Chapter 1

Getting to Know SharePoint 2013

In This Chapter

- Gaining a general understanding of SharePoint
- Exploring how the product is put together
- Getting familiar with SharePoint concepts
- Seeing how SharePoint works at a fundamental level

When I first heard about SharePoint, I just didn't get it. What the heck was this new thing called SharePoint? I knew it was a Microsoft product that was supposed to do lots of things, but I just couldn't figure out exactly what it was or how to get started working with it.

Well, after years of working with SharePoint, I have finally figured a few things out. SharePoint is indeed a Microsoft product and it is definitely capable of doing lots of things. In fact, SharePoint can do more things than you could ever imagine. And therein lies the problem. If you ask ten people what SharePoint does, you're very likely to get ten different answers. SharePoint has such a depth to it that it's hard to get your head around it.

In this chapter, I help you see the SharePoint big picture. You discover how SharePoint works and gain understanding on exactly what the term *SharePoint* means. This chapter peels away the mystery and shows you SharePoint at a basic level. After all, you need to understand SharePoint at a basic level before you can dive into its advanced functionality.

Wrapping Your Head around SharePoint

At a basic level, SharePoint is a *web-based software platform,* meaning that SharePoint is software designed for you to interact with using a web browser.

In past versions of SharePoint, you really needed to use Microsoft Internet Explorer to work with SharePoint. Times have changed though, and you can now use most any web browser to work with SharePoint.

No, really, what is SharePoint?

Maybe you're a whiz at Word or a spreadsheet jockey with Excel. Going forward, you're going to have to be just as good at SharePoint to get the most out of your desktop Office client applications. Microsoft continues to integrate functionality that used to be locked up in client applications, or not available at all, with SharePoint. For example, using SharePoint 2013 with Office 2013, you can create an online gallery of PowerPoint slides, display interactive spreadsheets in web pages, or reuse information from your company's databases in Word documents. You can even use Visio 2013 to automate your business processes using SharePoint.

Officially, Microsoft represents SharePoint 2013 as a "business collaboration platform for the enterprise and web." *SharePoint* is a platform from Microsoft that allows businesses to meet their diverse needs in the following domains:

- **Collaboration:** Use SharePoint's collaboration sites for activities, such as managing projects or coordinating a request for proposal.
- **Social networking:** If you work in a large company, you can use SharePoint as a social network for the Enterprise experience to help you track coworkers and locate people in expertise networks.
- **Information portals and public websites:** With SharePoint's web content management features, you can create useful self-service internal portals and intranets, or you can create visually appealing websites that are actually easy for your business users to maintain.
- **Enterprise content management:** SharePoint offers excellent document- and record-management capabilities, including extensive support for metadata and customized search experiences.
- **Business intelligence:** SharePoint is an ideal platform for providing entrée into your organization's business analysis assets. You can use insightful dashboards that allow users to get the big picture at a glance and then drill down to get more detail.
- **Business applications:** Use SharePoint to host sophisticated business applications, integrate business processes' backend databases and your SharePoint content, or simply use SharePoint as the means to present access to your applications.

The functionality I discuss in the preceding list is delivered by two editions of the product and one online cloud service:

- **SharePoint Foundation 2013** is the underlying software platform that delivers all the building-block functionality of SharePoint. That includes apps, web pages, websites, and alerts. SharePoint Foundation is licensed as a Windows Server component. In other words, as part of a properly

licensed Windows Server, you also get all the functionality of SharePoint Foundation 2013.

- **SharePoint Server 2013** is a set of applications that uses the building blocks of SharePoint Foundation 2013 to deliver all the functionality mentioned in the previous bulleted list. When using SharePoint internally, you have at least a standard license that grants you access to use search, portals, social networking, and some content management features. You also need an enterprise license if you intend to use SharePoint's advanced content management, business intelligence, and business application features.
- **SharePoint Online** is a cloud-based service offered by Microsoft that allows you to create much the same SharePoint experience as you can with SharePoint installed on a local server, but you don't have to install and maintain it. It can come bundled with an Office 365 monthly subscription, giving you access to hosted e-mail, calendaring, and conferencing with Microsoft Exchange and Microsoft Lync, or you can buy a SharePoint Online monthly subscription on its own.

Additional licensing is required to use SharePoint in Internet scenarios unless you have SharePoint Online, which comes with a built-in, Internet-facing website.

