

# Appendix: Overview of SharePoint 2010

Before learning how to use Microsoft SharePoint 2010, you should have a basic understanding of what SharePoint 2010 is and how it benefits users, particularly in combination with the Microsoft Office 2010 suite of products.

SharePoint 2010 is a strategic technology that allows people to seamlessly connect with each other in terms of centralized content management. It provides a single, integrated location where you can find documents and resources, create workflows, automate business processes, communicate using blogs and wikis, gain visibility for yourself and your team using team sites and My Sites, and discover shared knowledge to make better informed decisions in your business.

As information workers, you're probably aware that a significant part of your work day involves sharing, working in teams, and managing tasks and projects. Information challenges you face can be exacerbated if you do not have tools for better communication, more efficient sharing of information, and effective management of projects within your team. SharePoint 2010 helps you to get work done more effectively and productively by providing a platform for collaboration. You can use the tools and areas in SharePoint 2010 to better communicate with your peers and teams, better manage projects, and manage documents more efficiently.

The SharePoint 2010 platform covers six areas, each designed to improve worker efficiency and productivity. You'll find the following terms will become increasingly clear as you work through the Study Guide:

- **Collaboration** How information is stored and shared
- **Portal access** How users access information.
- **Search** How users can find information
- **Content management** How information is structured and categorized
- **Business forms** How information is recorded and captured
- **Business intelligence** How information automation provides better business decision making

The SharePoint 2010 platform and framework can be used for many types of functions. The extent of what this platform can do is limited only by the creativity and imagination of the users. The aim of SharePoint 2010 is to improve the efficiency and decision-making power of information workers by allowing them to create and manage their own online content spaces.

## What Can SharePoint 2010 Be Used For?

SharePoint 2010 is not simply a software application developed for a specific purpose (for example, an e-mail application for sending messages back and forth, a calendaring application for managing appointments and meetings, an accounting application to maintain financial records).

The multiple uses envisioned for SharePoint 2010 are further discussed in the following blog:

*[www.sharepointgeoff.com/scblogspace/Lists/Posts/Post.aspx?ID=95](http://www.sharepointgeoff.com/scblogspace/Lists/Posts/Post.aspx?ID=95).*

SharePoint 2010, from an end-user viewpoint, provides features such as being able to tell when specific group members are online so that chat sessions or instant messaging can occur, and the ability to set up a personal web page with things such as the latest local weather report. However, SharePoint 2010 isn't simply installed so that its employees can have instant messaging services or create their own customized web pages. SharePoint 2010, implemented correctly, enhances the productivity of employees, improves information management, and streamlines information sharing and collaboration.

So what are some of the reasons for using SharePoint 2010? And what are the typical obstacles to productivity you can avoid through the proper use of SharePoint 2010? The following list summarizes a few common problems that SharePoint 2010 helps you circumvent:

- Prevents your organization from lacking an efficient mechanism for sharing knowledge. Without a way to share knowledge efficiently, your projects will experience duplication of effort. For example, if User A needs to create a document and does not know that User B created a similar document, User A might needlessly spend hours of work re-creating the document.
- Prevents you and your peers from being unable to find information, which also results in wasted time. Carrying the previous example one step further, even if User A knows that User B created a document similar to what User A needs to produce, User A might have to spend an hour trying to find the document and then finally give up and start from scratch.

- Prevents you from being stuck with inefficient manual ways of doing things. In many organizations, the IT Support group is backlogged with requests for granting employees access to applications or information, for customizing applications, or both. An example of this situation is a department that wants to make information available online to employees, and thus has put in a request to IT Support to make this happen. SharePoint 2010 includes features you can use to bypass your organization's IT Support group and accomplish the same result on your own.

