



Introduction to Microsoft Office SharePoint Server 2007

Overview

Office SharePoint Server 2007 is a new server program that is part of the 2007 Microsoft Office system. Your organization can use Office SharePoint Server 2007 to facilitate collaboration, provide content management features, implement business processes, and supply access to information that is essential to organizational goals and processes.

You can quickly create SharePoint sites that support specific content publishing, content management, records management, or business intelligence needs. You can also conduct effective searches for people, documents, and data, participate in forms-driven business processes, and access and analyze large amounts of business data.

In addition, Office SharePoint Server 2007 is designed to work effectively with other programs, servers, and technologies in the 2007 Office release. For example, in many 2007 Office release programs, you can initiate or participate in workflows, which are the automated movements of documents or items through specific sequences of actions or tasks that are related to a business process, such as the approval process for an expense report.

The following list offers examples of how specific 2007 Office release programs work with Office SharePoint Server 2007:

Microsoft Office PowerPoint 2007 Create a library of PowerPoint slides that can be shared with other users on an Office SharePoint Server 2007 site.

Microsoft Office Access 2007 Take a SharePoint list offline and use the reporting features in Office Access 2007 to view the data and create reports while travelling. Forms and reports that use the SharePoint list are fully interactive — and Office Access 2007 can later synchronize the local list with the online list when you bring your laptop back online.

Microsoft Office Outlook 2007 Take document libraries offline. SharePoint folders are displayed just as other Outlook folders are.

Microsoft Office InfoPath 2007 Design browser-compatible form templates, publish them to an Office SharePoint Server 2007 site, and enable them for use in a Web browser.

Microsoft Office Excel 2007 Save worksheets on a SharePoint site so that users can access them by using a browser. You can use these worksheets to maintain and efficiently share one central, up-to-date version, while helping to protect any proprietary information, such as financial models, that is embedded in the worksheet.

Microsoft Office SharePoint Designer 2007 Create and customize Office SharePoint Server 2007 sites and workflows. Create your own master pages and content pages, so that your site has a consistent look and feel, or customize sites by using the latest ASP.NET technology, established Web standards such as Extensible Hypertext Markup Language (XHTML) code, and cascading style sheets.

Office SharePoint Server 2007 and Windows SharePoint Services

If you have heard about Microsoft Windows SharePoint Services, you may wonder how it relates to Office SharePoint Server 2007. Windows SharePoint Services is a technology that is included in Microsoft Windows Server 2003. Windows SharePoint Services helps teams stay connected and productive by providing easy access to the people, documents, and information that they need to make well-informed decisions and get work done.

Office SharePoint Server 2007 relies on the Microsoft Windows SharePoint Services 3.0 technology to provide a consistent, familiar framework for lists and libraries, site administration, and site customization. Any features that are available in Windows SharePoint Services 3.0 are also available in Office SharePoint Server 2007.

However, Office SharePoint Server 2007 offers enhanced and additional features that are unavailable on a Windows SharePoint Services site. For example, both Office SharePoint Server 2007 and Windows SharePoint Services include site templates for collaborating with colleagues and setting up meetings. However, Office SharePoint Server 2007 includes a number of additional site templates that are related to enterprise and publishing scenarios. Similarly, Office SharePoint Server 2007 enhances the search technology from Windows SharePoint Services 3.0 to include features that are useful for employees in large

organizations, such as the ability to search for business data in SAP, Siebel, and other business applications.

Collaboration

By using the following features in Office SharePoint Server 2007, you can work more efficiently and effectively with other people in your organization:

Use site templates to collaborate or manage meetings When you create a new Office SharePoint Server 2007 site, you can start by selecting one of several different kinds of site templates for collaborating with other people and managing meetings. The site templates in the Collaboration group are designed to help teams within an organization work on projects and collaborate on documents. For example, by using the Document Workspace site template, you can work with other people on a document or a set of documents. The site templates in the Meetings group are designed to help teams within an organization manage different kinds of meetings. The templates in this group support everything from basic meetings to decision-focused meetings or even social events.