You can approach SharePoint with the following model in mind:

- **Product:** SharePoint is a product with a lot of features, even in SharePoint Foundation. Explore how SharePoint works without any customization when you're deciding how to approach a solution, and then decide if you want to customize it for your specific needs.
- **Platform:** SharePoint provides everything you need to deliver a robust business solution. It provides the infrastructure (the "plumbing") required to deliver web-based solutions.
- **Toolkit:** Finally, SharePoint is a set of components and controls that you can mix and match to provide a solution. You can create sites, pages, and apps, all without leaving the comfort of your web browser.

A Microsoft product

SharePoint is a software product that Microsoft develops and sells to customers. As you see in Chapter 2, SharePoint can be purchased in a couple of different ways. Regardless of how you purchase and use SharePoint, you can be rest assured that your organization is paying Microsoft a licensing fee. In other words, SharePoint isn't free.

In the past, SharePoint had a very large cost for an organization wishing to adopt it. In addition to buying all of the licenses for your organization, you also need an IT team to install and manage SharePoint. For this reason, SharePoint used to be considered enterprise-class software because only large organizations could afford it. This is all changing though, and Microsoft now offers SharePoint Online for as little as $4 per user per month.

Microsoft also offers SharePoint Online as a bundle of other products. The branding for the bundle of products is called Office 365. To find out more about Office 365, check out *Office 365 For Dummies* by Jennifer Reed and yours truly (Wiley).

Many different SharePoint definitions

SharePoint has many different types of users, and depending on where your role fits in, you might have a very different experience from a fellow SharePoint user. For example, you might be assigned to create and administer a SharePoint website for your team. In this case, you might see first-hand the vast functionality of SharePoint websites. On the other hand, you might be a user of a SharePoint site. In this case, your SharePoint world might be only the site that someone has already created for you. To confuse matters even further, many organizations will roll out SharePoint and give it a spiffy internal name; for example "Connect." So even though the cool new web tool called Connect is actually SharePoint, most users don't even realize it!

On the more technical side, if you're an infrastructure administrator, you see SharePoint as a platform capable of offloading the difficult job of website administration. If you're a software developer, you see SharePoint as a web platform for developing programs for users.

The vastness of SharePoint creates areas of specialization. The result is that a person's view of SharePoint is greatly affected by how that person uses the product. It's important to keep this in mind when talking with people about SharePoint. If you ask ten people to define SharePoint, you're likely to get ten different answers, as illustrated in Figure 1-1.

SharePoint has many different administration levels, and each requires a different level of technical ability. For example, if you're comfortable working with software like Microsoft Word and Excel, then you won't have any problem administering a SharePoint site. At a deeper level, there are also SharePoint infrastructure administrators. To administer SharePoint at the infrastructure level is a role that falls squarely into the realm of the IT geeks.

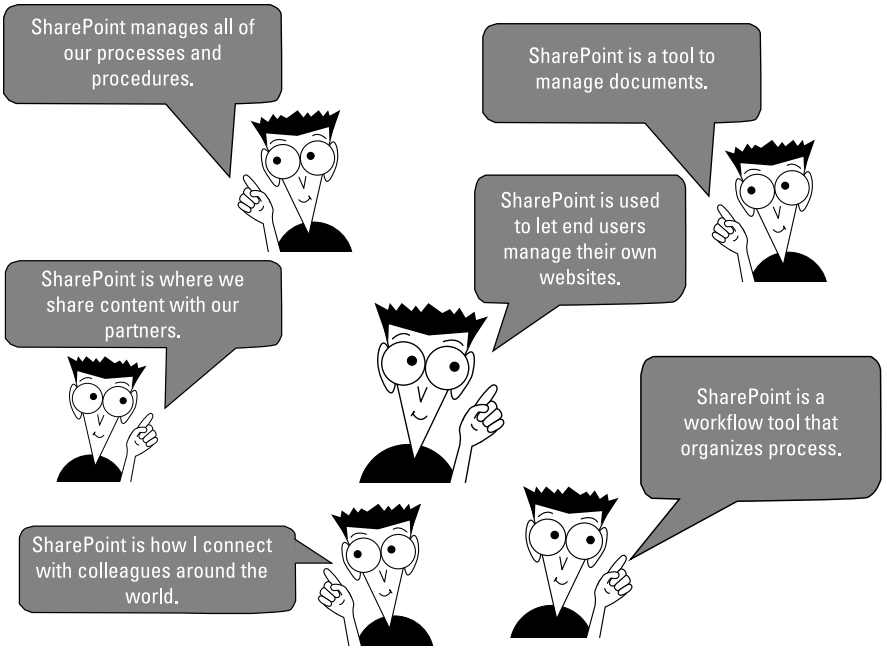

Figure 1-1: There are many different ways to define SharePoint.

