



Microsoft®
SharePoint® 2010



SharePoint 2010 Usage Best Practices

White Paper
September 2010

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About this Whitepaper

Microsoft SharePoint Server 2010 provides a vast number of capabilities that empower business users. For example, SharePoint Server 2010 enables users to collaborate on documents with each other, tag and rate content, self-publish, track group projects, and even develop their own productivity solutions. In short, Microsoft SharePoint 2010 makes it easier for people to work together.



Figure : SharePoint 2010 Capabilities.

With all of this power, sometimes it's hard to know exactly which feature or function to use in a given scenario, or what's the recommended approach for solving a specific collaboration need. This paper provides best practices for SharePoint usage and answers questions like:

- What collaboration methods and site templates are most appropriate for which types of situations?
- What should I ask myself before setting up a SharePoint site?
- How should I manage content?
- Should I consider a document's lifecycle before posting it to SharePoint?
- What should I think about when tagging?
- What's the correct etiquette for social interactions?

In this white paper, you will learn how to manage content effectively, how to choose the best option for displaying content, and the most effective way to find your content later. Let's first talk about Sites.

Sites

SharePoint 2010 Sites provide a “one-stop shop” for all your business-focused Web site needs. It provides a full set of tools that your people can use to create any kind of site, plus a single infrastructure that simplifies site management. From a team site for colleagues, to an extranet site for partners, to an Internet site for customers, people can share and publish information using one familiar system.

SharePoint sites are easy to make. In fact, the full set of features in SharePoint 2010 Sites can help anyone build a site from start to finish. Several out-of-the-box features provide instant value by helping a site owner build the first page right away. Still other features make it simple to modify pages—change content, add interaction, or apply a design theme. Novice or expert, anyone can quickly create, customize, and publish a site that looks great and meets a specific business need.

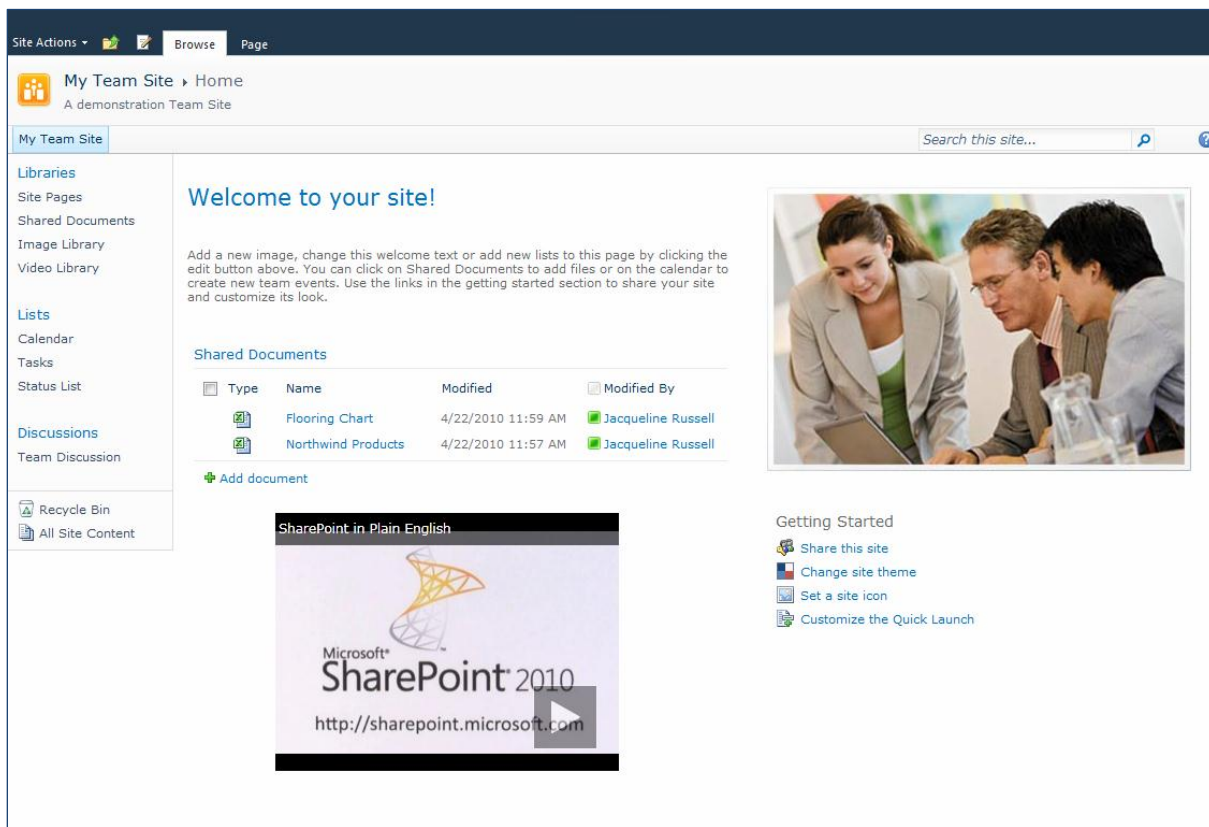


Figure : A SharePoint 2010 Team Site.

So how do you pick the right kind of site? When determining the best site for your SharePoint content, you'll want to ask yourself a few questions.

Things to Ask Yourself Before Setting Up a Site

Doing a few minutes of planning prior to creating a new site will ensure you get the right site for your needs. A site template provides a predetermined set of lists, web parts, and other functionality for your business solution. In order to select the right template, ask yourself:

- What is the purpose of the site?
- What are your business goals?
- Is there already an existing site that fulfills these goals?
- Do I need an entire site? Or would a new page or item in an existing site be better?
- Who needs access to the site? Team members, everyone in the department, external partners/vendors?
- What is the expected lifespan of site? 6 month project, until the next reorg, indefinite?
- Does the site need to be searchable?
- Should information within the site be able to be tagged and shared with others?
- What kind of navigation is needed within the site? Complex subsite and library structure?
Or fairly shallow, simple Information Architecture?
- Will the site be for publishing and broad communications or for small group collaboration?
- What kind of content will be stored within the site? Documents, project tracking, rich media, lists and spreadsheets?

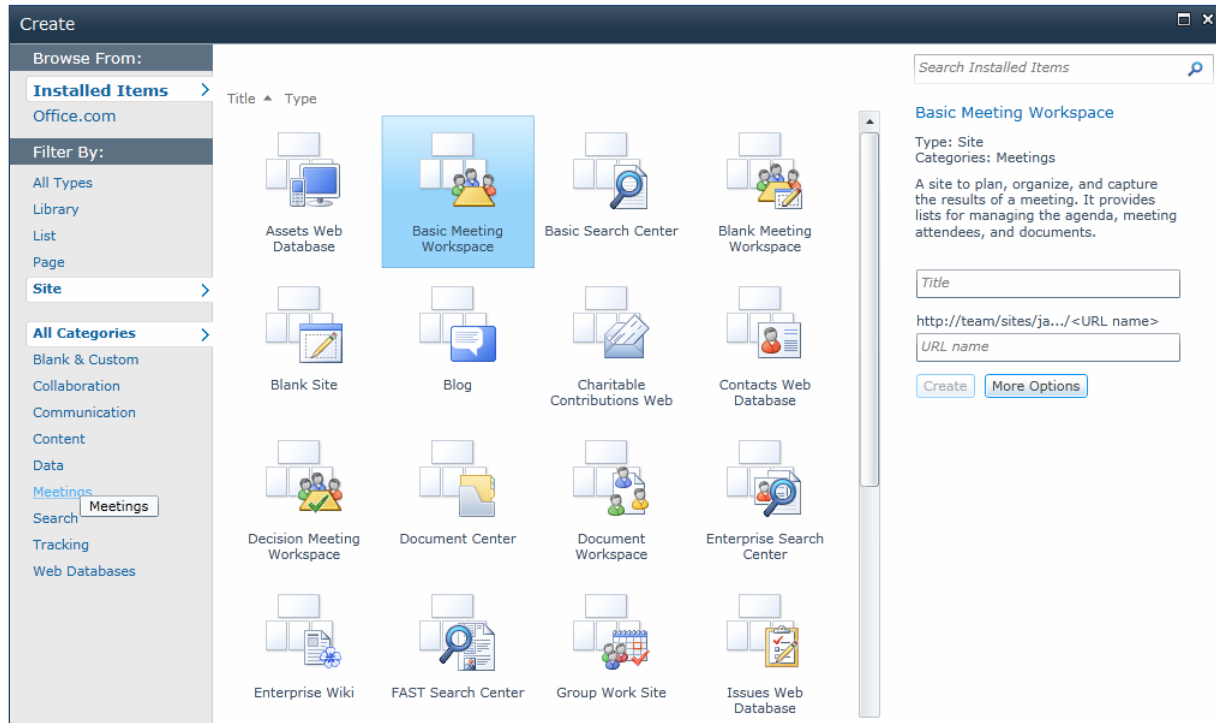


Figure : The Various SharePoint 2010 Site Templates—ability to filter by Type and Category.

Once you've determined your business goals, you can then determine the best template for your site. Use the following table to help you select the right template for your site:

| Business Goal | Use | Reason |
|--|--------------------|--|
| You need to collaborate with a group of users for a specific project or for ongoing team work. | Team Site | The Team Site template provides a core foundation for several types of content, starting with a document library, announcements list, team calendar, discussion list, and a single home page (default.aspx). |
| You want to create an area to collaborate on a document. | Document Workspace | A Document Workspace allows you to collaborate on documents with others. It provides a document library, a task list, and a list for links to related resources. |
| You want to track information (agenda, action items, etc) for a meeting or series of meetings. | Meeting Workspace | A Meeting Workspace enables you to associate meetings in Outlook with artifacts associated with the meeting such as agendas, meeting attendees, and supporting documents. |
| You want to provide regular communications and updates via a personal or team identity. | Blog | A team or individual Blog site enables you to post news and announcements, ideas and observations, and other information for people to consume via RSS and to comment on. |
| You need a large, centralized knowledge repository that is designed to both store and share information on an enterprise scale, and allows everyone to contribute information. | Enterprise Wiki | Enterprise Wikis provide an easy content editing experience and various ways to control content, such as assigning permissions or using a workflow to establish an approval process. |
| You would like to create a Portal for broad communications to a large group of people. | Publishing Site | The Publishing Site includes document and image libraries for storing and publishing website assets. Portal editors can work on draft versions of pages and use approval workflows to publish them to readers. |

For more information on all the different types of templates available in SharePoint 2010, please reference the [SharePoint Server 2010 Site Templates](#) article.

Team Sites vs. Blogs vs. Enterprise Wikis

Team sites are good for offering a structured collaborative site that encourages communication among team members, and provides storage of team documents and other content.

A blog is another SharePoint site template. Blogs are maintained by either an individual or a team who posts regular entries of news, commentary, events, or other material that is likely to be of interest to a larger community. Entries are displayed in reverse-chronological order, providing the most recent entry first. Most blogs are interactive, allowing visitors to leave comments and even message each other via widgets on the blogs and it is this interactivity that distinguishes them from other static websites.