Share documents, contacts, tasks, and calendars You can synchronize your Office SharePoint Server 2007 calendar with Office Outlook 2007. You can enter all-day events and specify more types of repeating, or recurring, events. You can track team projects more effectively with visual day and month views.

Brainstorm easily with wiki sites A wiki site enables you to brainstorm ideas, collaborate on a team design, build an encyclopedia of knowledge, or just gather routine information in a format that is easy to create and modify. Your team members can contribute to wikis from their browsers — they don't need a word processor or special technical knowledge.

Share ideas with blogs A blog, or weblog, consists of frequent short posts that are displayed in order, starting with the most recent post. With Office SharePoint Server 2007, it just takes a few clicks to create a blog, post to a blog, subscribe to updates to a blog, or customize a blog.

Receive updates to lists and libraries with RSS Lists and libraries use Really Simple Syndication (RSS) technology, so that members of your workgroup can automatically receive updates. RSS is a technology that enables people to receive and view updates or *feeds* of news, blogs, and other items of interest in a consolidated location.

Manage projects You can create a **Project Tasks** list, which includes a Gantt chart. A Gantt chart is a type of visual overview of project tasks that you can use to monitor the dates and progress of team tasks.

Get mobile access to content You can view portals, team sites, and lists on a mobile device to help you stay current on team projects and tasks when you are travelling. For example, lists appear on phones (or other telecommunications devices that support international standards) in a simplified text format, with a link to scroll through the content of each page.

Send e-mail to Office SharePoint Server 2007 You can use an e-mail program to participate in discussions, meetings, and documents on an Office SharePoint Server 2007 site. Just as you send e-mail messages to your team to discuss tasks and projects, you can also send e-mail messages to an Office SharePoint Server 2007 site or to a specific list or library.

Manage documents and some types of lists offline You can take your important work with you wherever you go. With Office Outlook 2007, you can work offline on files in a library and items in the following types of lists: calendars, contacts, tasks, and discussions. When you connect back online, you can update your files on the server. List items are updated automatically.

People and personalization

By using the following features in Office SharePoint Server 2007, you can connect to people within your organization who have the right skills, knowledge, and project experience:

Store and share information on your My Site You can store your content, links, and contacts on your personal My Site. Your My Site also serves as a point of contact for others to find information about you. You can use your My Site to present information about yourself, such as your skills and roles, your colleagues and managers, the groups and distribution lists that you belong to, and the documents that you are working on. Each site contains stringent privacy control and security mechanisms so that you can choose how much information to present and to whom. A separate My Site is available for every Office SharePoint Server 2007 user.

Manage who can see your information You can use the privacy settings on your public My Site content to restrict the people with whom you share information on your site. This can be useful when you want to share personal information such as your mobile phone number with only your workgroup or your manager.

Target information to specific audiences You can display content such as list or library items, navigation links, and entire Web Parts to specific groups of people. If you have the appropriate permission, you can target any item in a SharePoint list or library to specific audiences by using the Content Query Web Part. You can also target any other type of Web Part and its contents to a particular audience. In addition, you can target site navigation links to audiences. Targeting content simplifies the user experience, because users see only the information and navigation links that are relevant to them.

Search

Finding the right information or person is what search is all about. You can use the powerful search-related features in Office SharePoint Server 2007 to find exactly what you are looking for, such as the people who have the expertise that you need to get your job done.

Search from the Search Center The Search Center site provides a central location for initiating queries and browsing search results. If you add information about yourself to your My Site page, other people in your organization can use the Search Center to locate you, information about your projects, and your contacts.

Find documents on your intranet You can search for documents that contain a specific word or phrase, that are written in a specific language, that are created in a specific application, or that have specific properties.