SharePoint is a platform, so the user roles an organization defines depend on the organization itself. Here are some examples of the possible roles of users in SharePoint:

- **Anonymous visitor:** A person that browses to a website that just happens to be using the SharePoint platform. An anonymous visitor just sees SharePoint as a website and nothing else.
- **SharePoint visitor:** A person that browses to the site and authenticates so that SharePoint knows who they are. The visitor might still just see a SharePoint site as any other website, except he notices his name in the top-right corner of the screen and knows he must log in to reach the site. Visitors might not use any of the features of SharePoint, however, and just browse the information posted to the website.
- **SharePoint casual user:** A person that knows all the company documents are posted to SharePoint and knows she can upload her own documents to her personal SharePoint site. A casual user might realize that she is using SharePoint, or she might just think of the platform as the name the organization has given to SharePoint. For example, I have seen organizations give their web platform tool names such as Source or Smart or Knowledge Center. SharePoint is the name of the web platform product from Microsoft, which is often unknown by users of a tool built on the SharePoint platform.

- **SharePoint user:** A person that is familiar with SharePoint and its main features. A SharePoint user often performs various administrator functions even if he doesn't realize it. For example, he might be responsible for an app that stores all the company policies and procedures. He is thus an app administrator. A user might also be responsible for a site for a small team, in which case he is a site administrator. As you can see, a user can play many different roles.
- **SharePoint power user:** A power user is not only familiar with the main SharePoint features and functionality but also dives deeper. A power user might be familiar with the functionality differences of different features, routing documents using workflows, and building site hierarchies. A power user might also be a site collection administrator and thus is responsible for a collection of sites.
- **SharePoint technical administrator:** A technical administrator is someone from the IT department who is responsible for SharePoint. A technical administrator is less concerned with using SharePoint for business and more concerned about making sure the platform is available and responsive. An administrator might play many different roles. For example, farm administrators are responsible for all the servers that make up SharePoint, such as web front end servers, applications servers, and database servers. Specialized database administrators focus just on the database components. There are even administrative roles for specific services, such as the search service or user profile service. Depending on the size of the SharePoint implementation, these technical administrator roles might be filled by a single overworked individual or a team with highly specialized skills.

More than a website

SharePoint is called a *web platform,* as opposed to just a website, because of the sheer amount of functionality and capabilities it includes. In fact, if you already administer a SharePoint website, you can easily create a new website right within the existing website. You can also develop websites with an extraordinary amount of functionality without writing a single line of code. The result is a platform for websites instead of just a single website. The multitude of features and the complexity of the product are what lead to confusion.

The terms *SharePoint website* and *SharePoint site* can be used interchangeably. Both terms mean a website that is powered by SharePoint. Because this book is all about SharePoint, I sometimes abbreviate these terms to just *site*.

One thing that makes SharePoint so special is that you don't need to be a computer genius or even a power user to be a website developer and administrator in SharePoint. You just need to be comfortable using a computer.

The difference between social media and SharePoint

SharePoint and social media websites such as Facebook, LinkedIn, and Twitter are similar in that you interact with them using your web browser. The difference is in the intended use. Facebook, LinkedIn, and Twitter are designed for consumers as a whole, whereas SharePoint is designed for individual organizations.

SharePoint has many of the social and profile features of Facebook, LinkedIn, and Twitter, but these features are only available to people within your organization. In other words, only the people in your organization can use the features of SharePoint. Although SharePoint includes social and profile features, it also includes much, much more. Think of SharePoint as a product for business and productivity that also happens to have the social and profile features of sites such as Facebook, LinkedIn, and Twitter.

The term *website* and *web application* are often used interchangeably. In the deep, dark technical world of SharePoint administration, the term *web application* has a very specific meaning. A web application is a technical construct, and each web application has its own databases associated with it. If you create two SharePoint web applications, they store their content and configuration information in different databases. As with technology these days, a simple word can have different meanings, depending on the context of the conversation.