Wikis are a way for many members of the community to come together and edit content collaboratively. Wikis in SharePoint provide an easy editing experience, and also allow for version control (check in, check out) and support page history views and rollbacks.

Use a **Team Site** when you want to:

- Offer a structured way to exchange information.
- Store lists and libraries of shared information, such as documents, announcements, event calendars and other content.
- Enable users to add functionality and/or content by adding web parts, lists, and libraries.

Use a **Blog** when you want to:

- Provide a site that's either personal ("Scott's blog") or team branded ("The Contoso Executive blog").
- Post information on a regular basis.
- Allow other users to comment on your content, but not edit your content directly.
- Organize content by topic.

Use an **Enterprise Wiki** when you want to:

- Create a site that's edited by a community.
- Encourage many-to-many communication and contribution.
- Allow everyone to contribute, edit, and rate others' content.
- Use page layouts to structure content.

Team Site Usage Tips

For effective team site usage, you'll want to adhere to the following guidelines:

- Choose the appropriate lists, libraries, and web parts that you'll need when you first create the site. For example, if you don't need an announcements list, delete it so that it doesn't confuse other users or take up valuable screen real estate. You can also add more web parts later as you need them.
- Put a welcome message on the site, which will instruct visitors as to the site's purpose and target audience.
- Take some time to apply a pleasing design or Look and Feel to the site. In SharePoint 2010, it's also easy to apply PowerPoint themes to a site.
- Personalize it to the team or project by posting team photos or a project logo.
- Encourage users to make use of the site by:
 - Bookmarking the site.
 - Posting important shared content and information on the site (rather than sending through e-mail).
 - Requiring people to share their content through the site instead of through e-mail.
 - Setting up appropriate metadata properties and keyword terms to ensure content can be easily identified and found via SharePoint Search.
 - Giving people Contribute rights so they can participate in building out the site. For example, give select people specific site tasks such as building out the contact list or calendar.

Blogging Usage Tips

For effective blog usage, you'll want to be aware of the following tips:

- **Make sure you post on a regular basis.** If you only blog occasionally, your readers might think you've abandoned them. It's like a daily newspaper that's a blank sheet of paper! You don't have to blog every day, but at least once/week is recommended.
- **Review your blog for comments on a regular basis.** Readers will want you to comment back.
- Your blog is about your readers. Make sure you are posting information that your intended readership would find useful.
- **Tag your blog posts** with appropriate keywords and standard term taxonomy so the information can be disseminated across the organization.
- **Clearly mark any information as company confidential, or publically shareable.** You can also make use of SharePoint's record management capabilities by declaring any posts as records to automatically apply corporate policies and compliance.
- **For Team or Executive level blogs, make use of the approval workflows and publishing processes** to draft, review, and publish posts.

Enterprise Wiki Usage Tips

For effective wiki usage, you'll want to follow these guidelines:

- Read about [Enterprise Wiki Planning](#) to help you understand the requirements for an Enterprise Wiki site.
- Choose an appropriate Page Layout for your wiki.
- Allow many contributors to collect as much knowledge as possible. If you're concerned with ensuring appropriate, high quality content, you can use approval workflows to moderate content submissions.
- Use SharePoint's new [intellisense link feature](#) to put lots of links in the content. This will help other users find related information easily.
- Make generous use of images and video. As the saying goes, "a picture is worth a thousand words." You can also insert any SharePoint web part into your pages.
- Tag your content to make it more searchable. Spend some time planning your Wiki Categories.
- Constantly review the organization and navigation of your wiki site. Because wikis tend to grow organically, you must be vigilant that the information is still easy to find and isn't duplicated.
- Encourage contributors to add source or reference information to help validate their entries.
- For subject matter experts, or topic "owners", encourage them to set alerts on their page topics so they can be notified of any new edits or additions.
- Encourage readers to rate pages. This helps with quality control of content.
- Periodically review page restrictions and permissions. For example, you may want to restrict editing of an HR Policies page, or an Executive bio.

Site Structure

As you create sites and pages within your site, you'll want to understand the structure that SharePoint uses. There are fundamental concepts in SharePoint that are key to truly understanding the platform. Every portal, team site, workspace, internet page, and extranet site is based upon these building blocks:

| Building Blocks | Definition |
|---|---|
| SharePoint Farm and Web Applications | While not a technically perfect definition, you can think of a SharePoint farm as your whole SharePoint environment and each web application as a URL like <i>http://my.intranet.com</i> or <i>http://sharepoint.intranet.com</i> . |
| Collection | A site collection consists of a top-level site and its sub-sites. It is a logical unit for administration—there are settings that can only be configured at the site collection level (in other words, at the top-level site). Each web application can host many site collections. |
| Site | A site consists of a data repository, visual elements, administration, and almost every other core element of the functionality and experience for the user. Visually, a site is represented as one or more web pages, lists, and web parts. |
| Site Template | A template defines what the site will look like, what lists comprise the site initially, how publishing will work on the site, and a number of other settings. It enables a site to be created via self-service using a pre-created definition. You can think of a site as a cookie (that you eat) and a template as the cookie cutter. |
| Lists | Lists are a data repository that can hold columns of data and/or documents. The objects stored in a list are called items. Visually, a list is represented by views or a web part. It is analogous to a database table or Excel worksheet. |
| Libraries | A SharePoint library is a specialized form of SharePoint list that is used to store files and content types rather than items. Libraries are created in much the same way as normal lists and support the same type of functionality such as workflows, alerts, etc. |
| Items | Items are the fundamental data objects that are stored within a list. An example of an item might be a contact, a task, or a document. Items are analogous to rows within a database. |

Sites vs. Pages

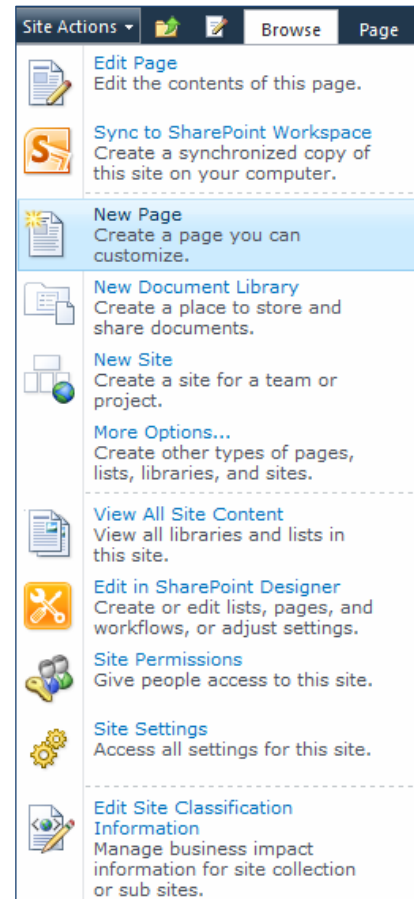
Sometimes, it's tempting to create an entirely new *site*, when all you really need is a *page*. What's the difference between a site and a page? A site is a SharePoint container that holds lists, libraries, permissions, and administrative settings. A page, on the other hand, represents a single item (a web page, actually) that enables you to see one or more visual elements such as a collection of web parts. For example, a site may contain a document library and a discussion list. A page, on the other hand, is a single .aspx file (such as *default.aspx* or *home.aspx*) that lives within the site, typically in the pages library, and lets you visually see content or information from within the site. For each site, you can create as many pages as you'd like, although many sites just have one page.

Create a new site when you want to:

- Create a new, distinct website location that can hold lots of different types of information, such as documents, announcements, or news articles.
- Create a new resource, such as a blog or an enterprise wiki.
- Create a new website that will host a collection of pages that will live together.

Create a new page when you want to:

- Display some information visually (typically via web parts) on an existing site.
- Add a new wiki topic to an existing enterprise wiki.
- Add publishing content to an existing website.



Web Part Pages vs. Wiki Pages

The primary deciding factor for using a Web Part Page as opposed to a standard SharePoint 2010 Wiki Page is the purpose of the page. The new SharePoint 2010 Page is by default a wiki page which can be easily edited and formatted. Pages can also contain web parts as well as text and images. A Web Part Page can only contain a collection of web parts, and is therefore narrower in scope. So, for general purposes, use the SharePoint 2010 Wiki Page template.

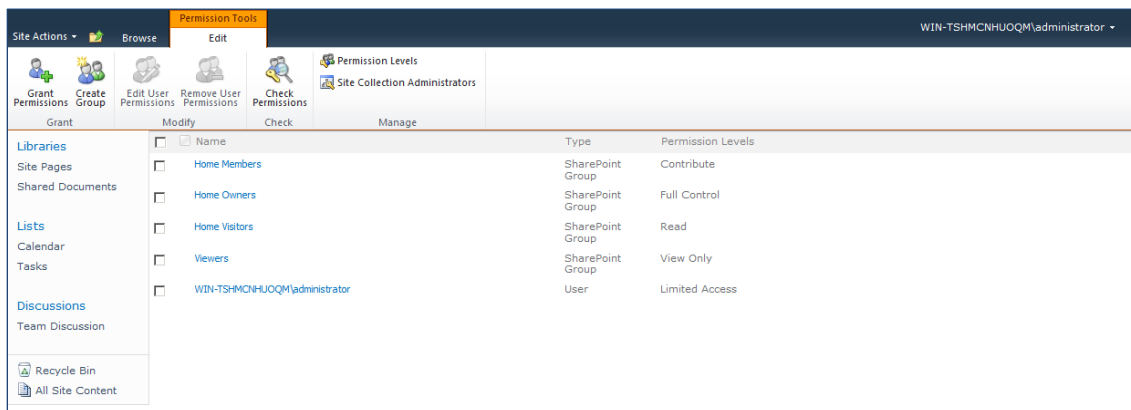
Security

Once you have a site, you will likely need to enable additional users to use the site. In many cases, you'll simply inherit permissions from the parent site. However, you may find that you need to set permissions directly. If you need to apply specific permissions, you'll want to use the Site Permissions options under Site Actions. This option takes you to a page to manage groups, permissions, and access requests.