## Some Popular Reasons for Using SharePoint 2010

The following list explains some of the more popular features of SharePoint 2010:

- **Document Management** SharePoint 2010 is ideal for managing manuals, policy documents, and procedure documents. Companies are starting to further embrace a document-management model consisting of creation, storage, retention, and scheduled expiration of documents, and SharePoint 2010 is certainly strong in those areas.
- **Record Keeping** SharePoint 2010 can be used to keep electronic records related to customers, employees, and suppliers. The current trend among organizations is to store information directly on the platform rather than on a network share.
- **Inventory Management** SharePoint 2010 is used to keep track of equipment or supplies and to quickly locate them. Helpdesk systems are an example of this. SharePoint provides an easy and cost-effective way to manage and monitor helpdesk requests—whether they are IT helpdesk requests or service requests from customers. In some cases, helpdesk systems are connected directly into SharePoint 2010 to provide automation and logging.
- **Websites** People use SharePoint 2010 not only to manage the content of their websites, but also to be their website. A key strategy in the designing of SharePoint 2010 is to allow individuals to create and manage their own websites.
- **Electronic Forms** Forms are used to automate systems, such as those used for expense claims, travel requests, holiday requests, or purchase orders. SharePoint 2010 provides integration features with Microsoft InfoPath 2010 for forms design. InfoPath forms can also be more sophisticated forms that are integrated into the existing business processes of a large organization, and they provide more form management features than are available from out-of-the-box SharePoint forms.

- **Reference Center (wiki)** People within an organization can use wikis in SharePoint 2010 to help store and share information. Information that an employee found helpful can quickly be made available to other employees.
- **Reporting** SharePoint 2010 can be used to use or retrieve data from many data sources, including SQL and Oracle databases. This means it is easier to compile reports and produce Business Intelligence (BI).
- **Contact Details** SharePoint 2010 can be used to store information concerning internal or external contacts, and it provides a detailed user directory. This feature can help organizations avoid the issue of the company telephone directory always being out of date.
- **News Distribution** SharePoint 2010 also can be used to share company or department news on a global basis and automatically by user location.
- **Surveys** You can use SharePoint 2010 to get feedback from, say, training courses or regarding the performance of a particular department.
- **Appointment Management** Calendars and event *repositories* (document libraries and lists) are available in SharePoint 2010. For example, you can use SharePoint to display weekly movements of key members of staff.
- **Catalogs** You can use SharePoint 2010 to list items, view them in customized ways, and filter and search information.
- **Discussions** Discussion boards are available so that users can chat on various subjects and share ideas.
- **Storage of Digital Media** SharePoint 2010 can be used to store many forms of digital media, including photographs, videos, and podcasts. It can also be used to provide audio and video feeds.
- **Information Searching** You can use SharePoint 2010 to index documents and repositories, and you can use SharePoint's features for searching and retrieving company information.
- **Project Management** SharePoint 2010 can be used to monitor and track multiple projects.

- **Time Management** SharePoint 2010 can be used to record the time an employee spends on individual projects or to manage work streams.
- **Meeting Management** Some departments use SharePoint 2010 Meeting Templates to plan agendas, create minutes, and check on follow-up actions.
- **Blogging** SharePoint 2010 Blogging is a powerful feature you can use to quickly disseminate internal business blogs. Users can also investigate the use of comments on these blogs.

These are just a selection of the business uses of SharePoint 2010. In addition, organizations are starting to embrace more social and light-hearted aspects of the product. For example, SharePoint 2010 sites can have sections where people within an organization can win prizes and see entertaining pictures of themselves on company outings. These kinds of social pages not only help morale, but also encourage employees to use SharePoint 2010.

The Social Networking feature of SharePoint 2010 includes capabilities for user directory management, person-to-person collaboration, and person-to-group collaboration through the use of a personal site (known as a *MYSITE*). This type of capability is known as *personalization* and includes other features (such as Organization Management, User Directory, User Status/Presence, and a lot more).

## SharePoint 2010 Starts at Site Templates

SharePoint 2010 improves team productivity by providing site templates that can be used to create a SharePoint 2010 site. Site templates enable different types of teams to create sites out of the box that are tailored to their general requirements. For example, a project site can be based on the Projects Web Database to manage team projects and their related tasks. The team members can use the site to create and manage documents such as business cases and project plans. Lists can be used to record and integrate specialized content, such as risk management and configuration management data. Links and Contacts list templates are available and can be used immediately without you having to design them. And because site templates establish one location for all of these collaborative activities, the project team can be more effective and productive.

