Flexible collaboration without programming

SharePoint 2010
Site Owner's Manual

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SharePoint 2010 Site Owner's Manual
by Yvonne M. Harryman

Chapter 3

Brief contents

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Creating sites using site and list templates

This chapter covers

- *Core list and library templates*
- *Web parts*
- *Site templates and their association with the SharePoint editions*

We'll now discuss core components of SharePoint that you can leverage with minimal configuration.

It's good to understand what components are provided out of the box. Once you have a solid understanding of that, you can begin to build your own if one of these doesn't meet your needs. In the scenarios where you build out custom sites, you typically start from a blank site template or a publishing site template. If you find that what you'd like to implement is similar to one of the out-of-the-box templates, you could always leverage one of these site templates, customize it, and save it as a custom site template based on your modifications. Before we get into site templates, let's discuss some of the core components that make up a site: lists.

3.1 Building templates with the different SharePoint editions

SharePoint Foundation and SharePoint Server sites are combinations of components. Think of a site as a holder that encompasses many different lists and web parts that can be accessed on web pages. When a user creates a site, it opens to the homepage. This is like the front page of a newspaper. Often the full stories aren't shown on the front page of a newspaper, just snippets of information, and you'll need to go to another page to get the full story. Well, a site is similar; the homepage often comprises web parts that contain summary views of information, and to get the full story you need to select the header of the web part to navigate to the web page that has all of the functionality and details. Users with the required permissions can move around the web parts and change their order within the different zones. The web parts are customizable, and users have many options for modifying their appearance. SharePoint Foundation and SharePoint Server provide a base set of list templates and site templates that users can leverage to quickly build out their sites. An example of a site with four web parts is shown in figure 3.1.
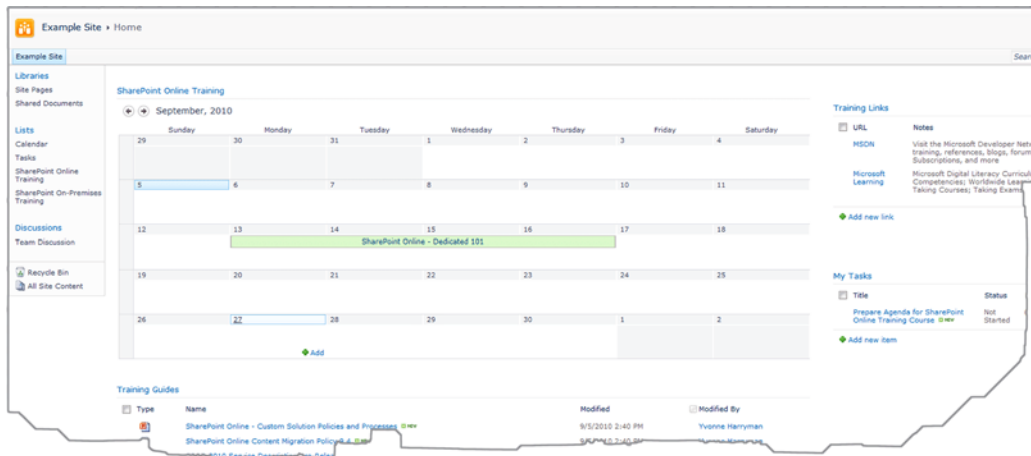
Figure 3.1 An example site that displays four web parts that each display snippets of data from the lists that compose the site

Figure 3.1 displays four web parts. These are web parts with views into the following types of libraries or lists: a calendar, a document library, a links list, and a task list. Each header of the web part gives you an idea of what that web part is filtered to show you. For example, the task list header reads *My Tasks*. If you were to select My Tasks, it would take you to all the tasks assigned to all users of this site. The view displayed in this web part has been configured to show the user only the tasks assigned to them that have not been completed. That is an example of how you'd use a web part to show snippets of data held within a list.

In addition, individual sites are combined and connected via a site collection. Sites within a site collection share navigation, permissions, and content. You can typically tell what site collection a site is part of by examining the URL. If it's similar to the following, http://portal.durante .com/sites/SiteA or http://portal.durante.com/sites/SiteA/SubSiteB, you should note that SubSiteB is part of SiteA. You can be certain by going to the top site, selecting View All Site Content, and seeing if the site is listed under Sites and Workspaces. This will show you only one level down, so if the site is nested further, the easiest way may be to look at the breadcrumb trail when you select the folder from the subsite to see what parent sites it has.

In the next few sections we'll cover some of the core list and library templates and then explain all of the site templates. It's important to have a good understanding of what's already available to you before creating your own site templates. In part 2 of this book, we'll cover how you can take the out-of-the-box site templates and develop your own site templates. Let's start by explaining some of the core list and library templates.

3.2 Core list and library templates

A variety of templates are provided for lists within SharePoint Foundation and SharePoint Server. A breakdown of all the lists and libraries

associated with SharePoint Foundation and SharePoint Server will be covered in appendix A, so for this section I'll focus on introducing you to some of the more popular list templates that are available. It's important to understand these because they're the functionality that makes up sites and site templates. Each is powerful and can be configured many different ways to meet the site owner's specific needs. The templates we'll go over are the Document Library, Picture Library, Asset Library, Announcements, Contacts, Links, Calendar, Tasks, Discussion Board, and Survey templates.

Let's start by going through some of the core features that are included in all lists and libraries regardless of what template you're using.

Each list and library is formatted to meet a specific functionality. In the next section I'll provide a screen shot of the lists and libraries we're discussing and a brief explanation of some of the functionality specific to that item. List and libraries, likes sites, can be saved as templates. You can take a list or library and save all of your customizations for reuse on other sites.

3.2.1 Document Library template

The Document Library is one of the core components of a collaboration system. This allows users to manage their documents and enable other users to access them. Beyond the functionality described in the introduction of section 3.2, this list is unique because of the ability to check in and check out documents. This prevents other users from making modifications to a document while you're working on it. A full list of functionality that's available to you is displayed in figure 3.2. Note that this is a view of the SharePoint Server Enterprise license. Depending on the edition of SharePoint that you're using, you may or may not have all of these capabilities.

Note that you have two ways to work with the items in the list. You can do so through the tools provided in the Ribbon or via the context menu tied to the list item. Using the Ribbon, you can quickly create and upload new documents as well as organize your information using
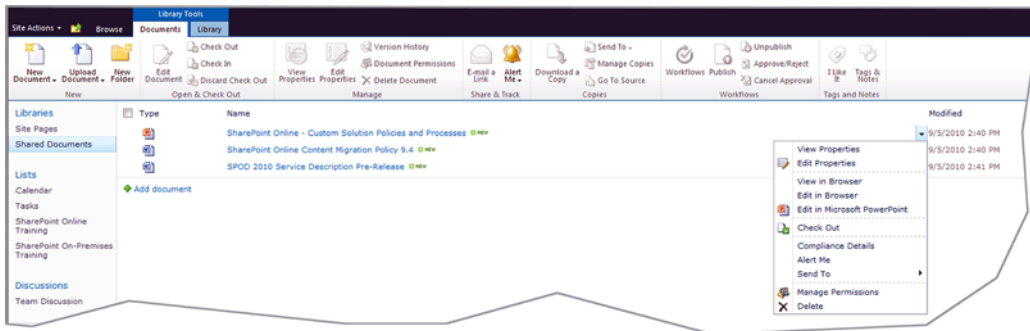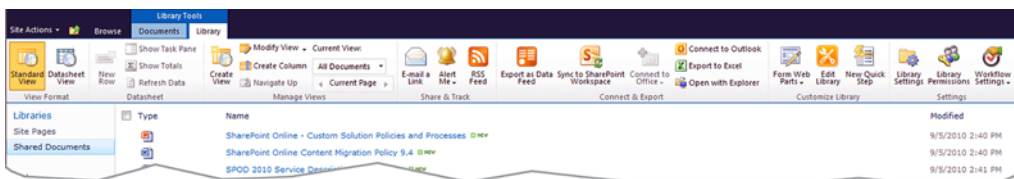
Figure 3.2 Document Library functionality for an item

folders. For each document added, along with options shown in the Ribbon you'll have a context menu, which is the drop-down menu shown for each item. Here you can view additional properties, choose different options to edit the document, or check it out so others can't make modifications. You also have the ability to set an alert on the item so you'll be notified of any changes or send a link to the item to your colleagues who have access to the site. The approval and workflow features are grayed out in this figure because they haven't been configured, but if you turn these on you'll see additional options to approve, publish, or manage the task requested by the workflow.

Lastly, there's a set of options associated with all of the documents, which can be found under the Library tab. This is shown in figure 3.3.

Along with item- and document-level functionality there are options at the library level. The most powerful features on this menu are the library settings and the ability to create and modify views. Let's quickly discuss the latter; right now you're looking at the default view. If you

Figure 3.3 Document Library functionality for the library

were to create a view, you'd get options to select which columns are displayed, set filters to see only certain items, and group and sort the results. This can be powerful when working with web parts to display snapshots of the data. The library settings are how you'd get to the configuration settings explained in table 3.1. Here you'll also see similar options explained in the previous paragraph, such as alerts. This will enable you to set an alert on the entire library, so you'll be notified if a document is ever created, deleted, or edited. There are many additional options, and we'll cover those in more detail in chapter 4, when we begin our first scenario, going through an example of building a site.

Table 3.1 Common settings for libraries and lists

| Feature	Description
Web-based access	Web-based access means that each list is hosted on a web page so users can access them via the intranet or internet.
Version control	Version control allows users to modify items without the concern of losing any information. It can track the history of the previous items so you can view or roll back to a previous version.
Columns	Columns are metadata, information that can be captured and used to search and sort information pertaining to the document, such as author and status (draft/final).
Validation	Validation is a new feature in the SharePoint 2010 release; it uses formulas that can be configured to validate information captured in the columns.
Content types	Content types are containers of columns that can be shared across lists and libraries.
Views	Views can be used to provide your users with different ways to access the information. For example, you can have a view for all draft documents that only certain users can access and a view for final documents that all users can see.

Table 3.1 Common settings for libraries and lists *(continued)*

Feature	Description
Item-level permissions	Item-level permissions can be applied to each item in your list. An example of how this can be used is to allow users the ability to modify only their own items and not those of others.
Workflows	Workflows are available for all lists and can provide a lot of power for approval or other task-related items that you want triggered when new items are modified or added.
Ratings	Ratings is a new capability with SharePoint 2010 that allows end users to rate the individual list items (0–5).
Enterprise keywords	This setting helps users enter keywords, providing suggestions to autocomplete the word, based on similar keywords that users have entered into other keyword fields.

These capabilities are similar to all libraries and lists. For the next section we're going to discuss only those items that are unique to that list or library. Because the focus of this one is documents, we'll now discuss a library whose purpose is pictures.