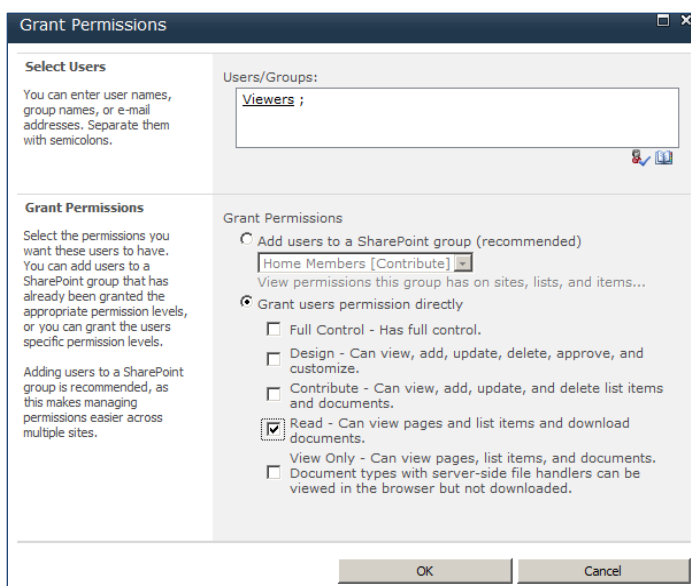
The Grant section in the ribbon enables you to add and remove users from SharePoint groups within the site and to create new groups. The Modify section enables you to edit permissions for existing site users or groups and to remove user permissions completely. On the lower right section of the screen, you must select the group or individual that you want to make changes to. Clicking a group name in this section also enables you to add or remove members from existing groups. On this screen, you can also Check Permissions for Users, Manage Access Requests, and set Permission Levels.

SharePoint only shows action links that you can execute (this is called *security trimming*). Actions are hidden from users who do not have the proper permissions. To demonstrate this, execute the following steps:

1. Be sure you have Site Administrator privileges (Full Control over the site). Click Site Actions in the upper left and select Site Permissions.



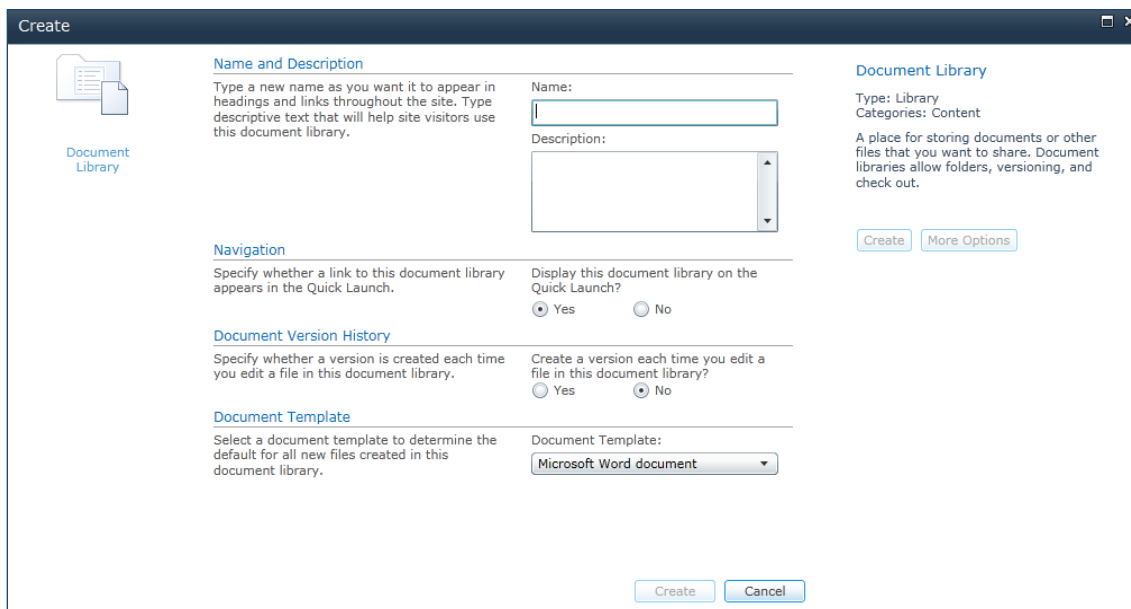
2. Click Grant Permissions.
3. Select a user and give him or her Read permission only (either directly or via an existing group).
4. Click OK.



5. Go to the Welcome message in the top navigation and select Sign in as Different User. Enter the credentials for that user.
6. The Site Actions box will be missing. That user can only view content on the site and will not see any Administration links.

One of the challenges of using a document library (or any document collection) is that it always seems that there are one or two documents that should have different security settings. From a business perspective, they fit logically in the grouping; from a security perspective, access should be limited to a subset of the entire team. SharePoint addresses this problem with the ability to apply list-item security. This feature is not limited to documents; SharePoint permits the application of enhanced security on any list item, including images, links, and custom list items. To set item-level security, execute the following steps:

1. Click Site Actions → New Document Library to create a new document library.

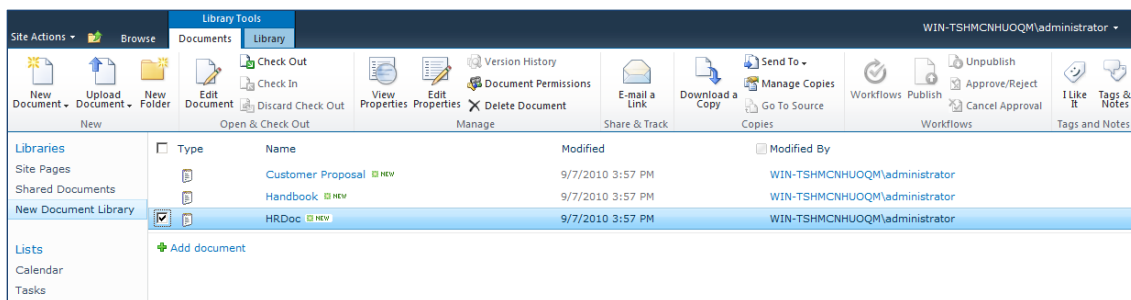


The screenshot shows the 'Create' dialog box for a new Document Library. It is divided into several sections:




- Name and Description:** Includes a 'Name' text box and a 'Description' text area.
- Document Library:** Shows 'Type: Library' and 'Categories: Content'. A description states: 'A place for storing documents or other files that you want to share. Document libraries allow folders, versioning, and check out.' There are 'Create' and 'More Options' buttons.
- Navigation:** 'Specify whether a link to this document library appears in the Quick Launch.' with radio buttons for 'Yes' (selected) and 'No'.
- Document Version History:** 'Specify whether a version is created each time you edit a file in this document library.' with radio buttons for 'Yes' and 'No' (selected).
- Document Template:** 'Select a document template to determine the default for all new files created in this document library.' with a dropdown menu set to 'Microsoft Word document'.

At the bottom, there are 'Create' and 'Cancel' buttons.

2. Upload a few documents to the document library. On one of your documents, select Manage Permissions from the context menu.

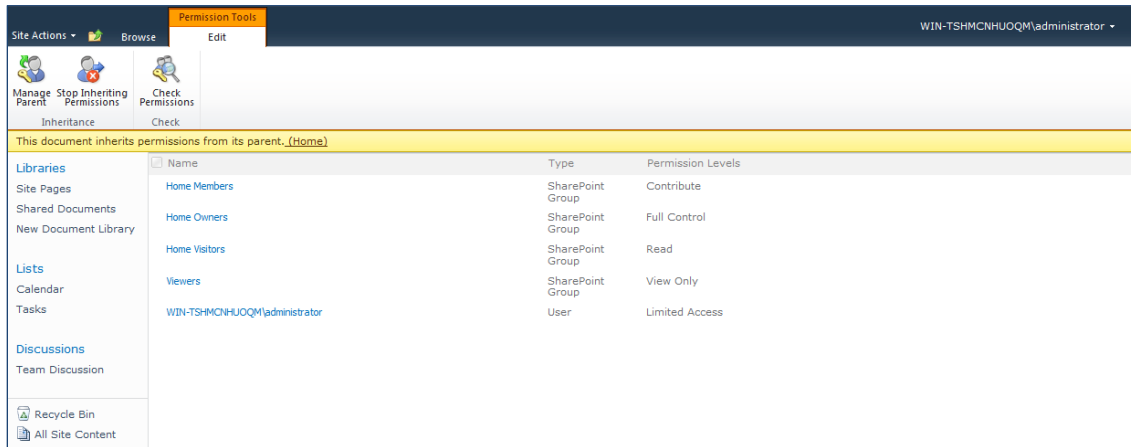


The screenshot shows the SharePoint 2010 document library interface. The top navigation bar includes 'Site Actions', 'Library Tools', and 'Library'. The main area displays a list of documents with columns for 'Type', 'Name', 'Modified', and 'Modified By'.

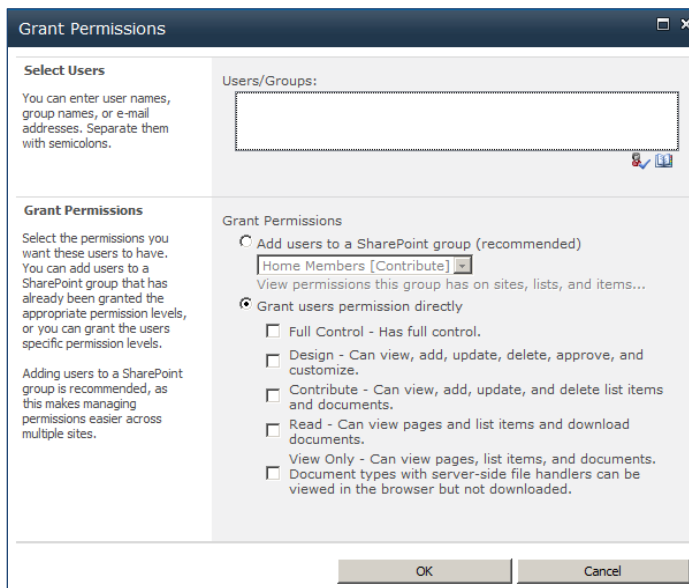
| Type | Name | Modified | Modified By |
|----------|---|------------------|-------------------------------|
| Document | Customer Proposal  | 9/7/2010 3:57 PM | WIN-TSHMCNHUOQM\administrator |
| Document | Handbook  | 9/7/2010 3:57 PM | WIN-TSHMCNHUOQM\administrator |
| Document | HRDoc  | 9/7/2010 3:57 PM | WIN-TSHMCNHUOQM\administrator |

The 'New Document Library' section is selected in the left-hand navigation pane.

- You will see a Permissions page detailing all security settings for the document. In general, a document will inherit permissions from its parent folder or library. To manage permissions directly, click Stop Inheriting Permissions from the Inheritance section in the ribbon. You will be warned that you are disassociating this document's security from the parent page and the document library. Click OK.



- Click Grant Permissions. You will be able to set security for the document/list item by selecting the user or group and the associated security access. SharePoint will also allow you to send an e-mail to the associated users with a message about this document.



A word of caution: just because you can change permissions at the item level, it doesn't mean that you should. A general recommendation is to set permissions at the highest level you can. For example, don't change the security settings for your site if the parent site's permission still applies. And rather than changing the permissions at the item-level, add a document library and set the permissions there if you can. There is no single best way to design security and manage security groups, since each business scenario is different.

Content

One of SharePoint 2010's strengths is its ability to manage content. Content comes in many forms; it can be a simple document, a blog posting, or a wiki page. The following is a description of many types of content you'll want to manage in SharePoint:

- Documents: this can include Word documents, Excel files, PowerPoint presentations and more
- Images
- Video
- Audio
- Web pages
- And more

Deciding Where Content Should Live

SharePoint has a variety of places where content should go. Some are obvious (blog postings go on a blog site, and wiki pages are added to an enterprise wiki). But what about things like documents? Should they go on a team site in a document library? In a central document repository?

