

Office Client, SharePoint Search, and Workflow Together

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Why are we here?

- Figure out how to get the most out of Office and SharePoint together
- Figure out how to connect SharePoint Search to our document metadata
- Warm the seats for the person in the next session



How difficult is it to find information?

- In it's White Paper "The High Cost of Not Finding Information" (2001) the IDC estimates that 30% of IW time is spent looking for information.



Why can't we find what we want?

- In "The Knowledge Worker Investment Paradox" (2002) Gartner estimates more than 80% of an enterprise's digitized information reside in individual hard drives and personal files.
- Gartner also estimates that employees get 50-75% of their relevant information directly from other people



Help! I'm Drowning in Email

- Recent Google search for the phrase "Drowning in Email" found 560 results!
- Email is routinely being used to deliver multiple versions of the same document.

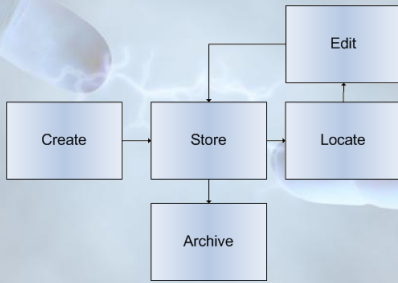


How does SharePoint Help?

- Find Information Better
 - Full Text Search
 - Meta Data
- Reduce Email by managing versions
- Reduce Email by defining the one repository

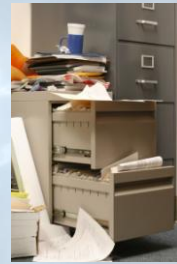


Document Life Cycle

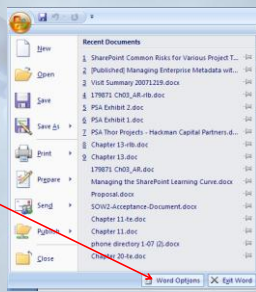


File Management

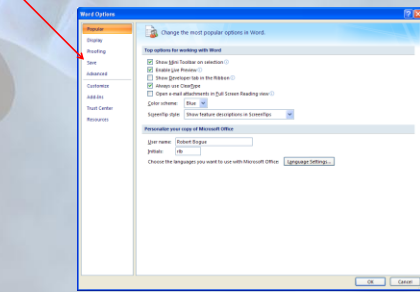
- Saving to and Opening From SharePoint
 - Default Location
 - Additional Locations



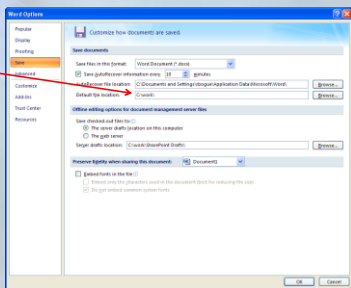
Setting the Default - 1



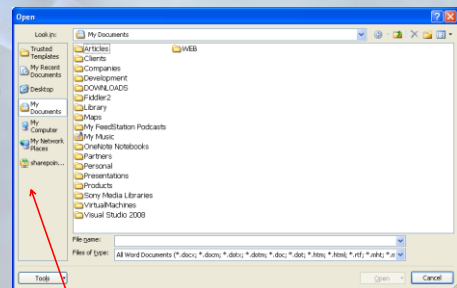
Setting the Default - 2



Setting the Default - 3

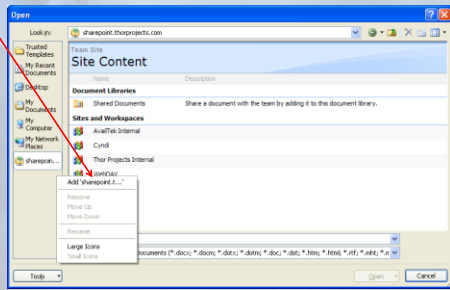


Adding a location - 1



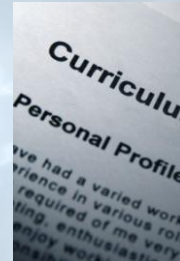
Right Click

Adding a location - 2



Metadata

- “Data about the data”
- Everyone has used it (hint: File Modified Date)
- SharePoint has Extensible Metadata



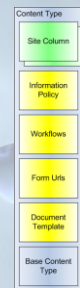
Site Column

- A container for a specific kind of data
- Examples:
 - Field or Column in a database table
 - Column or row in a spreadsheet
 - Field on a form



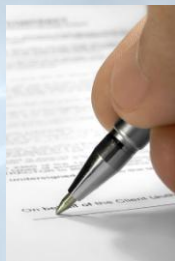
Content Type

- A collection of fields and non-field properties
- Non-Field properties are:
 - Information Rights Management
 - Workflow
 - Template File



Office Templates

- Contain all of the boilerplate text
- Can have fields and QuickParts
- QuickParts can connect to properties



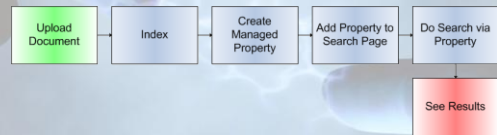
Creating a Content Type



Synchronizing to SharePoint



Metadata in Search



Metadata Management

- Only capture metadata when it's effortless or necessary.
- Consider that every required field is a reason to subvert the system.



