

Microsoft SharePoint 2010: Enterprise Content Management

Table of Contents

INTRODUCTION.....	INTRO-1
Prerequisites.....	INTRO-2
Software Requirements	INTRO-3
Configuring the Environment	INTRO-4
Disable Internet Explorer Enhanced Security Configuration.....	INTRO-4
Enable PowerShell.....	INTRO-5
Configure Active Directory	INTRO-6
Install the Sample Files.....	INTRO-14
Create Active Directory Accounts	INTRO-15
Install and Configure SQL Server Express 2008 R2.....	INTRO-16
Install and Configure SharePoint Server 2010.....	INTRO-20
Install the Sample Database for the Exercises	INTRO-38
Install Microsoft Silverlight	INTRO-45
Install Visual Studio, Office, and SharePoint Designer.....	INTRO-45
About the Author.....	INTRO-46
MANAGING SITE COLLECTIONS AND SITES.....	1-1
Site Collections and Sites	1-2
Site Collections	1-2
Sites	1-2
Terminology	1-3
Collaborating in SharePoint 2010	1-8
Lists.....	1-8
Document Libraries.....	1-8
Web Pages	1-9
Site Templates.....	1-22
Edition-Specific Site Templates	1-22
Site Template Categories	1-23
Portal Templates.....	1-23
Creating Custom Site Templates	1-23
Commonly-used Site Templates.....	1-24
SharePoint Features.....	1-31
The Publishing Infrastructure	1-31

SharePoint Server Publishing Infrastructure Feature	1-31
Publishing Infrastructure Site Collection Elements	1-32
SharePoint Server Publishing Feature.....	1-34
Publishing Site Elements	1-35
SharePoint Server Standard Site Features.....	1-36
SharePoint Server Enterprise Site Features.....	1-36
Publishing Portals	1-48
LAB 1: MANAGING SITE COLLECTIONS AND SITES.....	1-69
Lab 1 Overview.....	1-70
Create and Customize a Team Site.....	1-71
Create and Use a Custom Site Template	1-80
USER PROFILES AND MY SITES	2-1
Collaboration in the Enterprise	2-2
Finding Collaborators	2-2
User Profiles	2-3
Profile Properties	2-3
Configuring a Synchronization Connection.....	2-4
User Profiles in the Object Model	2-23
My Sites	2-40
Configuring My Sites.....	2-40
Linking to Office Client Applications.....	2-41
Personalization Links	2-41
Using Profile Data.....	2-51
Search.....	2-61
LAB 2: USER PROFILES AND MY SITES.....	2-71
Lab 2 Overview.....	2-72
Configure User Profiles.....	2-73
Create and Use an Audience.....	2-81
BUSINESS CONNECTIVITY SERVICES	3-1
Business Connectivity Services.....	3-2
BCS Architecture	3-2
External Content Types	3-3
Using BCS Data.....	3-17
External Lists	3-17
BCS Web Parts.....	3-23
Programming External Lists.....	3-28

Search and BCS	3-42
LAB 3: BUSINESS CONNECTIVITY SERVICES.....	3-47
Lab 3 Overview.....	3-48
Create a Profile Pages Site Collection and a Search Site	3-49
Create an External Content Type for Northwind Employees	3-54
Integrate SharePoint Search and BCS	3-69
INTRODUCTION TO INFOPATH.....	4-1
InfoPath and SharePoint.....	4-2
Enabling InfoPath in SharePoint	4-2
InfoPath Usage in SharePoint 2010.....	4-2
Custom List Forms.....	4-3
InfoPath and Libraries.....	4-23
Data Connection Libraries	4-23
Form Libraries.....	4-38
InfoPath Form Web Part	4-71
LAB 4: INTRODUCTION TO INFOPATH	4-75
Lab 4 Overview.....	4-76
Create a Custom List and Customize an Item Form with InfoPath Designer.....	4-77
Use the InfoPath Form Web Part.....	4-89
CUSTOMIZING SEARCH	5-1
SharePoint 2010 Search.....	5-2
Basic Search Center	5-3
Enterprise Search Center	5-3
Customizing Enterprise Search Center	5-23
Site Structure	5-23
Search Web Parts.....	5-24
Federated Search	5-24
Narrowing Results.....	5-25
Search Optimization	5-43
Search Reporting	5-43
Keywords	5-43
Controlling Visual Output	5-57
Search Query Object Model	5-72
Keyword Queries	5-72

Table of Contents

Keyword Syntax	5-73
Full-Text SQL Queries	5-73
Search SQL Syntax	5-74
LAB 5: CUSTOMIZING SEARCH.....	5-82
Lab 5 Overview.....	5-83
Add Tabs and Pages to the Enterprise Search Center.....	5-84
Associated Search Pages with a Search Scope.....	5-96
MANAGED METADATA SERVICES.....	6-1
Managed Metadata Services Overview	6-2
What is Metadata?	6-2
Taxonomy and Folksonomy.....	6-3
MMS Architecture	6-3
Administering the MMS.....	6-5
Creating Global Terms.....	6-5
Creating Local Terms.....	6-16
Securing Term Groups.....	6-17
Using Managed Metadata.....	6-18
Using Metadata on a List or Library	6-18
Metadata Navigation	6-29
Maintaining Managed Metadata	6-37
Term Deprecation	6-37
Synonyms	6-37
Social Tagging	6-48
Working with Managed Metadata Using the Server Object Model	6-53
Manipulating Term Sets and Terms.....	6-53
Working with Managed Metadata on a Site	6-53
LAB 6: MANAGED METADATA SERVICES.....	6-65
Lab 6 Overview.....	6-66
Generate Keywords via SharePoint Social Tagging.....	6-67
Maintain Keywords and Terms	6-72
DOCUMENT MANAGEMENT	7-1
Managing Documents.....	7-2
Document IDs	7-2
Document Sets	7-19
Rules Based Submission.....	7-33
Organizing Content	7-33

Defining Rules.....	7-34
Drop Off Library	7-34
Document Center.....	7-51
Content Query Web Part.....	7-51
LAB 7: DOCUMENT MANAGEMENT	7-69
Lab 7 Overview.....	7-70
Define New Content Types for Sales Proposals.....	7-71
Instantiate a Document Set	7-86
Version and Customize a Document Set.....	7-92
RECORDS MANAGEMENT.....	8-1
Records Management	8-2
What Is a Record?	8-2
Records Management in SharePoint	8-3
SharePoint 2010 Information Management Policies	8-3
In Place Records Management	8-4
Activating Library-level Records Management	8-4
Records Center Site	8-16
Organizing Content	8-16
Managing the Records Center	8-17
Hold and eDiscovery	8-43
Records Center Reporting	8-44
LAB 8: RECORDS MANAGEMENT	8-53
Lab 8 Overview.....	8-54
Create a Records Center Site.....	8-55
Define Information Management Policies	8-59
Test Information Management Policy Settings	8-67
INDEX.....	INDEX-1