3.2.2 Picture Library template

What makes the Picture Library unique is the additional capability to easily manage images by displaying thumbnails. An example of a Picture Library is shown in figure 3.4.
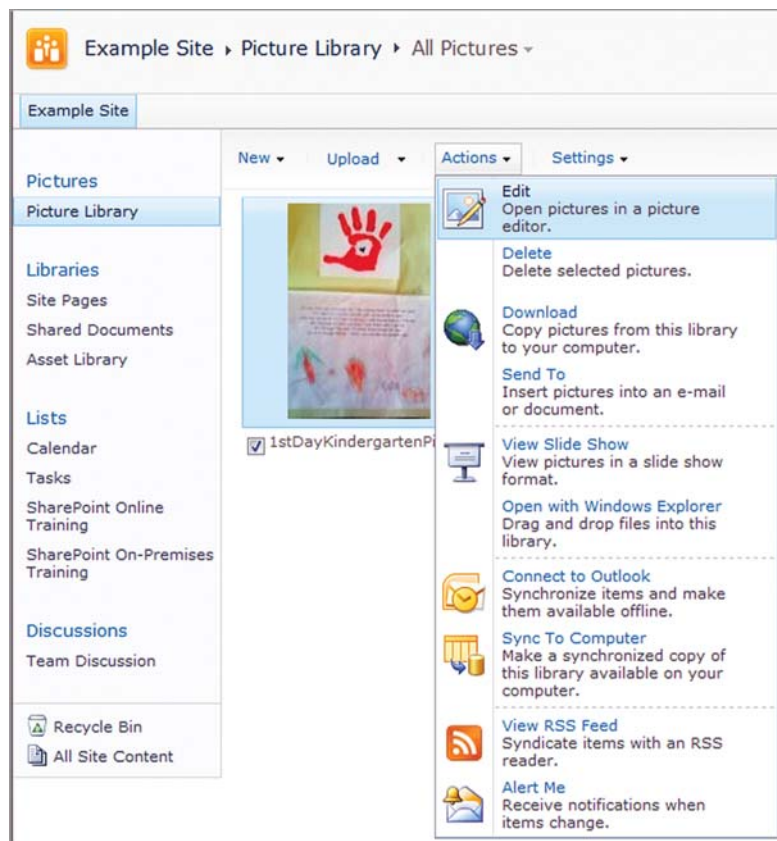
Figure 3.4 Picture Library with context menu displaying the different options

As you can see from figure 3.4, you get different options with a Picture Library, such as viewing the picture in a slide show format. These options make it easy to upload and organize your photos to share with others. When looking at the photos in slide show format, they'll appear as shown in figure 3.5.
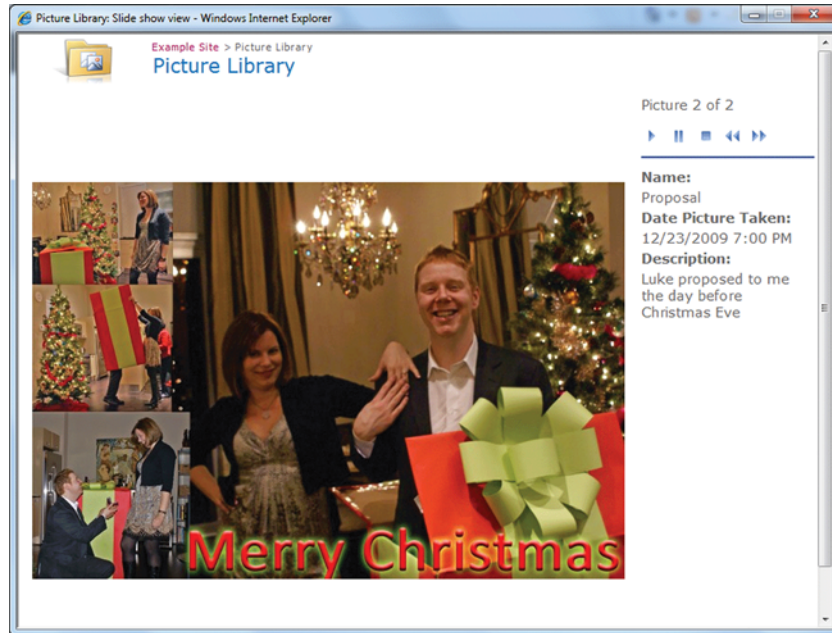
Figure 3.5 You can select certain pictures in a Picture Library and present them in slide show format.

You also have the ability to add a Picture Library slide show web part to the pages of your sites. This web part is shown in figure 3.6.

Picture libraries were critical in SharePoint 2007 because uploading an image had to be done by providing a web URL. In SharePoint 2010, you can often share an image that's stored on your computer, in a SharePoint library, or by providing a web URL. We'll talk about that more when we get to the Blog template, in the section covering site templates. The next list we'll discuss is the Asset Library.

Figure 3.6 Example of a Picture Library slide show web part with the configuration options

3.2.3 Asset Library template

The Asset Library is new to SharePoint 2010. Its purpose is to help in the sharing of digital assets such as audio or video files. In figure 3.7 I show an example of the Asset Library being used in a scenario to share training videos.

A common web part used in conjunction with the Asset Library is the Media web part, which allows you to display embedded video files on a page. To see the Media web part in action, look at figure 3.8; the options for configuring the web part can be seen in the Ribbon.
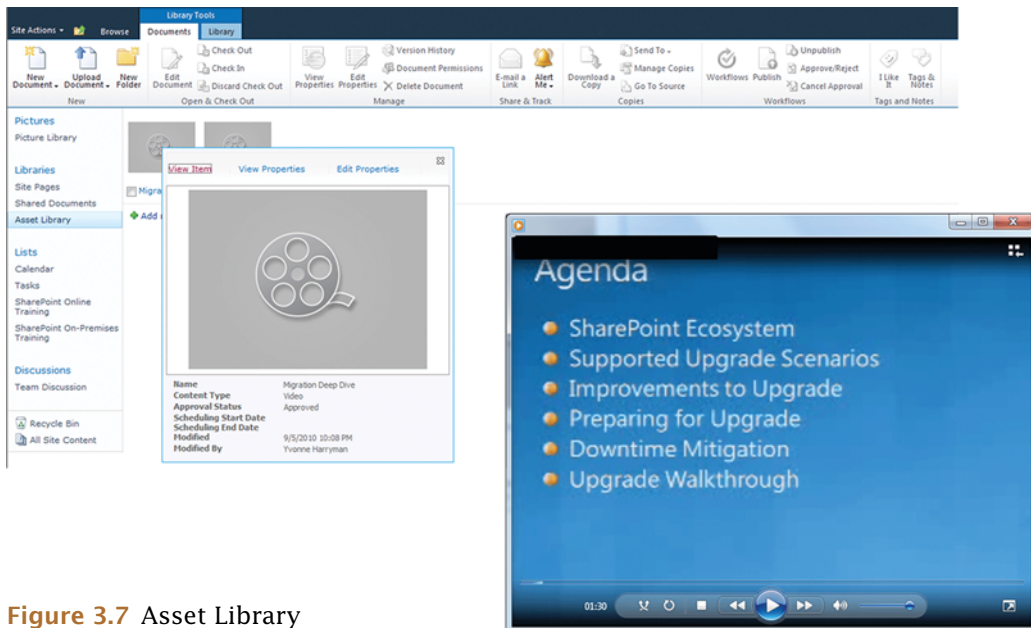
Figure 3.7 Asset Library

Now that we've discussed some of the common libraries that you can use, let's talk about common lists, starting with the Announcements list.
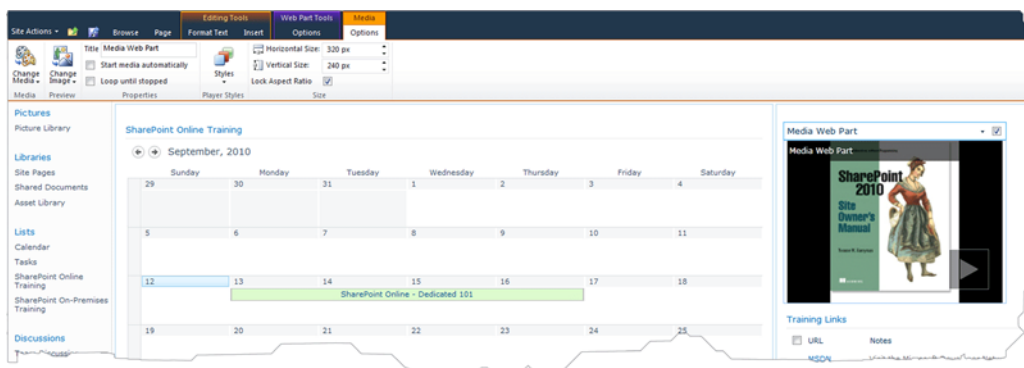
Figure 3.8 Media web part

3.2.4 Announcements list

The Announcements list has the core functionality of a list described in table 3.1. What makes the Announcements list unique is the additional capability to set an expiration date for the announcement that you enter. For example, if you want to announce the upcoming company picnic, you can set it to autoexpire on the day of the event. This will help keep your information up to date. In the example shown in figure 3.9, I'm creating an announcement and adding a picture to it.
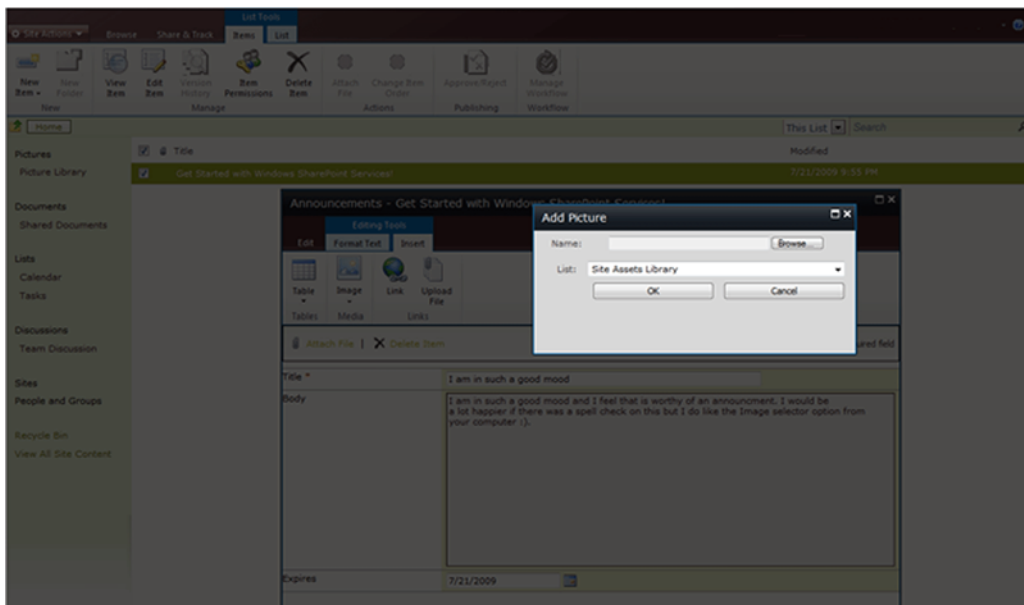

Figure 3.9 Announcements list with rich Silverlight editing options in action

You can leverage the Content Query web part (CQWP) to roll up announcements from subsites if you want to create a central location for users to see all of the announcements. The Announcements list will help you distribute and communicate important information. Next list we'll discuss the Contacts list, which will help you manage information about people.

3.2.5 Contacts list

The Contacts list has the core functionality of a list described in the introduction. What makes the Contacts list unique is the metadata for capturing information about individuals associated with that site and the ability to sync with your Outlook contacts. In addition, if you have SharePoint Server, you'll also have the ability to create a Contacts web database that leverages Access Services. We'll talk more about this in the section covering site templates. To start, let's see what a Contacts list can do, as shown in figure 3.10.
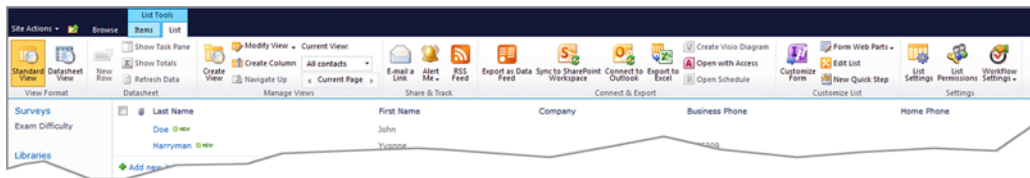

Figure 3.10 Contacts list

Note that you have many ways to work with this list. One way that's specific to this list is the capability to synchronize with Outlook. This will allow you to access these contacts offline or manage the contacts using Outlook, or you can do so in a SharePoint workspace. The next list we'll discuss is the Links list. The Links list is one of the more common lists used, because almost everyone has a need to organize and display links on a page.

3.2.6 Links list

The Links list, shown in figure 3.11, has the core functionality of a list described in the introduction. What makes the Links list unique is the additional capability to create and display a list of links, which provides the description and links to the web address.

Although many times you'll work with links using a Links list and adding a view of that list on a web page, there's another common way to work with links. When you design pages, several templates may contain summary links. This is a common way to use or create a page
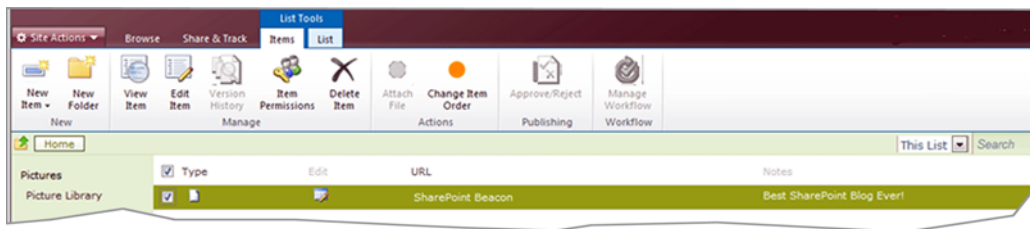
Figure 3.11 Links list

layout so that all pages will have links in a common location across the pages of a site.

