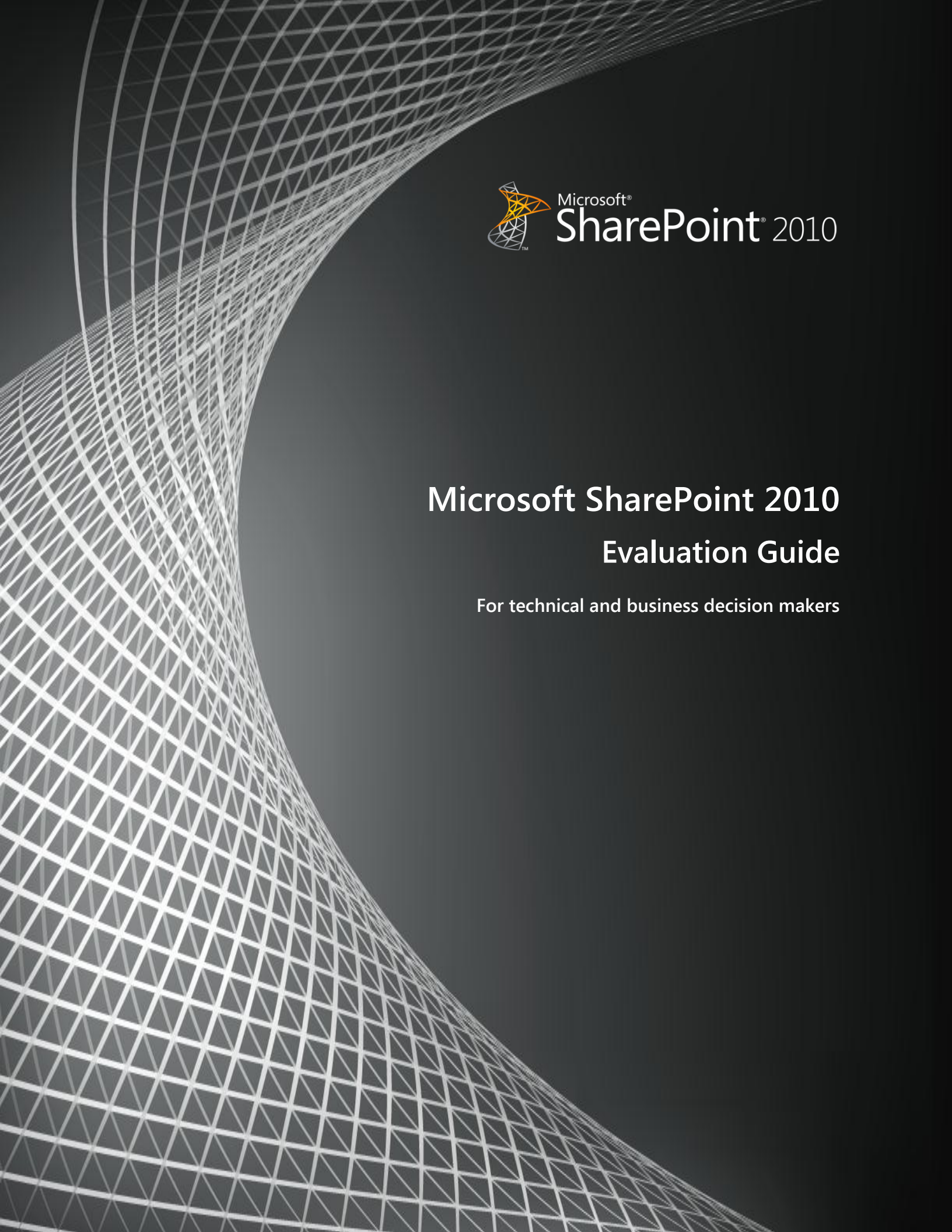


Microsoft SharePoint 2010

Evaluation Guide

For technical and business decision makers

SharePoint 2010 Overview

© 2010 Microsoft Corporation. All rights reserved.

This document is intended for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.

Microsoft, Access, Excel, Fluent, InfoPath, Internet Explorer, Office, Office SharePoint Portal Server, OneNote, Outlook, PerformancePoint, PowerPoint, Project Server, SharePoint, SharePoint Designer, SharePoint Workspace, Silverlight, SQL Server, Visio, Windows 7, Windows Live, and Word are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Table of Contents

Table of Contents i
Abstract 1
Introduction 2
Capability Areas 3
Sites 3
Communities 3
Search 3
Content 3
Insights 3
Composites 3
SharePoint Sites 4
SharePoint Ribbon User Interface 4
Easy Web Editing 5
Cross-Browser Support and Improved Mobile Experience 5
SharePoint Workspace 2010 5
Office Web Applications 6
Personalization 7
Standards and Accessibility 8
SharePoint Communities 9
My Sites 9
Social Feedback 10
Wikis 12
Blogs 13
SharePoint Content 15
Document Management 15

Records Management 17
Rich Media Management 18
Web Content Management 19
SharePoint Search 21
SharePoint Server 2010 21
Enterprise Scale 24
FAST Search Server 2010 for SharePoint 25
SharePoint Insights 28
Excel Services 28
PerformancePoint Services 30
Visio Services 31
Chart Web Parts 32
SharePoint Composites 33
Business Connectivity Services 33
SharePoint Designer 2010 35
Access Services 35
Workflows 36
InfoPath Forms Services 36
Sandbox Solutions 37
Appendix A: Resources Available for Evaluating SharePoint 2010 38
Appendix B: Feature chart - SharePoint 2010 Search and FAST Search for SharePoint 39

SharePoint 2010 Overview

Abstract

This evaluation guide is designed to help you understand the design goals, feature set, and implementation for Microsoft® SharePoint® 2010. The guide provides an overview of the solutions and benefits provided by SharePoint 2010, as well as descriptions of new and improved features in the areas of collaboration, social networking, search, business intelligence, enterprise content management, and composite applications. It also provides a tour of the main feature areas in SharePoint 2010 and concludes with useful information for administrators and developers.

This guide is designed to help you perform a thorough and effective evaluation of SharePoint 2010, and is intended for anyone who is interested in learning more about SharePoint 2010. **This guide is not a comprehensive explanation of the capabilities and tools in SharePoint 2010; instead, it highlights the main feature areas that can help you understand and evaluate SharePoint.**

For a product walk-through and for more information on downloading a trial version of SharePoint 2010, visit http://go.microsoft.com/?linkid=9727427.

For the latest information about SharePoint 2010 and for resources for the additional products in the SharePoint 2010, go to the SharePoint Web site: http://www.microsoft.com/sharepoint.

For other product information, refer to the Resources Available for Evaluating SharePoint 2010 section in this guide.

Introduction

Welcome to the Microsoft SharePoint 2010 Evaluation Guide. The goal of this guide is to help you understand and evaluate SharePoint 2010.

SharePoint 2010 is the business collaboration platform for the Enterprise and the Internet. When people need to work with other people, with content and information, or with line-of-business data, they can use the rich, out-of-the-box set of integrated capabilities in the SharePoint 2010 platform. People can also customize these capabilities to address specific business needs and integrate them with other products and solutions. Using the same set of capabilities and tools, companies can deploy SharePoint 2010 both inside the enterprise (that is, intranets) and outside of the firewall (that is, extranets, the Internet) so employees, customers, and business partners can work with the platform.

SharePoint 2010 helps companies:

- **Deliver the best productivity experience** by letting people work together in ways that are most effective for them. Whether through the PC, browser, or mobile device, SharePoint 2010 offers an intuitive and familiar user experience. These capabilities are significantly enhanced by the way SharePoint 2010 and Microsoft Office® 2010 work together, letting people increase productivity while using familiar products and tools.
- **Cut costs with a unified infrastructure** that offers enterprise-scale manageability and availability. Whether companies deploy the platform on-premises or as hosted services, SharePoint 2010 lowers the total cost of ownership by offering an integrated set of features and by helping companies consolidate their business-productivity solutions on top of SharePoint Server. Companies can then reduce costs related to maintenance, training, and infrastructure management.
- **Rapidly respond to business needs** with dynamic and easily deployed solutions. SharePoint 2010 offers the tools and capabilities for end users, advanced users, and professional developers to design and create business solutions that can be integrated with existing company data, tools, and processes.

The following section details the new and enhanced features of SharePoint 2010. You can use this information to evaluate these new features and readily describe their capabilities to your colleagues, clients, and business partners.

Capability Areas

SharePoint 2010 helps people work together in new and effective ways with a rich set of six integrated capabilities areas. Using SharePoint, people can set up Web sites to share information with others, manage documents from start to finish, and publish reports to help everyone make better decisions.

Sites

SharePoint 2010 Sites provides a single infrastructure for all your business Web sites. Share documents with colleagues, manage projects with partners, and publish information to customers.

Communities

SharePoint 2010 Communities delivers great collaboration tools—and a single platform to manage them. Make it easy for people to share ideas and work together the way they want.

Search

SharePoint 2010 Search cuts through the clutter. A unique combination of relevance, refinement, and social cues helps people find the information and contacts they need to get their jobs done.

Content

SharePoint 2010 Content makes content management easy. Set up compliance measures "behind the scenes"—with features like document types, retention polices, and automatic content sorting—and then let people work naturally in Microsoft Office.

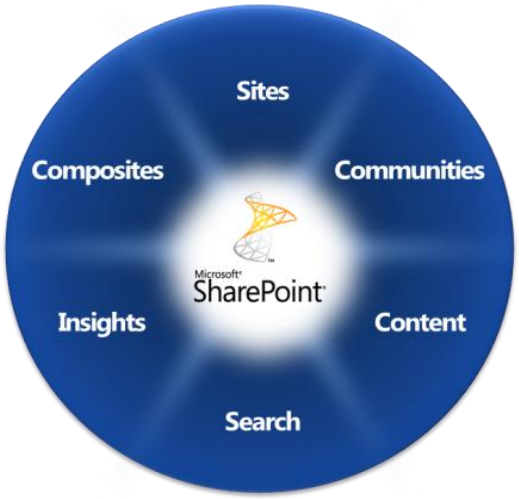
Insights

SharePoint 2010 Insights gives everyone access to the information in databases, reports, and business applications. Help people locate the information they need to make good decisions.

Composites

SharePoint 2010 Composites offers tools and components for creating do-it-yourself business solutions. Build no-code solutions to rapidly respond to business needs.

Figure 1 Capability areas of SharePoint 2010



SharePoint Sites

A Single Infrastructure for All Your Business Web Sites

New and Improved

- SharePoint Ribbon user interface
- Easy Web editing
- Cross-browser support and improved mobile experience
- SharePoint Workspace 2010
- Office Web Applications
- Personalization
- Standards and Accessibility

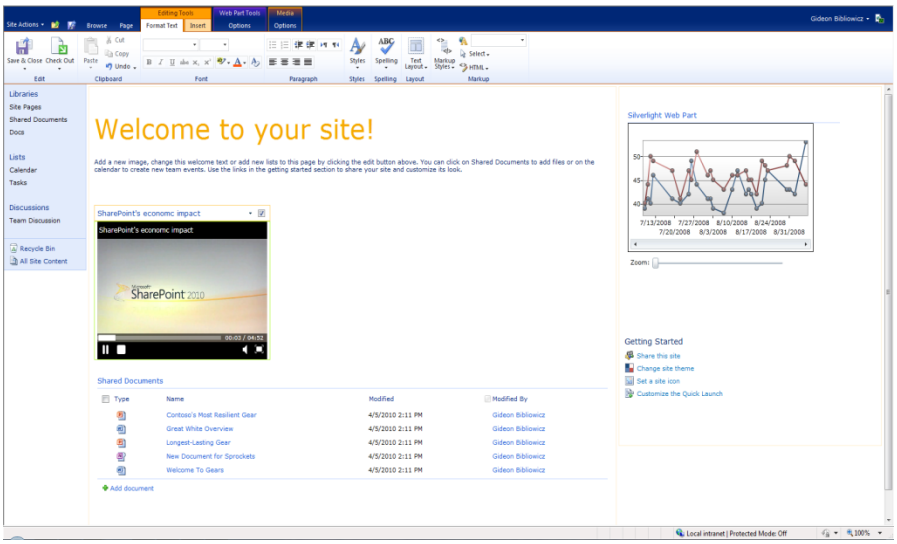
Microsoft SharePoint 2010 provides a comprehensive platform that companies can scale to meet business needs while simplifying how people find and share information. It provides a full set of tools that people can use to create any kind of site, plus a single infrastructure that simplifies site management. From a team site for colleagues, to an extranet site for partners, to an Internet site for customers, people can share and publish information using one familiar system.

