



Docs with Attitude

Enhancing Document Management with Content Types

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SUGDC

SHAREPOINT USER GROUP
OF WASHINGTON DC



Short Bios

- Kenneth Lo, PMP
- SharePoint Evangelist
- MCTS, MCSD
- BPM, SharePoint, Project Server
- Enterprise & Government 2.0
- <http://klopmp.com>
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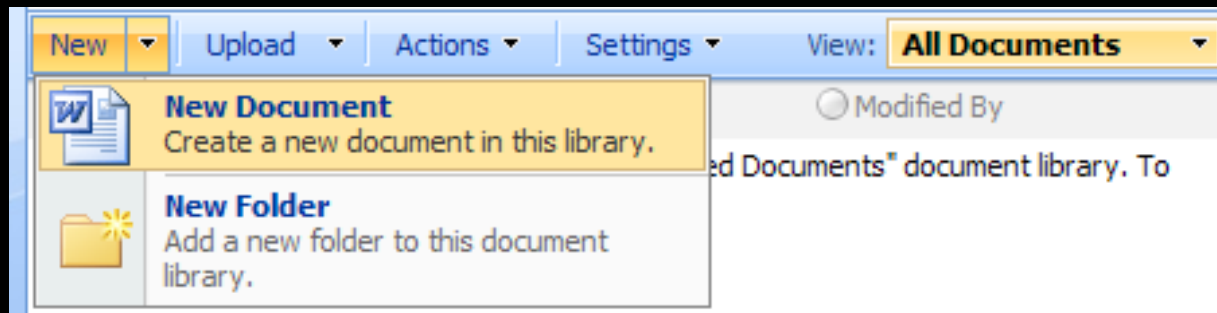
Agenda

- What are Content Types
 - Document Information Panel
 - Site Columns
- Why Use Content Types
- How to Use Content Types
- Live Case Study



What are Content Types

- New feature in WSS 3.0/MOSS 2007
- Reusable collection of settings for documents, list items, & folders
 - Metadata
 - Custom action (New, Edit, Display) forms
 - Document templates
 - Workflows





What are Content Types (cont.)

- Document Information Panel
 - Form within MS Office 2007
 - Enable centralized metadata management
 - Customize with InfoPath 2007
 - Branding, layout, & formatting
 - Custom data sources
 - Conditional logic

Content Type	Alcoholic Beverages
Name *	Sparkling Wine .doc
Title *	Sparkling Wine, Nevada
Volume	500
Alcoholic Volume	12 %
Regions	West



What are Content Types (cont.)

- Site Columns
 - Provide central, reusable model for column definition
 - Assignable to multiple lists and sites
 - Decrease rework
 - Enhance consistency
 - Inheritable

Site Column	Type	Source
Base Columns		
Append-Only Comments	Multiple lines of text	Home
Categories	Single line of text	Home
End Date	Date and Time	Home
Language	Choice	Home
Start Date	Date and Time	Home
URL	Hyperlink or Picture	Home



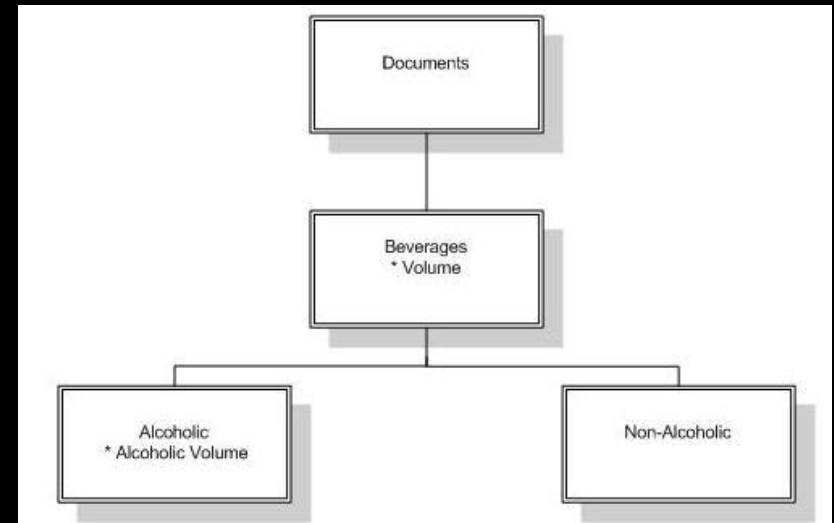
Why Use Content Types

- Benefits
 - Organization
 - Replace folder-based hierarchy
 - Manageability
 - Multiple types of documents in one document library
 - Information management policies
 - Searchability
 - Search by document content & metadata
 - Consistency