Some of those questions will depend on how your organization has put together your document management environment. If your company is already using a document center and your document needs to be managed, you'll want to simply navigate to the site and upload your document. If your content is less formal and more collaborative, you'll want to use a team site or document workspace for ad-hoc collaboration.

Not all types of content should go into SharePoint. In fact, sometimes, files are better left on a file share. To best determine if a file share or a document library would suit your business and organizational needs, we must look at the situational uses of file shares and SharePoint Document Libraries.

Use a file share instead of a SharePoint document libraries for:

- **Product installation packages.** For example, your company's Office 2010 installation will likely not be stored in SharePoint, but the page or list for communication and link to install it from might be.
- **Databases such as SQL or Access databases.** They are not good candidates for storage in a SharePoint list or library. Files that require locking or that have transaction logs would be more appropriate for storage on the file system.
- **Media files over 2GB in size.** SharePoint 2010 accommodates audio, video, and images well, but very large files should be stored separately and be linked to/from a SharePoint site.
- **Executables.** By default most scripts and executables are blocked in SharePoint. This is for your own protection. You may find that most of these file types are blocked in e-mail by default as well. This is to slow down the distribution of virus-prone files.

For everything else, it's best to store in SharePoint where the content will be indexed, versioned, and comply with corporate governance policies.

Folders

Folders are a common way to organize documents and are probably very familiar to you, especially if you've used file shares or even your local hard drive. SharePoint 2010 accommodates folders. However, there are several problems with folders:

- It takes lots of clicks to get to the content you are looking for. Folders are inflexible—you either put the same content in two different folders if it applies to more than one folder, which immediately creates version-control challenges, or you have to live with the structure you created and make sure all users understand how to correctly put documents “where they are supposed to go.”
- Using folders to organize content assumes that you and your colleagues all have the same mental model for content organization.
- Folders don't let you easily sort, filter, and create ad hoc views of your content—folders assume you know today how you might want to see your content tomorrow.

You might want to consider using SharePoint columns—otherwise known as *metadata*. Metadata can be a better organizing approach for several reasons:

- It's easy to see what content is available in a library or list.
- Users can look at, sort, or filter content by any dimension that is useful to today—and use a different dimension tomorrow.
- Metadata improves the ability to serendipitously discover what is available in a content repository—it surfaces rather than buries content. With metadata, you have the option to use “group by” in views if you need to collect content of a similar type to create an organizing experience similar to folders but still have the flexibility to group your content along multiple dimensions. Metadata improves search engine results. Most search engines factor the content metadata into the algorithm that returns results. In essence, it provides bonus points that can boost the content's position or rank on a results page. In addition, some search engines can be customized to support searches on specific metadata elements.

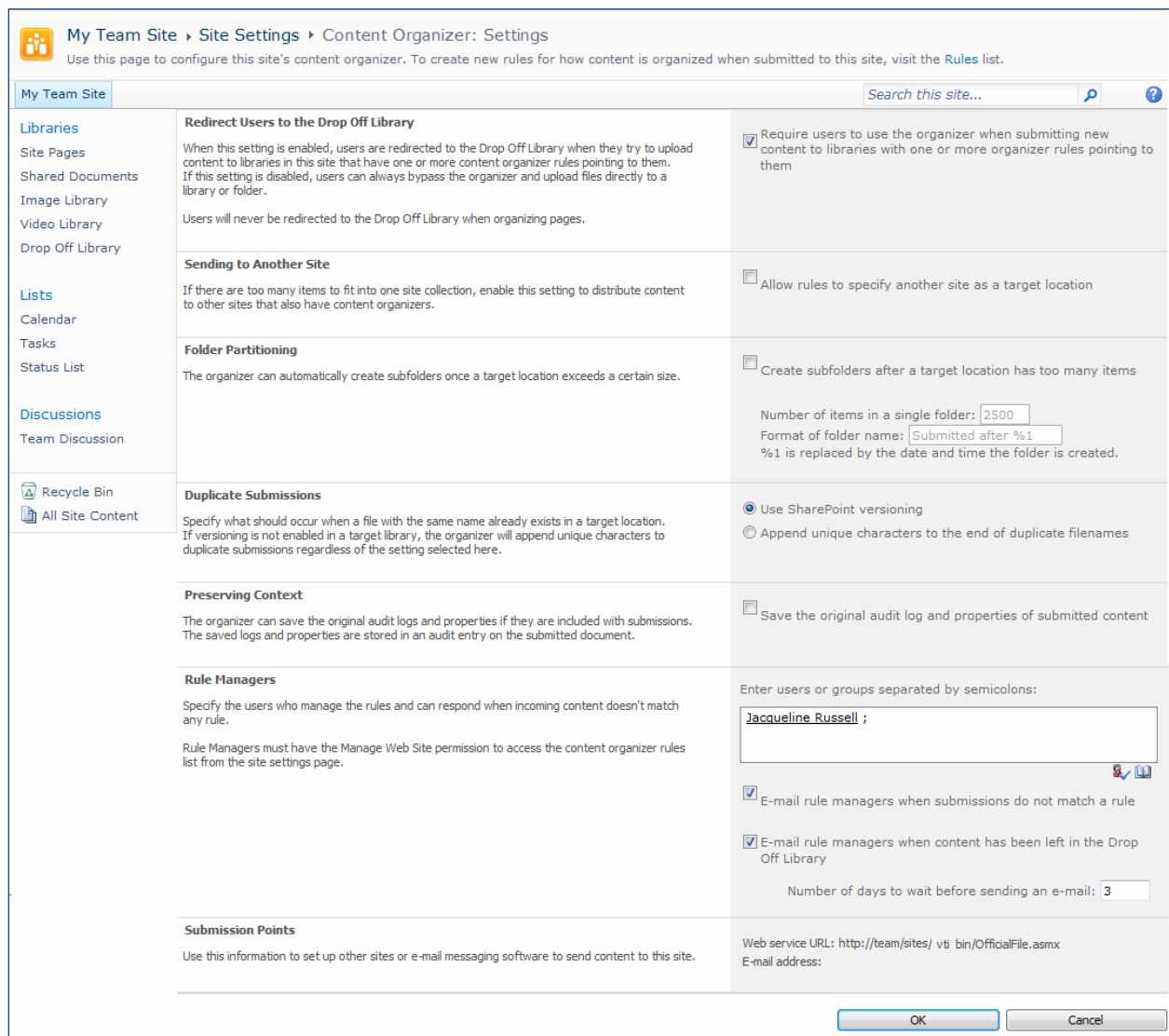
In SharePoint 2010, folders also have a useful purpose: “location-based” metadata can be assigned from a folder. In SharePoint 2010, you can assign default metadata values to a folder using the Column default value settings feature in Library Settings, and then all the documents that you create in or upload to that folder will “inherit” the metadata value associated with the folder automatically. Since folders can actually provide a valuable service, they may have a place in your document library—especially if you create views that show your items without folders. In addition, the new Content Organizer feature can be used to automatically “route” content to a specific location or folder in your site.

The Content Organizer



This is a new tool with SharePoint 2010. It allows you to define rules-based logic to help determine where new content should be placed on your Web site. First, let's look at how to enable it. Under Site Settings, pick the Content Organizer Rules. If you don't see it under Site Settings, it may not be activated. Go to Site Features and activate it.

Rules can be based on any fields available to you on the specific page. These rules can help define where new content will be placed. Think of it like a wizard that understands your site topology.

This is a nice way of controlling how new content is placed on your Web site. By setting up a few key rules, you can dictate the automatic placement of new content on your Web site. This allows a consistency in how content is presented and maintained by enforcing an overall topology for content.



My Team Site > Site Settings > Content Organizer: Settings
Use this page to configure this site's content organizer. To create new rules for how content is organized when submitted to this site, visit the [Rules](#) list.

My Team Site  

| | | |
|--|---|--|
| Libraries Site Pages Shared Documents Image Library Video Library Drop Off Library Lists Calendar Tasks Status List Discussions Team Discussion Recycle Bin All Site Content | Redirect Users to the Drop Off Library When this setting is enabled, users are redirected to the Drop Off Library when they try to upload content to libraries in this site that have one or more content organizer rules pointing to them. If this setting is disabled, users can always bypass the organizer and upload files directly to a library or folder. Users will never be redirected to the Drop Off Library when organizing pages. | <input checked="" type="checkbox"/> Require users to use the organizer when submitting new content to libraries with one or more organizer rules pointing to them |
| | Sending to Another Site If there are too many items to fit into one site collection, enable this setting to distribute content to other sites that also have content organizers. | <input type="checkbox"/> Allow rules to specify another site as a target location |
| | Folder Partitioning The organizer can automatically create subfolders once a target location exceeds a certain size. | <input type="checkbox"/> Create subfolders after a target location has too many items Number of items in a single folder: <input type="text" value="2500"/> Format of folder name: <input type="text" value="Submitted after %1"/> %1 is replaced by the date and time the folder is created. |
| | Duplicate Submissions Specify what should occur when a file with the same name already exists in a target location. If versioning is not enabled in a target library, the organizer will append unique characters to duplicate submissions regardless of the setting selected here. | <input checked="" type="radio"/> Use SharePoint versioning <input type="radio"/> Append unique characters to the end of duplicate filenames |
| | Preserving Context The organizer can save the original audit logs and properties if they are included with submissions. The saved logs and properties are stored in an audit entry on the submitted document. | <input type="checkbox"/> Save the original audit log and properties of submitted content |
| | Rule Managers Specify the users who manage the rules and can respond when incoming content doesn't match any rule. Rule Managers must have the Manage Web Site permission to access the content organizer rules list from the site settings page. | Enter users or groups separated by semicolons: <input type="text" value="Jacqueline.Russell ;"/> <input checked="" type="checkbox"/> E-mail rule managers when submissions do not match a rule <input checked="" type="checkbox"/> E-mail rule managers when content has been left in the Drop Off Library Number of days to wait before sending an e-mail: <input type="text" value="3"/> |
| | Submission Points Use this information to set up other sites or e-mail messaging software to send content to this site. | Web service URL: http://team/sites/vti bin/OfficialFile.aspx E-mail address: |

Figure : The Content Organizer helps users put content in the right place.

Columns and Content Types

Columns

The specific authoritative fields or attributes that are used to “tag” each SharePoint item are called Columns. Columns allow you to keep metadata about an item consistent across libraries and lists and can be defined at the Site Collection or site level and can be inherited by “child” sites or defined locally in a library or list. Columns have a name and a type, such as:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from: drop-down, check box, radio button)
- Number
- Currency
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or group
- Hyperlink or picture
- Calculated (calculation based on other Columns)
- External data
- Managed Metadata

The Managed Metadata type is new in SharePoint 2010. Managed Metadata allows you to share a hierarchical set of attribute values across your entire SharePoint infrastructure.