The capabilities included in SharePoint Sites are based on a simple and powerful site framework, the management tools included in SharePoint 2010, and enhanced capabilities that help people extend the SharePoint platform and customize SharePoint sites.

SharePoint Ribbon User Interface

SharePoint 2010 features the Microsoft Office Fluent™ user interface, including the ribbon user interface. The SharePoint Ribbon user interface offers an extensible, seamless, and familiar user experience across client and server applications, and people can customize it to address specific business and usability needs.

Figure 2 SharePoint Ribbon



Easy Web Editing

Sites in SharePoint 2010 contain the same list and libraries as previous versions of SharePoint, but the site is now a collection of pages. Because SharePoint sites focus more on pages than collections of lists, people can better control sites. People can quickly and easily create and edit pages within sites using the tabs and groups in the SharePoint Ribbon and a consistent, contextual rich text editor. The resulting experience is very similar to editing content in an application such as Microsoft Office Word®, making it easy and intuitive for people to create and edit SharePoint sites.

People can also easily work together to change existing pages with wiki technology in SharePoint 2010 team site pages. To edit content on a page, people can simply click the Edit tab type on the page. To enhance content, people can embed Web Parts, media files, and SharePoint lists in the page with a single click.

Cross-Browser Support and Improved Mobile Experience

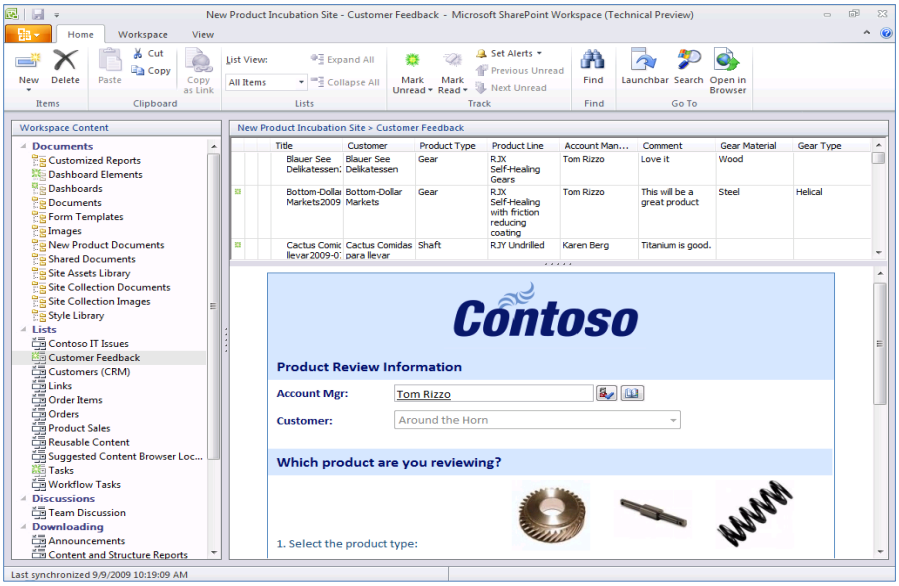
As more organizations want to increase productivity within a diverse environment and a mobile workforce, SharePoint 2010 now supports not only Microsoft Internet Explorer®, but also Firefox and Safari. With any of these browsers, people can view and edit sites, and work with content effectively with a high-quality experience.

SharePoint 2010 also offers support for multiple micro-browsers, helping more people work together while using mobile devices. People can view and edit Office documents, browse SharePoint document libraries, and search for content and people.

SharePoint Workspace 2010

Microsoft SharePoint Workspace 2010 is the rich desktop client for SharePoint 2010 that helps people work together, even when they're not connected to a network. When people work in SharePoint Workspace while connected to a network, their changes within the client immediately appear in the corresponding SharePoint site. When people work offline, SharePoint Workspace caches any changes and automatically synchronizes the changes when connected to the SharePoint site. In SharePoint Workspace 2010, people can take offline the content of entire sites, including custom lists and line-of-business data, and can integrate Microsoft InfoPath® 2010 forms for richer data entry and data validation.

Figure 3 SharePoint Workspace 2010 with InfoPath forms



Office Web Applications

When people are on the go, they may not have access to the Office applications like Microsoft Word or Microsoft Office Excel®. SharePoint 2010 works with the Web companions to the most popular Office applications, so people can access documents, spreadsheets, presentations, and notes without worrying about whether the computer they use has the latest Office programs installed. The Office Web applications for Word, Excel, Microsoft Office PowerPoint®, and Microsoft Office OneNote® add convenience by making it easier for people to view and edit documents, spreadsheets, presentations, or notes when away from the office, including concurrent editing capabilities (co-authoring).

Figure 4 Viewing and editing Office documents with the Word Web application

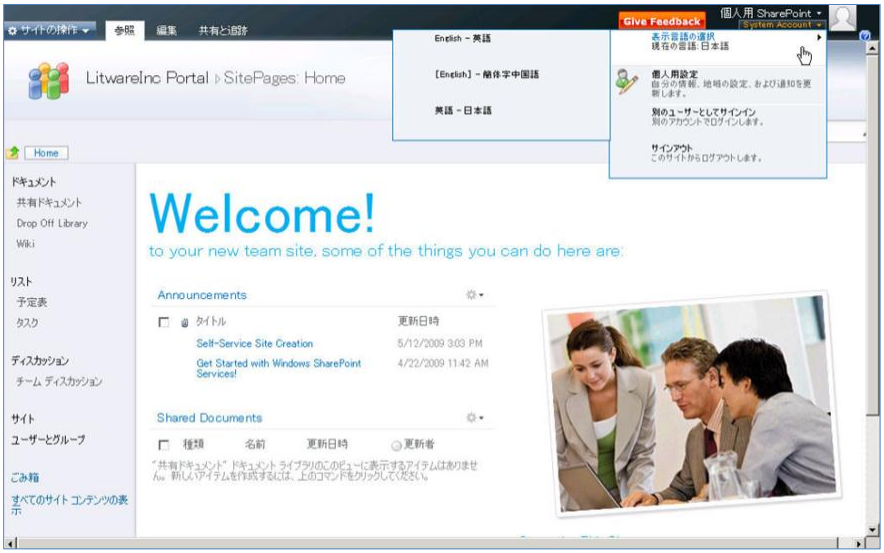
Personalization

Multilingual User Interface (MUI)

Many organizations have employees who speak different native languages or send employees across borders as part of their jobs. SharePoint 2010 makes it easier for those employees to interact with people and content while using an interface in the language of their choice. After site administrators install the required language packs and activate the Multilingual User Interface (MUI) service, people can switch between languages and have their sites' chrome use texts (strings) in the language they've chosen.

With the MUI in SharePoint 2010, site owners can configure fields within lists to support multiple languages. And when people create new content, they can also submit translations of the content so other users can view the content in specified languages.

Figure 5 Switching between pre-configured languages



Audience Targeting

In SharePoint 2010, people can target content to audiences defined by rules, SharePoint groups, or memberships in distribution lists. People can target any list item—not just lists—and can target virtually any individual item within the site (for example, documents, events, Web Parts).

People can target Web Part content in two ways:

- Configure Web Parts Pages to display different Web Parts based on audience membership.
- Configure Web Parts to display different content based on audience membership.

For example, in a default area called Human Resources, a site administrator can create a Manager Resources Web Part that appears only to users who are members of a manager audience (for example, managers). The site administrator can also target specific news items in the News Web Part to only new employees.

Audiences are created through the Central Administration site of a server farm, and are defined and managed from within the Profile Service application. Administrators configure one or more rules that define who belongs to the audience. Then a scheduled process analyzes the user profile database and finds all people whose profiles match the defined rules. For more complex rules, SharePoint 2010 provides the Audience object model, which administrators can access to create and modify audiences.

Web Parts

SharePoint 2010 builds and improves on the powerful Web Part model of SharePoint Server 2007 and includes a variety of new Web Parts that let people easily customize their SharePoint sites and Web pages to address their specific needs. This comprehensive set of additional Web Parts is suitable for a wide range of additional applications in areas such as business data access, RSS feed monitoring, key performance indicators (KPIs), summary links, and searches. For more details on the full complement of pre-built Web Parts, consult the SharePoint 2010 documentation.

People can edit pages within SharePoint sites, rapidly generating content and updates. With proper permissions, people can insert Web Parts within content blocks on a page and quickly create lists while editing the page. The contents of the list are displayed using one of the out-of-the-box list Web Parts inline in the content.

Though all pages have a shared view, people can create a personalized view of the page. People can close a Web Part or add a new Web Part to their personalized view without affecting the view across the company.

Standards and Accessibility

SharePoint 2010 features a significantly improved implementation method that follows industry Web development standards (for example, XHTML), delivers a more accessible interface for people with disabilities (follows the WCAG 2.0 AA guidelines), and supports more of the major browsers.

SharePoint Communities

An Integrated Collaboration Platform

New and Improved
• My Sites • Social feedback • Wikis • Blogs

SharePoint 2010 provides capabilities to help transform the way people and companies work together to share expertise and ideas, meet changing demands, and promote innovation. In this release, SharePoint offers improved social-networking features, including blogs, wikis, status updates, and team sites, and can help companies gain a competitive advantage through innovation, increased productivity, consolidated IT spending, and improved workforce agility.

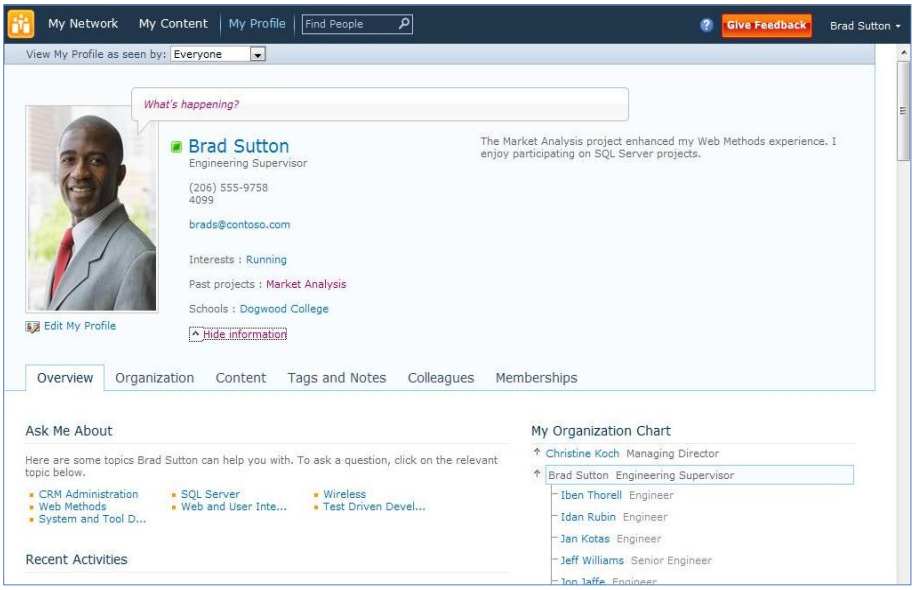
My Sites

A My Site is a personal SharePoint site that people can customize. People can change the content and design of their My Sites and include a public profile, where they can share details like contact information and colleagues. My Sites first appeared in Microsoft Office SharePoint Portal Server 2003 and was included in subsequent versions of SharePoint. SharePoint 2010 dramatically enhances My Sites with new social features, including user profiles, newsfeeds, and the "Ask Me About" section.

User Profiles

The user profile is the core of the social features in SharePoint 2010. People can share their personal information and knowledge, and they can determine how much of that information to make public. My Site user profiles let people view social information like the organizational browser, tags and notes manager, note board, and more.

Figure 6 My Site user profile



Newsfeeds

Newsfeeds show people's recent activities and are a vital part of many social networking solutions. SharePoint 2010 introduces this capability with default newsfeed settings based on activity monitoring from within SharePoint itself. The default setting can then be changed to include external feeds as well. By connecting newsfeeds to activity monitoring, SharePoint 2010 shows people's activities by date, which helps community members keep track of project work and progress.

"Ask Me About"

To more easily share their expertise, people can add keywords or tags to their profiles under the "Ask Me About" section. SharePoint 2010 can also examine patterns in Sent Items folders in Microsoft Outlook® 2010 and then suggest keywords for the "Ask Me About" section, which people can then accept or decline.