Getting Familiar with SharePoint Building Blocks

In order to obtain a perspective on SharePoint, it is important to understand how SharePoint is put together. As mentioned previously, SharePoint is a web-based platform. A number of technologies are required in order to make the platform available. Each technology builds on the one below it. In this manner, it is common to call the whole ball of wax a *technology stack.*

The SharePoint technology stack begins with server computers running the Microsoft Windows Server operating system. On top of Windows Server are some additional technologies required by SharePoint. In particular, SharePoint needs a database and a web server — Microsoft SQL Server and Microsoft Internet Information Services (IIS), respectively. Only when this entire stack of technology is available can you install SharePoint, as shown in Figure 1-2.

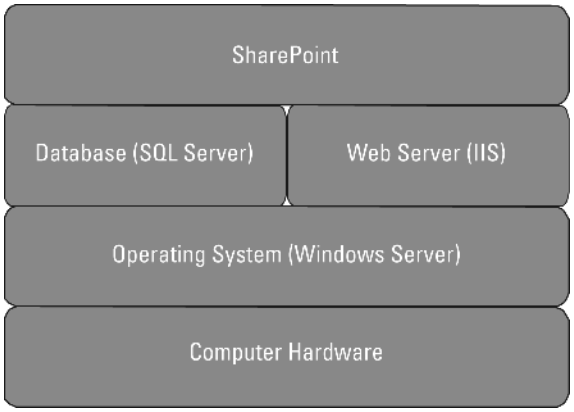

Figure 1-2: The stack of technologies that make up SharePoint.

SharePoint will only work with the Microsoft stack of supporting technologies. For example, you cannot swap in an Oracle database or the open source Apache web server. SharePoint would simply refuse to install and might ask you what the heck you are trying to do using a non-Microsoft product to install SharePoint.

Taking a Peek at a SharePoint Site

The primary purpose of SharePoint is to provide websites. When you create a website, you select which type of template you want to use to create the site. The dialog shown in Figure 1-3 shows the different templates available. Creating a site is explored in detail in Chapter 4.

Figure 1-3: The dialog box used to select a website template when creating a SharePoint site.

The template tells SharePoint which features and functionality should be included on the site. Keep in mind that you can always add more features, and you can even choose to start with a blank site template and add only the specific features you want to use for the site.

One of the most common SharePoint site templates is called the Team Site template. The Team Site website template includes features such as a discussion board, library to store documents, and a calendar. In fact, many books simply talk about the Team Site template and call that SharePoint. As you will learn in this book, the Team Site is very important, but it is just another SharePoint website template. Part II explores building a site based on the Team Site template.

A SharePoint website created using the Team Site template is shown in Figure 1-4.

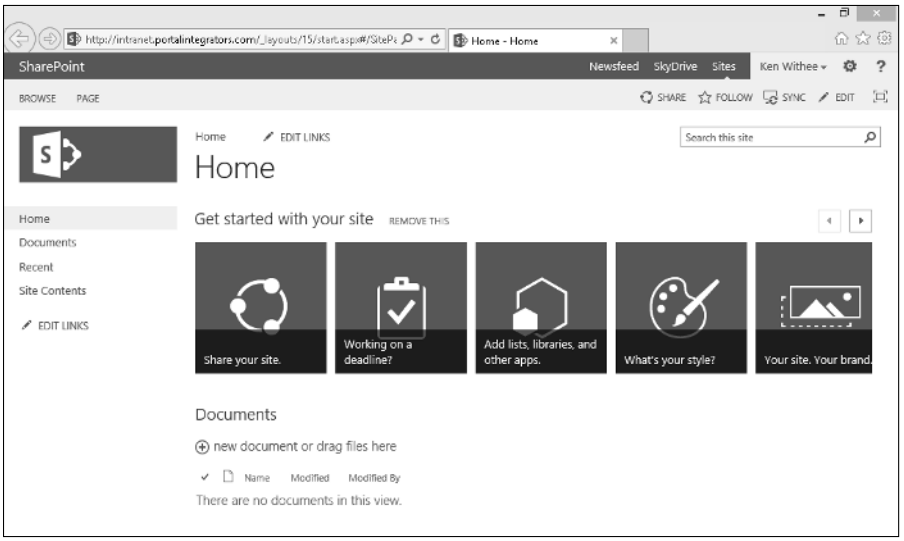

Figure 1-4: A standard SharePoint website created using the Team Site template.

