Big Wins with Document Libraries and Search

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Agenda

- 🌐 Creating document libraries
  - 🌐 Deploying shortcuts to frequently used libraries
- 🌐 Working with content types
  - 🌐 Custom templates for new documents
- 🌐 Configuring & managing document metadata
  - 🌐 Exposing and inserting SharePoint metadata within Office documents
- 🌐 Organizing & managing content
- 🌐 Tracking library activity
- 🌐 Check Out
- 🌐 Search

Agenda

- Creating document libraries
- Working with content types
- Configuring & managing document metadata
- Organizing & managing content
  - Views versus folders
  - Reports and search
- Tracking library activity
  - Tips for effective email alerts
- Check Out
  - Delegating the Override Check Out permission.
- Search

Creating a Discoverable Document Library
Best Practices & Underdocumented Guidance
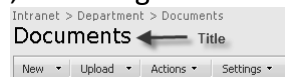
Configure an easy URL

- User-friendly library URL
  - Easy for users to read, remember & type
  - No spaces!
    - They become %20 in the URL
  - Short!
    - Do not reach URL length limit
  - Consistent case (MixedCase or lowercase)
    - URLs are not case sensitive in IIS web applications

Configure library URL and name

- View All Site Content → Create *or*
  Site Actions → Create
  - **Configure Name as URL**
    - Name becomes both the library URL and Title
    - The URL can't easily be changed after library has been created
    - Title can be changed to a "human friendly" name later
    - Do *not* add the URL-friendly name to Quick Launch
- Settings → Document Library Settings
  - Title, description, and navigation

  Intranet > Department > Documents
  Documents ◄—— Title
  New ▾   Upload ▾   Actions ▾   Settings ▾

  - Manage List permission
  - Design permission level
  - Owners group

  - Configure user friendly Title
    - To correct the URL-friendly Name when creating library
  - *Now* add library to the Quick Launch

Favorites
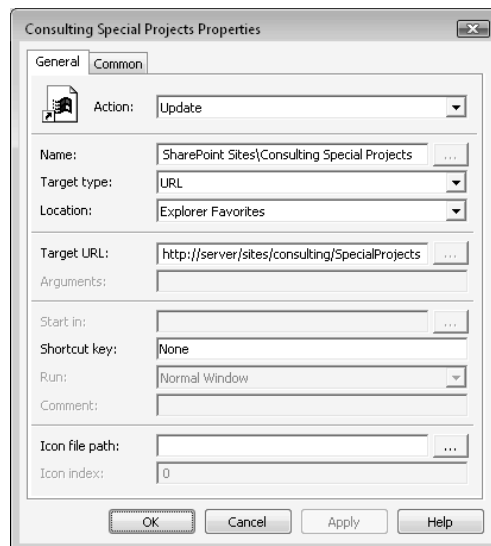
- Use Group Policy to deploy Favorites to important document libraries
  - Shortcuts preference

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Shortcuts Preference

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Favorites

- Use Group Policy to deploy Favorites to important document libraries
  - Shortcuts preference
- Group Policy Preferences
  - One (and only one) Vista SP1 or Server 2008 system
    - Provides the newest version of the Group Policy Management Editor to configure the policies
  - Group Policy Preferences client side extensions
    - XPSP2+
    - WS2003 SP1+
    - A Windows Update (WSUS)

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Navigate with Network Locations

- Give users shortcuts to document libraries
  - Network Locations (Vista)
    - Created in the COMPUTER folder
  - Network Places (XP)
    - Created in the MY NETWORK PLACES folder
- Using Network Locations/Places
  - Save & Open commands
    - Vista: Click Computer in the Favorite Links bar
    - XP: click the My Network Places link in the Places bar
  - Office 2007: Publish → Document Management Server

Deploy Network Locations/Places

- Deploy Network Locations (Vista)
  - Copy Network Location to a shared folder on a server
  - Copy "down" to clients: %appdata%\Microsoft\Windows\Network Shortcuts
  - Sample copy command:
    - xcopy "\\server\demos\Consulting Special Projects" "%appdata%\Microsoft\Windows\Network Shortcuts\Consulting Special Projects" /h /e /k /i
- Deploy Network Places (XP)
  - Copy Network Place to a shared folder on a server
  - Copy "down" to clients: %userprofile%\NetHood
  - Sample copy command:
    - xcopy "\\server\demos\Consulting Special Projects" "%userprofile%\NetHood\Consulting Special Projects" /h /e /k /i

Templates
Provide templates in document libraries

Create A Site Content Type

- Site Actions → Site Settings → Site Content Types → Create
  - Name and Description
  - Parent content type: Document Content Types \ Document
  - Put site content type into a group
- Advanced Settings: Document template
  - Use the UPLOAD option!