Social Feedback

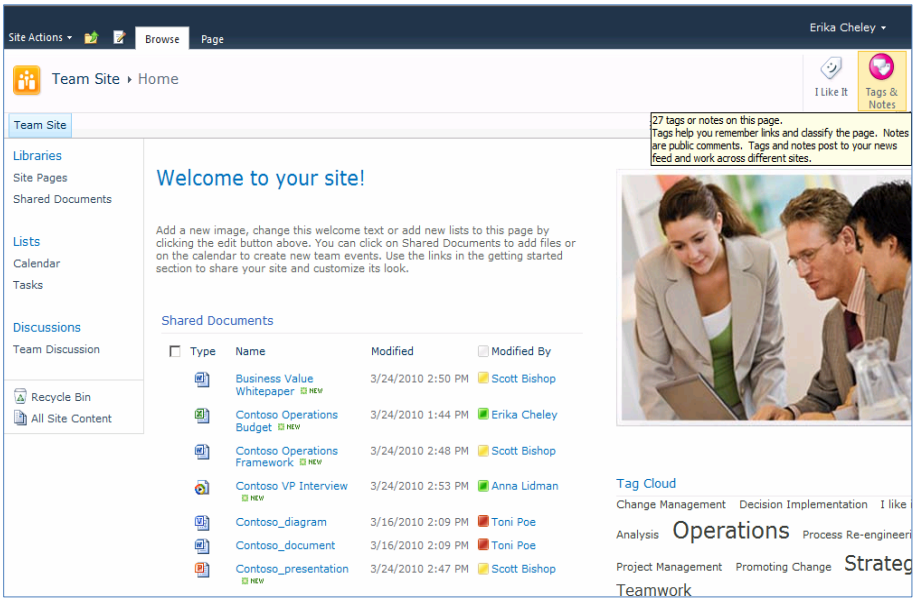
Social feedback—including tagging, bookmarking, rating, and commenting—is a new addition to the SharePoint 2010 experience. These features take the social experience of SharePoint 2010 to a new level of participation and interaction, helping people to discover content as well as what others think of that content.

Tags

People use tags by assigning descriptive words or categories to content. SharePoint Communities features two types of tagging: social tagging and expertise tagging. Social tagging adds metadata to content to describe what it is, what it contains, or what it does. Expertise tagging adds metadata to describe the person on the My Site profile, such as what they do, which projects they work on, or what skills they have. By using social tagging to tag content, people can help build the structure of the company's information

and improve search relevance for that content. By using expertise tagging to tag other people in SharePoint 2010, people help build relationships and connections in the company.

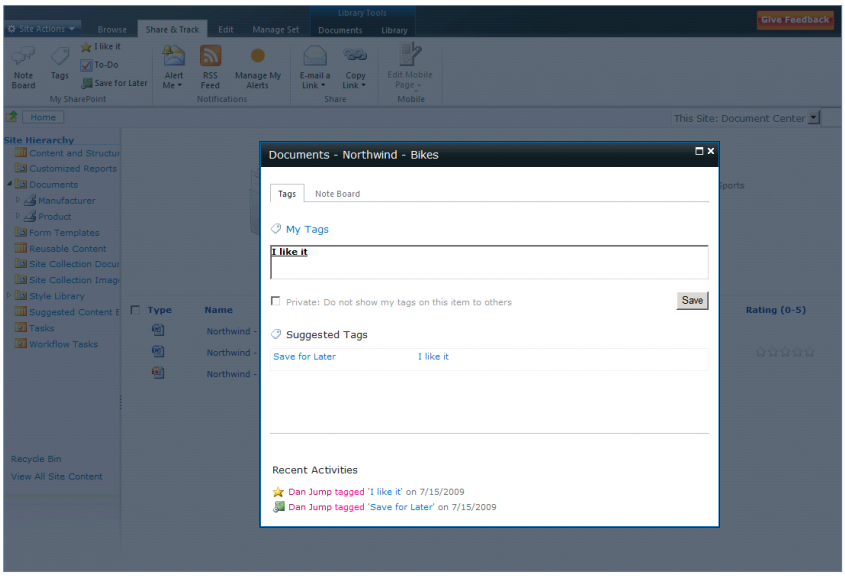
Figure 7 Tags and notes



Bookmarks

Social bookmarking allows people to share bookmarks with a community of users to help build the knowledge and perspective of the community as a whole. In SharePoint 2010, people bookmark content (including content outside of SharePoint) by clicking the "I Like It" tag. By using bookmarks in SharePoint 2010, people can include any piece of Internet content in their communities' sets of social bookmarks.

Figure 8 Tagging and bookmarking



Ratings

In many social networking platforms, people share their opinions of content by rating and commenting on the activities and contributions of other people. In SharePoint 2010, people can rate content on a five-point scale and comment on it, much like how they can comment on a blog post. People can then search both the original content and the comments associated with it.

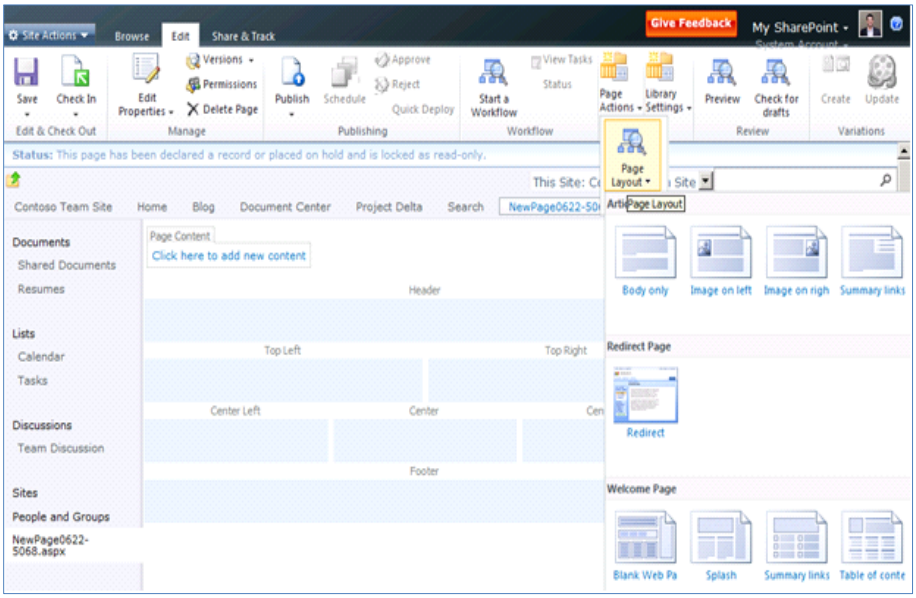
Note Boards

The Note Board Web Part gives people a place to post comments, questions, and other notes so that people across the company can easily communicate with each other. People can add Note Boards to My Sites, tag profiles, and tags and notes pages.

Wikis

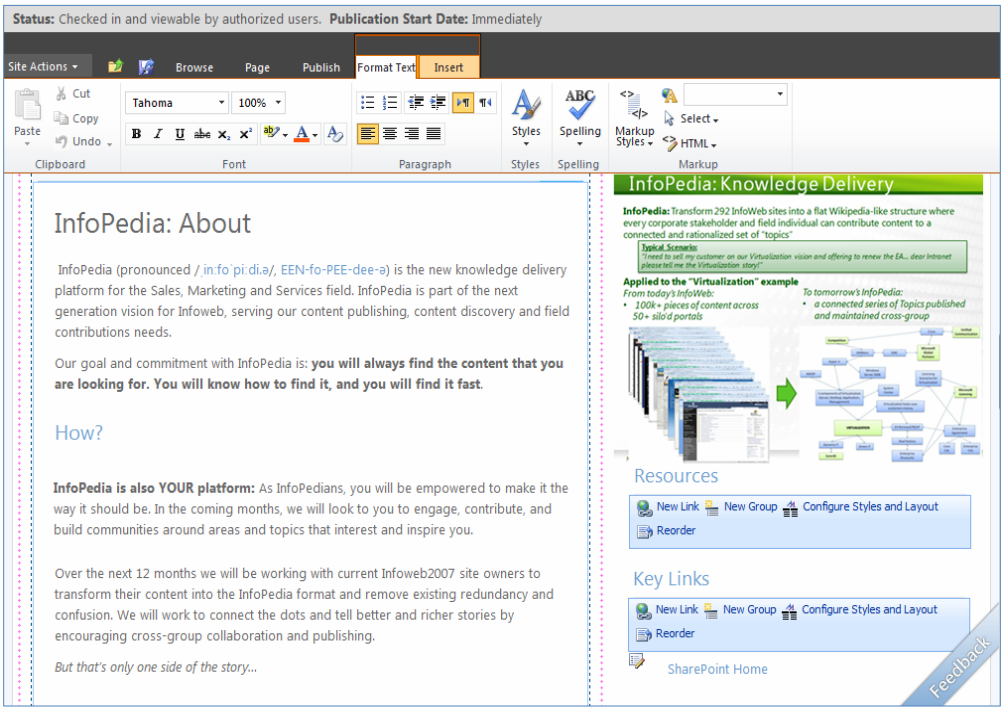
SharePoint 2010 incorporates wiki technology into all team site pages. People can easily edit content on a page by clicking the Edit tab and typing in the page. They can also easily embed Web Parts, media files, and SharePoint lists into the page.

Figure 9 Editing a wiki page



SharePoint 2010 also features Enterprise Wikis to help consolidate company-wide information into a central, easy-to-manage repository. The Enterprise Wiki template is built on the SharePoint publishing infrastructure to support rich page types with embedded metadata, allowing the combination of unstructured wiki content with structured data. Using page editing, people can embed dynamic content, including rich media. In addition, the Enterprise Wiki uses the Managed Metadata service to provide categorization for pages and includes, by default, features such as ratings, metadata-driven navigation, and the ability to activate workflows as part of managing the content.

Figure 10 Changing the page layout of an Enterprise Wiki



Blogs

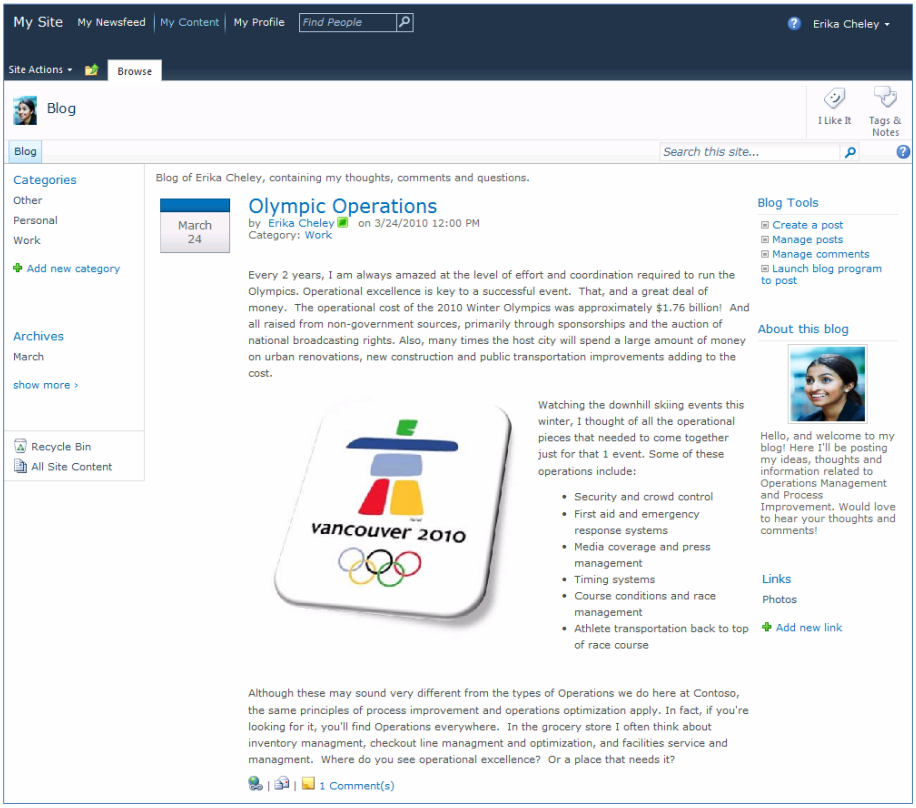
SharePoint 2010 enhances blogs for improved author and reader experiences. Each person in the company can have a personal blog, which is linked to his or her My Site. When people submit blog posts, the posts are added to the Recent Activity section of their My Sites.