The next list we'll discuss will help you to manage events and share them in various formats; this is a Calendar list.

3.2.7 Calendar list

The Calendar list has the core functionality of a list described in the introduction. What makes the Calendar list unique is the additional capability to display the items using a calendar format, as shown in figure 3.12. Notice that you can also create a workspace for the new events. This is essentially the equivalent of a site but with the expectation that it's temporary.
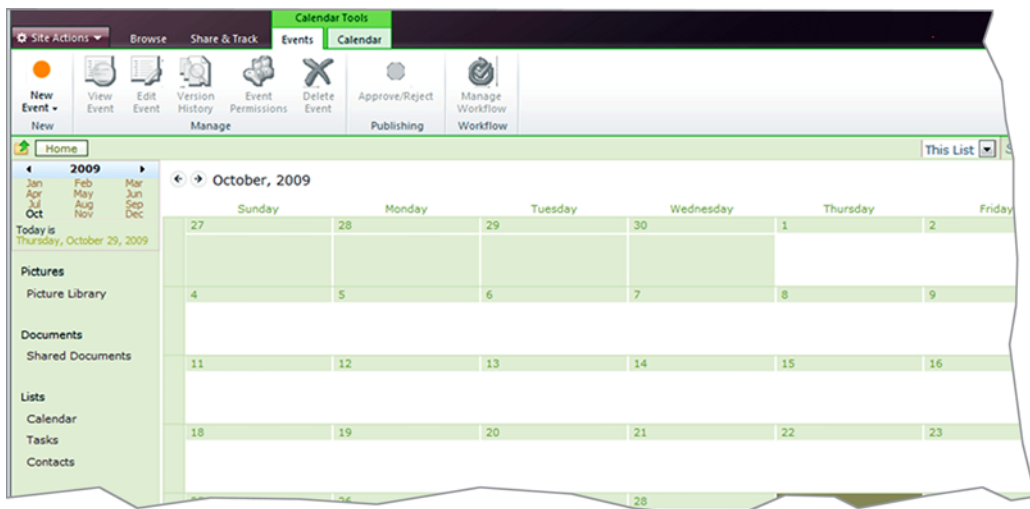
Figure 3.12 Calendar list
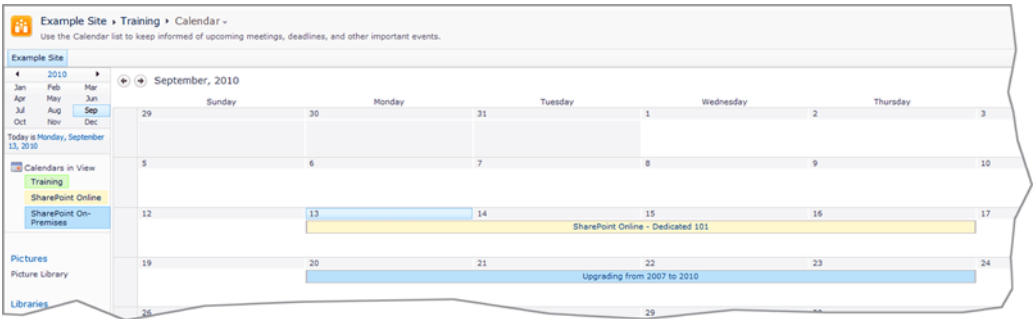
Figure 3.13 A calendar overlay combines the events from multiple calendars and color codes them.

A new capability is the ability to set up calendar overlays, as shown in figure 3.13. This allows you to see multiple calendars in a view and to configure style changes so you can easily identify the type of calendar events you're viewing.

Also note that although the calendar view is very popular, there are many other options where you can show events, based on how current they are, in a textual format, as shown in figure 3.14.


Figure 3.14 Example of textual format of current events

Now that you have a good understanding of how to handle events and calendars, the next list we'll discuss will help you to manage items that require an action.

3.2.8 Tasks list

The Tasks list helps you to manage action items. What makes the Tasks list unique is the additional capability to manage and assign tasks to different people associated with the site. Notifications will automatically be sent so that the assigned person will know to begin working on the task. When you create a new task, by default you'll get the options shown in figure 3.15.
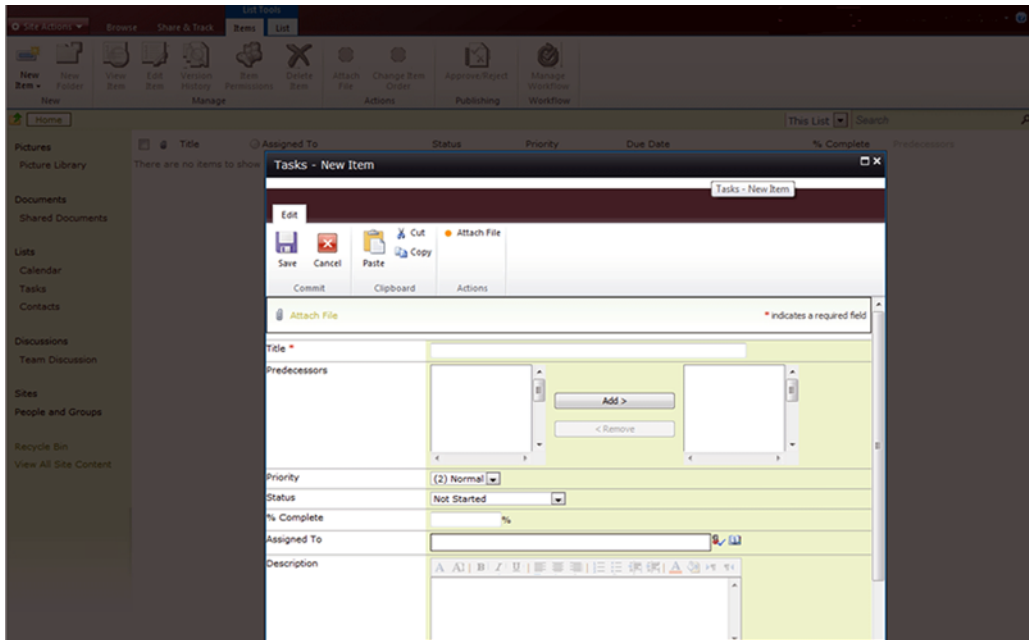
Figure 3.15 Tasks list with rich Silverlight editing options in action

Notice the many data points that help you keep track of the task. One of my favorites is the ability to link it to other tasks that may require completion in order to finish this task. If other tasks are present in the list, they'll show up in the Predecessors box so you can add them upon entry of a new task if they require completion first. As an example, if you need to buy gas before leaving on a trip, create the buy gas task first. Then when you create the leave on trip task, add *buy gas* as a predecessor. The next list we'll discuss is the Discussion Board list, which is great for informal group collaboration.

3.2.9 Discussion Board list

The Discussion Board list enables end users to carry on a casual conversation with other users and have the discussions organized by topic. It also provides the ability to manage threaded topics so you can respond to users throughout the thread and see which comment you're referring to. Another tool that's commonly used for casual discussions
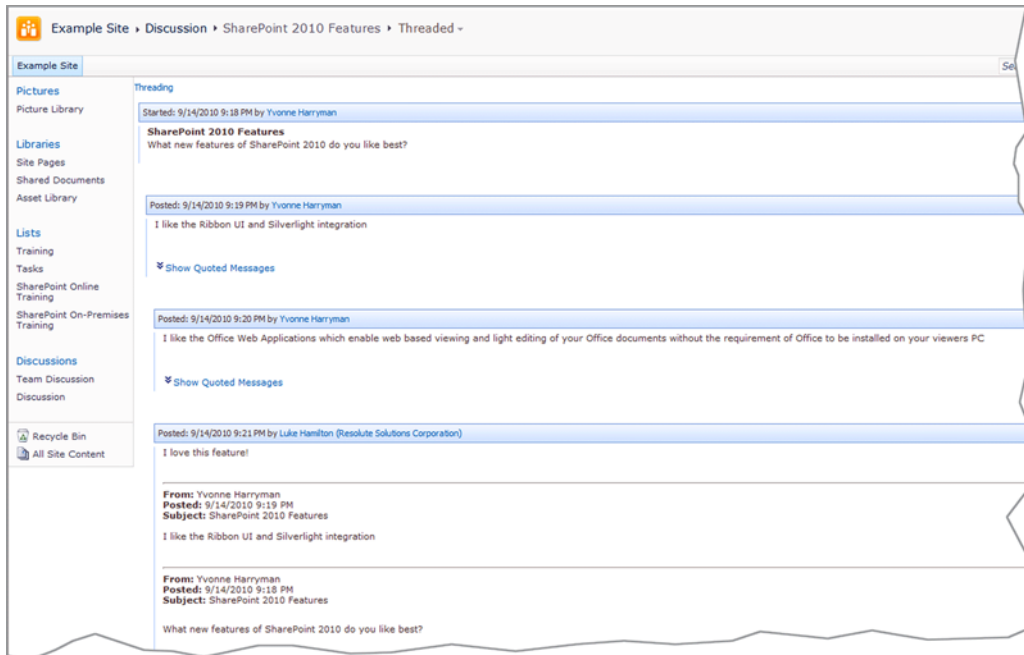
Figure 3.16 Discussion Board list

is the Blog template. One key advantage that the Discussion Board has is threaded comments. Comments in a blog are flat, and it can be difficult to tell to whom you're responding. Users can post discussion topics, and replies will be nested within each topic. An example of a threaded discussion on SharePoint 2010 features is shown in figure 3.16.

The next list we'll discuss is the Survey list. This list is commonly used in a polling scenario or when you want to put out a series of questions to your end users.

3.2.10 Survey list

What makes the Survey list unique is the additional capability to create a series of questions and format the survey with page separators and branching logic. The Survey list also supplies a graphical summary of all the responses. In figure 3.17 you can see the graphical summary
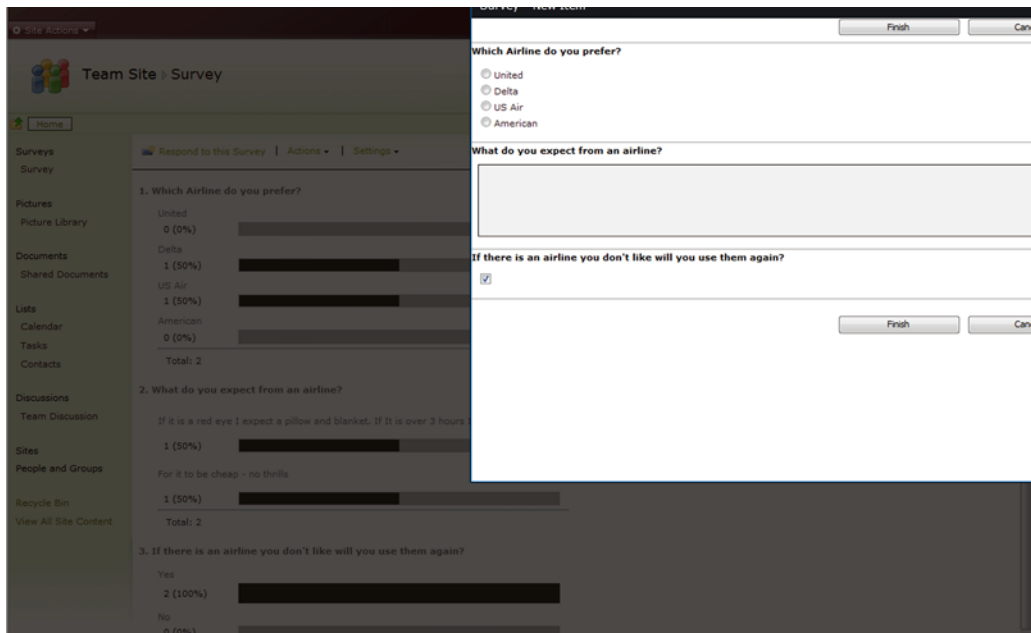
Figure 3.17 Survey list with rich Silverlight editing options in action

response on a survey for a consulting company where the employees travel quite often. The company is gathering feedback on the different airlines to provide advice to employees when they travel in the future.

If we had integrated branching logic or page separators, you might see an additional option to save or go to the next screen. This can be confusing to end users because they may click Save and think they've submitted their response. So be wary when using those features, and make it clear to your end users that saving is not submitting.