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Using Content Types In A Library

- Enable multiple content types in a library
  - Settings → Document Library Settings → Advanced Settings
- Add multiple content types to the library
  - Settings → Document Library Settings → Advanced Settings → Add from existing site content types
- Change button order (1 = default for New)
- Remove default Document content type
- Documents started from library template will save to library by default
  - Will not "overwrite" template

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Columns

Manage content metadata

Overview

- SharePoint "columns"
  - Fields, attributes, properties, metadata
  - Organize and manage content: views, reports, alerts
  - Describe and locate content: search
- Define a column
- Associate column with content type
- User enters metadata
  - Upload: In browser
  - SharePoint compatible applications: Inline
  - Word 2007: QuickParts
- Create custom views, reports, alerts…

Site columns

- Create site columns
  - Site Actions → Site Settings → Site Columns → Create
    - Column will be available to site and all sub-sites
    - Recommend creating columns in the top-level site of the collection
  - Configure the Description for columns that are not self-explanatory
  - Choice columns: set Default Field to blank or <Select One>
  - Site column groups simply 'organize' site columns
    - No technical impact of your choice
    - Can move columns between groups
- Add site columns to your content types
  - Site Actions → Site Settings → Site Content Types
  - Click the content type
  - Add from existing site column

User experience

- SharePoint interface exposes columns when you
  - Upload a document
    - Required column empty → document not checked in / visible
    - Great reason for requiring check out on libraries!
  - View document properties
    - Document's edit menu → View Properties command
  - Edit document properties
    - Document's edit menu → Edit Properties command
- Applications expose columns
  - Office 2007:Document Information Panel
  - Office 2003: Shared Workspace Task Pane

Inserting columns into templates

- Possible in Word 2007

- Open a new document of the specified content type
- On the INSERT tab of the Ribbon, choose QUICK PART
- Choose the SharePoint Column from the DOCUMENT PROPERTY list
- Save the resulting template to your template repository, replacing the original template

Views, folders, reports

Organize and manage content

Views

- Views
  - Which columns are (and are not) visible
  - Sort, filter, group
- Use columns (metadata) to create Views
  - Settings → Document Library Settings → Create view
    or Settings → Create view
  - Public views, Default view, User (personal) views
  - Alerts on lists can be based on views
- Views are always security trimmed
  - You will not see what you do not have permissions to read
- Try to avoid >2000 items or documents in a *view*
  - You can have millions of documents in a library but...
  - Performance starts to degrade if the *view* shows > 2000
  - Create indexed column then view that filters with it

Folders

- Create folders
  - Doc library settings → Advanced Settings
  - New → Folder
- Don't go "deep"
  - Open with Explorer fails if URL > 260 characters
- Views can show all documents in a library including those in folders.
  - The Folders setting for the view specifies whether the view presents results in a flat list or in folders
  - Again, watch out for >2000 items in a flat view

Folders

- Use views wherever possible
- Reasons to use folders
  - Unique security permissions
    - A folder can scope permissions for all its documents
  - If you have more than 2000 items
    - Better to use a view that filters to < 2000 items than to 'subdivide'
  - Outlook synchronization
    - When you connect a document library to Outlook, you take all documents in the selected folder and its subfolders
    - Create subfolders to create 'subsets' of documents that users can take offline with Outlook
- **Use views wherever possible**
  - **"Group By" creates effect like a folder**

Reports

- Reports & analysis
  - Actions → Export to spreadsheet

Alerts and RSS

Track and monitor changes

Alerts

- Configuring alerts
  - Always change the default title to be more descriptive!
  - Which changes
    - All, New Edit, Delete
  - Which documents
    - All
    - All changes except those I made
    - Just documents I was involved with creating or modifying
    - **Items that appear in a view**
      - Allows you to filter alerts!
      - Only appears if you have more than one view defined
    - List-specific alerts (e.g. calendar "time/location change")
  - When to get alerts
    - Immediately
    - Daily
    - Weekly

Alerts

- Managing alerts
  - Users with "Create Alerts" permission can create alerts for others
  - Can create alerts for a *group*
    - AD group: goes to *group's* email address
    - SharePoint group: goes to each member
  - Can create alerts based on a *search*

RSS

- Configuration
  - All document libraries & lists in SharePoint are RSS-enabled by default
- Use
  - View library as an RSS feed
  - Subscribe
  - Read using your favorite RSS aggregator
    - IE7
    - Outlook 2007
    - NewsGator
    - etc.