The blog site template in SharePoint 2010 features enhanced, blog-related navigation elements that allow people to sort posts by category and date. Blog content features an AJAX-based page experience when people toggle the comment view on and off. Readers can view the "About this blog" content area, which explains the purpose of the blog and introduces the blog's author or authors.

In addition to individual blogs, SharePoint 2010 provides team blogs, which allow multiple people to publish blog posts. Teams can use blogs to work with internal and external customers, or with other teams who are interested in the status or progress of a project or for any other purpose.

Blog authors can take advantage of the Office Fluent user interface and the new rich text editor that are built into SharePoint 2010. The Ribbon user interface in SharePoint 2010 provides live preview functionality and easy access to commonly used actions, like inserting images or uploading files. Blog authors can also use external programs like Microsoft Word or Microsoft Windows Live™ Writer for a different blog editing experience.

Figure 11 SharePoint blog with embedded Presence indicators



SharePoint Content

ECM for the Masses

New and Improved

- Document management
- Records management
- Rich media management
- Web content management

SharePoint 2010 blends the worlds of traditional content management, social computing, and search to deliver an Enterprise Content Management (ECM) platform that is accessible to everyone. SharePoint is easy to use and provides rich policy and process, helping companies manage a broad range of information from creation to disposition. It provides a single platform for managing documents, records, Web content, and rich media, helping companies reduce their IT spending by consolidating multiple systems.

Document Management

SharePoint 2010 includes a broad collection of new capabilities that simplify and streamline how companies manage documents. This is achieved by designing features that can be applied across an entire deployment, regardless of its size, and ensuring that policies are consistently and effectively implemented.

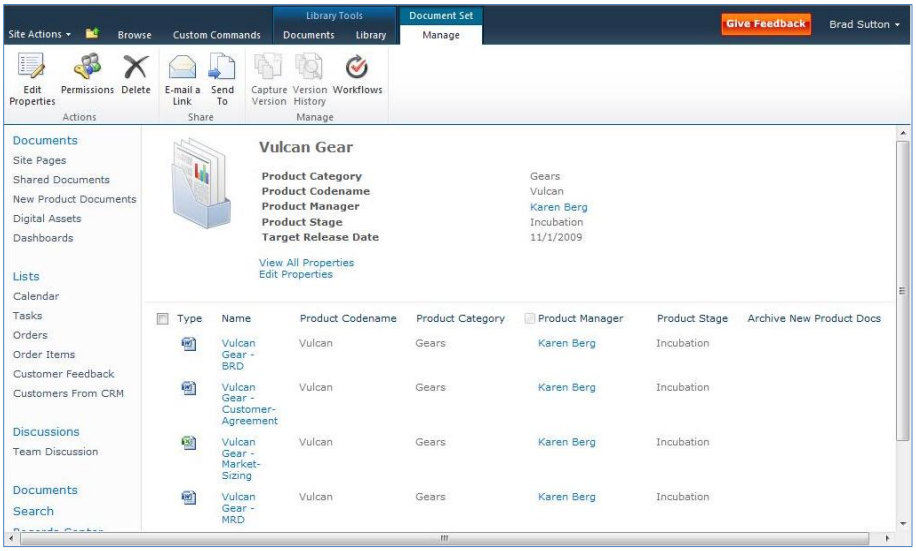
Content Organizer

People using enterprise content management solutions often face challenges: Where should new content be saved and how should it be classified? SharePoint 2010 addresses these challenges with the Content Organizer, a rules-based classification engine that promotes consistent classification of content based on Content Type and specific metadata properties. Site owners can create rules to drive content to specific Document Libraries and folders, where they inherit access control policy, default metadata values, and specific retention schedules.

Document Sets

People often create multiple documents that support a single case or project. By using SharePoint 2010, they can group all of these documents into a single entity. All documents in a Document Set exist as unique entities; but the set can share metadata properties, and people can apply workflows and versioning to the Document Set as a whole. Each Document Set has a customizable welcome page that displays shared metadata properties and can be used to display standard processes, workflow stages, and other set-related information. Like other Web Part pages, the welcome page can be customized to meet specific requirements.

Figure 12 Document Set welcome page



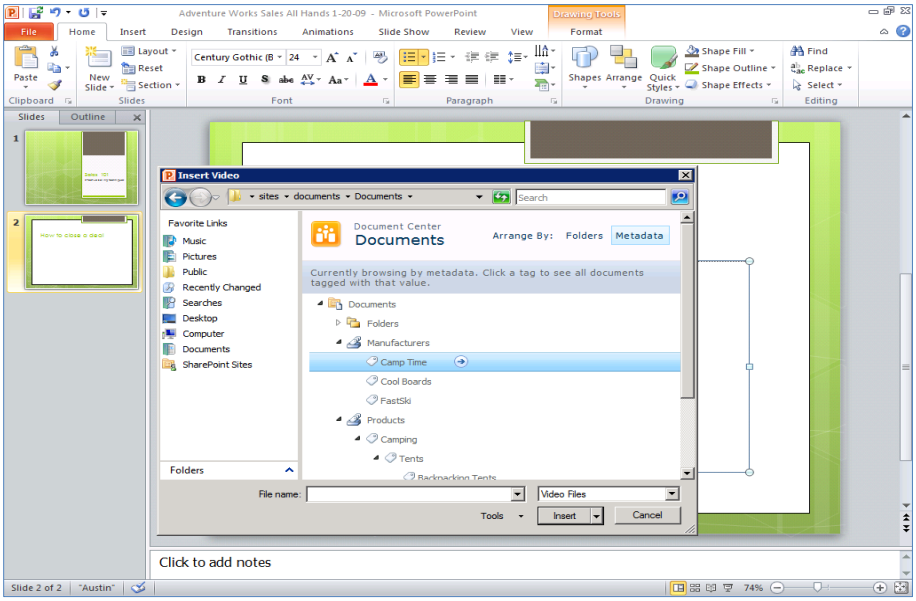
Document IDs

In any content management repository or collaboration environment, content is often reorganized or moved. Hyperlinks to documents no longer work, which causes frustration and loss of efficiency. SharePoint 2010 offers a new capability that assigns documents a unique identification number. Each document has a "permalink" based on its unique ID, which lets people retrieve the document regardless of where it is within a SharePoint deployment.

Managed Metadata Service

As companies worldwide receive increasing amounts of unstructured content, people are having more difficulty finding desired content with full text searching and basic keyword terms. However, if content owners tag documents with metadata, providing accurate details on the nature of the information, people can find that content more easily. SharePoint 2010 helps people easily tag content with metadata through auto completion and taxonomy-browsing tools. Using that metadata, SharePoint 2010 improves the process of finding content by providing search refiners and metadata-driven navigation. People can use metadata-driven navigation from within SharePoint or through Office applications to find the content they need without knowing where it is stored.

Figure 13 Metadata-based navigation used in PowerPoint 2010



SharePoint 2010 includes other metadata features, such as content ratings and Content Types. People can use Content Types to categorize content in a way that is meaningful and to specify the metadata properties, policies, workflows, and other rules for specific types of content (for example, press releases, legal contracts, project plans, financial reports). Content Types support an inheritance model, so site owners can define more specific Content Types with process and policy that are related to specific parts of the company. In SharePoint 2010, people can reuse Content Types across SharePoint Sites Collections and Farms, helping to ensure consistent application of process and policy in company-wide deployments.

Records Management

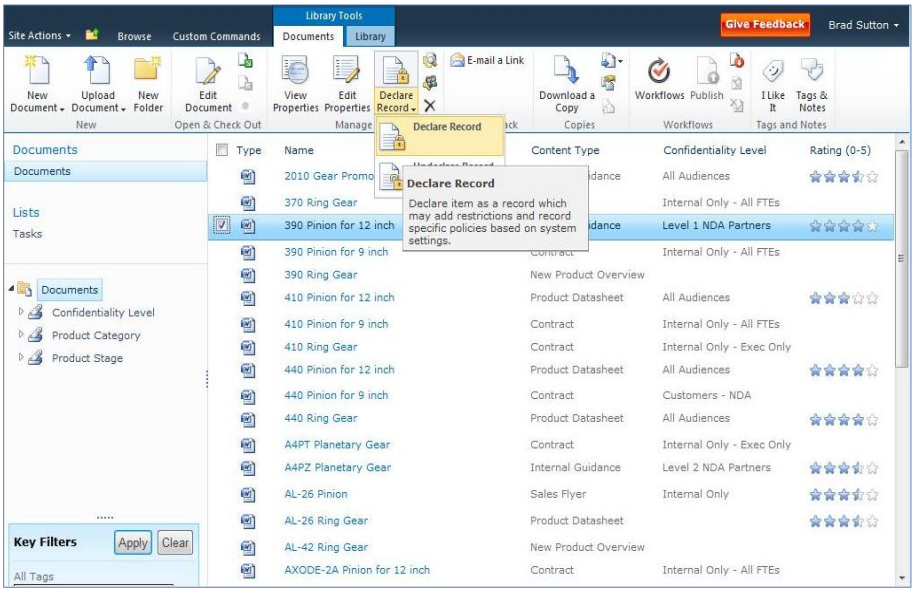
SharePoint 2010 broadens the scope of records management by delivering core capabilities across the entire SharePoint platform. As a result, people can declare all content within SharePoint as records, and companies can manage a central records archive or support in-place records management. SharePoint 2010 makes it easier for companies to drive transparent, intuitive records management. Companies can better adhere to corporate policy and increase accuracy of content classification, making it easier for records managers to manage and monitor records management solutions.

In-Place Records Management

In SharePoint 2010, records management features are available in all site collections (not just in the Records Center) for everyone to use. Site administrators and records managers can work together to decide which records management capabilities to include in any site collection, or whether they will maintain a central records archive to store all official records. By supporting in-place records management, site administrators and records managers can store records and documents within the collaborative environment, retaining the documents' rich context.

While all content in SharePoint should have policy attached, people can declare a document as an in-place record either manually or automatically by using workflow activities. After a document is declared as a record, it is locked from future editing or deletion. Records are denoted by a lock image on the file and continue to reside with other content in the same document library.

Figure 14 Declaring a record in a document library



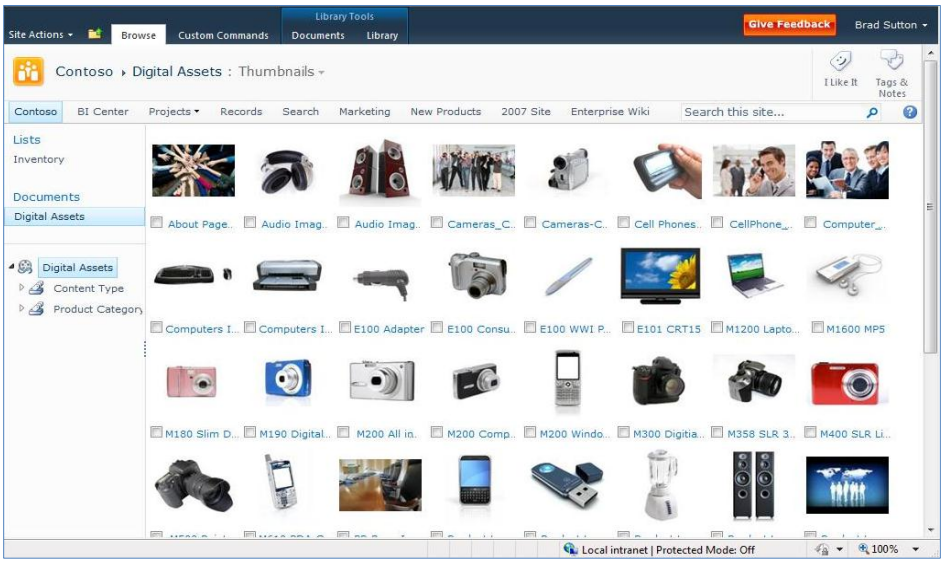
Rich Media Management

SharePoint 2010 includes enhanced management and presentation of multimedia content including Asset Libraries and the Media Player Web Part.

Asset Library

The Asset Library template is a library template that people can use with digital media like video, audio, and image files. In an asset library, metadata columns are automatically populated with information about the assets by inspecting embedded details such as EXIF data. This metadata is then available to refine search results or, through metadata-driven navigation, to allow people to quickly find and use content. People can also configure folders within lists and libraries to automatically apply default metadata properties (for example, adding a “year=2010” tag to all documents within the “2010” folder). Content owners can easily add media to content pages by searching through a central asset library using the media metadata in the filtering criteria.