Now that we've covered some of the core libraries and lists, let's discuss how SharePoint Foundation and SharePoint Server provide a base set of site templates. Note that there are additional libraries and lists, but I wanted to cover the ones that are more extensively used so you can get a good introduction to what SharePoint can do out of the box. Each of the site templates that we'll cover in the next section comprises lists and libraries that we just discussed; combined with web

parts and some customizations, they can support a common scenario and essentially be used as a business application. In part 2 of this book, you'll build your own sites that can be made into templates for reuse, similar to the site templates we're about to discuss. You'll create these templates to solve various business problems, but before you do that, we'll explore what's already available so we don't try to reinvent the wheel. We'll begin to define these in the following section.

3.3 Learning about the site templates

This section will cover all the out-of-the-box site templates that you can use as a starting point when you create a site. I'll provide scenarios for each site template along with what edition of SharePoint it's associated with. For example, certain templates apply only to SharePoint Server Enterprise, and they may not be available for use if you have Share-Point Server Standard. In part 2, you'll build similar sites to these, and we'll go into detail on how to configure these sites using web parts, lists, and other tools such as SharePoint Designer. Prior to doing that, though, you need to understand what options you have out of the box. Imagine how great it would be if you were sitting in your boss's office and he was discussing contracting with a company to help build and manage all internal records. He needed records to be routed to various locations based on metadata and to have the ability to look up a record based on a document ID. Wouldn't it be great if you had read this section and could tell him not to contract with a company for this because your company can do it with its SharePoint implementation without custom development?

Before we dive into the different site templates, I want to highlight the new site templates for SharePoint 2010:

- Group Work Site
- Visio Process Repository
- Assets Web Database
- Charitable Contributions Web Database

- Contacts Web Database
- Issues Web Database
- Projects Web Database
- Business Intelligence Center
- Enterprise Search Center
- Basic Search Center
- FAST Search Center
- Enterprise Wiki

If you're already familiar with the standard site templates for Share-Point 2007, this list will help you identify those that are new. Another thing to note is that several site templates have been deprecated, and these include the following:

- Wiki Site
- Site Directory
- Report Center
- Search Center with Tabs
- Search Center
- Collaboration Portal
- News Site

Now that you know which site templates are new and which ones have been deprecated, let's get started with discussing those site templates that are included with SharePoint Foundation.

3.3.1 SharePoint Foundation

SharePoint Foundation is the base of any SharePoint installation, so regardless of what version of SharePoint you're running, SharePoint Foundation technology underlies it. Because of that, the site templates shown in table 3.2 are included in all versions of SharePoint. The following sections will give a brief description along with a picture of each of the different SharePoint Foundation site templates.

Table 3.2 SharePoint Foundation site templates

| Template	Description
Team Site	Team sites enable groups of end users to easily collaborate by sharing documents, tasks, events, and announcements and creating discussions.
Blank Site	A blank site has nothing configured on it, so you truly have a clean slate to begin creating your site.
Document Workspace	A document workspace is similar to a team site, but it limits the capabilities to focus on enabling end users to collaborate on the completion of a document by means of a document library, tasks, and a list of links associated with the documents.
Blog Site	A blog site allows contributors to post ideas and let the end users comment on those ideas.
Group Work Site	The group work site is a groupware option to allow end users to organize and circulate resources.
Basic Meeting Workspace	A basic meeting workspace helps end users organize meetings.
Blank Meeting Workspace	The blank meeting workspace is configured to provide a clean slate on which to begin creating your site.
Decision Meeting Workspace	The decision meeting workspace helps you to manage and track items and decisions made in a meeting.
Social Meeting Workspace	The social meeting workspace helps you organize and share pictures associated with a social event.
Multipage Meeting Workspace	The multipage meeting workspace helps you to manage a meeting and provides tabs so you can create many pages to capture action items, tasks, agendas, and the like.

Now that you have an idea of the different templates we'll be covering, let's dive deeper into each template so you can see it in action. We'll discuss them in the order listed in the table. I've tried to group them based on similarities. We'll start with some of the core general collaborative templates, such as the Team Site template.

3.3.2 SharePoint Foundation collaborative site templates

I've grouped the SharePoint Foundation templates into a series of col-
laborative templates that have various purposes, mostly organized
around team collaboration and social collaboration. The following
section includes those that are focused on meeting organization and
collaboration.

Team Site template

A team site is a site for teams to quickly organize and share informa-
tion. For example, if you'll be working with a team over the next few
months to define IT policies for you company, you'd most likely start a
team site so you could share your thoughts and ideas via the web. It
provides important pieces of functionality, such as a document library
and lists for managing announcements, links, calendar items, tasks, and
team discussions. An Image web part set to the Windows SharePoint
Services logo is also available for you to customize and replace with
your team's logo. An example of a team site is displayed in figure 3.18.
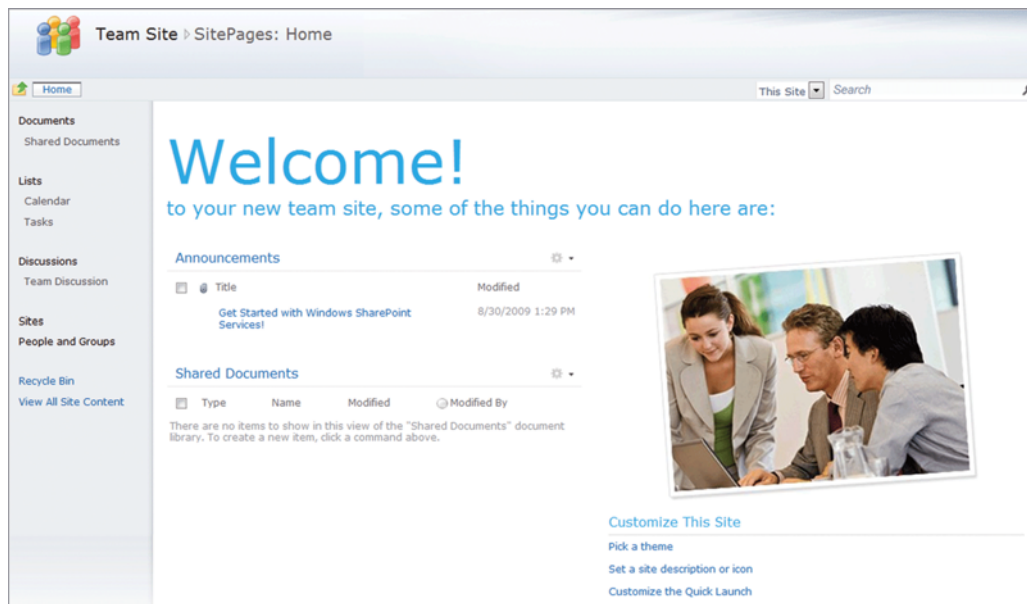
Figure 3.18 Out-of-the-box SharePoint Foundation site template for a team site

SharePoint Foundation web part components shown in this template are the Announcements web part, Calendar web part, and Links web part. The Windows SharePoint Services image is displayed in an Image web part. Notice that it doesn't have a header like the other web parts. You can modify this by editing the web part and then switching the chrome type under the Appearance group. Web parts are easily customized. You can change this image by uploading another image and adding the new link to the web part properties.

The next template we're going to discuss is the Blank Site template.

Blank Site template

A blank site has all the same functionality as other sites, but nothing is precreated. For example, you won't have a Document library or Announcements list. About the only thing you'll see on a blank site is the Image web part with the SharePoint Foundation logo. This is good when you're planning to create your own custom site. An example of what a blank site looks like is shown in figure 3.19.

The next template we'll discuss is the Document Workspace template, whose sole focus is collaboration on a document.

Document Workspace template

This site enables a group of users to collaborate on a document or documents. It offers a Document library to use for uploading and storing the files. Additional lists are provided to facilitate collaboration. These include calendar, discussion board, announcements, and task lists. On
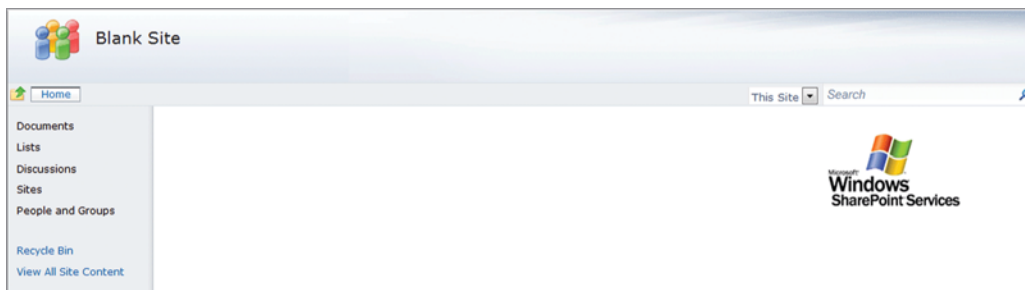
Figure 3.19 Out-of-the-box SharePoint Foundation site template for a blank site
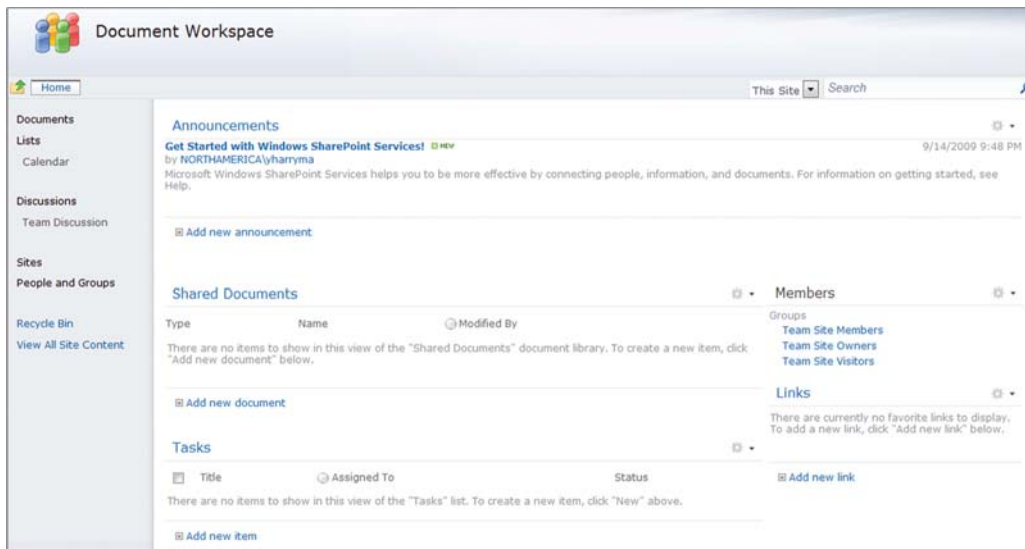
Figure 3.20 Out-of-the-box SharePoint Foundation site template for a Document Workspace site

the right side of the site is the Members web part, which is useful for seeing other users associated with this workspace. If the site is so configured, you'll also have access to members' presence and contact information. By default, this shows the groups, but it can easily be configured to show individual users. This template is displayed in figure 3.20.

Presence information

In a SharePoint site you'll often see Messenger-style icons in front of people's names corresponding with their IM status. When you place the mouse pointer on the icon, additional functionality becomes available, such as the ability to send an email to that person or plan a meeting with them. For users to see this, they would need to have a compatible instant messaging client installed such as Lync, Communicator, Windows, or MSN Messenger.

SharePoint Foundation web part components shown in this template are the announcements, shared documents, tasks, members, and links. Notice that the Quick Launch navigation displays links to calendar and team discussions. You can easily modify Quick Launch to display your choice of links and lists. We'll discuss this further in the *Quick Launch* section in chapter 4.

The next template we're going to discuss is the Blog Site template.