If you are not using Managed Metadata to share values for Columns, you should still consider creating all Columns as Site Columns at the top site in a Site Collection. Managing Columns centrally allows you to automatically propagate new values to any library or list that uses that Site Column.

Content Types

It is often difficult to find related information when you are searching through a large repository. For example, let’s assume that you need to create a project plan for a new project and you know that there have been other projects similar to yours in the past. In a portal with many project team sites, it can be challenging to find all of the project plans. Content Types in SharePoint helps simplify this task. If you define “Project Plan” as a Content Type, you can then find all project plans in your portal easily with a single search. Content Types also let you associate specific Site Columns with different types of content. For example, you can associate an Effective Date with a Policy but not with other types of documents. If you share and manage the Policy Content Type across your entire farm, you can ensure that all Policy documents, created in any Site Collection, will have Effective Date as an attribute.

A Content Type contains these elements:

| Element | Details |
|--|---|
| Metadata (Site Columns) | The attributes required by a Content Type are metadata about the content that can be used for categorization. You cannot define default values for Columns in a Content Type, just which properties or Columns are associated with the Content Type. The values for a particular metadata Column are defined for the Column, not the Content Type. If the values for a particular Column are unique to a Content Type, consider defining a separate, unique Column that is associated with a particular Content Type. |
| Document Template | Document templates can be used to create files with predefined styles and boilerplate content. You can assign one unique document template to each Content Type. |
| Custom "Forms" | Specific New, Edit, and Display forms can be defined to use with a Content Type. |
| Workflows | Some Content Types have a consistent process that can be assigned for approval. For example, all Status Reports may have to be routed to the project manager before they can be published on the portal. A workflow can be associated with a particular Content Type. Workflows can be triggered automatically based on a specific event or manually with a user's action. |
| Information Management Policies | Your organization may have rules about how particular Content Types should be managed. This is particularly useful for records management. You can associate policies with a Content Type to manage characteristics such as retention period. |

You can also associate workflows, properties, templates, and policies directly in a list or library. However, when you associate these items "locally," they are not reusable, even within a specific site. Content Types are organized in a hierarchy that allows one Content Type to inherit characteristics from another Content Type in parent-child relationship. For example, while a memo is an "instance" of a document, if your organization wants users to leverage a standard template when creating a memo, you will want to create a new "Memo" Content Type as a child of the parent "Document" Content Type. The Memo Content Type can inherit all of the properties of the Document Content Type but can leverage a different template.

As a general rule, define Columns and Content Types at the highest possible level in your solution so that they are reusable and "manageable" across the entire solution. Depending on your role, you can define Content Types at the site, Site Collection, or enterprise level. Once you define a Content Type, it is available in that site and all subsites.

- If you want a Content Type to be available to a specific site (and its subsites), define it in the site Content Type Gallery.
- If you want a Content Type to be available to all sites in a Site Collection, define it in the Site Collection Content Type Gallery.
- If you want to create a Content Type to be used across your entire farm or across multiple Site Collections (at the enterprise level), define a Site Collection to be a "Content Type hub." The Content Type created in the hub can then be associated with each Site Collection using the Managed Metadata service. Once an enterprise Content Type is published, it can't be changed within the local Site Collection.

As you might imagine, if you are going to define metadata at the enterprise level, you are potentially introducing the need for a new governance role— an enterprise data or content architect or metadata planning group. If you don't see that type of planning in your organization, ask for it!

Someone (or some group) in the organization should be responsible for planning and managing enterprise-level Content Types and other shared (managed) metadata. This does not have to be someone in a full-time job (though it may be in large organizations), but the role will clearly need to be defined in someone's job description.

There is as much art as science required to determine what Content Types you need in your solution. Consider the following when you are planning Content Types for the enterprise, Site Collection, or individual site:

- Does this type of content have unique requirements based on the Content Type elements listed here?
- Should this Content Type be available across the entire enterprise or in one Site Collection or one site? For example, if your organization has implemented a records management policy, you may want to add a Records Retention Code to one or all enterprise document Content Types and make it a required field. This will ensure that users will assign a Records Retention Code to all documents.
- Would another user want to search for this type of content uniquely? For example, if you think that your users might want to be able to search for all forms in your portal, no matter who publishes the form, you will want to create a unique Content Type called Form. However, if personnel forms have a different template or workflow than accounting forms, you will want to create a "parent" Content Type called form and two "children" Content Types, perhaps called Form-Personnel or Form-Accounting.
- Many users find that having too many unique Content Types creates more confusion than value. Try to keep the number to less than 10 to 15 if you can. A smaller number of Content Types is probably better, especially for document repositories.

The Content Types that you define will be very specific to your organization; however, here are a few examples to consider in addition to those provided out-of-the-box. This list is not meant to be exhaustive, but it will give you a sample of some Content Types other organizations use:

- Article
- Brochure
- Case Study
- Form
- Job Description
- Lesson Learned
- Policy
- Project Plan
- Trip Report

Content Lifecycle

You should consider the lifecycle of your content, whether it's a document, blog entry, video, or any other type of content, such as a list item. Traditionally, documents get dumped into a file share, languish on a c: drive, or get relegated to being an e-mail attachment. Documents deserve better. You should consider the full *lifecycle* of your content, which relates to their creation, management, archival, and destruction.

Here's a checklist that you'll want to consider:

- How long will the content be active?
- Who needs to have access when the content is being edited? What about after it is published?
- Do I want this content to be searchable?
- Does the item need to be reviewed in 6 months? A year?
- How should the content be tagged? Versioned?
- Will multiple people be editing the content at the same time?
- Does the content need to be archived?

Versioning

Version management is a core component of any document management system. It involves tracking the history associated with each group of changes made to a particular document. SharePoint 2010 offers the ability to keep no prior versions, major versions only, or major and minor versions. A major version number is associated with a version that has been published. A minor version number is associated with a version that is in progress, will be published, but is not yet published.

SharePoint tracks changes to both content inside a document and to the document's metadata properties.

Major and minor versioning is an option for documents (and other list items) under the Versioning Settings for a document library. Here, you can determine whether items should have major versions only (or minor versions as well), how many versions of each type to keep, and the visibility of minor documents. Let's discuss each of these in more detail.

Content Approval

There are a number of versioning settings to discuss, the first of which is Content Approval. You can think of this setting as a one stage approval process. When this setting is enabled, all major-versioned documents need approval from a particular user role before they can be seen by most users. New and changed items remain in a pending state until they are approved or rejected by someone who has permission to approve them. If an item or file is approved, it is assigned an Approved status in the list or library, and it is displayed to anyone with permission to view the list or library. If the item or file is rejected, it remains in a pending state and is visible only to the people with permission to view drafts. Minor versions (drafts) don't require approval. These settings apply to what gets returned in search results as well; if you don't have permissions to see "pending" items, they will not be returned in the search results.

Document Version History

Depending on the options selected in this section of your library settings, SharePoint will track revisions to items in this library or list. Libraries can track both major and minor versions. Lists and libraries can also limit the number of versions that people can store.

Tracking both major and minor versions provides a more detailed way to track the version history of an item. Major versions are more likely to represent a milestone, such as when a file is ready to be viewed by a wide audience. A minor version is typically used as a routine increment, such as a version that you might save or check in while you are still writing the content. When you want to view the version history of a document, major and minor versions make it easy to identify the stages of the document’s development.

When versioning is enabled, versions are stored by default as a minor version unless you designate them as major versions. When users save a file and close it, the version is tracked as a minor version. Users must publish the item in order for it to become a major version.

If you check out files before working on them, you can designate which type of version you are checking in. You do not have to publish a file if you designate it as a major version when you check it in.

Versions are numbered when they are created. When tracking major and minor versions, the major versions are whole numbers, and the minor versions are decimals. For example, when you first create or upload a document, the document is versioned as 0.1. If you revise it, the document becomes 0.2 (then 0.3 and so on) until you first publish it to create version 1.0. The next revision cycle creates version 1.1, 1.2, 1.x ... until you publish its next major version (2.0).

Let’s walk through an example to illustrate how the version numbering might work. Let’s assume that you’ve created a new file in a document library; the document is labeled 0.1. When you publish the document, it is then labeled version 1.0. When that document is checked back into the document library, version 1.1 is visible to team members but not seen by the organization.

The rest of the organization continues to see only version 1.0. Same with a second draft, tagged as version 1.2. Finally, when the document is published, version 2.0 is created, and it supplants version 1.0 from a visibility perspective so that everyone sees version 2.0.

To recap:

| | |
|--------------------|--|
| Version 0.1 | Created at check-in. Visible to author and/or approval team only. |
| Version 1.0 | Created when published. Visible to all after approval takes place. |
| Version 1.1 | Created at check-in. Visible to author and/or approval team only. |
| Version 1.2 | Created at check-in. Visible to author and/or approval team only. |
| Version 2.0 | Visible to all. |

The power in the major/minor functionality is the ability to manage the document revision process within the portal (versus on a local drive) while at the same time ensuring that a document is not made available until complete and approved.

Note that if you choose to limit the number of versions that SharePoint stores, the oldest versions are permanently deleted when the limit is reached and not sent to the Recycle Bin.

Draft Item Security

The Draft Item Security setting enables you to control which groups of people can read drafts. As discussed in the previous section, drafts are the minor versions of a file and are created in one of two ways: either when a minor version of a file is created or updated in a library that tracks major and minor versions, or when a list item or file is created or updated but is not yet approved in a list or library in which content approval is required.

You can specify which groups of people can view drafts—either by enabling all users with read access to view them or by restricting it to only users who can edit items. This enables you to specify different settings for the group of people who can view the rest of the items in your list or library, such as the major versions of files or the files or list items that are approved.

When content approval is required, you can specify whether files that are pending approval can be viewed by people with permission to read, people with permission to edit, or only the author and people with permission to approve items. If both major and minor versions are being tracked, the author must publish a major version before the file can be submitted for approval. When content approval is required, people who have permission to read content but do not have permission to see draft items will see the last approved or major version of the file.

If you plan to use minor versions and content approval, then we recommend configuring the Draft Item Security in such a way that only editors and/or approvers see draft items. This ensures that general site users don't see unapproved versions of documents.

Requiring Check-out

You can also configure the document library to require check-out before items can be edited. Requiring check-out prevents multiple people from making changes at the same time. When this setting is enabled, new files are initially set as checked out. The person who creates or adds the file must check it in before other people can see it. Check-out is also required to update metadata properties on the file.

When check-out is required, a file is checked out automatically when someone opens it for editing. When a file is checked out, no one can edit it except the person who checked it out. Changes that someone makes to a file while it is checked out are not visible to others until the file is checked back in. This is true regardless of whether the person is working on the file locally or on the server.

When you check in a file, you are prompted to enter comments about the changes that he made. If a library tracks versions, the comments become part of the version history. If both major versions and minor versions are tracked, you will be prompted to choose which type of version they are checking in (major or minor).

