



# Docs with Attitude

Enhancing Document Management with Content Types

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# Short Bios



- Kenneth Lo, PMP
- Solutions Architect at Booz Allen Hamilton
- MCTS, MCSD, SCJP
- SharePoint 2003/2007, Project Server 2007
- Content Management System
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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



# 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>



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