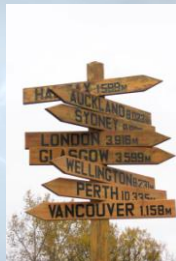
What is a Workflow?

- Long Running
- Serializable
- Resumable



Workflow Types

- Manual
- Out of Box
- SharePoint Designer
- Event Receivers
- Workflows with Visual Studio



Manual

- Advantages
 - Low Cost/No Cost
 - No Development
- Disadvantages
 - Low/No Control



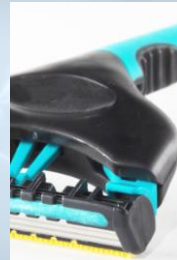
Out of Box Workflows

- Advantages
 - Easy
 - No Development
- Disadvantages
 - Minimally customizable



SharePoint Designer Workflows

- Advantages
 - Quick Custom Workflows
 - No coding required
- Disadvantages
 - Limited Activities
 - Limited Flow Control
 - Can not be reused



Event Receivers

- Advantages
 - Simple Development
- Disadvantages
 - Not good for long running workflows



Workflows with Visual Studio

- Advantages
 - Complete Control
- Disadvantages
 - Requires strong development skills
 - Requires more time to develop



Almost Out of Box (Fabulous 40)

Site Admin Templates

- Board of Directors
- Business Performance Reporting
- Case Management for Government Agencies
- Classroom Management
- Clinical Trial Initiation and Management
- Competitive Analysis Site
- Discussion Database
- Disputed Invoice Management
- Employee Activities Site
- Employee Self-Service Benefits
- Employee Training Scheduling and Materials
- Equity Research
- Integrated Marketing Campaign Tracking
- Manufacturing Process Management
- New Store Opening
- Product and Marketing Requirements Planning
- Request for Proposal
- Sports League
- Team Work Site
- Timecard Management

Server Admin Templates

- Absence Request and Vacation Schedule Management
- Budgeting and Tracking Multiple Projects
- Bug Database
- Call Center
- Change Request Management
- Compliance Process Support Site
- Contacts Management
- Document Library and Review
- Event Planning
- Expense Reimbursement and Approval
- Help Desk
- Inventory Tracking
- IT Team Workspace
- Job Requisition and Interview Management
- Knowledge Base
- Lending Library
- Physical Asset Tracking and Management
- Project Tracking Workspace
- Room and Equipment Reservations
- Sales Lead Pipeline

Out of the Box Workflows

- WSS (Web)
 - Tri-State
- MOSS (Web)
 - Approval
 - Collect Feedback
- MOSS (Non-Web)
 - Collect Signatures
 - Disposition Approval



SharePoint Designer Workflows

- Rules Engine
 - If-Then-Else
 - And
 - Serial/Parallel activities (Actions)
- Extensible with Visual Studio Developed Activities



Creating a Field for a Content Type

```
<Field
ID="{0116A5FF-6FB7-43e1-B3E3-30A58B40349C}"
Name="GradingScore"
Group="Grading"
DisplayName="Score"
Type="Number"
Sealed="FALSE"
ReadOnly="FALSE"
Hidden="FALSE"
DisplaceOnUpgrade="TRUE"/>
```

Creating the Content Type

```
<ContentType
ID="0x01080100B7336179CFFE43e59B86E241C767010E"
Name="GradingTask" Group="Grading"
Description="Grading Task" Version="0"
Hidden="FALSE" >
<FieldRefs>
<FieldRef
ID="{0116A5FF-6FB7-43e1-B3E3-30A58B40349C}"
Name="GradingScore" DisplayName="Score" />
<FieldRef
ID="{81792580-6F97-4960-84C2-7A8A926D1DCE}"
Name="GradingNotes" DisplayName="Notes"/>
</FieldRefs>
</ContentType>
```

Designing the Workflow

- Workflow Steps
 - onWorkflowActivated
 - CreateTask
 - onTaskChanged
 - CodeActivity
 - DeleteTask
- Properties and Code
 - Correlation Token (x2)
 - TaskId
 - TaskProperties
 - Copy task properties to document



Activating and Associating the Workflow

- Activating
 - Stsadm -o activatefeature -name featurename (or)
 - Site Settings -> Site Collection Features
- Associating
 - List -> List Settings -> Workflow Settings



Thank You!

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