Before going into more detail about SharePoint 2010 team sites, review the following descriptions of all the other templates available in SharePoint 2010. These are grouped

into their functional areas so that you can select the template that best matches the functionality of your site:

## Blank and Custom

- **Blank Site** Has no repositories assigned. You can use this template to customize the contents of the site to your specific requirements.
- **Personalization Site** This site template can be used to create a site that delivers personalized data, navigation, and views from a site collection into My Site. This is very useful if there is a requirement to expose content that is personalized for or targeted to individual users on their My Sites.

## Collaboration

- **Team Site** Allows teams to quickly author, organize, and share information. The Team Site template provides a document library and lists for managing announcements, calendar items, tasks, and discussions.
- **Document Workspace** This is a site at which colleagues can work together on a document. It provides a document library for storing the primary document and supporting files, a tasks list for assigning to-do items, and a links list for resources related to the document.
- **Group Work Site** This template enables teams to create, organize, and share information quickly and easily. It includes a group calendar, phone-call memo, document library, and basic lists.
- **Enterprise Wiki** An Enterprise Wiki is a site used for publishing information that can be shared across the enterprise. It provides for an easy content-editing experience in a single location for co-authoring content, having discussions, and conducting project management.

## Content

- **Document Workspace** See the “Collaboration” bullet earlier in this list.
- **Blog** A Blog is a site for a person or team to post ideas, observations, and expertise that site visitors can view and comment on.
- **Document Center** A Document Center is a site where you can centrally manage documents in your enterprise.
- **Publishing Site** A publishing site gives you the ability to create publishing web pages. Contributors can work on draft versions of pages and publish

them to make them visible to readers. This type of site includes document and image libraries where you can store web publishing assets.

- **Publishing Site with workflow** This type of site provides the same features as the Publishing Site template and includes approval workflows you can use to control page scheduling.
- **Enterprise Wiki** See the “Collaboration” bullet earlier in this list.
- **Visio Process Repository** A site used for teams to quickly view, share, and store Visio process diagrams. It provides a versioned document library for storing process diagrams and lists for managing announcements, tasks, and review discussions.

## Data

- **Records Center** This site template is designed for records management. You can configure the routing table to direct incoming files to specific locations in the site. The site also lets you manage whether records can be deleted or modified after they are added to the repository.

## Meetings

- **Basic Meeting Workspace** This site template allows you to plan and organize a meeting, as well as record its results. It provides lists for managing the agenda, recording meeting attendees, and organizing meeting documents.
- **Blank Meeting Workspace** Like the Basic Meeting Workspace, this site template allows you to plan and organize a meeting and record its results. Unlike the Basic Meeting Workspace, it has no lists. It is blank so that you can customize it to meet your requirements.
- **Decision Meeting Workspace** This is a site template that allows you to track the status of a meeting or make decisions about it. It includes lists for creating tasks, storing documents, and recording decisions.
- **Social Meeting Workspace** This is a site template for social occasions. It provides lists for tracking attendees, providing directions, and storing pictures of the event.
- **Multipage Meeting Workspace** Like the Basic Meeting Workspace, this site template allows you to plan and organize a meeting and record its results. It provides lists for managing the agenda and recording meeting attendees in addition to two blank pages for you to customize based on your requirements.

## Search Delivers the SharePoint 2010 search experience.

- **Enterprise Search Center** The Welcome page includes a search box with two tabs: one for general searches, and another for searches for information about people. You can add and customize tabs to focus on other search scopes or result types.
- **Basic Search Center** The site includes pages for search results and advanced searches.
- **FAST Search Center** The FAST Search Center template is structured the same as the Enterprise Search Center and includes the same libraries and lists. The page layout is also the same. The difference between the FAST Search Center and the Enterprise Search Center is that the FAST Search Center must be configured against the FAST Search engine, not standard SharePoint search.