Blog Site template

A blog is a site for users to share information with other users and provide them with a forum so that they can comment on the different posts. It provides easy ways for you to categorize your post and manage the site. Blog sites are commonly used with SharePoint Foundation for public-facing sites by SharePoint techies to post their ideas and guidance in relation to SharePoint. You'll often see executive blogs in corporations, and individual employees may even create one and tie it into their personal site if they're running SharePoint Server. The Blog Site template is displayed in figure 3.21.
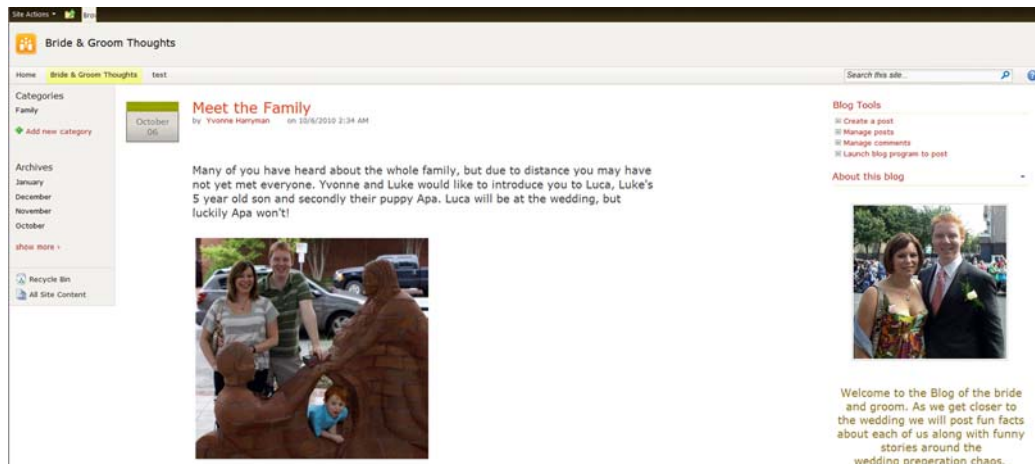
Figure 3.21 Out-of-the-box SharePoint Foundation site template for a blog site, with sample data

The image denotes the ability to categorize your posts and archive them. Also, many people like to post their picture on their blog.

The next template we'll discuss is the Group Work Site template.

Group Work Site template

This template, shown in figure 3.22, is new to SharePoint Foundation. It's a groupware solution that teams can use to create, organize, and share information. It includes a group calendar, which allows you to schedule members and reserve resources. It has a Whereabouts section so you can update the group as to your status. A Circulations list lets you post either public or confidential memos to members and get a confirmation that the memo was read. It also includes a Phone Call Memo, which can also be set to confidential and be available only to the specified members. In addition to these great new features you'll find the core list, such as the Document library, task, links, discussions, and surveys.

Working remotely never got any easier than this! Make sure you mention this new site template when you're trying to make a case to your boss as to why you should be allowed to work remotely.

Next, we'll discuss the different meeting templates starting with the Basic Meeting Workspace template.
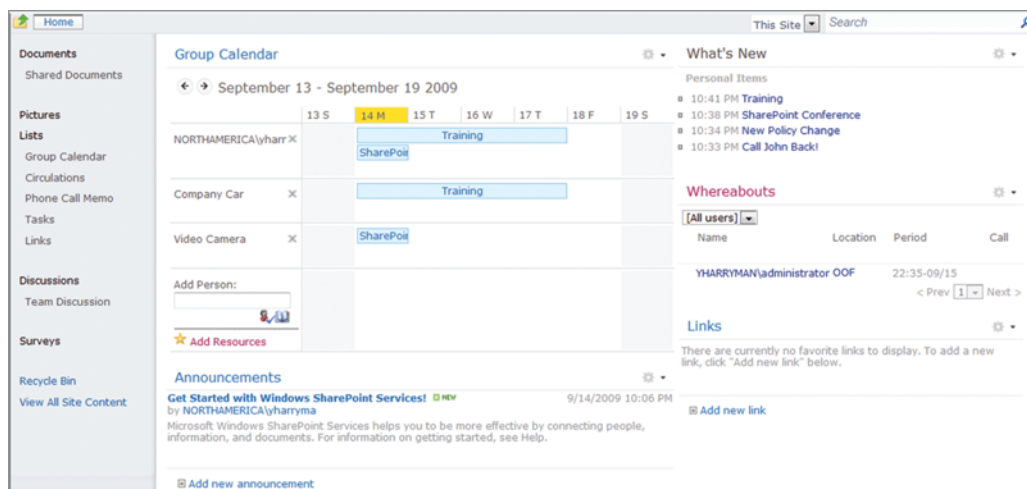
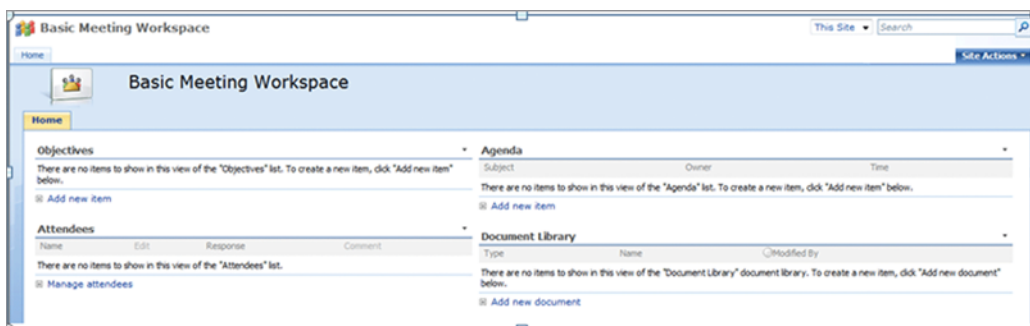**Figure 3.22** Out-of-the-box SharePoint Foundation site template for a group work site

3.3.3 SharePoint Foundation meeting site templates

The rest of the templates included in SharePoint Foundation are meeting templates. There are five of them, all with a slightly different purpose for the organization and continuing collaboration of meetings. We'll start by discussing the Basic Meeting Workspace.
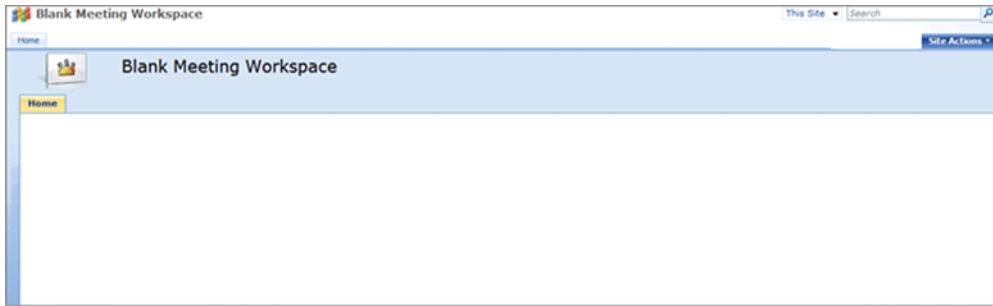
Basic Meeting Workspace template

A meeting workspace is a site for organizing and capturing the actions in a meeting. It provides lists for managing the objectives, agenda, meeting attendees, and documents. It's a great site to use when setting up a meeting, and you really can't go wrong with an acronym like BMW. An example of a Basic Meeting Workspace template is shown in figure 3.23.

SharePoint Foundation web part components shown in this template are a custom list for objectives, attendees, and agenda and an out-of-the-box Document library web part. Notice that a web part is highly customizable. For example, if you were to select Add New Item for the Agenda web part, you'd see that a lot of other data is captured besides what's displayed in the web part. Web part customizations will be covered extensively throughout all of the scenarios. Now we'll discuss another meeting template: the Blank Meeting Workspace template.

Figure 3.23 Out-of-the-box SharePoint Foundation site template for a Basic Meeting Workspace

Figure 3.24 Out-of-the-box SharePoint Foundation site template for a Blank Meeting Workspace

Blank Meeting Workspace template

Need I say more—a picture is worth a thousand words, as shown in figure 3.24. As you can see from the image, this meeting workspace is blank and available for a site owner to customize it as they wish.

Whereas this site template is set up so you can design it to your heart's content, the next template has a specific focus—capturing decisions and the execution of those decisions that are sometime made in a meeting (if it's a productive one).

Decision Meeting Workspace template

A Decision Meeting Workspace expands the previous meeting site. It provides additional lists for creating tasks and recording decisions. The goal of this site is to provide a bit more structure for a meeting to ensure that outcomes of the decisions are tracked. As you can see in figure 3.25, this site is configured to capture objectives, tasks, a detailed agenda, and any decisions that were made.

The SharePoint Foundation web part components shown here are the same as for the previous template with the addition of tasks and decisions.

The next template we'll discuss is the Social Meeting Workspace template.
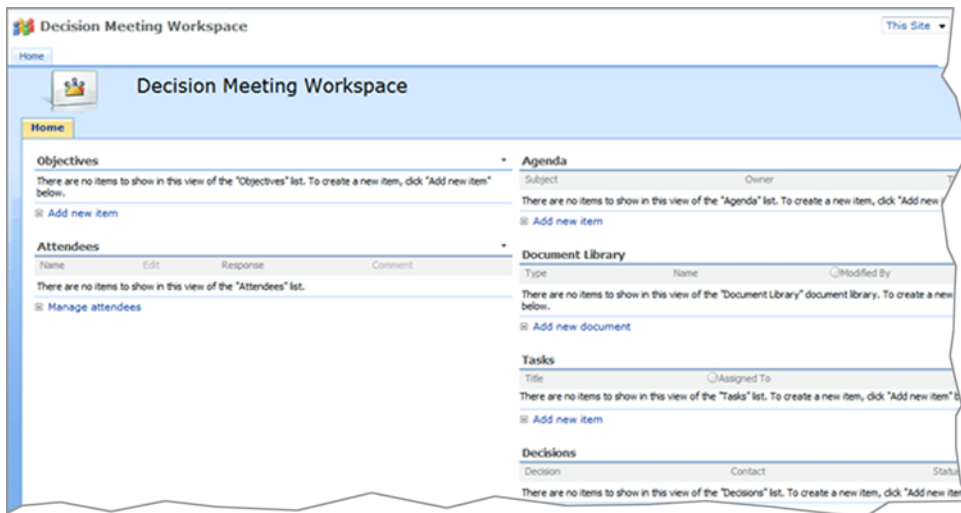
Figure 3.25 Out-of-the-box SharePoint Foundation site template for a Decision Meeting Workspace

Social Meeting Workspace template

A Social Meeting Workspace is a site for planning social occasions. It provides lists for tracking attendees, providing directions, instructions for what to bring, discussion boards, and storing pictures of the event. Notice how it organizes the information through the use of tabbed navigation, as shown in figure 3.26.

Figure 3.26 Out-of-the-box SharePoint Foundation site template for a social meeting workspace

The SharePoint Foundation web part components shown here are the custom lists Attendees, Directions, and Things To Bring. The other tabs offer a discussion board and photo library. I've seen several implementations of the tabbed meeting workspaces reused for other site purposes. You can always remove the custom web parts associated with the meeting from the template and customize it to make it your own.

Now let's discuss the last meeting template, which is another tabbed template for the Multipage Meeting Workspace.

Multipage Meeting Workspace template

A Multipage Meeting Workspace is similar to the Basic Meeting Workspace with the addition of two blank pages for you to customize based on your requirements. The tabs are shown in figure 3.27. I commonly see this template reused and renamed for other purposes because people love to have the tabbed web part to display multiple pages.

The SharePoint Foundation web part components shown here are a customized list for objectives, agenda, and attendees. Two blank pages have already been added for further customization. Even though there are only three pages displayed, you can add extra pages and delete existing pages using the Site Actions menu.

Before we dive into the next section, let's recap what you've learned. You now understand the core templates that come with the free version of SharePoint Foundation, but what you haven't seen yet are some of the more powerful site templates that come with SharePoint Server.
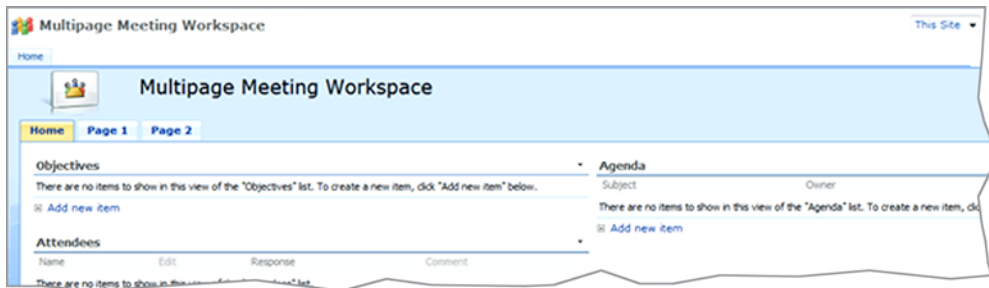
Figure 3.27 Out-of-the-box SharePoint Foundation site template for a Multipage Meeting Workspace

The next section will dive into the details of those templates. This is where you'll begin to learn about the business automation and application capabilities of SharePoint along with enhanced collaboration. Remember that users who have SharePoint Server can also use the templates we just reviewed.

3.3.4 Out-of-the-box site templates for SharePoint Server

The following sections will give a brief description along with a picture of each of the different SharePoint Server sites. To get started we'll cover those templates included in SharePoint Server Standard; in the next section we'll cover those in SharePoint Server Enterprise.