Getting Familiar with SharePoint Terminology

You should add a number of terms to your SharePoint vocabulary. Some terms are made up by Microsoft marketing, some are industry standards, and others are buzzwords that have grown to have various meanings depending on the context of the conversation. In the following sections, I describe the various components of SharePoint, how the terms that define functionality fit together, and what they mean.

Branding

The term *branding* refers to the way a SharePoint site looks and behaves to users. Branding includes things like the colors, fonts, images, logos, and layout of the various components on a site. Branding your SharePoint 2013 site will be covered in Chapter 13.

The term branding is not specific to SharePoint and refers to the way something looks and behaves. The term is borrowed from the marketing industry in which an organization will brand its product. For example, Coca-Cola has a very strong brand. In the software world, branding refers to the look and feel of a piece of software or website.

Business Connectivity Services

Business Connectivity Services (BCS) is a specific feature of SharePoint Server. BCS enables you to connect SharePoint with external systems. For example, say you have a customer relationship system and you need SharePoint to interact with the data in that system. You could use BCS to make it happen.

BCS can be a fairly in-depth piece of SharePoint and also often requires the skillset of a developer.

Business intelligence

The term *business intelligence* is definitely not new. An article was published in the October 1958 edition of the *IBM Journal* by H. P. Luhn called "A Business Intelligence System." The article describes how an organization can process documents in order to make business decisions. Business intelligence has continued to evolve over the years and has morphed into something of a catch-all phrase for using data to drive business.

In the Microsoft realm, business intelligence consists of a number of different technologies. In fact, I wrote an entire sister book on the subject — *Microsoft Business Intelligence For Dummies* (Wiley). As SharePoint has become a central and nearly ubiquitous application, it has also become a prime place to show the data that decision makers need to make decisions. In other words, SharePoint is a perfect display case for all those fancy charts, graphs, performance indicators, and other data.

Unfortunately, business intelligence has a fairly steep learning curve in SharePoint. Tools such as Report Builder, Dashboard Designer, and

PowerPivot unleash endless possibilities, but figuring out how to use them all takes time. One thing you will find with business intelligence in SharePoint is that there are often many ways to achieve the same result. And therein lies the learning curve.

At the basic level, if you can create a chart in Excel, you can plunk it into a SharePoint library and embed it on a page using a web part. Ta-da! You just achieved business intelligence in SharePoint. The consumers of the data might never even know how easy it was to put that data in Excel and embed it in a SharePoint webpage. And that is the point. These things shouldn't be difficult to get started.

At the other end of the spectrum, however, you might need to create a data cube (a specialized database in the big data world) with millions or billions of records, and then use a specialized tool such as Dashboard Designer to create an interactive graph with click-through capabilities. Whew! That sounds complicated, and trust me, it is.

You need serious expertise when diving into the depths of business intelligence, but that doesn't mean you can't understand it at a high level. Many different tools and features make up business intelligence in SharePoint 2013, and Part V walks you through them at a high level and provides you with insights into quick techniques you can use to get started right away.

eDiscovery

The term *eDiscovery* relates to the legal world of business. In particular, the word derives from *electronic discovery* in litigation. If you have ever watched *Law & Order,* you understand that critical evidence can make or break a case. In the high-tech world of digital information, it's a rather tricky endeavor to discover and hold electronic documents.

SharePoint 2013 has a number of features specifically designed for eDiscovery. This is great news if you're a decision maker looking to comply with legal requirements, or you're a lawyer. If neither applies to you, then just knowing SharePoint 2013 handles eDiscovery is good enough.

Identity management

Frankly, modern technology can often be a real pain. It seems that there are gazillions of systems in any organization, and each requires its own username and password. I have so many usernames and passwords on various websites across the Internet that my mind just tries to block it out. Of course,

then I forget my password and have to go through the tiring process of resetting it each time I want to log in to a particular system. On the other side, when a user logs in to a system, that system also needs to know what the user can access.

Identity management refers to the functionality of a software system that manages users and what they can access. Identity management isn't specific to SharePoint and is used by any system that requires you to enter a username and password.