## Web Databases Uses the power of Microsoft Access to provide SharePoint sites with the following automation features:

- Assets Web Database
- Charitable Donations Web
- Contacts Web Database
- Issues Web Database
- Projects Web Database

**Tip** You need Access Services to be enabled before you can use the Web Databases site templates.

## Components of a SharePoint Team Site

A SharePoint team site includes several repositories, allowing users to share and centrally locate the data they need to manage as a team. These are as follows:

- **Shared Documents library** This is where you can store documents.
- **Announcements list** This is where you can enter information that informs people of events and, optionally, provide a date when the announcement will no longer be displayed.



- **Calendar** This is where you can store information about upcoming events.
- **Team Discussion list** This is where you can create a forum for people to leave messages to each other and create threads of conversation for the visitors of the site.
- **Tasks list** This is where you can assign jobs to team members and track progress.
- **Links list** This is where you can enter hyperlinks allowing visitors to access other sites or information.

By default, these repositories are made available after a new site is created using the Team Site template. So, if there is a requirement to get a team using SharePoint quickly, you can create a SharePoint 2010 team site by using the Team Site template. The SharePoint 2010 Team Site template meets a range of typical requirements because you can use it to store information related to a single team or to several departments in your enterprise. Additionally, the team site can be customized to meet individual, team, or enterprise requirements. Consider the following scenario:

*Scenario 1.1: The Project Team at Fabrikam needs to manage its projects by assigning tasks and deadlines across their team. It needs to use a calendar to record meetings, shows, and events. The team needs to have an online calendar that can be connected to their personal calendars in Microsoft Office Outlook 2010. Additionally, team members require visibility of tasks assigned to them so that they can track their projects efficiently. You need to include the features of a team site that meet all of these requirements.*

Here's a solution that fulfills all the requirements described in Scenario 1.1:

- Use the built-in Project Tasks List template, which enables you to visualize task relationships and project status with automated Gantt charts.
- Coordinate the team's work with shared calendars, alerts, and notifications. Connect a calendar on your SharePoint 2010 site to your calendar in Office Outlook 2010, where you can view and update it just as you do your personal calendar.
- Create Meeting Workspace sites to gather materials and documents related to a meeting.

## SharePoint Helps Teams Review, Create, and Share Content

SharePoint 2010 team sites can help teams create, edit, and manage documents collaboratively. For example, taking Scenario 1.1 of the Project Team's requirements further, the team could use two types of repositories in a SharePoint 2010 team site:

- A Shared Documents library to save project plans, business cases, and quality-control documentation so that other members can read them, check them out, and edit them
- A Slide Library to save and manage slides for presentations

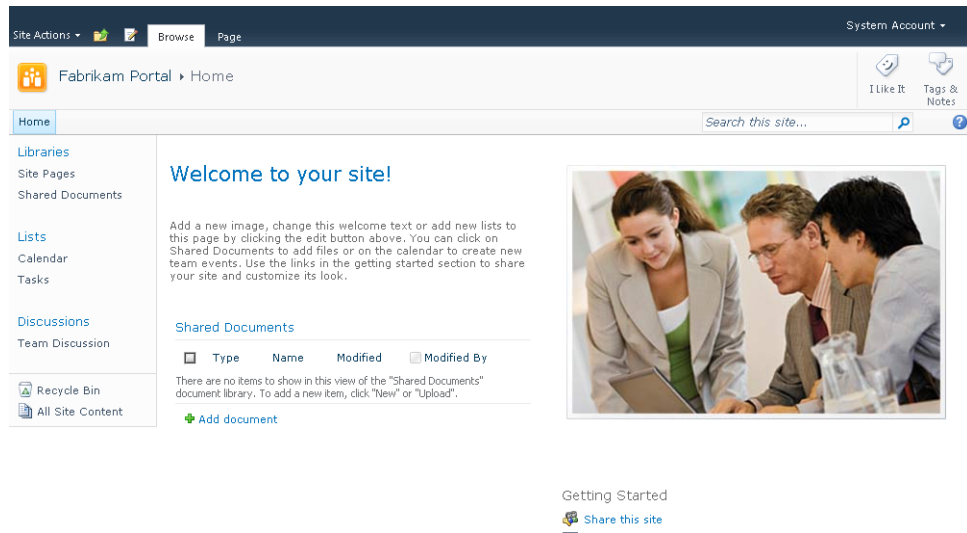
**Tip** For special projects that involve only a few people, team members sometimes create Document Workspace subsites on their team site. Document Workspace sites help you to coordinate work on a single document or a group of documents.