Find people on your intranet Finding the right person can be critical for getting things done quickly. You can search for someone by name, or you can use other profile details, such as skills, current projects, or title. You can also search for people in your organization's enterprise applications.

Find business data in enterprise applications The Search features in Office SharePoint Server 2007 can help you find information in enterprise applications such as SAP and Siebel, or in custom databases that were created for your organization.

Content management

Microsoft Windows SharePoint Services 3.0 provides the foundation for document management tasks, such as versioning, auditing, and workflow. Office SharePoint Server 2007 extends these capabilities to deliver enhanced document authoring, business document processing, Web content management and publishing, records management, policy management, and support for multilingual publishing.

In Office SharePoint Server 2007, content management is divided into three categories: document management, records management, and Web content management. In the following sections, you will learn more about each of these categories.

Document management

Document management features determine how documents in your organization are created, reviewed, published, and accessed. With Office SharePoint Server 2007, it is possible to enforce appropriate policies at every step of the document life cycle, use centralized repositories for storing, managing, and accessing documents, and use labels and barcodes to efficiently track documents. The following features can help you manage organizational documents in more efficient and effective ways:

Manage documents in the Document Center The Document Center site template lets organizations create large-scale document management sites that support highly structured document management scenarios. Default settings for the Document Center site template support strong content control: Check-out is required before editing, major and minor versions are enabled, support for multiple content types is enabled, and auditing is enabled to track content changes over time.

Manage translation documents and processes The Translation Management Library helps organizations create, store, and manage translated documents by providing both views and features that facilitate the manual document translation process. This library features a customized view that groups translations by source document. It also features a Translation Management workflow that can be used to manage the manual translation process.

Convert documents on the server Office SharePoint Server 2007 offers support for the server-side conversion of documents from one file format into another.

Integrate document management on the server and the client Many document management features in Office SharePoint Server 2007 are extended powerfully through tight integration with 2007 Office release client programs such as Microsoft Office Word 2007 and Office Excel 2007. From within 2007 Office release client programs, users can start and complete workflow tasks, update properties for server documents in the Document Information Panel, insert barcodes or labels into server documents, and much more.

Records management

Records management is the process of collecting, managing, and disposing of corporate records (information deemed important for the history, knowledge, or legal defense of a company) in a consistent

and uniform manner based on an organization's policies. These policies are shaped by the type of work that the organization does, the kinds of legal risks it faces, and the laws and regulations that govern it. Office SharePoint Server 2007 introduces a new set of features for creating and supporting formal records management capabilities in your organization.

Implement information management policies Organizations can define and use information management policies on Office SharePoint Server 2007 sites to enforce compliance with corporate business processes or legal or governmental regulations for the management of information. Information management policies enable site administrators or list managers to control how content is managed. Office SharePoint Server 2007 includes several predefined policy features that organizations can use individually or in combination to define information management policies for their sites. These policy features, which can be defined for an entire site collection or a specific list, library, or content type, include Auditing, Barcodes, Labels, Form Conversion for Archiving, and Expiration. Additionally, organizations can develop custom information management policies.

Limit actions on files that are downloaded from sites In Office SharePoint Server 2007, organizations can use Information Rights Management (IRM) to limit the actions that users can take on files that have been downloaded from SharePoint lists or libraries. IRM encrypts the downloaded files and limits the set of users and programs that are allowed to decrypt these files. IRM can also limit the rights of the users who are allowed to read files so that they cannot take actions such as printing copies of the files or copying text from them.

Manage records retention in the Records Center The Records Center site template in Office SharePoint Server 2007 is designed to help organizations implement their records management and retention programs. This site template extends Office SharePoint Server 2007 with additional records management features such as a Records Collection interface, vault abilities, Records Routing, information management policy features (such as Auditing, Expiration, and Barcodes), and the capability to place records on hold.