SharePoint 2013 has made great strides in simplifying identity management. SharePoint 2013 uses claims-based authentication in conjunction with an open authentication standard called Open Authorization (OAuth for short) in order to play nicely with other systems. What this means for you is that you shouldn't have to remember yet another username and password when working with SharePoint 2013. If only the rest of the Internet could be so thoughtful!

Mobile

It's amazing how quickly mobile computing has taken over our lives. Not that long ago, the flip phone was a technological marvel. Not any longer! The trend towards using your smartphone or tablet to get things done is accelerating rapidly.

SharePoint 2010 had the capability to access a site from a smartphone, but the experience was less than stellar. SharePoint 2013 support for smartphone devices has come a long way. When paired with the new Windows 8, you might even say accessing your Word, Excel, OneNote, and PowerPoint is enjoyable on your smartphone or tablet. Well, as enjoyable as information work can be.

Working with SharePoint from your smartphone or tablet is covered in Chapter 17.

Records management and compliance

In the world of information work, you often hear about *records management* and *compliance*. Depending on how much of a rebel you are, you might think of these terms as keeping people and processes in line or as an invitation to break some rules.

Every organization has a different set of rules around managing records and keeping processes compliant with company policy. This line of thinking is not specific to SharePoint, and, depending on your organization and industry, could be buttoned-up strict, as in the banking industry, or open to the world and free loving, as in many technology startup companies.

In SharePoint 2013, a number of features are specifically designed to keep records organized and easily managed. In addition, SharePoint has compliance features that even the stodgiest of stodgy big banks will adore. And as someone who has done consulting work for the banking industry, let me tell you, there are some really strict compliance rules out there. (Considering that they're keeping track of our money, that's a good thing.) Chapter 20 covers records management and compliance features in SharePoint.

Search

If you have ever used Google, Bing, or Ask.com, then you're familiar with search engines. These search engines for the Internet are amazingly powerful and eerily comprehensive. SharePoint does a bang-up job of managing content, and the next logical step in managing content is finding content when you need it. As an organization grows, the need for search grows too.

Microsoft acquired a top-notch search company based in Oslo, Norway. The company was called FAST, and Microsoft moved quickly to integrate FAST search with SharePoint. The problem was that FAST was a separate product and was difficult to configure with SharePoint 2010. In SharePoint 2013, the FAST technology is fully integrated and baked right into SharePoint 2013. So no separate search product must be configured to work with SharePoint. The result is a very powerful and seamless search experience right out of the box.

Search is one of those topics that spans from simple to mind-numbingly complex. At a base level, you have search capabilities for every SharePoint site right out of the box. The tech geeks can go deeper and optimize search for your organization. For example, your search query can be aware of your role in the organization and display results specifically for you. So, for example, if you're in sales and searching for a product, your search results will be sales materials. If you're an engineer and searching for a product, your results will include specifications. SharePoint search can make this happen, but configuring it is best left to the IT department.

Social

In recent years, computers and the Internet have been connecting people like never before. This new way of interacting through computers is called social computing. The biggest public social network of all is Facebook. Not every organization wants to be in such a public space though.

SharePoint is designed for organizations, and the social aspects of SharePoint share a common goal with Facebook — connecting people. The difference is that SharePoint connections are limited to people in a particular organization. The social aspects of SharePoint are covered in Chapter 16.

Web content management

Content is a fairly simple concept. When you create a Word document or an Excel spreadsheet, you generate content. If you develop a web page for your colleagues to admire, you generate content. Even if you just pull out a pencil and paper and start writing, that's content. If you scanned that paper, you could then let SharePoint work its content management wonders on the scanned image file.

SharePoint 2013 is especially powerful in handling content, as described in Chapter 18. One particularly tricky piece of content, however, is the content you develop for websites. You know, all of those web pages that contain policies and procedures and documentation and all of that? If the content is created for a web page, then it's web content and it holds a special place in the heart of SharePoint. The web content management features of SharePoint are legendary, and many organizations first started using SharePoint for just this reason.

Content management often goes by the name Enterprise Content Management (ECM). Don't be fooled by the terminology though. The *Enterprise* portion of ECM just means the system manages content at a large scale, as found in a large company or enterprise.

You might be wondering what makes the relationship between SharePoint and web content so special. Well, it all comes down to delegation and control. SharePoint provides the ability for many people to generate content and for a few to approve content. After it's approved, content can be published automatically for the world, or those in your organization, to consume.