



Docs with Attitude

Enhancing Document Management with Content Types

Kenneth Lo, PMP

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OF WASHINGTON DC



Short Bios

- Kenneth Lo, PMP
- Solutions Architect
- MCTS, MCSD , SCJP
- SharePoint 2003/2007, Project Server 2007
- Content Management System
- <http://klopmp.com>
- @klopmp



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



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”



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
- Solutions



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>



Contact

- <http://klopmp.com>
- <http://klopmp.com/twitter.com>
- <http://klopmp.com/linkedin>