Manage e-mail records Office SharePoint Server 2007 is tightly integrated with Microsoft Exchange Server 2007. This integration enables organizations to create Managed E-mail Folders in Exchange that are exposed to users in Office Outlook 2007. Organizations can define information management policies for these folders that specify a retention period or quota. Users can also use these folders to send e-mail to a Records Center site in Office SharePoint Server 2007.

Web content management

Office SharePoint Server 2007 includes many features that are useful for designing, deploying, and managing enterprise intranet portals, corporate Internet presence Web sites, and divisional portal sites. By using these features, employees in your organization can create and publish Web content in a timely manner, which can reduce the cost and overhead of managing multiple sites.

Improve the consistency and efficiency of your site design By using master pages, page layouts, and content pages, you can easily establish or change the look and feel of all the pages across an entire site. A master page defines the common elements that you want all pages on your site to share, such as the search box or navigation links. A page layout defines the layout for a particular type of content page, such as a news article page. It also defines the fields where contributors can enter various types of article content, such as article titles, graphics, quotations, and unstructured text. When a content page is rendered in the browser, the master page supplies the common content, and the content page supplies the page-specific content, which is displayed in its associated page layout.

Customize sites with Office SharePoint Designer 2007 Office SharePoint Designer 2007 is a new product for creating and customizing Office SharePoint Server 2007 sites and building workflow-enabled applications that are based on SharePoint technologies. You can use Office SharePoint Designer 2007 to create and customize page layouts and master pages for Office SharePoint Server 2007 sites. The default master page for an Office SharePoint Server 2007 publishing portal is called `blueband.master`, and it is a good starting point for branding your site. However, if you prefer, you can design an entirely new master page in Office SharePoint Designer 2007. By using master pages along with state-of-the-art editing tools that employ cascading style sheets, you can easily and effectively make site-wide changes.

Publish SharePoint sites more systematically Office SharePoint Server 2007 includes site templates that support specific content publishing needs for news sites and collaboration and publishing portals. Each site template has publishing features enabled, including a page-editing toolbar, a content editor, and check-out. By using these features, you can associate workflows with publishing tasks, establish a publishing schedule for pages, use versioning features, and control page layout.

Create and update pages from the Web-based content editor With an Office SharePoint Server 2007 publishing site, content owners can use a built-in content editor to create and update Web pages on the site. For example, if you are a department manager, you can use the content editor to draft and format announcements and other information on your team Web site. You can use the content editor to type text, insert hyperlinks and pictures, apply styles, and so on. All of the HTML coding is done behind the scenes. Alternatively, you can use an HTML editor to access and edit the underlying HTML code for the page.

Create and update pages from 2007 Office release client programs If the Document Conversions feature is enabled on the Office SharePoint Server 2007 site, you can convert existing 2007 Office release documents to Web pages. For example, you can use Office Word 2007 documents to create Web pages for your site collection. It is also possible to convert Office InfoPath forms (.xml files) into Web pages and to create custom converters to support additional file formats. Client authoring lets you use the richer features of 2007 Office release programs to create Web pages quickly, with or without a connection to the Internet.

Create and maintain variations of a site Audiences of Web sites can vary in many ways, including language, geographic region, browsing device, or company affiliation. The job of producing and maintaining variations of a site can be difficult and time consuming. In Office SharePoint Server 2007, the Variations feature allows site administrators to simplify the process of managing variations by maintaining customizable copies of the content from a source site in each target site. This feature is particularly useful for publishing multilingual sites. For example, if you specify a source site (for example, Press Releases – English) and multiple target sites (for example, Press Releases – French, Press Releases – Japanese), Office SharePoint Server 2007 keeps the target sites synchronized with the source site.