Document Sets

A new feature in SharePoint 2010 is called Document Sets. Using this feature, documents can be organized into a collection of related documents that can be managed as one. In effect, document sets are folders with which you can:

- Share metadata across documents.
- Version the document set itself (in addition to the individual documents).
- Initiate workflows for the whole document set.
- Set permissions on the document set.
- Create a welcome page for the document set.

Document sets are implemented as Content Types. To enable document sets, go to Site Actions → Site Settings. Next, under Site Collection Administration, click Manage Site Collection Features and activate the Document Sets feature. After you have the feature enabled, you can go to the document library's Advanced Settings page and enable management of Content Types. Finally, add the Document Set Content Type to the library.

So when do you use document sets? Mainly you want to use document sets when you want to treat a number of documents as a single item with common metadata, permissions, and workflow. For example, you might be creating a proposal for a customer. This proposal itself might be a Word document, while you'll also deliver a PowerPoint presentation, a video presentation, and an Excel spreadsheet for financial analysis. In this scenario, you would probably want all of the items to share the same metadata (customer name, opportunity ID, and so on).

Another example of a document set is when you have a presentation that is associated with supporting materials in spreadsheets. Document sets allow you to keep all the related content together and ensure that users can find documents in the context of their "family."

When you navigate to a document set, you will see information about the document set and can view and upload documents associated with the set. In addition, there is a special tab in the ribbon that appears when a user enters a document set. This ribbon selection enables the user to create a version of the set, start a workflow on the set, and manage permissions on the set as a whole.

Document IDs

The document ID service enables you to assign unique IDs to documents within a Site Collection. You can then search for and retrieve documents based on ID independent of location. To use this feature, you have to enable it within the Site Collection. When you do, you can click the Document ID settings page within Site Collection Administration.

There are two options within the Document ID settings page. The first setting is vitally important—it enables you to configure a prefix that will be applied to all documents within the Site Collection. Why is this setting so important? Provided you use unique prefixes across your Site Collections, it will ensure that your document IDs will be unique across Site Collections. The second option enables you to specify a search scope that is used for looking up documents using the ID field.

As a best practice, make sure that each Site Collection has a unique document ID prefix properly configured. Don't just make something up; instead, use consistent prefixes according to your document management policies. Your governance committee should approve all document ID prefixes used in your enterprise; this will ensure that all document IDs assigned by SharePoint are globally unique.

Retention Policies

Very much like metadata capture, document expiration is critical to the overall effectiveness of portal document delivery. Few documents should live forever (at least in the context of the corporate portal). Over time, most documents become less relevant and therefore should be either reviewed and revised or moved out of the mainstream. Without rules and policies in place, this becomes an overwhelming burden for document administrators. Who can be responsible for investigating all documents for usefulness?

SharePoint 2010 introduces the ability to have multistage expiration policies, which is a set of rules for executing activity on a particular document or group of documents. This is a two-step process.

The first step is to define *when* a document will encounter an expiration trigger. This is most easily done with logic against known metadata (another reason to properly tag content!). While most rules will be date driven (for example, expire after 180 days), any metadata can be used to drive expiration, including a Records Retention Code.

The second step in the policy definition is to define *what happens* to the document when the criteria are met. This can take many forms; you can delete the document from the repository or perhaps launch a SharePoint-based workflow that can move that document to an archive location. By setting expiration rules, administrators and records managers can ensure that the portal always contains relevant and timely data.

Tagging Considerations

When managing files and other content in SharePoint, often it's best to tag information in order to keep the content well-organized. To get the greatest benefit from searches within SharePoint, it helps tremendously if content is well-tagged. Finally, social interactions just wouldn't be the same if users didn't have the ability to tag content informally or to update their own user-profile properties.

What Is Tagging?

Tagging is the assignment of descriptive words or categories to content, using terms that mean something to the person doing the tagging. When users add tags to content in SharePoint, they're essentially adding metadata to describe what the content contains, what it does, or what it's about. Tags extend the organizational taxonomy, which improves content "findability." Tags help to expand your solution's information architecture over time and, most importantly, they extend the responsibility for evolving the information architecture to everyone in the organization. This feature helps to associate content with new and emerging terms—even before these terms are formally added to the organization's taxonomy.

SharePoint 2010 offers two primary types of tagging:

- Authoritative tagging
- Social tagging

Authoritative Tagging

In this type of tagging, a content contributor or editor selects or adds a value in a column defined by the content designer. This is a form of *authoritative metadata*—it's assigned by the content contributor in a structured field.

Social Tagging

In this type of tagging, a content consumer assigns a "social" tag to a document. A social tag is a value entered by any user—typically not the content editor. As the user starts typing a value, SharePoint provides a list of previously used social and managed terms (keywords), and the user can choose to select from this list. Since any user can add this *social metadata*, these tags or keywords are not considered authoritative, but they can be used to filter content in search results.

A special tag unique to SharePoint is the *managed keyword*. Managed keywords are authoritative tags because they're added by users who have content-editing privileges. The source of these values includes the managed terms for the site as well as the social data values used by other content contributors and "visitors." You can think of managed keywords as social tags assigned by a content editor. (Making the situation a little more interesting: content editors can choose to prohibit users from adding their own managed keywords to items, by requiring the user to select from existing values.)

Out-of-the-box document libraries in SharePoint 2010 include the following columns from SharePoint 2007:

- Title
- Created By
- Modified By
- Checked Out To

In addition, SharePoint 2010 document libraries include a new column:

- Managed Keywords

Like any other column, Managed Keywords helps users to find content in a library. However, the values of Managed Keywords columns are more flexible and less structured than those of other columns, which provide a very dynamic way to react quickly to evolving terms, opportunities, and emerging business needs.

Managed Metadata

Managed metadata is a hierarchical group of enterprise-wide or centrally managed terms that you can first define and then use in columns in content types or lists and libraries. Managed Metadata is a new type of column in SharePoint 2010 that you can use to assign metadata to an item. SharePoint 2010 uses three terms to refer to managed metadata:

Managed Terms

Think of *managed terms* as the controlled vocabulary that you'll use to assign metadata to content across your solution. Not all metadata values need to be stored and managed as a managed term. Following are some good candidates for managed terms:

- Metadata with valid values that can or should be organized hierarchically.
- Metadata that's likely to be used in multiple lists and libraries across your solution.
- Metadata consisting of a restricted list of values from which users can select.

For example, your list of product names is a good candidate for a managed term. Sharing a restricted list of product names across the enterprise ensures that all users will assign the same spelling and name for each product. New products can be added in one place and be available immediately across your entire solution.

Managed Keywords

Words or phrases added by any user to SharePoint 2010 items—either formally in a managed term store, or informally as social tags—are *managed keywords*. Note that managed terms can be organized hierarchically, but managed keywords are all stored in a flat term set called the *Keyword Set*.

Term Store

The *term store* is the SharePoint database used to store both managed terms and managed keywords.

Managed metadata is "consumed" in a managed metadata service. You must have at least one managed metadata service in order to share content types and managed terms across more than one site collection.

Term sets are groups of related terms. In SharePoint 2010, the *Term Store Management Tool* is used to create and manage terms and term sets so that users can pick from a known list of values. With appropriate permissions (generally, Site Owners with Full Control privileges), users can use this tool to perform the following activities:

- Create a new term set or delete one that's no longer needed.
- Add, change, or remove terms.
- Create a hierarchy for terms, identifying which terms in the hierarchy can be used to assign tags to content and which are just used for grouping other terms. (You typically will want to use only the "lowest level" in the term hierarchy for tagging.)
- Define alternate terms (authorized synonyms). If users use different terms for the same thing, or you introduce a new term to replace an old one, taggers will be able to use their familiar terms to find a tag, but the authoritative term will actually be assigned to the document.
- Import terms from an existing list. Unless you only have a few terms to add to your term set, you'll probably want to use the import capability to add your terms. You act on each term independently in the Term Store Management Tool; while it's convenient to use this tool for updates to existing terms, you won't want to use it to add a large collection of terms.
- Change managed keywords into managed terms by moving them into a term set. This capability allows you to evolve your managed terms over time. In other words, you don't have to make yourself crazy trying to define all your managed terms up front. You should invest some time to plan your initial managed terms, but you can change your mind later. However, you'll need to assign someone to pay attention to how keywords are being used across the site.

Community

One of SharePoint's strengths is its ability to help individuals connect with colleagues and other employees. Providing a social identity enables the users of your solution to:

- Gather insight into other users based on their social network, such as informing them about what the people they know are doing.
- Provide social feedback in the form of ratings, comments, and tags.
- Find an 'expert'—a mechanism that provides a way for users to locate a person within the organization based on profile attributes.
- Provide an accurate organization chart so that users know the reporting structure.
- Display items such as human resources news, based on the user's organization and business role within the company.
- Show a picture of your users in Outlook via the social connector.

If you plan to use social computing features, such as My Site Web sites or People Search in Microsoft SharePoint Server 2010, you will likely want to integrate profile information that you have stored in a directory service such as Active Directory Domain Services (AD DS) or a business system such as SAP or Siebel, with SharePoint Server 2010. By using Profile Synchronization in SharePoint Server 2010, you can do exactly that. Below are two cornerstone features in SharePoint Server 2010's 'social identity' capability set. This section contains overview information about these features.

User Profiles

User profiles allow you to search for and connect with people within your organization, based on information published about them. SharePoint Server 2010 provides a search scope for searching people.

In SharePoint Server 2010, you can import user profile information from Active Directory Domain Services (AD DS), LDAP servers (Sun, Novell, IBM), or from applications registered in Microsoft Business Connectivity Services, or you can enter it manually. You can customize the default user profile by adding properties according to the needs of your organization, mapping the properties to AD DS or other directory sources. SharePoint Server 2010 also provides write-back capabilities to update key data items back to AD DS such as a user's profile picture, mobile phone number, and so on.