3.3.5 SharePoint Server Standard templates

In table 3.3 I provide a brief description of the templates that can be found in SharePoint Server Standard and follow it up with a detailed description and image of each.

Table 3.3 SharePoint Server Standard templates

| Template	Description
Enterprise Wiki	The Enterprise Wiki template's goal is to provide you typical functionality that you'd find in a wiki site. It helps you to share information by allowing the easy creation of multiple web pages that can be interconnected.
My Site Host	The My Site Host template is a site-collection template that can be created for each person who uses SharePoint to share information about them.
Personalization Site	The Personalization Site is a site within the My Site Host template that's available for each person who uses SharePoint to store their own documents, links, and the like.
Publishing Portal	This is a site-collection template that's typically used for an internet or intranet site. It has built-in processes for content approval and security measures to ensure anonymous users can access only certain content.

Table 3.3 SharePoint Server Standard templates *(continued)*

Template	Description
Publishing Site	The Publishing Site enables content authors to modify the page in a draft format prior to publishing to the end users.
Publishing Site with Workflow	The Publishing Site with Workflow is the same as the Publishing Site, with the additional of a workflow process built in for the approval of the content prior to publishing to end users.
Visio Process Repository	The Visio Process Repository is set up to help end users manage and share Visio documents.
Basic Search Center	This enables users to search for content within SharePoint along with various external sources, if configured.
Enterprise Search Center	The Enterprise Search Center provides the same search functionality as the Basic Search Center, but it has an additional tab so you can also do people searches.

Now that you understand at a high level the different site templates associated with SharePoint Server Standard, I'm going to go through each one in detail and provide a visual so you can see how it works. I'll start with the Enterprise Wiki template.

Enterprise Wiki template

One unique thing to note about the Enterprise Wiki is that all pages in SharePoint are now termed *wiki pages*. This new functionality was added to the SharePoint 2010 release, and it allows you to select any site page that you're editing and add content. Figure 3.28 shows an example of an Enterprise Wiki in edit mode, so you can see the different editing options available. All SharePoint pages can be edited in a similar manner.
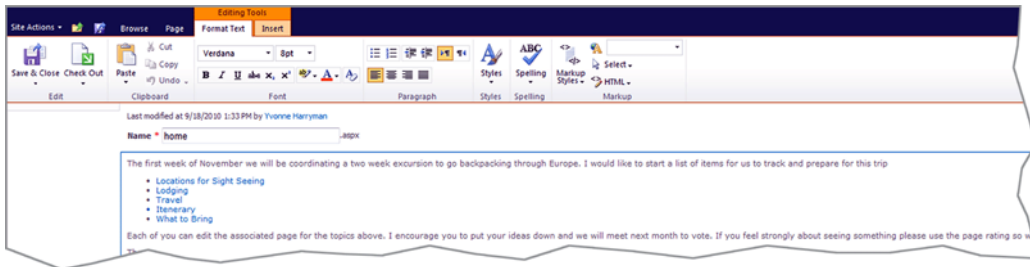
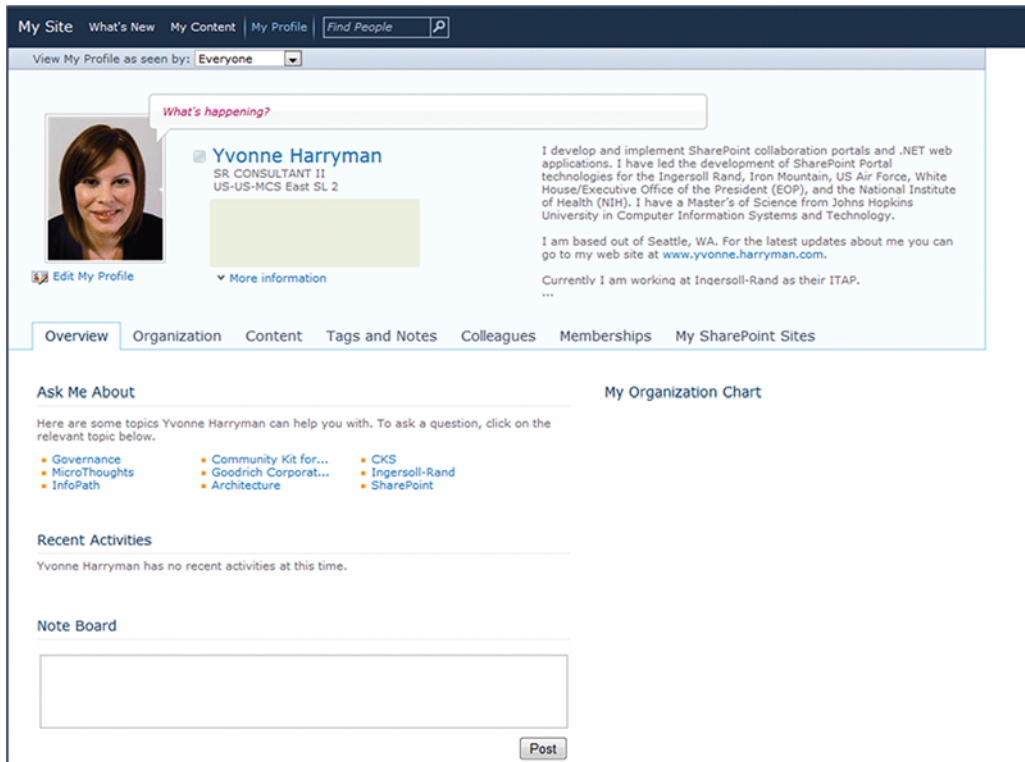**Figure 3.28** Out-of-the-box SharePoint Server site template for an Enterprise Wiki

The Enterprise Wiki template introduces some additional capabilities such as the ability to comment, rate, and categorize on the wiki page.

The next site template we're going to cover focuses on My Sites.

My Site Host template

If My Sites are configured in SharePoint Server, you'll have the ability to provide each of your end users with a site collection, which allows them to share information about themselves or organize their personal content. The My Site Host template is the public page that's tied to people search and allows users to share information. An example of my public page that I have up for Microsoft is shown in figure 3.29. Certain information is blocked out because I don't want to publicly distribute all of my details, but you can get a good idea of how it works from the information shown.

The next site template we're going to discuss is also tied to My Site. It's specifically focused on the end user's personalized view of their content.
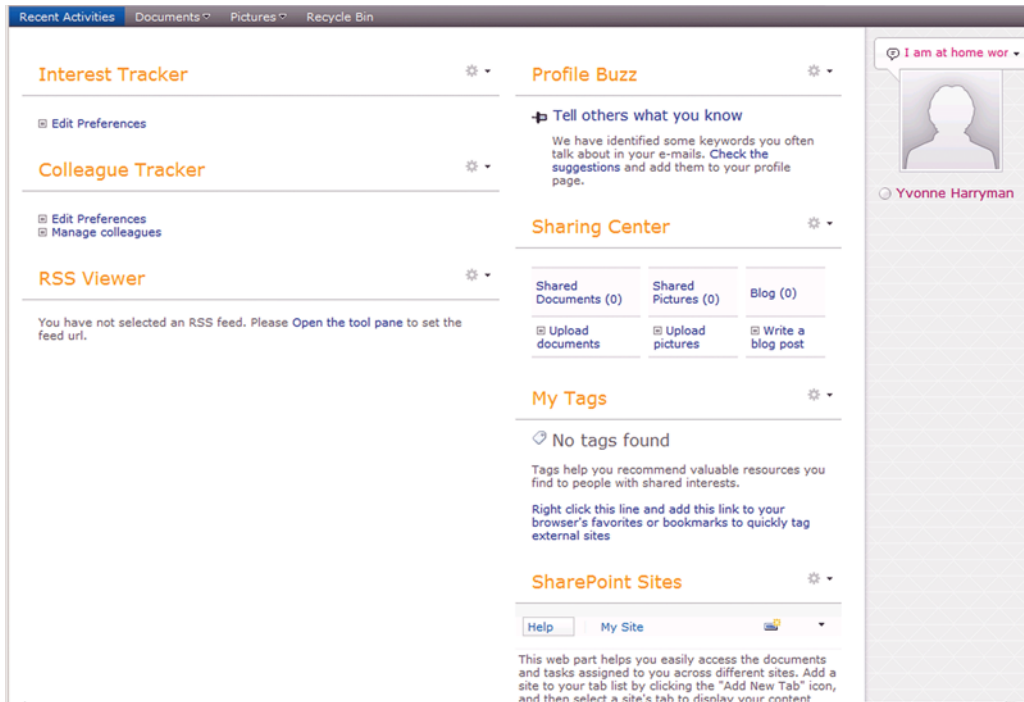
Figure 3.29 Out-of-the-box SharePoint Server site template for a My Site host

Personalization Site template

A Personalization Site is often added to a user's My Site. It's good for delivering personalized views of information for the user who accesses it. It includes personalization-specific web parts and navigation so you can track your colleagues, interest, sites, and the like. The Personalization Site is shown in figure 3.30.

Now that we've covered My Sites and you understand how to organize and share end-user information, let's discuss the most popular set of templates for sharing read-only content.

Figure 3.30 Out-of-the-box SharePoint Server site template for a Personalization Site

Publishing Portal, Site, and Site with Workflow templates

A publishing site is typically used if the process of sharing information needs to be formalized. A publishing site, regardless of it being a publishing portal, a publishing site, or a site with the publishing workflow added, will work and look like figure 3.31. A portal just means it's a site collection with a series of publishing sites as subsites; this is typically used for public-facing SharePoint sites or internal company portals. A publishing site or a publishing site with workflow is an individual site configured with publishing rules, which allows you to work on the content in draft format before enabling end users to see the information. This is the power of a publishing site, because it allows the content editors to work on draft versions of pages, which are not visible to readers until it's published. The page's editing toolbar is visible in the screen
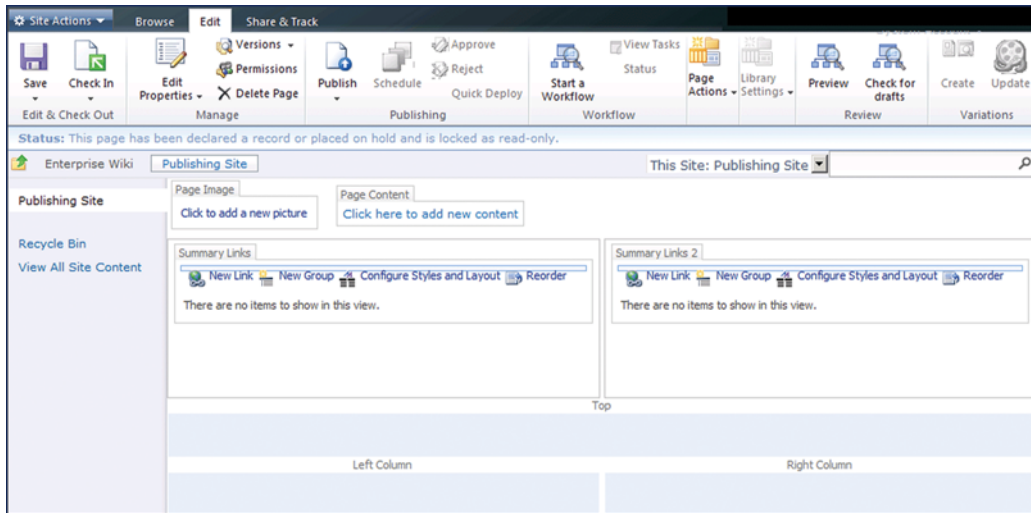
Figure 3.31 Out-of-the-box SharePoint Server site template for a Publishing Site

shot. The site does include some lists, such as a Document and Image library for storing web-publishing assets.

The key difference between the Publishing Site and the Publishing Site with Workflow templates is an approval process that's built into the Publishing Site with Workflow template. This template allows you to have a multilevel approval process for publishing a site and schedule when it can be displayed to the end users.

When you start part 2 and begin to build out the scenarios, you may want to consider starting from a Publishing Site rather than a blank site.

The next site template we're going to discuss is specific to Visio and organizing your process diagrams.