Manage site navigation more easily Office SharePoint Server 2007 bases its navigation model on the hierarchical structure of the site collection. This means that when you change the structure of the site (for example, if you move a subsite), the change is automatically reflected in the site navigation. In addition, when sites, pages, or internal links are updated, they are automatically renamed or deleted in the navigation. You can create navigation links to internal resources, such as pages, documents, and other sites, and to external locations, such as intranet portals and Internet resources. The view of sites, pages, and internal links that a user sees is always adapted to the user's permission level. Site owners can show pages and sites in the navigation automatically, sort and edit the navigation links, or choose to inherit the global navigation and current navigation from the parent site. The navigation controls are part of the master page and can be directly customized and styled in Office SharePoint Designer 2007.

Manage sites more effectively You use the Site Content and Structure page to manage both the content and structure of your SharePoint site collection. You can manage content by performing actions on sites, lists, and list items. For example, you can check out, check in, or publish multiple items at the same time. Sites and list items can be easily copied or moved to other locations in the site collection. You can also create, customize, and view authoring-related reports. For example, you can find and view all documents on the site that are pending approval or all documents that are checked out to you. You can then take action with those documents, such as approving them or checking them in.

Business processes and forms

Business processes are at the center of any organization, and forms are often at the center of many business processes, such as the process of approving expense reports. Office SharePoint Server 2007 provides built-in **workflow** templates to help you automate your processes. You can also create custom workflows to streamline your collaborative processes. Electronic forms provided through InfoPath Forms Services can help you to collect and validate information that drives your business processes.

Streamline your processes with workflows Workflows help people to collaborate on documents and manage project tasks by implementing specific business processes on documents and items on an Office SharePoint Server 2007 site. Office SharePoint Server 2007 includes several predefined workflows that are designed to address common business scenarios:

Approval This workflow routes a document or item to a group of people for approval.

Collect Feedback This workflow routes a document or item to a group of people for feedback.

Collect Signatures This workflow routes a Microsoft Office document to a group of people to collect their digital signatures.

Disposition Approval This workflow, which supports records management processes, manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents.

Three-state This workflow can be used to manage business processes that require organizations to track a high volume of issues or items, such as customer support issues, sales leads, or project tasks.

Group Approval This workflow provides a hierarchical organizational chart from which you can select the approvers and allow the approvers to use a stamp control instead of a signature. This solution was designed specifically for East Asian markets.

Translation Management This workflow manages the manual document translation process by creating copies of the document to be translated and assigning translation tasks to translators. This workflow is available only for Translation Management Libraries.

Collect and validate information by using browser-based forms When you design form templates with Office InfoPath 2007 and deploy them to an Office SharePoint Server 2007 site, you can enable a setting that allows users to fill out forms by using a Web browser. That is because Office SharePoint Server 2007

employs InfoPath Forms Services technology, which — in addition to enabling the deployment of browser-based forms — provides a central location to store and manage form templates for your organization.

When you publish a form template to an Office SharePoint Server 2007 site, you can distribute it not just on your corporate intranet, but also on external Web sites, such as extranet sites or corporate Web sites. This allows you to collect data from customers, partners, suppliers, and others who are vital to the success of your business or organization. For example, a large insurance company can use a single form template to collect and process insurance claims and then deploy that form template to their Internet and intranet sites.

Business intelligence

Traditionally, the tools for accessing large amounts of unstructured data for the purpose of analysis were available only to people with years of experience in data warehousing or data mining. Publishing to the Web by using data from multiple sources was historically restricted to developers and consultants. By using the new features available in Office SharePoint Server 2007, information workers can assemble data from multiple sources and publish that data on the Web.

Office SharePoint Server 2007 can link to business applications such as SAP, Siebel, and Microsoft SQL Server 2005, allowing you to easily publish reports, lists, and **key performance indicators (KPIs)**.

When you publish reports from the data in one of these systems, you provide strategic or operational data for decision makers. Executives and line managers rely on timely and accurate reports to make informed decisions. Examples of reports include Microsoft Office Excel workbooks, SQL Server Reporting Services reports, and Microsoft Office Access reports.