Figure 15 Digital Asset Library with a metadata-driven navigation pane



Media Player Web Part

SharePoint 2010 includes improved support for streaming video and audio. People can add a customizable Microsoft Silverlight™ Media Player Web Part to any site, wiki page, or Web publishing page to stream media.

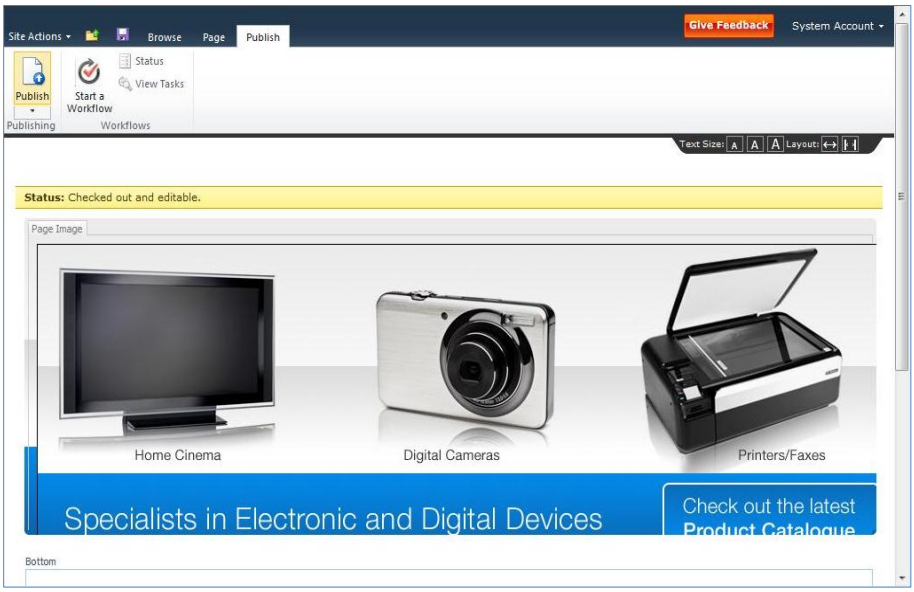
Web Content Management

With the powerful Web content management features in SharePoint 2010, companies can host rich, dynamic Web sites. The rich editing controls and robust publishing infrastructure helps content owners to easily create, publish, and maintain content pages with appropriate controls over branding, page layout, and publishing approval.

Rich Authoring

SharePoint 2010 helps people quickly and simply create content. People can increase the quality and shorten the timelines of content with the Ribbon UI and fewer clicks to create and publish a page.

Figure 16 Simple publishing of Web pages



Web Analytics

SharePoint 2010 delivers improved Web Analytics, providing detailed reports on user activity, content inventory, and search use. People can configure analysis reports to show activity for an entire SharePoint Web application down to a single SharePoint site. People can also create custom reports that use the Web Analytics data repository, allowing site owners to further analyze specific details. Using the reports generated by Web Analytics, new Web Parts in SharePoint 2010 display popular content and the results of popular queries.

SharePoint Search

Relevance, Refinement, and People

New and Improved
• Relevance • Refinement • People Search • Enterprise scale • FAST Search Server 2010 for SharePoint

SharePoint 2010 Search helps people find the information they need to get their jobs done. It provides intranet search, people search, and a platform to build search-driven applications—all on a single, cost-effective infrastructure. But what's so unique about SharePoint 2010 Search is its combination of relevance, refinement, and people. This new approach to search provides an experience that is highly personalized, efficient, and effective.

The SharePoint Search capabilities are delivered through two server products:

- **SharePoint Server 2010** delivers out-of-the box intranet and people search. SharePoint makes it easy to find content by combining relevance, refinement, and social behavior in the search experience.
- **FAST Search Server 2010 for SharePoint** offers a new choice in enterprise search. Combining the power of FAST with the simplicity of SharePoint, FAST Search Server 2010 for SharePoint delivers an exceptional intranet and people search experience and a platform for building custom, search-driven applications.

SharePoint Server 2010

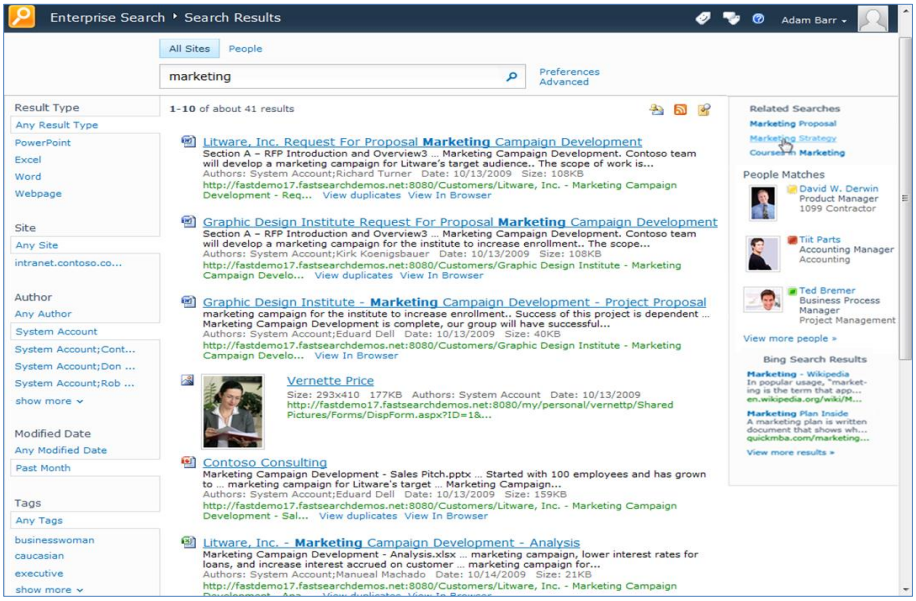
Relevance

SharePoint 2010 provides great out-of-the box relevance tuned for intranet scenarios.

- **Improved core relevance** ranks the best search results more frequently in the top three positions. New ranking ingredients such as URL fuzzy matching, social tags, phrase matching, and extracted metadata (such as author and title) improve result ranking. For example, a PowerPoint presentation with a vague file name like "slides.pptx" could instead use the title on the first slide (for example, "Analysis of Quarterly Results") if it were more relevant.
- **Social behavior** improves search relevance. As users interact with results, search learns which results work best for your organization. Over time, these popular results will bubble to the top, hence leveraging the collective knowledge of your organization.

- **Better result summaries** allow users to identify whether they have the correct result more quickly than ever. Summary quality has been improved by providing longer, higher quality textual snippets from the best parts of the document.
- **Improved multilingual support** for 51 languages, helping people find information across the company in almost any language. Improvements include better coverage and handling of compounds, numbers, and dates. Additionally, an improved multilingual relevance model retrieves and ranks documents more accurately when in a mixed-language environment.

Figure 17 SharePoint 2010 Search Results page



Refinement

SharePoint 2010 provides a new way to explore information through search refinements. These refinements are displayed on the left side of the page, to the side of the core search results, and provide people with self-service capabilities to finely filter the search results. SharePoint 2010 automatically determines refinements by using tags and metadata entered and indexed on the search results return set. These refinements include searching by type of content (for example, Web page, document, spreadsheet, presentation), location, author, last modified date, metadata tags, and more.

In addition to refinements, SharePoint 2010 includes several other features that help people explore the result set. Search results include short excerpts, and definitions at the bottom of the list are automatically generated based on the context of the query words. “Did you mean” suggestions appear to help people specify misspelled and ambiguous queries, and acronyms are expanded to help people find the right content. For example, if a person searches for “ECM,” the search results will show “enterprise content management.” Results are quickly returned and are available in a browser, on a smart phone device, or through desktop search integration with Windows® 7.

People Search

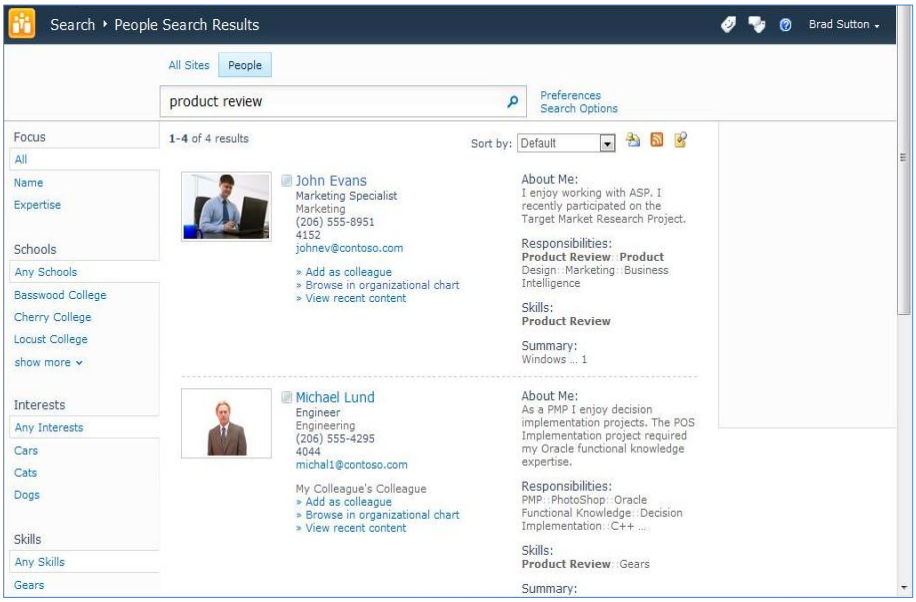
Businesses thrive when people work together, and finding the right people who have specific skills and talents can be challenging in a large company.

Finding People

The People Search experience in SharePoint 2010 is similar to an address book with better name matching, making it easier to find people by name, title, and organizational structure. The name search includes phonetic name matching that will return names similar to the query, and will return variations of common names, including nicknames. For example, if someone searches for "Robert," the results will also show people with the names "Rob," "Bert," "Bob," and "Robby." People can also use wildcards in searches, helping them find the right person.

People Search results feature the same refiners as the core search results. By exploring results through name, title, and expertise, people can quickly browse and select people and expertise. People Search results also include real-time presence through Microsoft Office Communications Server, making it easy to immediately connect with people from search results.

Figure 18 People Search results page



Mining and Discovering Expertise

SharePoint 2010 builds a model of people's regular interactions based on e-mail conversations and group memberships, which it uses to organize people search results based on social distance. People can manually submit or automatically generate a list of colleagues mined from Microsoft Outlook. Automatically generated lists of colleagues are a way of rapidly inferring social relationships throughout the organization, speeding the adoption and usefulness of people search results. SharePoint 2010 also infers expertise—automatically suggesting topics mined from people's activities (for example, tags,

keywords) and Outlook inboxes, and suggesting additions to their expertise profile in their My Site. This makes it easier for people to complete My Site profiles, leading to more people with informative profiles. With complete, visible expertise, companies benefit in both search and communities capabilities.

Improving Search Based on Social Behavior

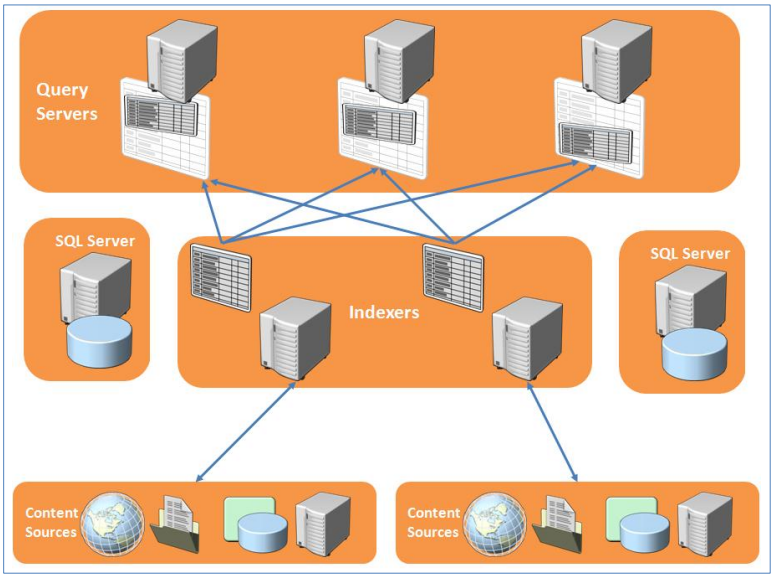
For many companies, SharePoint sites have become the gathering place where people create, share, and interact with information. Social behavior improves search results in several ways. First, the relevance ranking for people search accounts for social distance. For example, a direct colleague will appear in a search before someone removed by three degrees. Second, SharePoint 2010 supports social tagging and content rating, and this social feedback on content can influence the relevance of content in search results. People's daily use of information in SharePoint and Office applications can have a measurable impact on search relevance, helping companies capitalize on the collective wisdom of people. Finally, search solutions in SharePoint 2010 use click-through on search results for relevance ranking; that is, by identifying that the user clicked a link in the last similar search, that link is more likely to be the best one this time.

