

Contents at a Glance

1	Introduction and SharePoint History	1
2	SharePoint Concepts	13
3	Working with Documents	43
4	Collaboration	75
5	Tagging and Taxonomy	107
6	Publishing Sites	135
7	My Sites and Personalization	147
8	Web Parts	159
9	Customization	177
10	Using SharePoint with Client Applications	201
11	Template Reference for Libraries, Lists, Pages, and Sites	213
	Index	241

Contents

Foreword	xiii
Acknowledgments	xv
Introduction	xvii
CHAPTER 1 Introduction and SharePoint History	1
SharePoint History, by Arpan Shah	2
The SharePoint User Interface	5
SharePoint Server 2010 vs. SharePoint Foundation	12
CHAPTER 2 SharePoint Concepts	13
Sites	13
Opening a Site	15
Configuring Site Settings	16
Creating New Sites	21
Managing Content and Structure	23
Lists and Libraries	23
Viewing Lists and Library Content	24
Configuring a List or Library	26
Creating and Deleting Lists	27
Items and Documents	30
Metadata	30
Pages	30
Web Parts	31
Adding a Web Part to a Page	31
The Recycle Bin	33
Permissions	36
Content Types	38
SharePoint Central Administration	38
Opening Central Administration	39

viii Contents

CHAPTER 3 Working with Documents	43
Document Libraries	44
Opening a Document for Editing	45
Using the SharePoint Ribbon	45
Adding Documents to SharePoint	46
Uploading an Existing Document	46
Uploading Multiple Documents	50
Adding Documents with Windows Explorer	52
Creating a New Document	54
Document Tasks	55
Deleting a Document	56
Recovering a Document from the Recycle Bin	57
Viewing Document Properties	58
Editing Document Properties	59
Using Document Versioning	60
Checking Out Documents	61
Checking In a Document	63
Approving a Document for Publishing	67
More About Versions	68
Turning On Versioning	68
Working with Version History	70
Summary	74
CHAPTER 4 Collaboration	75
Discussion Boards	75
Creating a New Discussion Board	76
Using a Discussion Board	77
Editing a Discussion Board Item	80
Using Discussion Boards from Microsoft Outlook	81
Alerts	82
Blogs	83
Posting Blog Comments	85
Managing Blog Posts	85
Blogging with Windows Live Writer	86
Wikis	88
Announcements	91
Calendars	93
Calendar Views	95
Custom Calendar Views	97
Surveys	99
Creating a Survey	99
Survey Branching	103
Workspace Sites	104
Meeting Workspaces	105
Document Workspaces	106

CHAPTER 5 Tagging and Taxonomy	107
Social Tagging	108
I Like It	108
Ratings	108
My Profile	109
Tags & Notes	111
Enterprise Managed Metadata	112
SharePoint 2010 Taxonomy Improvements	113
A Taxonomy Primer	115
Managed Keywords	117
Enabling Keywords	117
Using the Tag Cloud Web Part	119
Managed Terms	121
Metadata-Driven Navigation	121
SharePoint Managed Metadata Administration	123
Enabling Managed Metadata on Your Server	123
Understanding SharePoint Taxonomy Hierarchy	128
Promoting a Managed Keyword to a Managed Term	131
Creating Your Own Term Store	131
How Will the New SharePoint 2010 Taxonomy Be Used?	134
CHAPTER 6 Publishing Sites	135
Publishing Site Template	135
Editing a Page	136
Summary Links	138
Web Parts	138
Creating Pages and Using Page Layouts	139
The Pages List	141
Site Actions	141
Master Pages	142
Publishing Site with Workflow	143
Publishing Approval	143
Publishing Site Exercise	143
CHAPTER 7 My Sites and Personalization	147
My Sites	147
Creating Your Own My Site	148
Adding a Blog to Your My Site	150
Viewing Your Newsfeed	151
Your SharePoint Profile	152
Personalizing SharePoint Pages	154
Personalization Sites	155

x Contents

CHAPTER 8 Web Parts	159
Adding Web Parts to a Page	159
Out-of-the-Box Web Parts	164
Lists and Libraries	164
Business Data	165
Content Rollup	167
Filters	168
Forms	170
Media and Content	171
Outlook Web App	172
Search	173
Social Collaboration	174
Closed Web Parts	175
Data View Web Part	175
Custom Web Parts	176
CHAPTER 9 Customization	177
List Customizations	177
Custom Lists	177
Custom List Example: Mileage Tracker	181
Custom Views	183
Custom Views in SharePoint Designer	186
Per-Location View Settings	190
Site Customizations	191
Themes	191
Customizing Navigation	192
Custom Forms	193
CHAPTER 10 Using SharePoint with Client Applications	201
Microsoft Office Backstage	201
Connect to Office	203
Microsoft Outlook	204
SharePoint Workspace	206
Microsoft InfoPath 2010	209
SharePoint Designer	209
Colligo Contributor	209
Metalogix Site Migration Manager	211
CHAPTER 11 Template Reference for Libraries, Lists, Pages, and Sites	213
Libraries	213
Asset Library	214
Data Connection Library	215
Document Library	215
Form Library	215
Picture Library	215

Report Library	219
Slide Library	219
Wiki Page Library	221
Lists	222
Communications	222
Tracking	224
Custom Lists	227
Data	229
Pages	230
Page	230
Web Part Page	231
Sites	233
Blank and Custom	233
Collaboration	233
Content	235
Meetings	236
Web Databases	237
Data	239
Search	239
Index	241