Store reports in a Report Center The Report Center site provides a central location for storing reports that are common to a group, whether the group is a small team or a large organization. Special document libraries on the Report Center site store reports, lists, and connections to external data sources. The site also provides access to page templates and Web Parts to help you create pages and lists that contain business information. Within the Report Center, users can search for items by using categories, view a calendar of upcoming reports, and subscribe to reports that are relevant.

Share Office Excel 2007 workbooks as interactive reports Excel Services is a server technology that you can use to share, secure, and manage Office Excel 2007 workbooks as interactive reports in a consistent way throughout your organization. Excel Services enables you to store an Excel workbook on a server and then publish any part of that workbook on a Web page. Users need only a browser to view and

interact with the live data. The workbook is published on the Web page by using the Excel Web Access Web Part. One advantage of publishing workbooks in a Web Part is that all of the calculation occurs on the server. As a result, the business logic in the workbook is never exposed. Another advantage is that there is only one copy of the workbook, which is stored in a central, secure place. From the Web page, you can give users view-only rights to limit access to the workbook. For example, you can prevent users from opening the workbook in Excel, or you can limit what the users can view.

Connect SharePoint sites to external data sources You can use data from other business applications, such as SAP and Siebel, in SharePoint lists, pages, and Web Parts. Administrators usually create the system connections and can store them in a Data Connection Library in the Report Center. That way, the central pool of connections can easily be accessed and reused by anyone with permissions. By using connections to external data sources, you can build Web Pages and SharePoint lists that allow users to interact with the data in the external source without ever leaving the SharePoint page.

Track key performance indicators Key performance indicators (KPIs) are valuable for teams, managers, and businesses to evaluate quickly the progress made against measurable goals. By using SharePoint KPIs, you can easily visualize answers to questions such as: What am I ahead on or behind on? How far ahead or behind am I? What is the minimum I must complete? KPIs are created by using KPI lists and then are displayed by using KPI Web Parts. You can store KPI lists in the Report Center or on any other site in Office SharePoint Server 2007, where they can be reused by anyone with permissions to access them.

Display information from multiple sources in dashboards Dashboards are tools that are used to communicate status and to drive action. An Office SharePoint Server 2007 dashboard is a Web page template that allows you to assemble and display information from disparate sources such as reports, charts, metrics, and KPIs. For example, the human resources division might design a dashboard that employees use to view personalized information, such as their salary or benefits history.

Connect and filter information in a variety of ways Filters allow you to display only the subset of data that you are interested in viewing. For example, a data set can contain five years' history of multiple products for the entire country or region. By using filters, you can display something more meaningful, such as only one sales region, only one product, or only the current year. Office SharePoint Server 2007 has 10 Filter Web Parts that you can use to change the contents of one or more Web Parts on a page, so that your Web Parts display exactly the information that you need. For example, the Current User Filter Web Part automatically filters information based on who is logged on to the computer. This is useful when you want to display only information that is currently assigned to that user, such as customer accounts or tasks.

Unlock business data through the Business Data Catalog After the **Business Data Catalog** (BDC) is configured, the people in your organization can use Office SharePoint Server 2007 to find, view, and analyze the data that is stored in business applications such as SAP, Siebel, and Microsoft SQL Server. You can then combine columns from a SharePoint site and from an external business application in a single list or library. For example, you can store documents such as proposals, contracts, and presentations in a SharePoint list and then associate those documents with a customer in a customer relationship management (CRM) database. This helps keep all of the customer documentation in one place, so that you can easily navigate to the customer's record in the business application.

You can also incorporate business application actions into your lists or libraries, so that you can display the user interfaces of business applications, open Web pages and forms, and perform other frequently used tasks from a SharePoint site. In addition, Office SharePoint Server 2007 includes several business data Web Parts that you can connect and use to customize how business data is displayed on your sites. After enabling the business data Search feature in Office SharePoint Server 2007, you can search business data from within your SharePoint sites.



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