Enterprise Scale

SharePoint 2010 helps people add multiple instances of the crawler, indexing, and query components. This level of flexibility means that people can scale SharePoint farms. (Previous versions of SharePoint Server did not allow companies to scale the indexing components).

By scaling components of the search architecture with SharePoint 2010, companies can gain sub-second query times for all queries, regardless of the size of the farm. SharePoint 2010 can also remove bottlenecks that were present in previous versions of SharePoint Server.

Figure 19 Scaled architecture for query servers and indexers



Companies can add multiple indexers to farms to provide availability and to scale to achieve high performance for the indexing process. In a new capability for SharePoint 2010, each indexer can crawl a discrete set of content repositories, so not all indexers need to index the entire corpus. Furthermore, indexers no longer store full copies of the index; they simply crawl content repositories and submit the indexes to query servers.

People can also add multiple query servers to provide availability and to achieve high query performance. Adding multiple query servers is actually implementing index partitioning; each query server maintains a subset of the entire logical index, and therefore does not need to query the entire index (which could be a very large file) for every query. SharePoint 2010 automatically maintains the partitions, using a hash of each crawled document's ID to determine in which partition a document belongs. The indexed data is then propagated to the appropriate query server.

FAST Search Server 2010 for SharePoint

FAST Search Server 2010 for SharePoint offers a new choice in enterprise search. Combining the power of FAST with the simplicity of SharePoint, FAST Search Server 2010 for SharePoint delivers an exceptional intranet and people search experience and a platform for building search-driven applications.

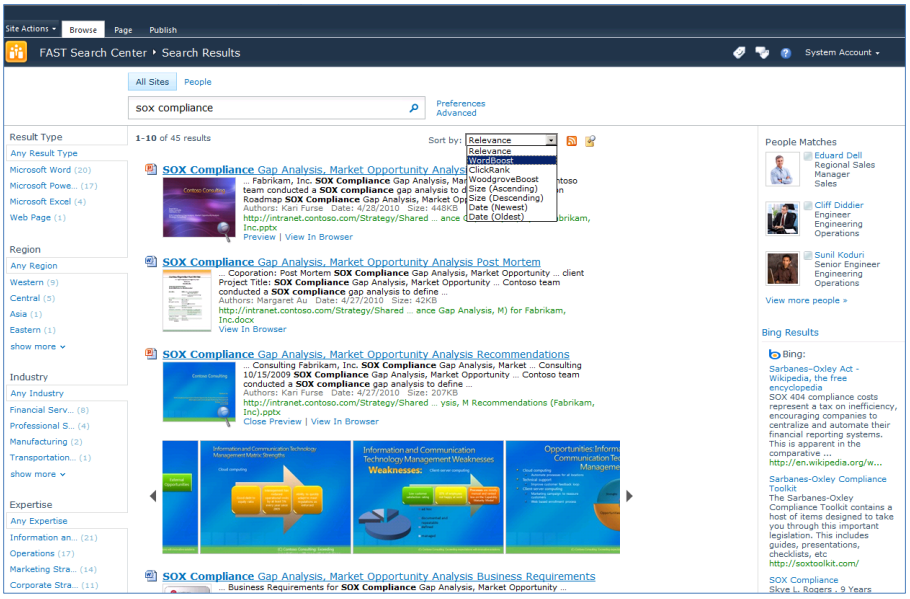
Every organization has unique search requirements. FAST Search Server 2010 for SharePoint can customize the search experience so that it fits the company and its people.

Advanced Content Processing

FAST Search Server 2010 for SharePoint includes extremely powerful content processing based on deep linguistics and text analytics technology. This processing adds tags and structure to unstructured information, creating metadata directly from the content. This gives users the ability to search using terms and language that are familiar and unique to the business.

Most companies frequently use a set of internal names, acronyms, or code words. These words can be confusing to different groups, outsiders, or new members of the company. People will be able to use their own terminology to sort, refine, and query content. Furthermore, advanced language support helps people find content written in its native language.

Figure 20 FAST Search for SharePoint Results Page



Contextual Relevance

FAST Search Server 2010 for SharePoint can give people results that are meaningful and dynamically tailored to their jobs, roles, and functions within the company. For example, the sales teams will be able to quickly find product information, collateral, and answers to RFP questions, while the engineering teams will see specifications and requirements documents at the top of their results sets. Site administrators can tailor search quickly and easily to deliver contextually relevant results the first time.

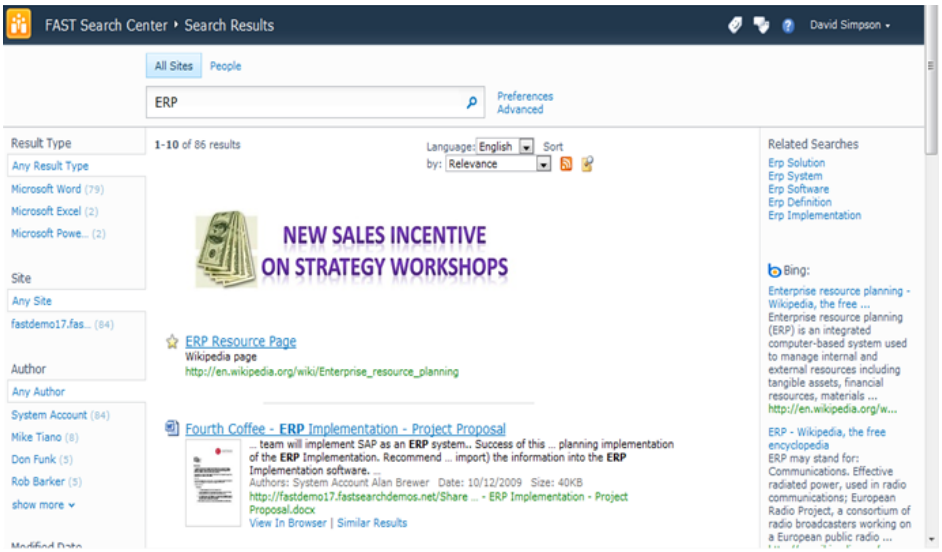
Tunable Relevance to Meet Diverse Needs

Relevance is central to search, but one size doesn't always fit all. FAST Search Server 2010 for SharePoint provides a highly tunable relevance model to meet the needs of a diverse set of applications. Multiple ranking profiles can be available simultaneously—even presented as options for people to choose. By extending the default relevance algorithm, site administrators can quickly and easily create and deploy new custom ranking algorithms that are tuned to meet multiple business demands.

Visual Search Experience

With a more visual search experience, people can more easily find content. Most people identify better with information when it's presented visually. FAST Search Server 2010 for SharePoint includes document thumbnails and scrolling previews of PowerPoint presentations, so people can find what they are looking for quickly, without opening the documents. With Visual Best Bets, site administrators can easily add visual banners and applications to highlight essential information.

Figure 21 Highlight essential information with Visual Best Bets



Search-Driven Applications

Companies can drive measurable return on investment with search-driven applications. Search-driven applications help a well-defined set of people accomplish specific business tasks more efficiently. They aggregate information from a defined set of content sources, add structure to unstructured information, and provide a contextual, interactive, and usable experience. Search-driven applications are valuable to all roles, including sales, marketing, research and development (R&D), consulting, support, operations, legal, human resources (HR), IT, and finance. With FAST Search Server 2010 for SharePoint, companies can meet all search application needs across the business.

Figure 22 Example of a sales search-driven application

SharePoint Insights

BI for Everyone

New and Improved
• Excel Services • PerformancePoint Services • Visio Services • Chart Web Parts

SharePoint 2010 includes new capabilities, including rich scorecards, dynamic dashboards, and easy-to-use Chart Web Parts, that give people more flexibility when working with data to make business decisions.

Using the SharePoint 2010 Insights capabilities, people can turn raw data into usable reports without involving developers or server administrators in the process. They can increase their productivity and make prompt, informed decisions using the familiar, decentralized user interface in SharePoint 2010. They can also interact with data, work with key performance indicators, perform analytics, and create their own data visualizations.

Excel Services

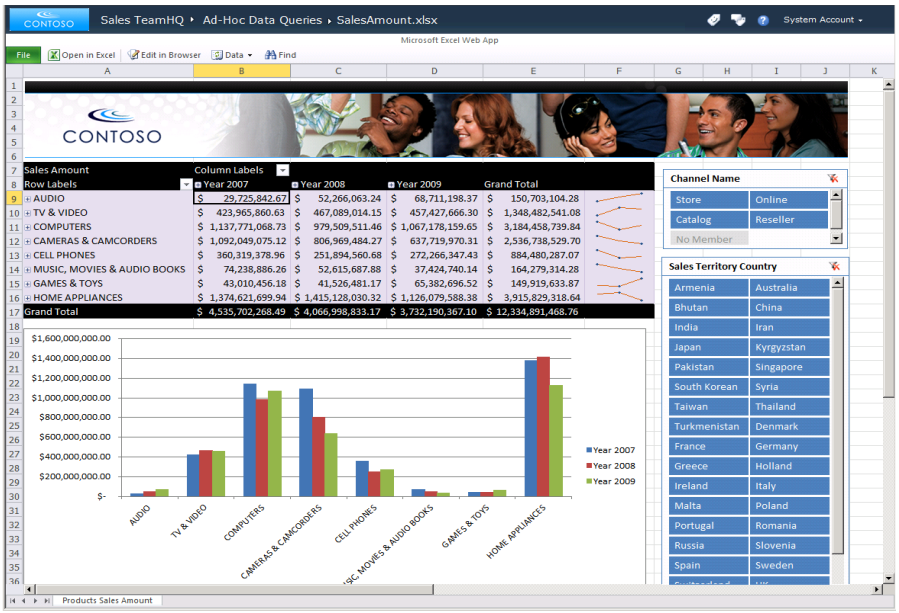
Increasingly, people use Microsoft Excel to enter, store, and analyze data. As the use of Excel has increased, so has the need to share the results (for example, graphs, charts, spreadsheets) with colleagues and customers. Often, people share spreadsheets through e-mail messages. For example, Joe sends a spreadsheet to Ursula, who makes a change and forwards it to Phillip. Phillip then makes another change to the spreadsheet and sends it to someone else.

This method of sharing causes a problem: a loss of control. Not only does Joe, the original author, lose control of the content in the spreadsheet, but he loses control of the intellectual property in the spreadsheet (for example, formulas that are not meant to be distributed).

With Excel Services, people can meet their business needs by using Excel 2010 to create and modify spreadsheets. However, by using Excel Services, people can now maintain control over the spreadsheets in many ways and provide a single version of correct information.

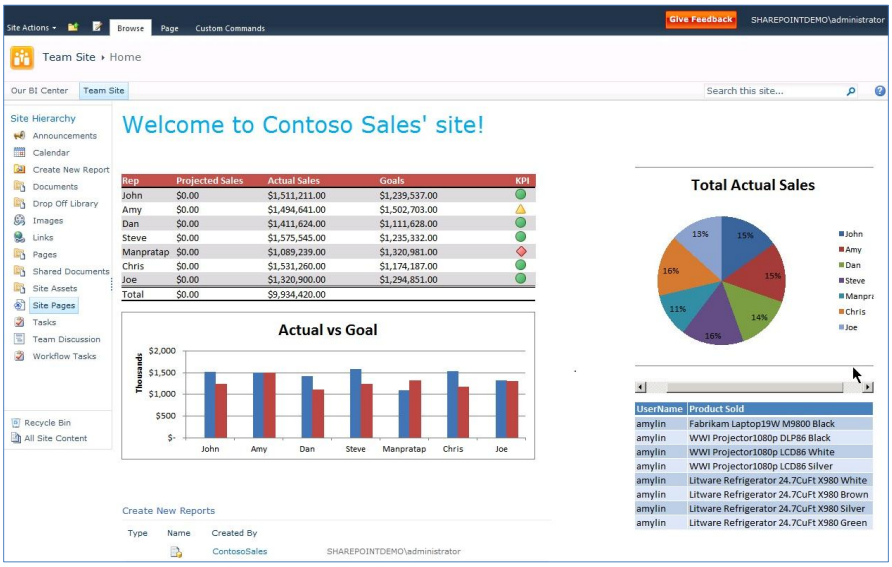
People can take spreadsheets created in Excel 2010 and publish them to Excel Services in SharePoint 2010. After defining the trusted location of the spreadsheet, they can allow other SharePoint site users to view the spreadsheet in their browsers. Authors can also protect the intellectual property embedded in spreadsheets because the information is not displayed in the versions published in the browser. For example, Joe can define the aggregated revenue figures for regional sales information as the trusted location of the spreadsheet while hiding the detailed revenue figures for each salesperson in the region that the financial details are based on.