My Sites

My Sites provide the capability to display user profile information about users within your organization, enabling others to view status updates, contact information, and other useful data. With your My Site, you can publish a personal blog, subscribe to a feed of colleague activity, and interact with other users via their note board. There are three sections of a user's My Site:

1. My Profile – displays personal information including skills and activities to other employees
2. My Content – place to store private and shared documents, wikis and blogs
3. My Newsfeed – recent activities of colleagues in your social network

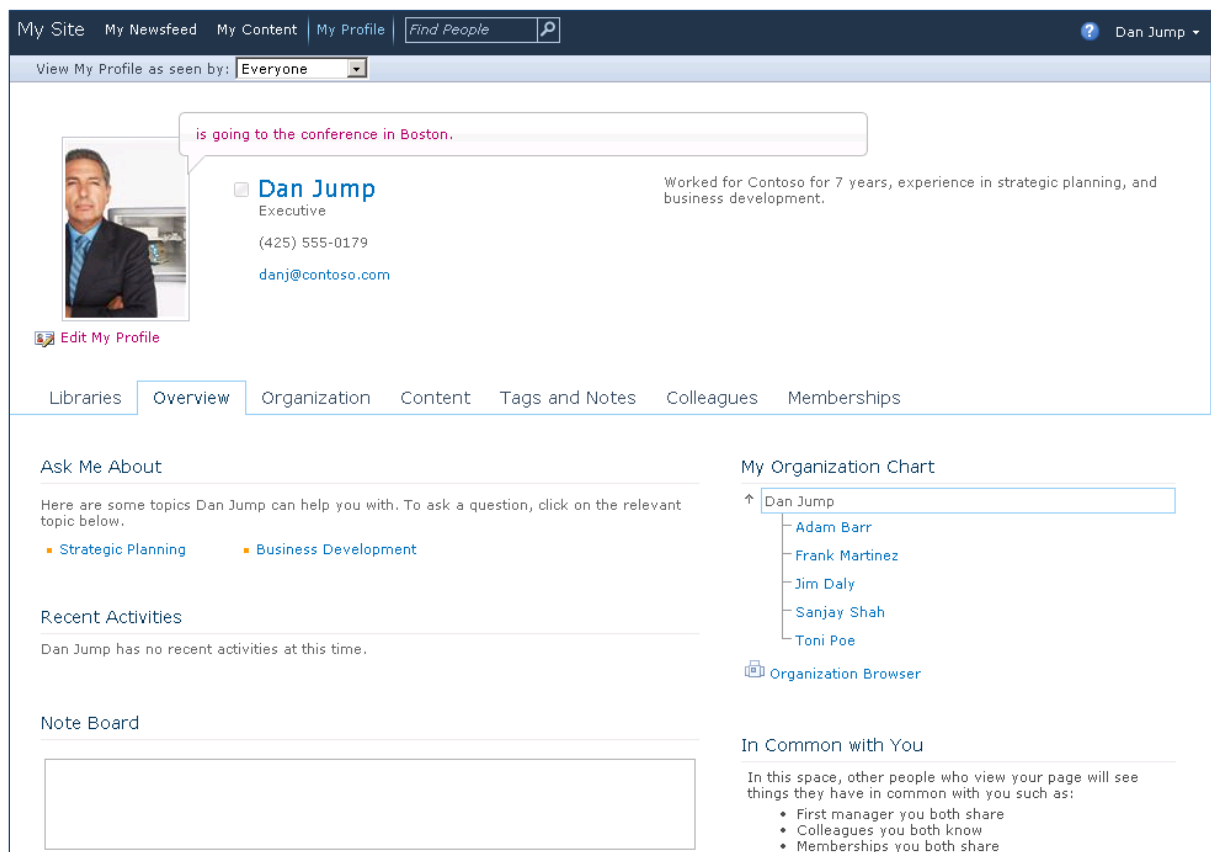


Figure : A user's My Site profile page.

In order to realize the full potential of My Site capabilities, users should make sure their profile information is populated and up-to-date. All information about a user is stored in the user profile database of SharePoint Server 2010.

My Site not only allows the display of user profile information but also gives the ability to edit properties and various levels of control as to who sees the data. Users can edit their profile page and specify who can see which fields of data. For example, a user can decide to enter his or her home phone number but only make it visible to colleagues.

| | | |
|-------------|--|--|
| Home phone: | <input type="text" value="(212)555-3658"/> | <input type="text" value="My Colleagues"/> |
|-------------|--|--|

What the user can edit and the ability to select the level of visibility is controlled by the administrators through the user profile service.

Some properties will not be editable by users, and some properties will not allow users to select the audience. Below is an image of a user profile in edit mode.

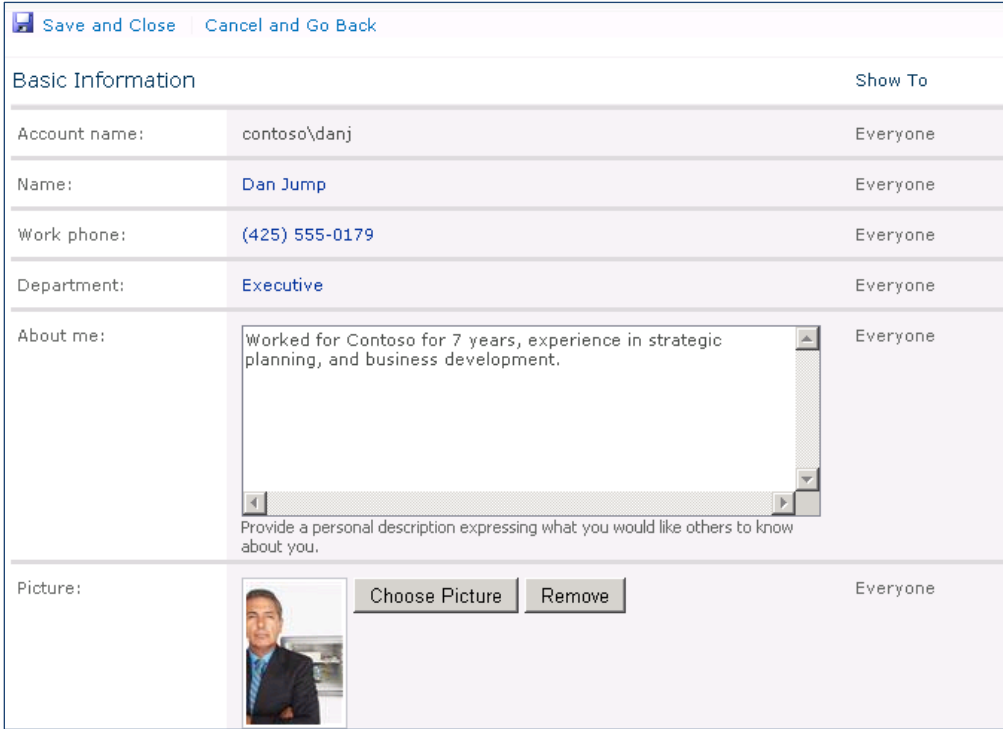


Figure : Editing the user profile.

The profile page also shows a basic organizational chart, allowing you to quickly see who the user reports to, his or her direct reports, and also peers. In addition to this, a richer, dynamic organizational chart is provided using Silverlight® allowing you to click-through to follow a reporting structure.

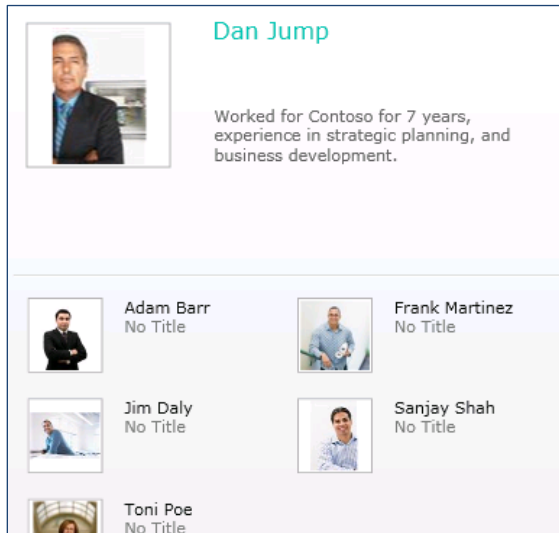


Figure : The Silverlight organization chart.

With all this information in My Site profiles, we can also enjoy a rich search experience. People Search in SharePoint Server 2010 takes advantage of the user profile properties to display a “business card” format for the results.

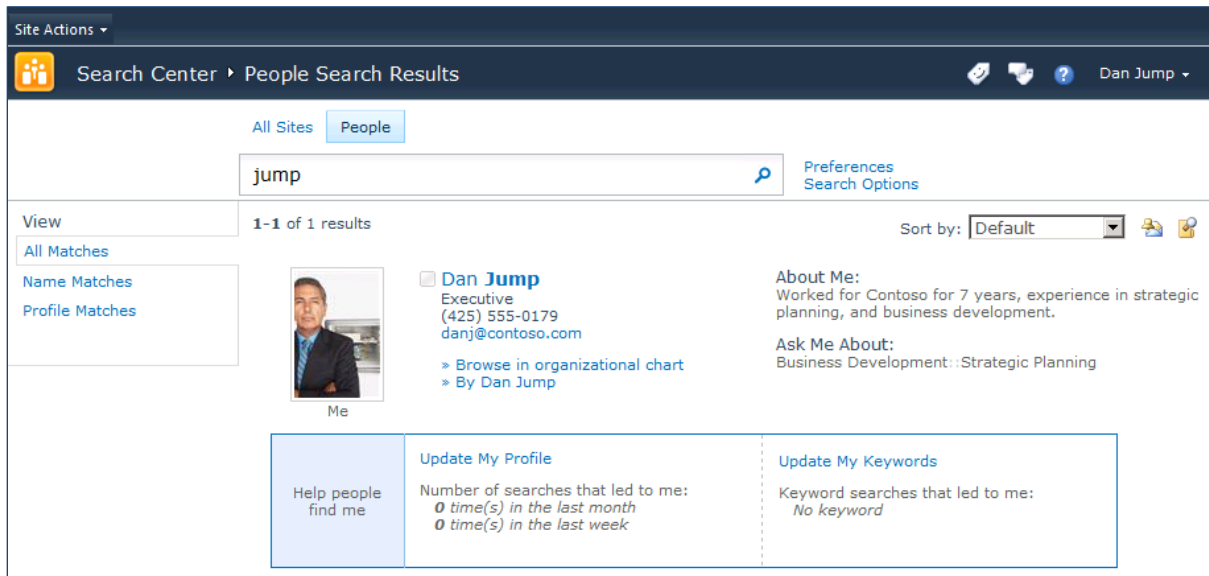


Figure : People Search in SharePoint Server 2010.

With the amount of functionality that My Sites provide, user profile synchronization is critical to the successful deployment of profiles and a personalized, social identity for each user.

My Site vs. Team Site

When should you use a Team Site vs. your My Site?

Use a team site when you want to:

- Maintain a site where you want to store project-related artifacts, rather than personal artifacts.
- Collaborate with a group of users (you can also use an Enterprise Wiki).
- Enable other users to personalize functionality and/or content by adding web parts.

Use your MySite when you want to:

- Personalize a site that you can use to view your inbox, RSS feeds, or other information.
- Update your personal information so that others can find you.
- Store personal artifacts that don't belong to a specific team or project.
 - Use the Shared Documents library to enable other users to discover and leverage artifacts you've worked on.
 - Use the Private Documents library to store items that you don't want to share with other users.