Check Out
Control Document Editing

Overview

- Control document editing
  - Prevent multiple users from making potentially conflicting changes to a single document
- Configuration
  - Default: enabled but not enforced
  - **Enforce check out requirement**
    - *Highly* recommended ('required') for libraries that are not "read only"
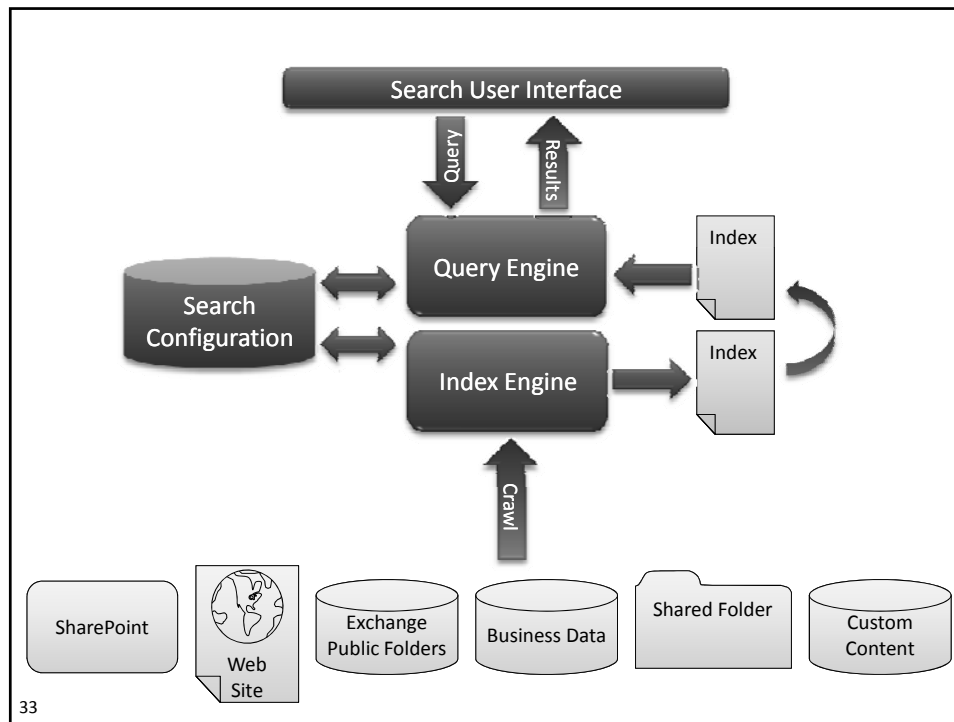 - Settings → Document Library Settings → Versioning Settings → Require Check Out

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Override Check-Out permission

- Allows
  - Check-in a document checked out by another user
  - Discard check-out
- A SharePoint permission
  - Included in Full Control
- Create a permission level ("role")
  - Perhaps with *only* Override Check Out
- Create a role assignment
  - Assign the permission level to a SharePoint or Active Directory group

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Search
SharePoint and Beyond

Search User Interface

Query   Results

Query Engine

Index

Search Configuration

Index Engine

Index

Crawl

SharePoint   Web Site   Exchange Public Folders   Business Data   Shared Folder   Custom Content

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Search

- Search as an enterprise service
- Index all content in SharePoint sites
  - Libraries
  - Lists
- Index content outside of SharePoint
  - File shares
  - Exchange public folders
  - Web sites
  - Databases via Business Data Catalog

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Indexing

- Search service indexes documents automatically
- Can *disable* search for a library
  - Document Library Settings → Advanced Settings
  - Not necessary in most scenarios
    - Search result lists are always "security trimmed"
      (users only see results they have permission to)

Indexing

- Only listed extensions will be crawled
  - SharePoint indexes most Office file types
- Extensions require a valid iFilter
  - Add to server (MOSS: index server)
  - Microsoft iFilter pack KB946336: OneNote, ZIP, Visio
  - **ifilter for document types you want indexed
    (e.g. for PDF)**
    - Best guide see OfficeSharePointPro.com
    - FoxIt Software and Adobe have x32 & x64 PDF ifilters
    - iFilter.org – third-party iFilters
- Perform full crawl after adding iFilters in order
  to index existing content

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Content sources

- Central Admin → SSP → Search Settings
- Content sources and crawl schedules
- New content source
- URL (e.g. file://server/share)

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Managed properties

- Central Admin → SSP → Search Settings
- Metadata property mappings
- New managed property

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Customize the search UI

- Search Center → Advanced Search
- Site Actions → Edit Page
- Advanced Search web part → Modify Shared Web Part
- Properties
- <PropertyDefs>:
<PropertyDef Name="CrawledProp" DataType="text" DisplayName="Crawled Property" />
- <ResultType…> after <Query/>:
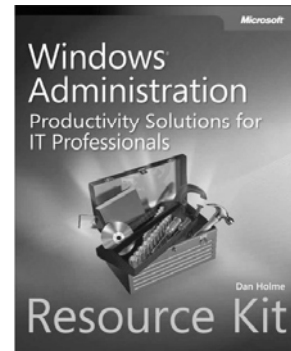<PropertyRefName="CrawledProp"/>
- OK
- Publish

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Search

- High value for enterprise
  - Typical user has access to 3GB of data
- Search options
  - WSS + Search Server Express (MSS Express)
    - Single query/index server
  - WSS + Search Server or MOSS
    - MOSS Search & Search Server features now at same level

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Resources

- www.officesharepointpro.com
- *Windows IT Pro* magazine
- *Windows Administration Resource Kit: Productivity Solutions for IT Professionals*
  - Solutions Collection 4: SharePoint Document Libraries
- Blog http://share.intelliem.com
- danh@intelliem.com
- Q & A

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