will discuss these additional site types and their capabilities in Chapter 3.

SharePoint includes several site templates for use when creating any of the types of sites listed previously. A template is a starting point or default set of capabilities organized to meet a specific need. You create a site based on a template to automatically provide a starting set of capabilities for the site. You can then, if necessary, customize the created site to better meet specific needs. The default set of site templates available through SharePoint Foundation for creating team sites, document workspaces, group work sites, meeting workspaces, and blog sites are designed to provide the most common set of capabilities needed when creating sites for the associated purpose.

As we mentioned previously, several types of components are available in SharePoint Foundation that provide the core capabilities of SharePoint sites. These components act as the building blocks for most SharePoint solutions. Table 2-1 lists the components available in each of the SharePoint Foundation site categories we discussed in this section.

**Table 2-1.** Site Component Options

	Team Sites	Document Workspaces	Group Work Sites	Meeting Workspaces	Blog Sites
<b>Libraries</b>					
Document libraries	✓	✓	✓	✓	✓
Form libraries	✓	✓	✓	✓	✓
Picture libraries	✓	✓	✓	✓	✓
Wiki page libraries	✓	✓	✓	✓	✓
<b>Lists</b>					
Agenda				✓	
Announcements	✓	✓	✓	✓	✓
Calendar	✓	✓	✓	✓	✓
Circulations			✓		
Contacts	✓	✓	✓	✓	✓
Custom list	✓	✓	✓	✓	✓
Decisions				✓	
Discussion board	✓	✓	✓	✓	✓
External list	✓	✓	✓	✓	✓
Issue tracking	✓	✓	✓	✓	✓
Links	✓	✓	✓	✓	✓
Microsoft IME Dictionary list			✓		
Objectives				✓	
Project tasks	✓	✓	✓	✓	✓
Survey	✓	✓	✓	✓	✓
Tasks	✓	✓	✓	✓	✓
Text box				✓	
Things to bring				✓	