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Document Management in SharePoint 2010

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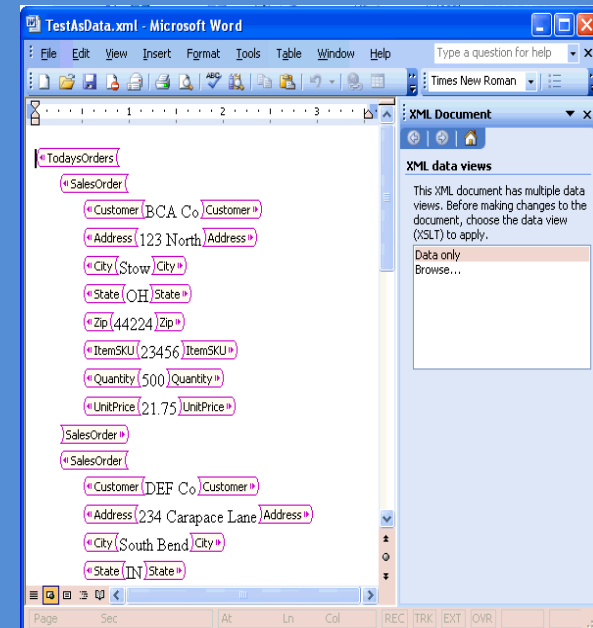
Agenda

- Definitions
- General DMS requirements
- SharePoint 2010 capabilities
 - Document Sets
 - Metadata Management
 - Content Organizing
- Offline document management



Definitions

- Document = ???
- Content Management
 - Document Management
 - Records Management
 - Digital Asset Management
 - Web Content Management
 - Enterprise Content Management



General DMS Requirements

- Store, edit, modify metadata, etc.
- Version management
- Permission management
- Workflows
- Content Types
- Document Templates
- Extensibility
- Search – and Find!



DMS IN SHAREPOINT 2010



Document Sets

- Features:
 - Custom Content Types
 - Metadata Sharing
 - Versioning
 - Workflows
 - Permission management
 - Download all documents
 - Customizable Welcome Page



Document IDs

- Unique in the site collection
- Link to the documents
- Can be customized



Metadata Management – 1.

- **Term:**
a word or a phrase that can be associated with an item in SharePoint Server 2010
- **Term Set:**
a collection of related terms
- **Metadata column:**
contains a term from a specific term set
- **Metadata management:**
is a way of referring to the fact that terms and term sets can be created and managed independently from the columns themselves



Metadata Management – 2.

1. Create the Term Set
2. Add terms
3. Define synonyms
4. Using metadata
 - Create metadata columns
 - Metadata based navigation
 - Organize Content
 - Improve the search



Organizing Your Content

- Metadata based content organizing
- Users don't need to know where to save anymore
- Well organized content
- Searchability and findability



THANK YOU!

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