Figure 23 Excel 2010 workbook published using Excel Services for SharePoint 2010



In SharePoint 2010, Excel Services increases fidelity to the experience in Excel 2010. People can use Excel Services to gain interactive capabilities like sorting, filtering, and working with PivotTables, plus new features like PowerPivot, visual slicers, and sparklines—small charts that convey a lot of information in simple terms. Excel Services for SharePoint 2010 supports more Excel features and larger workbooks, improving performance. Developers can use new programmability features, such as a new REST API and JavaScript Object Model, to create rich and dynamic business applications.

Figure 24 Published Excel workbook with functionality using the JavaScript Object Model



Excel 2010 introduces new data visualizations and conditional formatting capabilities, including negative data bars, multiple icon sets, right-aligned data bars, and sparklines. When placed in an Excel cell,

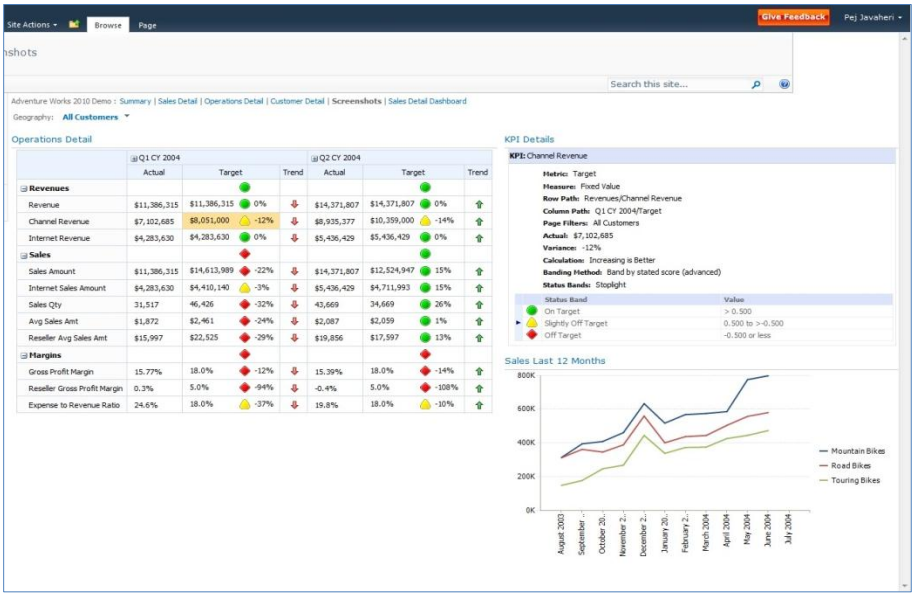
sparklines dramatically improve the data visualization for fast comparison. Excel Services in SharePoint 2010 can render these new data visualizations and conditional formatting capabilities when creating or publishing spreadsheets in the browser.

Excel Services also provides a rich API and Web services that offer developers extensibility points for custom solutions. Developers can use a new REST API to easily access the data within a spreadsheet, which they can use to create mash-ups or other advanced customized solutions. Developers can also use a new JavaScript object model to create dynamic applications that use the same data.

PerformancePoint Services

Almost every business intelligence implementation uses scorecards and dashboards. Scorecards are collections of KPIs and objectives that people use to measure multiple performance factors in a business. A dashboard is a group of related objects that help companies quickly understand their performance. Dashboards can include scorecards, reports, spreadsheets, and diagrams; they may also contain filters that all scorecards and KPIs use to control the context of reports and visualizations. Microsoft PerformancePoint™ Services helps companies view and manage key drivers of the business and tie them to the corporate strategy.

Figure 25 KPI detail view in PerformancePoint Services



People can further analyze relevant data and make better decisions with new visualizations like the decomposition tree, a view of the factors that have a great impact on business. Scorecards now contain KPI details highlighting ownership, date stamps, and thresholds, which provide complete transparency of strategic initiatives and processes. People can find the right information with new filtering and sorting capabilities such as Top/Bottom filtering, switching measures, and drilling across dimensions.

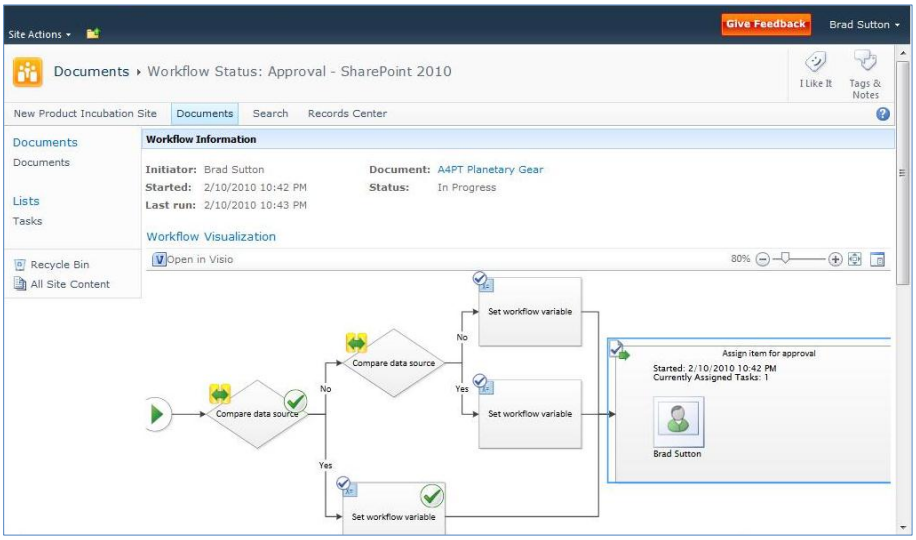
People can easily create dynamic dashboards and scorecards with improvements to Dashboard Designer, a dedicated tool to that can aggregate data and content from multiple sources into a single view. With Dashboard Designer, people can create rich, dynamic, and interactive dashboards displaying the right information from sources like Excel, SQL Server Analysis Services, SharePoint lists, and Web page content. They can deploy rich dashboards by publishing to SharePoint 2010 with a single click, displaying them through a Web browser. They can also deploy business intelligence seamlessly and easily throughout the company and access the content they need when they need it.

PerformancePoint Services is now tightly integrated with and included as part of SharePoint 2010. Because PerformancePoint Services is no longer a stand-alone product, people can quickly assemble dashboards using the data sources available across SharePoint, Office, and SQL Server for reporting, analytics, scorecards, and dynamic dashboards. PerformancePoint Services is also now a part of the SharePoint security and administration services, and stores all content in SharePoint lists. This means that companies can set up PerformancePoint Services as part of deploying SharePoint 2010, while using the rich SharePoint architecture for scalability and availability.

Visio Services

SharePoint 2010 now includes Visio Services, which lets people render Visio diagrams and charts within a browser. SharePoint 2010 treats Visio files as first-class document types, like Word, Excel, or PowerPoint files, so people can easily open a Visio diagram from a document library. Additionally, it indexes the contents of the Visio diagram so they will be fully accessible within search results.

Figure 26 Editing Visio diagrams with Visio Services



People can use Visio 2010 to create sophisticated data visualizations to transform raw data into more dynamic diagrams. They can also use SharePoint 2010 Excel Services in Visio 2010 as a data source when creating visualizations, which allows them to use published spreadsheets, SQL Server database cubes, or SharePoint lists as data sources for Visio 2010 visualizations. People can connect Visio diagrams to other

SharePoint Web Parts, such as filters, to create dynamic views, and can combine Visio diagrams with other data-driven Web Parts as part of a SharePoint dashboard page. With a rich JavaScript object model, people can use Visio diagrams create new and interactive business applications, such as mash-ups, to solve immediate business problems. For more information about the power of combining solutions in SharePoint 2010, see SharePoint Composites.

Chart Web Parts

As people increasingly manage information through SharePoint, they must be able to visualize and share that information to help decision makers base their choices on relevant and up-to-date data.

People can use step-by-step wizards to add Chart Web Parts to SharePoint Web pages and then configure them to visually represent the data. People can quickly and easily follow the steps because the wizards offer a rich set of options and familiar user interface.

Figure 27 Chart Web Part

SharePoint Composites

Do-It-Yourself Business Solutions

New and Improved

- Business Connectivity Services
- SharePoint Designer 2010
- Workflows
- Access Services
- InfoPath Forms Services
- Sandbox Solutions

Almost all companies need custom solutions that meet the needs of their specific lines of business. To satisfy these requirements, decision makers turn to developers or IT staff to build these solutions. Some decision makers even reach outside the company and hire external contractors or vendors to build these solutions. Often, this process results in a bottleneck at a single point within the company: the IT staff.

With SharePoint Composites, people can create solutions using out-of-the-box SharePoint components and tools to deliver business collaboration solutions without having to write custom code and without involving the corporate IT team. Companies can then increase productivity and promote teamwork by letting users and decision makers create SharePoint-based solutions.

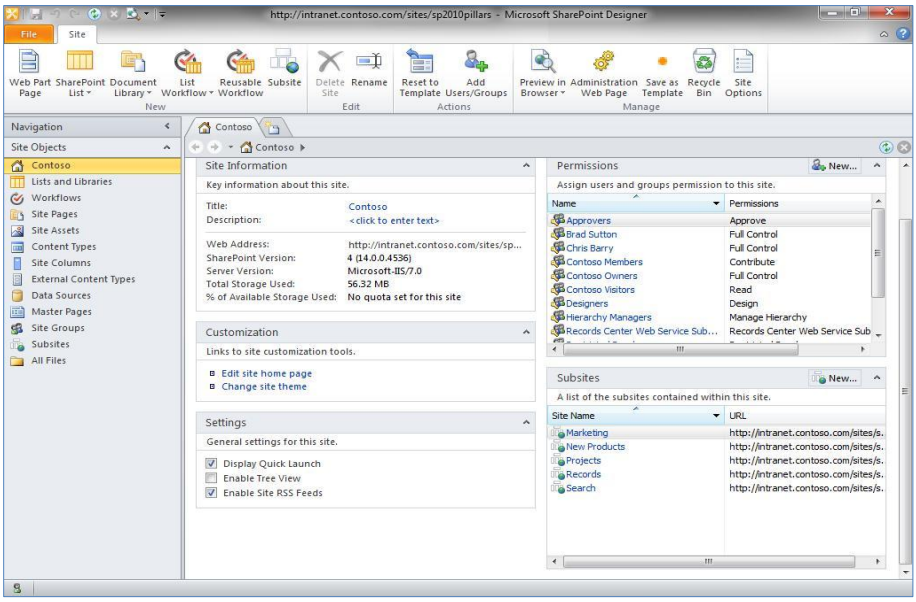
SharePoint Composites helps IT teams focus on higher priority initiatives and improve the return on existing application investments. The company IT team benefits from this approach because out-of-the-box solutions are easier to maintain, require less management, and let administrators deploy and maintain a predictable infrastructure to support such solutions.

Business Connectivity Services

In SharePoint Server 2007, people could work with external data using the Business Data Catalog (BDC). With this powerful capability, people gained advanced search solutions and could supplement information in SharePoint lists with data from external line-of-business systems. SharePoint 2010 builds on the BDC and introduces Business Connectivity Services (BCS), helping people integrate external data into SharePoint solutions with both read and write operations.

People can easily connect a SharePoint Composites application to external data by using Microsoft SharePoint Designer 2010 to create an external content type, which they can use in SharePoint lists or throughout the application. People can also use the external data within Office client applications such as Word, Excel, and Outlook. For example, custom task panes in Outlook can use data from external line-of-business applications to add details to a selected contact card, such as the company's recent orders.