Visio Process Repository template

The Visio Process Repository template was added because of a common request regarding storing organization diagrams. The solution was a SharePoint site template where Visio users can leverage the SharePoint capabilities such as check in and check out, associating metadata with diagrams that are uploaded, and workflow for any required approval. To see the Visio library in action, take a look at figure 3.32.
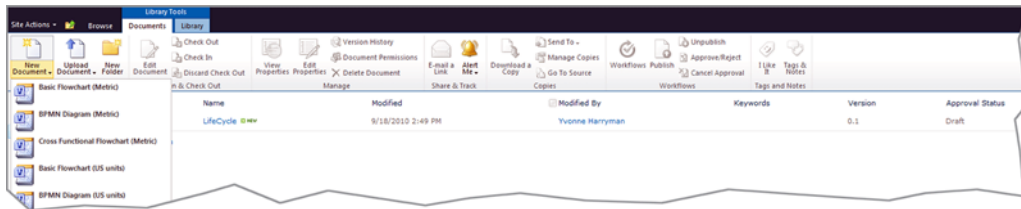
Figure 3.32 Out-of-the-box SharePoint Server site template for a Visio Process Repository

Wow, we've almost finished reviewing the site templates associated with the standard version of SharePoint. Without ever installing or playing with SharePoint, you should have a pretty good idea of what SharePoint has to offer. For our last two site templates, we're going to discuss search.

Basic Search Center template

This is your template for a basic search site. Here you'll have the basic search options, which display results to your end users based on keywords they enter. There'll also be some options for advanced search and the ability to filter your search results using the refinement panel on the left, as shown in figure 3.33.
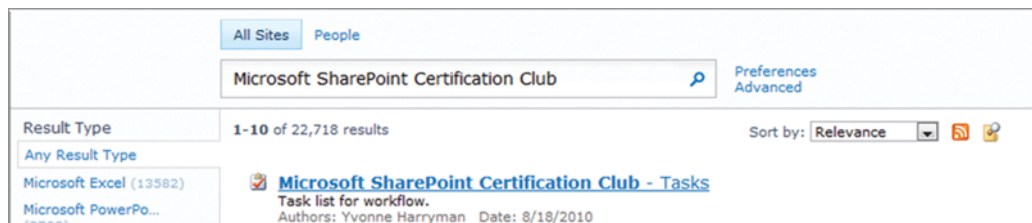
The next template we'll discuss is an additional search center template.
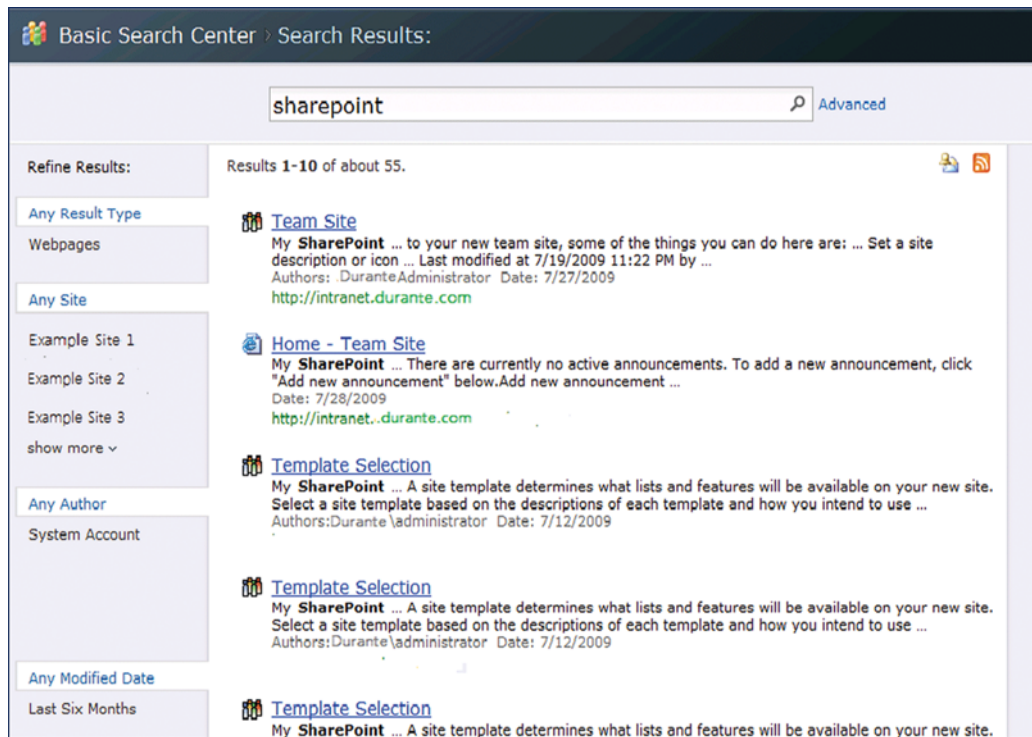
Figure 3.33 Out-of-the-box SharePoint Server site template for a Basic Search Center

Enterprise Search Center template

The Enterprise Search Center, shown in figure 3.34, is similar to the Basic Search Center with the exception that it has a People tab so you can search for people.

Figure 3.34 Out-of-the-box SharePoint Server site template library for an Enterprise Search Center

We have one more set of templates to go through, and then you'll know what's available to you out of the box. This is important to understand before diving into the instructions for creating your own custom site templates. The last series of templates we're going to discuss is associated with the Enterprise version of SharePoint Server.

3.3.6 SharePoint Server Enterprise templates

The highest version of SharePoint that you can have is Enterprise. This will give you access to all the functionality and all the site templates that we've already covered in the previous templates. To begin, I'll list in table 3.4 the site templates that are unique to Enterprise and provide a brief description of their purpose. I'll then dive into each one and show a visual example it. These templates have been organized into Enterprise templates and followed by templates specific to Access Services.

Table 3.4 Enterprise templates

Template	Description
Business Intelligence Center	The Business Intelligence Center is known for hosting information that we refer to as BI. It also has the capability to link to content from Performance Point Services.
Document Center	If you need one central repository for documents across the enterprise, you can use the Document Center.
Records Center	The Records Center helps route and store files in compliance with the company's records management policy.
FAST Search Center	The FAST Search Center enables some enhanced search capabilities and provides document previews.
PowerPoint Broadcast Center	The PowerPoint Broadcast Center is a site collection that allows presenters to create a link for viewers to watch a slide show with them as they flip through it.
Assets Web Database	The Assets Web Database enables you to manage your active and retired assets along with their value.

Table 3.4 Enterprise templates *(continued)*

Template	Description
Charitable Contributions Web Database	The Charitable Contributions Web Database allows you to manage many different campaigns and the events associated with them along with any fundraising goals and donations received.
Contacts Web Database	The Contacts Web Database helps you to manage your contacts.
Issues Web Database	The Issues Web Database helps to track issues, their status, and resolution of the issues.
Projects Web Database	The Projects Web Database helps you track multiple projects and the tasks and status of those tasks associated with the project.

Now we'll go though each of these templates, and I'll provide an image of them so you can get a better idea of how they work. To begin, we'll discuss the Business Intelligence Center.

Business Intelligence Center template

The Business Intelligence Center can be tied to Performance Point Services or it can be used standalone. It allows you to track status indicators to measure performance. We'll step though an example of configuring status indicators in chapter 9. You can publish and share your Excel spreadsheets using Excel Services or create rich dashboards pulling from Performance Point and Excel Services. The Business Intelligence Center is shown in figure 3.35.

If you need to do some knowledge mining on data you have, the BI features included in SharePoint and grouped together in the Business Intelligence Center template are a good place to start.

The next set of templates we'll discuss is focused on the centralized storage of documents and records.
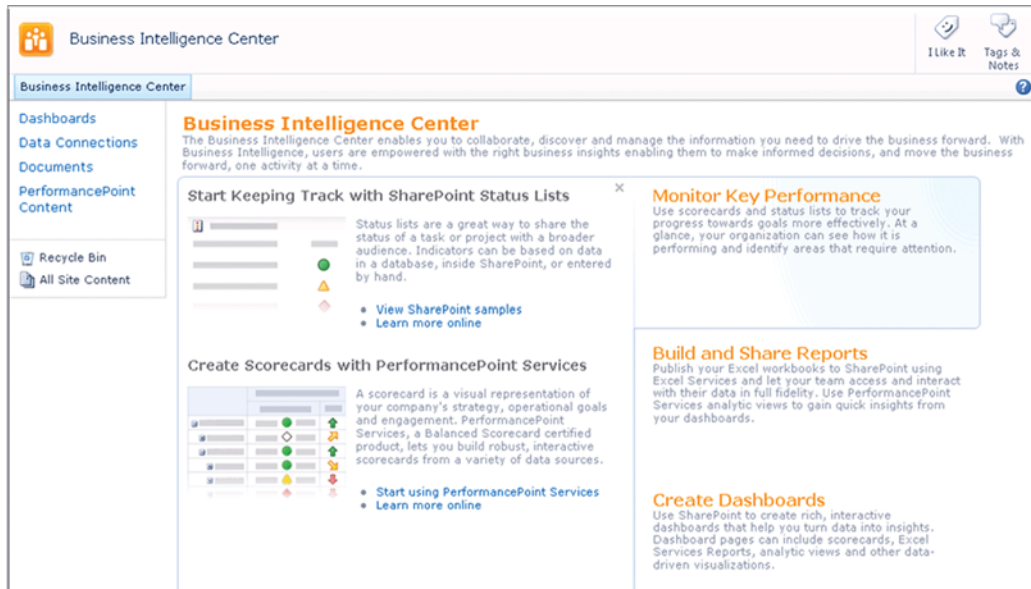
Figure 3.35 Out-of-the-box SharePoint Server site template for a Business Intelligence Center

Document Center template

> The Document Center is a site you'd create if you chose to create a central repository for the documents in your enterprise. It provides tree-view navigation, and you can use the relevant document web part on this site to help you manage a large number of documents. Certain document-management features are enabled on this template such as versioning and required checkout. New features since 2007 include the creation of a unique ID upon creation, which can be used to look up documents, enterprise metadata, ratings, and document sets. The Document Center homepage is shown in figure 3.36.
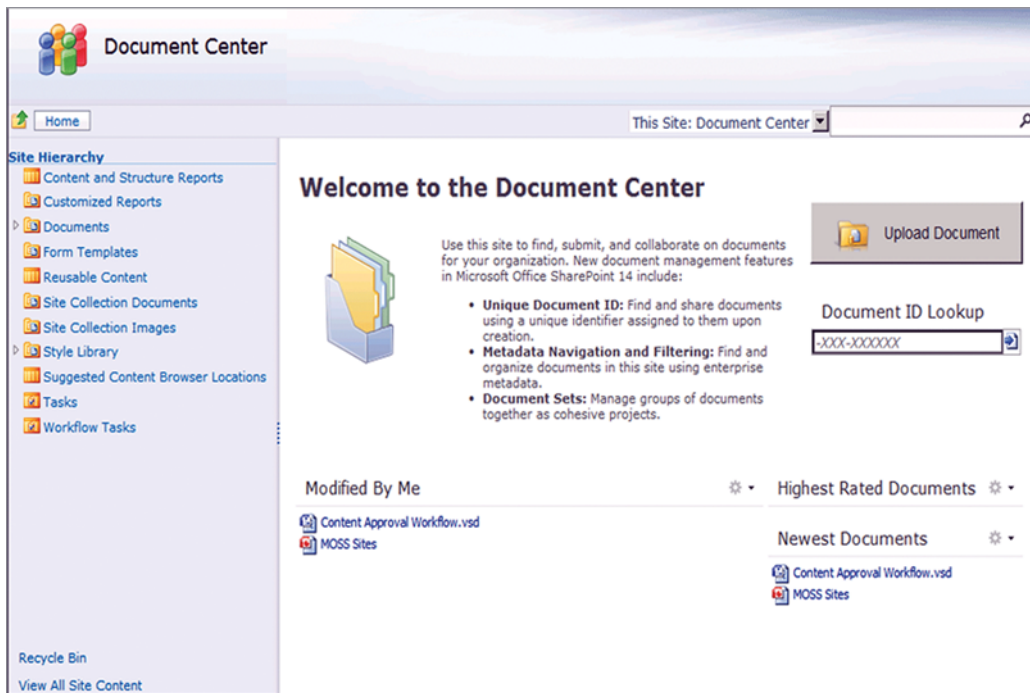
Figure 3.36 Out-of-the-box SharePoint Server site template for a Document Center

If you go into the Document Center you'll see some additional features such as the enhanced capabilities to filter though documents. This is shown in figure 3.37.

Similar to the Document Center template is the Records Center template, which is focused on capturing any documents that are considered records.