How to Use Content Types

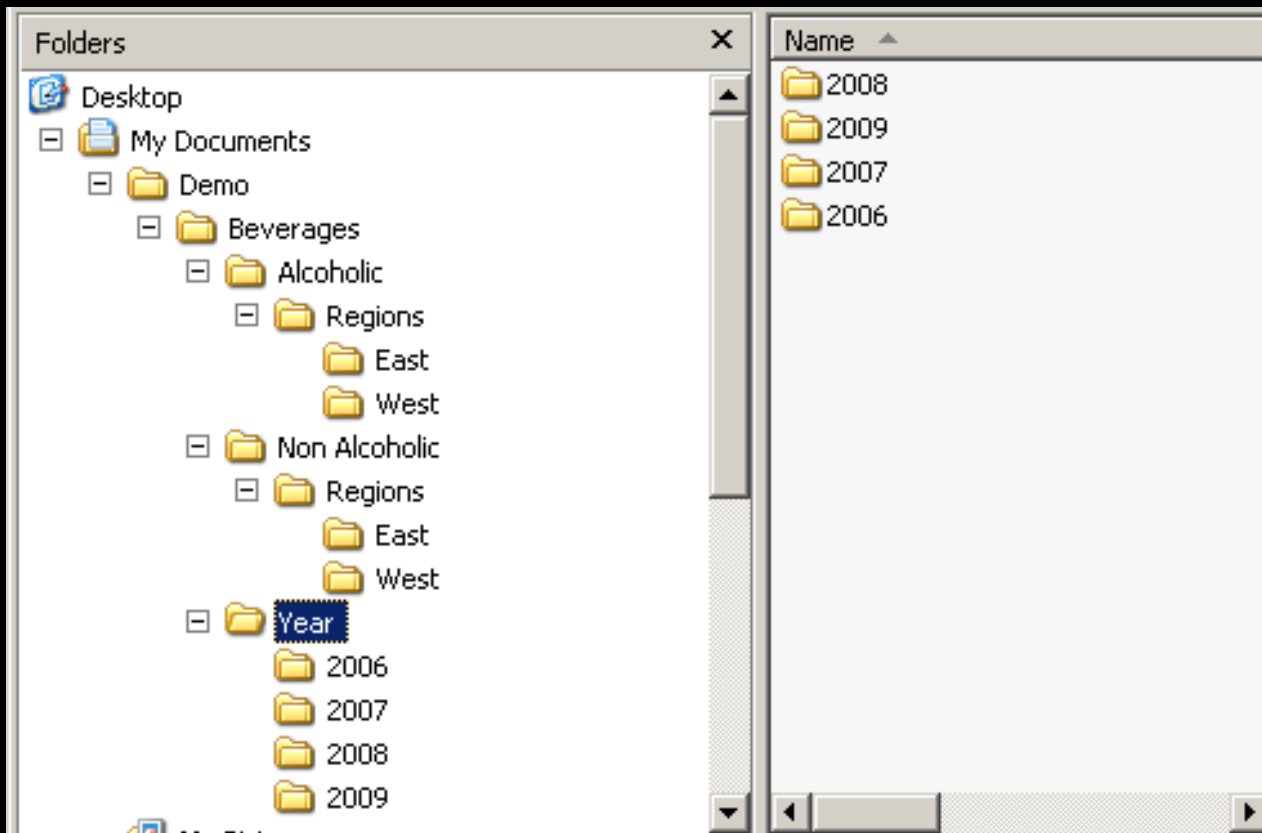
- Design Considerations
 - Parent Content Type
 - Columns
 - Template
 - Workflows
 - Policy
 - Document Conversions





Live Case Study

■ Challenges





Live Case Study



■ Solutions

Demo > Shared Documents

Shared Documents

Share a document with the team by adding it to this document library.

New | Upload | Actions | Settings | View: **All Documents**

Type	Name	Modified	Modified By
[-] Content Type : Alcoholic Beverages (1)			
[-] Regions : West (1)			
	Sparkling Wine !NEW	7/9/2009 2:41 PM	System Account
[-] Content Type : Non-Alcoholic Beverages (1)			
[-] Regions : East (1)			
	Sparkling Water !NEW	7/9/2009 2:41 PM	System Account



Resources

- Introduction to Content Types
 - <http://msdn.microsoft.com/en-us/library/ms472236.aspx>
- Plan Content Types
 - <http://technet.microsoft.com/en-us/library/cc262735.aspx>
- Kenneth Lo's Bookmarks
 - <http://delicious.com/kennethlo/sharepoint>



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