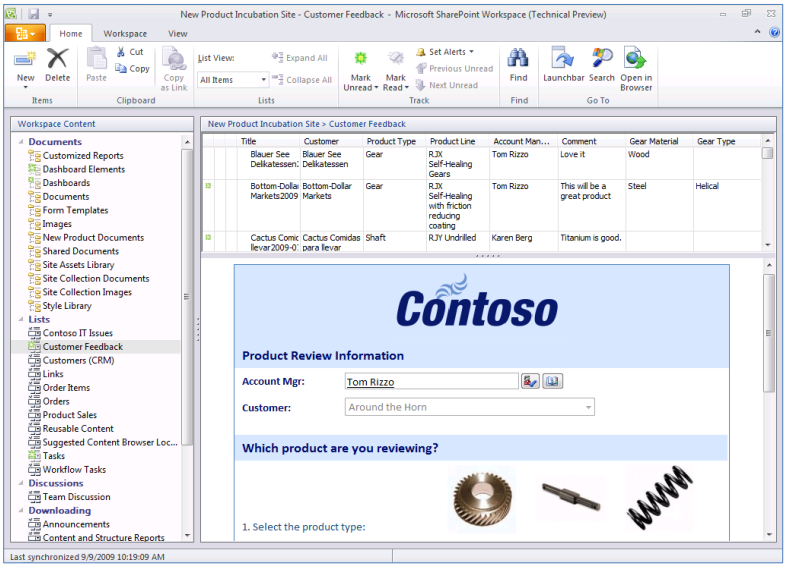
Figure 28 SharePoint Designer 2010 navigation with external content types and data sources



Not all users are connected at all times. For people who need to work with company data while disconnected from the network, SharePoint Workspace 2010 offers a rich offline experience that gives them access to SharePoint content from almost anywhere at almost any time, whether online of offline.

People who work with SharePoint solutions in a browser will have an almost identical experience in SharePoint Workspace 2010. When a user is connected to the network, SharePoint Workspace automatically sends updated data to the server. If SharePoint Workspace detects the user is not connected to the network, it caches all of the changes offline. When the user connects to the network, SharePoint Workspace automatically updates the server with the changes.

Figure 29 SharePoint Workspace 2010 with InfoPath forms



SharePoint Designer 2010

Many people already know SharePoint Designer as a very powerful and useful tool to customize sites in SharePoint. Because of it being so powerful yet easy to use, companies have struggled to balance and control the level of access business users have to SharePoint Designer. To address this need for control, SharePoint Designer 2010 in SharePoint 2010 allows SharePoint Server farm administrators to control the use of SharePoint Designer from the server within Central Administration or to limit users to specific capabilities. Site collection administrators can further limit what business users can do with SharePoint Designer 2010 within a specific site collection. With these controls, SharePoint farm administrators can define the operations that users can perform with SharePoint Designer and ensure the sites, workflows, and data connections are edited only within specific permissions.

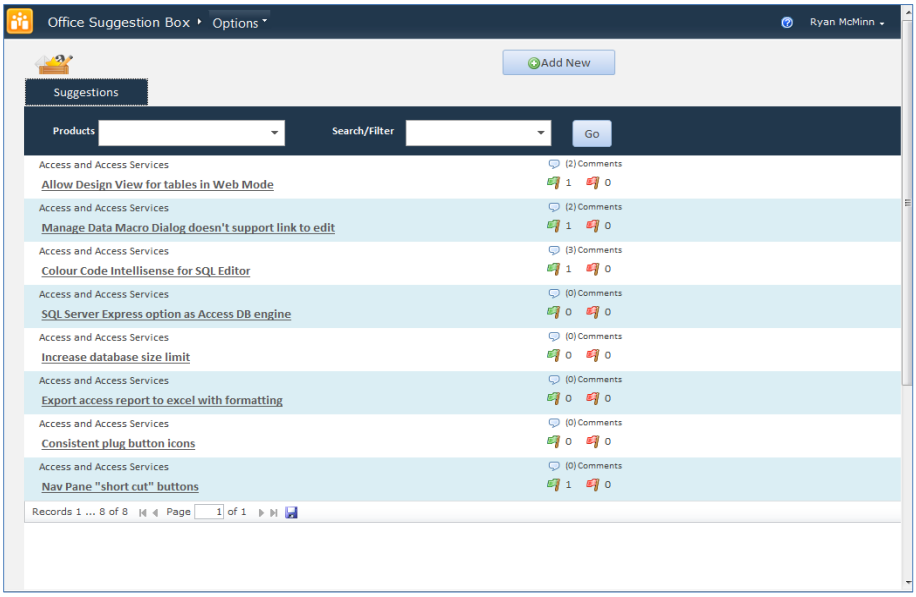
SharePoint Designer 2010 includes the Office Fluent user interface, making it simpler to use and easier to discover the different functions it offers. In addition, new and powerful capabilities of SharePoint Designer help people create and manage data connections between their SharePoint sites and external data sources, using the new Business Connectivity Services in SharePoint 2010.

Access Services

Business users often use Microsoft Office Access to create data-centric applications using tables, views, forms, and reports. Access applications are often designed for individual use or to be used by only a few people at the same time. These applications gain importance within the company as more people use them. Because Access is not intended to be used by many concurrent users, the applications begin to experience scale-related problems. When the importance and popularity of Access applications grow, companies eventually must redevelop them into Web applications. Depending on the complexity and size of the application, redeveloping applications can become very difficult.

SharePoint 2010 addresses this problem by helping people create applications in Access 2010 and publish them to SharePoint sites with Access Services. Access applications published to SharePoint sites are almost identical to the Access client applications. Access tables, reports, forms, and macros are all deployed to SharePoint sites, allowing more people to use the application in the browser interface.

Figure 30 Access Services rendered within SharePoint 2010



Workflows

To streamline work and boost productivity, companies must be able to automate business processes using workflows. SharePoint 2010 allows people to create workflows in Visio 2010 and then export them to SharePoint Designer 2010 to add business logic and additional rules. Using Visio, people can more easily express the intent of the desired workflow process. People can export workflows developed in SharePoint Designer 2010 from one SharePoint site into another SharePoint site, allowing those workflows to be reused and for people to develop and test custom workflows in a trusted environment before deploying them to a production system. In SharePoint 2010, workflow visualizations with Visio Services help people determine the status of active workflows by showing the entire workflow execution plan with indicators of the current stages of workflows.

The design of SharePoint 2010 also lets people export workflows to Visual Studio 2010. With this capability, professional developers can add custom code to enhance workflow capabilities for specific business requirements.

InfoPath Forms Services

With Microsoft InfoPath 2010, business users can design sophisticated electronic forms to quickly and cost-effectively gather information required for an immediate business need. It is possible to customize forms with features such as calculated fields, setting default values, conditional formatting and screen tips, all without writing code. When used together with SharePoint 2010, these forms can be used for information stored in SharePoint lists.

On the server-side, InfoPath Forms Services in SharePoint 2010 help people seamlessly render InfoPath forms within different clients, such as Web browsers, Office clients, and SharePoint Workspace. This

provides business users and IT with a robust component for form and process automation that is scalable across different scenarios.

It is now much simpler to use the capabilities of InfoPath forms to add form-filling experiences to SharePoint web pages, populate SharePoint lists, and use business connectivity Services in SharePoint 2010 to connect forms to line-of-business systems. As an example, it's easier than ever to host your forms on Web pages using the new InfoPath Form Web Part. In SharePoint Server 2007, users who wanted to host their InfoPath forms on Web pages had to write ASP.NET code in Visual Studio. Now, without writing a single line of code, it is possible to simply add the InfoPath Form Web Part to a Web Part page and point it to a published form. The Web Part can be used to host any InfoPath browser form that has been published to a SharePoint list or form library, and it can be connected to other Web Parts on the page to send or receive data.

Sandbox Solutions

While SharePoint Composites provides multiple options for creating robust, no-code solutions with out-of-the-box components and tools, companies often need custom-code solutions. Custom-code solutions are the most powerful option when creating business-collaboration solutions; however, they require a server administrator to deploy the code to the server. In large SharePoint Server farms that host sites for thousands of people, poorly performing code can affect many more users than the solution was built for.

SharePoint 2010 addresses this challenge with sandboxed solutions, which contain custom code and can be deployed by either a server administrator or a site collection owner. Administrators can designate thresholds in CPU utilization, memory use, database query times, and other areas so that if a sandboxed solution exceeds a threshold, SharePoint 2010 will automatically disable it. Sandboxed solutions cannot harm the health of SharePoint Server farms because resource monitors and controls allow SharePoint 2010 to disable expensive and poorly performing custom code. This removes the burden on the corporate IT team to vet, deploy, and maintain custom code for a small subset of users in a large SharePoint deployment.

Developers who create sandboxed solutions are limited in what they can do with the SharePoint Server object model. For instance, a sandboxed solution deployed by the site collection owner cannot interact with the hosting Web application or with the SharePoint farm; it has access only to the current site collection and the sites within that site collection.

While site collection owners can deploy custom code without relying on the IT staff, SharePoint Server farm and server administrators must be able to establish boundaries and controls around custom-code deployments. SharePoint 2010 offers resource monitoring and management capabilities for sandboxed solutions to help companies keep poorly performing code from affecting SharePoint Server farms.

Appendix A:
Resources Available for Evaluating SharePoint 2010

In addition to this evaluation guide, use the following resources to help you install and evaluate SharePoint 2010:

- Online resources:
  - The SharePoint 2010 Web site (http://www.microsoft.com/sharepoint), which provides overviews, content, and updates regarding the SharePoint 2010 release and product offerings.
  - The MSDN SharePoint Developer Center Web site (http://msdn.microsoft.com/sharepoint), which contains technical resources about Microsoft SharePoint Products and Technologies from a developer's perspective.
  - The TechNet SharePoint Web site (http://technet.microsoft.com/en-us/sharepoint/default.aspx), which contains resources on how to deploy, manage, maintain, and support SharePoint 2010.
  - The Microsoft SharePoint Team Blog (http://blogs.msdn.com/sharepoint) is the official blog of the SharePoint Products and Technologies Group.

- Product evaluation and guidance:
  - SharePoint 2010 product documentation.
  - The product walk-through document for downloading SharePoint Server 2010 and trying out its main new features.
  - The SharePoint 2010 IT Professional Reviewers Guide includes an administration and maintenance perspective of SharePoint 2010.
  - The SharePoint 2010 Developer Reviewers Guide contains an overview of the extensibility and customization points available for developers.
  - The SharePoint 2010 evaluation guides for Search technologies:
    - Enterprise Search Getting Started
    - SharePoint Server 2010 Enterprise Search
    - FAST Search Server 2010 for SharePoint

Appendix B: Feature chart - SharePoint 2010 Search and FAST Search for SharePoint

Feature	SharePoint 2010 Search	FAST Search for SharePoint
People and Expertise Search Search for people by name or by associated terms.	●	●
SharePoint 2010 Search Connector Framework Crawl content outside of SharePoint easily and securely. The Search Connector Framework is built on Business Connectivity Services and allows you to easily create your own connectors.	●	●
Enterprise Scale Search Search up to 100 million documents to meet the needs of your entire company or the specialized needs of individual departments.	●	●
Search from Windows 7 & Windows Mobile Search beyond the search center. Conduct searches from the Windows 7 desktop and on your Windows mobile device.	●	●
Metadata-Driven Refinement Use the new refinement panel in SharePoint 2010 to narrow the results of your search and find the right content faster.	●	●
Click Through Relevancy Find results that others liked. Each time people click on a search result, its ranking for related queries increases.	●	●
Taxonomy Tag Integration Bring the power of taxonomy into Search. Tag metadata is shown in results, and users can refine by taxonomy-based tags.	●	●
Phonetic and Nickname Search Search for a person's name as it sounds, without knowing the exact spelling.	●	●
Advanced Content Processing Extract and create metadata from documents to improve search results, sorting capabilities, and refinement.		●
Tunable Relevance with Multiple Rank Profiles Blend static and dynamic ranking parameters to instantly improve search results. Multiple ranking profiles can be available simultaneously		●
Contextual Search Tailor different results and refinement options based on the profile of the user or audience.		●
Thumbnails and Previews Recognize the right content quickly with thumbnail and preview images in your search results.		●
Extensible Search Platform Meet your company's complex search needs with an extensible search platform. Build search-driven applications, including 360° Customer Insight applications, Research and Development portals, and Product Support dashboards.		●
Extreme Scale Search Scale to extremes with FAST Search for SharePoint while maintaining sub-second query times.		●
Business Intelligence Indexing Connector Crawl Browse Excel workbooks and Reporting Services Reports with improved results, descriptions, thumbnails, and refiners. Discover your Business Intelligence assets quickly and easily, browse the document and its behind-the-scenes data, and access the information you need quickly and easily.		●