## SharePoint 2010 Helps Capture and Share Community Knowledge

SharePoint 2010 sites provide the enterprise with a central location to capture best practices, share information, and promote true standardized business processes. For example, the Project Team in our example could use a wiki site and a blog site to capture and communicate information of interest to team members. The wiki site could be used to hold information about the project management process, which in turn would be helpful to members and visitors of the team site. These wiki sites could be opened up to allow all or some team members to add their own articles. Blog sites allow team members to post company-based or project-based information—in turn, providing a mechanism for other team members to read the posts and post their own comments. This provides a forum to share ideas throughout the team.

## The SharePoint 2010 Team Site

The chapters in this book cover the features provided by a SharePoint 2010 team site. A SharePoint 2010 team site is where all of the day-to-day work takes place for a user engaged in creating and managing online content. Figure A.1 shows the Welcome page of a team site for our fictional company, Fabrikam.



**Figure A.1** A SharePoint 2010 team site

A SharePoint team site encompasses all the benefits described in this chapter by exposing methods to navigate, store, and share content with the members of the team site.

Let's take a look at some of the key features of a SharePoint 2010 team site. These are the ribbon, top link bar, Quick Launch bar, and the landing page.

## The Ribbon

Figure A.2 shows the ribbon in SharePoint 2010.

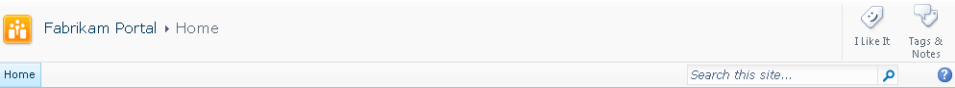


**Figure A.2** The SharePoint ribbon

The ribbon is where all management of an item, repository, or site is carried out. Members of the site use the ribbon as they do in Microsoft Office applications such as Microsoft Word 2010. Interacting with documents, document libraries, lists; conducting site management; and navigating the site can be accomplished by using options provided on the ribbon.

# The Top Link Bar

Figure A.3 shows the top link bar.

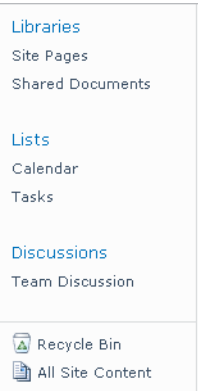


**Figure A.3** *The top link bar for Fabrikam*

The top link bar is where you'll find the icon for the site, the name of the site, the name of the page, and the navigation links for the site (including the search and help functions).

# The Quick Launch Bar

Figure A.4 shows the Quick Launch bar.



**Figure A.4** *The Quick Launch bar categories and links*

Every SharePoint 2010 site has a Quick Launch bar, located on the left of the site, that provides navigation options for the content of the site. The Quick Launch bar can be customized.

## The SharePoint Team Site Landing Page

Figure A.5 shows the team site landing page in SharePoint 2010.

### Welcome to your site!

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

#### Shared Documents

<input type="checkbox"/>	Type	Name	Modified	<input type="checkbox"/>	Modified By
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There are no items to show in this view of the "Shared Documents" document library. To add a new item, click "New" or "Upload".

 [Add document](#)



Getting Started

 [Share this site](#)

 [Change site theme](#)

**Figure A.5** *SharePoint team site landing page*

The team site landing page is where you can describe the function of the site, provide information to visitors, and include any other relevant information. SharePoint displays contents of the Shared Documents area by default, including a generic picture to the right of that section and links to common jobs to be carried out on the new team site.