Records Center template

The Records Center is a site for records management and storage of documents that require long-term archival; it isn't meant for collaboration. Records managers can configure the routing table to direct incoming files to specific locations based on the type of record. Records can't be modified after they're added to this repository. The Records Center is shown in figure 3.38.
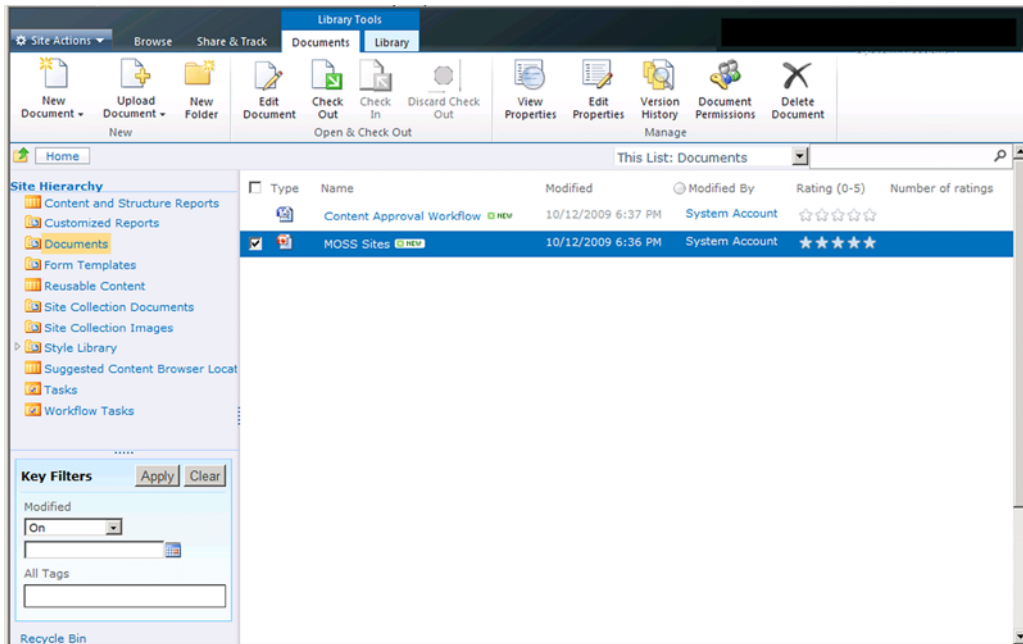
Figure 3.37 Document Center enhanced features

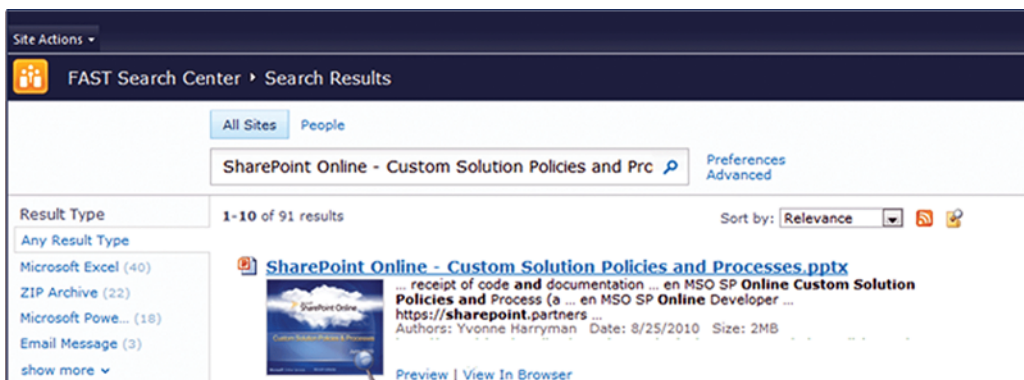**Figure 3.38** Out-of-the-box SharePoint Server site template for a Records Center

You should have a good idea now of your enhanced capabilities for centrally storing documents. The next template that we're going to discuss, the FAST Search Center template, will help you to later find that content.

FAST Search Center template

If you license FAST, it offers you additional search capabilities such as these:

- Search enhancements to return items based on your prior search history and email content
- Perform a new search based on certain search results
- Sort results based on managed properties
- Refine results based on metadata for all returned items
- Display document previews, as shown in figure 3.39

You now have lots of new knowledge of the capabilities to manage documents and records and search on your content. Let's quickly discuss a new template that helps you to broadcast your content using the PowerPoint Broadcast Center.

Figure 3.39 Out-of-the-box SharePoint Server site template library for a FAST Search Center

PowerPoint Broadcast Center template

The PowerPoint Broadcast Center is a site-collection template. You can configure this so that you can share a presentation with end users by selecting in PowerPoint that you'd like to broadcast the slide show. PowerPoint will then go through a series of steps in which you can select the Broadcast Center, and it will generate a link for you that you can send out to end users. The PowerPoint screen will appear, as shown in figure 3.40, which is how you know you're broadcasting your presentation via the PowerPoint Broadcast Center. Any end users who go to the site will be watching the presentation with you as you go through the slides.
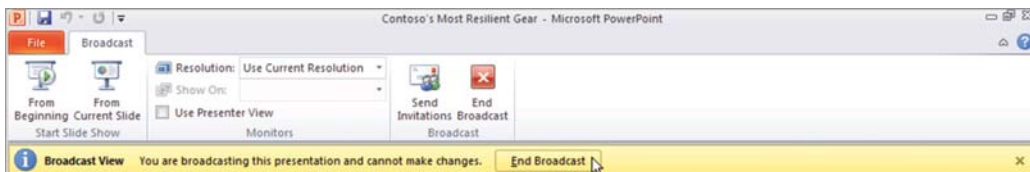
Figure 3.40 PowerPoint Broadcast Center

The next series of templates that we're going to discuss is associated with Access Services.

3.3.7 SharePoint Server Access Services templates

These templates use Access to create an application that maintains the information in an Access database versus a SharePoint list. In chapter 11 we'll walk through a scenario where you set up an Access database and use Access Services. To begin, let's see what's already configured and set up for you using the site templates.

Assets Web Database template

The first Access Services site template that we'll discuss is the Assets Web Database template, as shown in figure 3.41. There are four main tabs to help you manage and track current assets. In this image we're focused on the reports of the assets that have been entered. If you needed to track your assets and their value, this is a great application to use.
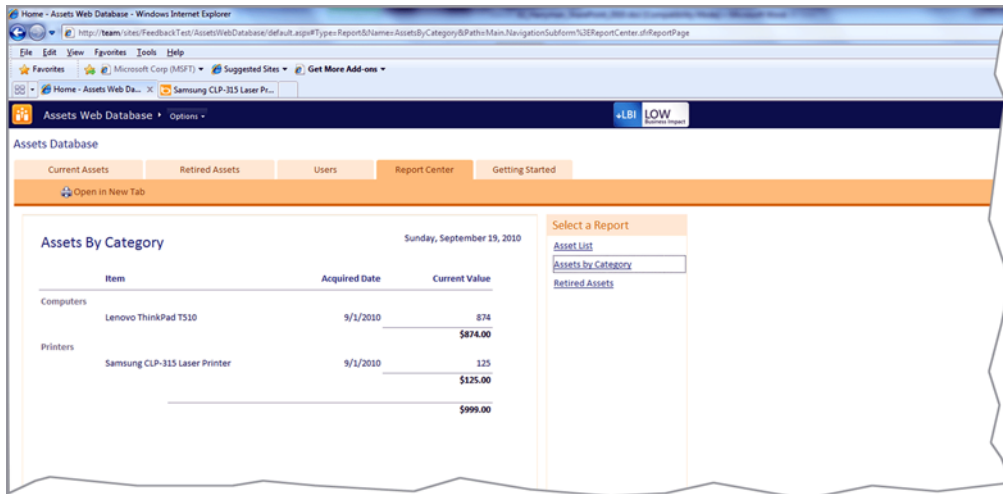
Figure 3.41 Out-of-the-box SharePoint Server site template library for an Assets Web Database

The next Access Services template we'll discuss is focused on the management of charities.

Charitable Contributions Web Database template

The Charitable Contributions Web Database allows you to track various charity campaigns and associate multiple events with each campaign. An example of entering the details of a campaign is shown in figure 3.42. Here you can enter the fundraising goal and track donations received in association with the various events.

This is a great and easy way to manage a nonprofit without have to buy or design and build an application. The next site template we'll look at is the Contacts Web Database template.

Contacts Web Database template

The Contacts Web Database is useful for tracking contacts that need to be shared with a team. For example, if your company has many clients, this would be good to use to track and share information about your clients. There's a Notes section as well, so you can enter specific information about a person to share with the team. I've entered myself as an example contact in figure 3.43, so you can see the Contacts Database in action.

Figure 3.42 Out-of-the-box SharePoint Server site template library for a Charitable Contributions Web Database

Figure 3.43 Out-of-the-box SharePoint Server site template library for a Contacts Web Database

	ID	Summary	Status	Resolution	Priority	Assigned To	Opened By	Category	Opened Date
✎	(New)	Unable to create a My Site	4 - Closed	Fixed	1 - Critical	Yvonne Harryman	Yvonne Harryman	Permissions ▾	9/19/2010
✦	(New)		1 - New		1 - Critical		Yvonne Harryman		9/19/2010

Figure 3.44 Out-of-the-box SharePoint Server site template library for an Issues Web Database

The next Access Services template we'll discuss is the Issues Web Database template.

Issues Web Database template

The Issues Web Database can help you track active and closed issues. They can be assigned and categorized. An example of entering issues is shown in figure 3.44. This would be a great template to use for a help desk to log problems and track their status.

The last Access Services template that we'll cover is the Projects Web Database template.

Projects Web Database template

The Projects Web Database can help you track multiple projects and the tasks associated with each project. If you were to use this, I'd suggest tracking key milestones for each project and using the Project Site template, which we discussed earlier, for the details. This is a good template to use for tracking at a high level the status of many projects. I've entered an example project with tasks in figure 3.45. I'm tracking tasks associated with the completion of my SharePoint 2010 book. If you were to continue building out that scenario, I'd recommend having Manning enter all of their books in production and having each chapter be a key milestone. The editors could then update the chapters as they're completed, and the publishers could check this site at any point to see the overall status of the many different books being prepared for publication.

You now have a really good idea of most of the capabilities of Share-Point out of the box, and you've never even opened SharePoint. This

Figure 3.45 Out-of-the-box SharePoint Server site template library for a Projects Web Database

chapter is great for showing you what SharePoint can do without any customizations. If you read only this chapter, I'd say you're well versed in what SharePoint is. Let's summarize what you've learned.

3.4 Summary

You now have the foundation of SharePoint sites and what you can get out of the box. You should have a good understanding of the following:

- The different lists and libraries that are available
- What a web part is
- Out-of-the-box site templates for SharePoint Foundation
- Out-of-the-box site templates for SharePoint Server Standard
- Out-of-the-box site templates for SharePoint Server Enterprise
- Meeting site templates
- Access Services site templates
- Search site templates
- How you can leverage this functionality

Now we can get into the muscle of SharePoint and discuss what you can do as a power user to customize and create your own site templates. The rest of the book will continue teaching the fundamentals of

SharePoint through a scenarios-based approach. This will help you envision the different possibilities and get you on your way to creating customized sites for your own use. So let's get started with the fun part. Part 2 covers the scenarios found in this book. If you don't have access to an environment to build out these scenarios, appendix A has been provided to walk you through the steps to create your own SharePoint test or development environment.

SharePoint 2010

Yvonne M. Harryman

Site Owner's Manual

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This book is a guide for business users without programming skills who want to build their own SharePoint sites. With it, you'll learn how to set up document sharing, trackable workflows, and many other business applications. You'll go step-by-step through real-world scenarios like content management, business intelligence, sharing information on the web, and search. Along the way, you'll learn how to interact with other business tools like Access, InfoPath, and SharePoint Designer.

What's Inside

- Go from user to *power* user
- Build on out-of-the-box features
- Customize your SharePoint site

This book is designed for SharePoint users who want to become tech-savvy in configuring SharePoint's out-of-the-box functionality. No programming or system administration experience is required.

Yvonne M. Harryman is an Architect at Microsoft, specializing in SharePoint technologies. She has implemented and designed SharePoint solutions for clients such as the White House, US Air Force, National Institute of Health, Iron Mountain, Ingersoll-Rand, and many others.

For online access to the author and a free eBook for owners of this book, go to manning.com/SharePoint2010SiteOwnersManual

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