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microsoft sharepoint user guide 2010

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Microsoft SharePoint User Guide 2010

Welcome to the definitive Microsoft SharePoint 2010 user guide. Whether you're a new administrator, a seasoned developer, or an end user looking to harness the full power of SharePoint, this comprehensive resource will walk you through every feature, setting, and best practice. SharePoint 2010 introduced a host of enhancements—improved search, modernized user interface, and powerful workflow capabilities—that can transform the way your organization collaborates and manages information.

In this guide, we'll cover:

- Installing and configuring SharePoint 2010
- Navigating the new interface
- Creating and managing sites, lists, and libraries
- Controlling permissions and security
- Leveraging workflows and business process automation
- Optimizing search and content discovery
- Administering the farm and troubleshooting common issues
- Best practices for a healthy SharePoint environment

By the end of this article, you'll have a solid understanding of how to use SharePoint 2010 effectively and confidently. Let's dive in.

1. Overview of SharePoint 2010

Microsoft SharePoint 2010 is a web based collaboration platform that combines document management, enterprise search, social networking, and business intelligence. It's built on the .NET framework and integrates seamlessly with Microsoft Office, allowing users to work from familiar tools while benefiting from powerful cloud ready infrastructure.

Key highlights of SharePoint 2010 include:

- Modern UI – A cleaner, more intuitive interface with improved navigation.
- Enterprise Search – Contextual search across sites, content types, and metadata.
- Workflow Enhancements – Built in workflows and integration with Microsoft Office 2010.
- Content Types & Metadata – Better organization and classification of information.
- Social Features – Blogs, community sites, and social networking capabilities.

Understanding these core components will help you unlock the full potential of SharePoint 2010.

2. Installing SharePoint 2010

2.1 System Requirements

Before you begin, verify that your environment meets the following minimum requirements:

- Windows Server 2008 (R2) or later

- Microsoft SQL Server 2008 (R2) or later
- 4 GB RAM (8 GB recommended)
- At least 5 GB free disk space for the SharePoint binaries
- Internet Explorer 8 or later (for administration)

2.2 Installation Steps

1. Download the SharePoint 2010 installation media from Microsoft's official website.
2. Run setup.exe and follow the wizard:

   Accept the license agreement.
3. Choose the installation type (Typical, Custom, or Complete).
4. Select the SQL Server instance for the configuration database.
5. Specify the web application URLs.
6. Configure service accounts and permissions.

2.3 Post Installation Configuration

Once SharePoint 2010 is installed, perform the following tasks to ensure a secure and stable environment:

- Set up service accounts with least privilege.
- Configure database backups and restore points.
- Enable SSL certificates for secure communication.
- Apply the latest security patches and updates.
- Configure search services and crawl schedules.

3. Navigating the SharePoint 2010 Interface

3.1 The New Ribbon

SharePoint 2010 introduced the Ribbon UI, similar to Microsoft Office. The Ribbon groups related commands, making it easier to find the tools you need. Key tabs include:

- Files – Manage documents and libraries.
- List – Create and modify lists.
- Library – Library specific actions.
- Site Actions – Site settings, permissions, and administration.

3.2 Quick Launch and Top Navigation

Use the Quick Launch on the left to jump between pages, while the top navigation bar provides access to global features like search, community sites, and help.

3.3 Search Box

The search box is now more powerful, offering instant results and filters. Type a keyword and press **Enter** to view relevant documents, people, or pages.

4. Creating and Managing Sites

4.1 Site Collection vs. Subsite

A **site collection** is a top level container that holds subsites. Each site collection has its own unique URL, content database, and permissions.

4.2 Creating a New Site Collection

1. Open Central Administration.
2. Navigate to Application Management !’ Create site collections.
3. Enter the title, URL, and select a template (Team Site, Publishing Portal, etc.).
4. Assign the owner and primary administrator.
5. Click Create.

4.3 Adding a Subsite

1. Go to the parent site.
2. Click Site Actions !’ Site Settings !’ Create subsite.
3. Fill in the title, URL, and template.
4. Set unique permissions or inherit from the parent.
5. Click Create.

4.4 Site Templates

SharePoint 2010 offers several built in templates:

- Team Site – For collaboration and document sharing.
- Project Site – Includes task lists and calendars.
- Publishing Portal – For content centric websites.
- Intranet – Corporate intranet with news and events.

5. Lists and Libraries

5.1 Understanding Lists vs. Libraries

A **list** stores data in tabular form (e.g., tasks, contacts), while a **library** stores documents and files.

5.2 Creating a List

1. Navigate to the site where you want the list.
2. Click Site Actions !’ New !’ List.
3. Select a template (Custom, Issue Tracking, etc.) or create a blank list.
4. Define columns, views, and permissions.

5.3 Creating a Document Library

1. Go to the site.
2. Click Site Actions !’ New !’ Document Library.
3. Choose a name, description, and set versioning options.
4. Configure columns and content types.

5.4 Versioning and Check In/Check Out

Enable versioning to keep track of changes. Use **Check In/Check Out** to prevent conflicts when multiple users edit a document.

5.5 Content Types and Metadata

Content types allow you to apply consistent metadata across documents. Create a content type in **Site Settings** !’ **Site Content Types** and add it to libraries.

6. Permissions and Security

6.1 Permission Levels

SharePoint 2010 offers several default permission levels:

- Full Control
- Design
- Contribute
- Read
- Limited Access

6.2 Managing Permissions

1. Navigate to the site or list/library.
2. Click Site Actions !’ Site Settings !’ Permissions for this site.
3. Break inheritance if you need unique permissions.
4. Assign users or groups to permission levels.

6.3 SharePoint Groups

Create groups for easier management:

- Go to Site Settings !’ People and Groups.
- Click Create Group and define group settings.

6.4 Security Trimming

SharePoint automatically hides content that a user does not have permission to see, ensuring secure information access.

7. Workflows and Business Process Automation

7.1 Built In Workflows

SharePoint 2010 includes several ready to use workflows:

- Approval
- Collect Feedback
- Collect Signatures
- Collect Information

7.2 Creating Custom Workflows

1. Open SharePoint Designer 2010.
2. Select the site and navigate to Workflows.
3. Choose a workflow type (List Workflow, Reusable Workflow).
4. Define triggers, actions, and conditions.
5. Publish the workflow.

7.3 Workflow Alerts

Set alerts to receive email notifications when items change. Go to the list/library, click **Alert Me**, and configure the alert settings.

8. Search and Content Discovery

8.1 Search Architecture

SharePoint 2010’s search service application crawls content and indexes it for fast retrieval. Key components include:

- Search Service Application

- Content Source
- Result Source
- Result Types
- Managed Properties

8.2 Configuring Search

1. Open Central Administration.
2. Navigate to Application Management !’ Manage service applications !’ Search Service Application.
3. Set up content sources (e.g., SharePoint sites, file shares).
4. Define crawls schedules and indexing options.

8.3 Customizing Search Results

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