Etiquette for Social Interactions

The social networking tools within SharePoint 2010 can help you interact with co-workers and foster additional relationships through online social interactions. Here are some recommendations (do's and don'ts) when it comes to work-related social interactions:

| Recommendation | Details |
|----------------------------------|--|
| Profile Picture | Be sure to select a photograph that broadcasts an image that you'd want to portray. You'll want to keep your profile picture professional, since this could be the first way that people see you. In fact, Outlook 2010 will automatically show your picture to everyone you e-mail. |
| Status Updates | Remember, this isn't Facebook. You'll want to stick mostly to professional updates, such as "working on the Alpha project" or "heading to Seattle to speak at the conference" rather than glib postings such as "hangover from the company party." |
| Completing Your Profile | Try to include as much information as possible about your professional career. In addition, make sure you review the privacy settings that SharePoint has to offer. You might not want to share your home phone number with everyone, but might want your workgroup to see it. You can also add your birth date without a year—that way, people can celebrate your birthday without you having to disclose your age. |
| Presence/Instant Messages | It's very useful to be able to see the presence of your colleagues. Be sure to respect their status. For example, if their status is 'busy', you might want to reconsider sending an instant message and sending an e-mail instead. Do the same for your colleagues by setting your status appropriately. The nice thing about Exchange, SharePoint, and Communicator is the automatic status changes that the integration provides. |
| Postings | Try to post content that highlights your personal interests and your professional areas of expertise. For example, a finance professional might post a link to the latest quarterly results, while a technology professional might post a link to an interesting technical article. |
| Adding Colleagues | In SharePoint 2010, you can add colleagues freely, which enables you to track their updates. Colleagues are one-way, which means that you can add someone as a colleague but they don't need to add you. This differs from Facebook, where you need to 'invite' a friend who needs to accept your invitation. Adding colleagues also helps with 'social distance', which lets you see how you are connected to the rest of the folks in your organization. |
| Expertise Location | SharePoint people search provides a great way to find other employees at your company who might be able to help you. Be considerate when reaching out to someone you find. If you can, use SharePoint's social distance feature to see if you are connected to a mutual colleague; that way, your contact can make a warm introduction for you. |

Search

SharePoint 2010 Search helps you find the information you need to get your job done. SharePoint 2010 Search is unique in that it combines relevance, refinement, and people. This new approach to search provides an experience that is highly personalized, efficient, and effective. This section provides recommendations for making your existing content more searchable and ways to issue effective searches.

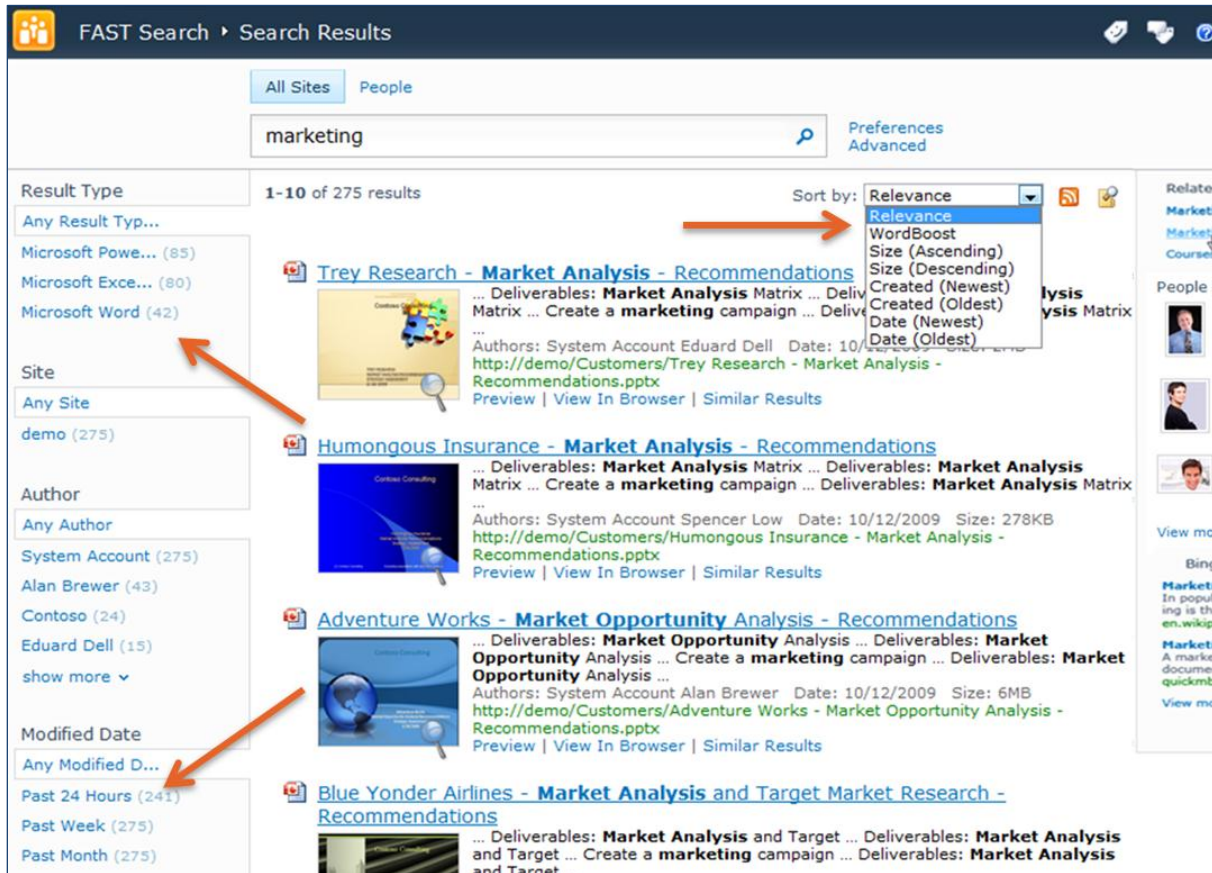


Figure : SharePoint 2010 provides a number of new features to enhance your search experience.

Making Your Content Searchable

There are a number of ways to make sure the content that you contribute to SharePoint is more easily found by searches. Here are some things you should consider:

- Tagging content
- Adding keywords
- Using synonyms
- Using best bets
- Regularly review search reports

Issuing Effective Searches

There are a number of things you can do to make your searches better:

| | |
|---|---|
| <p>Use Keywords Effectively</p> | <p>Keywords are the terms that a user enters in the search box to issue a search request. A keyword can actually be a simple term, which is a single word. For example, issuing a search on 'contract' may yield a specific set of results. This is the most common way to search. Keywords can also be issued as a phrase. A phrase includes two or more words separated by spaces and enclosed in quotation marks. If you don't include the words in quotation marks, SharePoint will search for either the first term 'or' the second term. For example, a search for 'statement of work' would return all results with the word 'statement' or 'work' in them. On the other hand, a search for "Statement of Work" would only return results containing that exact phrase.</p> |
| <p>Use Property Filters</p> | <p>Property filters allow a user to reduce the result set based on criteria which is defined in metadata properties. Common properties that are leveraged for this type of query include content source, author, and file type. To retrieve a result set filtered by location, users can use the site keyword, which lets you filter results to those from a specific URL address. For example, to request results from only https://inside.mycompany.com, you could issue a search query including the term, site:https://inside.mycompany.com. Below are some other examples.</p> |
| <p>Understand Prefix Matching</p> | <p>Prefix matching allows you to search using only a partial beginning of a word or phrase. For example, a search for "door*" would return documents containing "doorway". Since this method of using an asterisk in a keyword search only works for prefixes, a search for "*way" would not yield "doorway" results. Prefixes do work with property queries. For example, author:mic would return documents authored by people with the first names beginning with 'Mic,' including Micah, Michael, Michaila, and Michelle.</p> |
| <p>Use Inclusions and Exclusions</p> | <p>SharePoint keyword syntax allows you to specifically include or exclude search results having a particular word or phrase. Included terms allow you specify that you require certain terms to be in the result set; this is denoted by a plus sign (+). For example, if you are searching for information about Nevada laws, but only want items which have the phrase 'speed limit,' you could issue a search for, 'Nevada + "speed limit".' Similarly, you can exclude search results which contain a particular word or phrase using the minus sign (-).</p> |
| <p>Use Boolean Expressions</p> | <p>SharePoint 2010 supports the use of Boolean expressions such as "AND" and "OR." If you are searching your personal site for a spaghetti sauce recipe you uploaded, you might search for "tomato AND garlic AND oregano."</p> |
| <p>Search from Within Office</p> | <p>It is also possible to issue searches from within Office 2010 client applications. This assists with searching your company intranet, for example, for documents and other content without leaving the work you currently have open. To perform a search right from within Word, right click on a word and choose 'Look Up...'. Office will then open the research pane, providing the option to look in a number of sources. In order to search from Microsoft Word, you may need to add your SharePoint search as one of the search providers. To do this, you can begin by selecting the 'Research Options' link at the bottom of the research pane. Next, click 'Add Services' button and enter the URL of your intranet search web service. The default name is http://<server>/_vti_bin/search.asmx . Microsoft Word should find your search service and present you with a confirmation. Click 'Install' to add the service to the research pane.</p> |

Conclusion

Understanding the rich array of choices that SharePoint 2010 offers can help you get the most out of your company's investment. Using the guidelines offered in this document, you can become a power user of SharePoint, making your day more productive than ever.

About the Author

Scott Jamison is Managing Partner and CEO of Jornata LLC (www.jornata.com), a Gold-Certified Microsoft Partner that helps customers implement top-tier SharePoint solutions for their business. Scott is a world-renowned expert on SharePoint, knowledge worker technologies, and collaborative solutions and is an experienced leader with 20 years experience directing managers and technology professionals to deliver a wide range of business solutions for customers. Prior to joining Jornata, Scott was Director, Enterprise Architecture at Microsoft and has held numerous leadership positions, including a senior management position leading a Microsoft-focused consulting team at Dell. Scott has worked with Microsoft teams on a local, regional, and international level for years, often participating as an advisor to the Microsoft product teams. Scott is a recognized thought leader and published author with several books, dozens of magazine articles, and regular speaking engagements at events around the globe. Scott received his master's degree in Computer Science from Boston University, with post-graduate work at Bentley's McCallum Graduate School of Business. Scott is a SharePoint Certified Master. His blog can be found at www.scottjamison.com.

Susan Hanley, President of Susan Hanley LLC, is an expert in the design, development and implementation of successful portal solutions, with a focus on information architecture, user adoption, governance and business value metrics. She is an internationally recognized expert in knowledge management and writes a blog on SharePoint and Collaboration for Network World Magazine that can be found at <http://www.networkworld.com/community/sharepoint>. Prior to establishing her own consulting practice, Sue spent 18 years as a consultant at American Management Systems where she led AMS's knowledge management program. During this time, she was recognized by Consultants News as one of the key "knowledge leaders" at major consulting firms. Sue left AMS to lead the Portals, Collaboration, and Content Management consulting practice for Plural, which was acquired by Dell in 2003. In this role, she was responsible for a team that developed hundreds of solutions based on the Microsoft SharePoint platform and participated as a member of Microsoft's Partner Advisory Council for Portals and Collaboration. In 2005, she established Susan Hanley LLC (www.susanhanley.com), a consulting practice dedicated to helping clients achieve high impact business outcomes with portals and collaboration solutions. Her clients include some of the largest global deployments of SharePoint. Sue has an MBA from the Smith School of Business at the University of Maryland at College Park and a BA in Psychology from the Johns Hopkins University.