



NYC SharePoint User Group  
The Power of Content Types  
December 3, 2008



**Presenter: Daan De Brouckere – Solution Innovation Executive – Crowe Horwath LLP**

# Agenda

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- Introduction
- Example 1 – Connecting With Students
- Definition of Content Types
- Introducing the components
- Why use Content Types?
- Example 2 – Manufacturing Process Optimization
- Example 3 – Policies and Procedures

# About Crowe

- Top 10 U.S. public accounting and consulting firm
- Founded in 1942 (technology consulting since 1966)
- More than 2,500 partners, professionals, and specialists in 26 cities working in areas of:
  - Assurance
  - Financial Advisory
  - Performance
  - Risk Consulting
  - Tax
- Dedicated teams focused on key industry issues:
 

<ul style="list-style-type: none"> <li>• Retail Dealerships</li> <li>• Healthcare</li> <li>• Manufacturing/Distribution</li> <li>• Financial Institutions</li> </ul>	<ul style="list-style-type: none"> <li>• Private Equity Groups</li> <li>• Construction</li> <li>• Government</li> <li>• Not-for-profit</li> </ul>
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# Example 1: Connecting With Remote Students

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- Problems/Objectives:
  - Improve writing quality to reaffirm accreditation
  - Improve retention of distance learning students which exceed campus students 4:1
  - Maintain ranking as “Top 3” distance learning university
- Solution:
  - Implement an Online Tutor Service that...
    - Tracks and responds to requests for writing assistance
    - Manages Tutors and their workload
    - Encapsulates all requests and student history in one consolidated view
    - Reports on key metrics and usage of the system

# Definition of Content Types

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“A content type is a reusable collection of settings you want to apply to a certain category of content. Content types enable you to manage the metadata and behaviors of a document or item type in a centralized, reusable way.”

<http://msdn.microsoft.com/en-us/library/ms472236.aspx>

- Represents settings that apply to a certain kind of content
- Can be derived from other Content Types (Parent – Child)
- Enable Content Standardization
- File Format Independent

## Example 1: Technical Components

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- Content Types differentiate the types of requests
  - Live tutoring
    - **Document Template:** InfoPath form
    - **Metadata:** method of communication, meeting time
    - **Workflow:** scheduled with a tutor and routed
  - Offline tutoring
    - **Document Template :** InfoPath form
    - **Metadata:** actual paper, when they need to have the paper returned
    - **Workflow:** requests are routed to a supervisor who can assign the papers based on tutor availability and specialty

# Example 1: Screenshots

Available time slots (live assistance only)

Date: 5/6/2008 Start Time: 8:00 AM End Time: 8:30 AM

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**Student Information:**

Preferred Name: \* Student ID: \*

Preferred Email Address:

Date Needed Returned (offline assistance only): 5/8/2008

Degree:  Graduate  Undergraduate

Major/Program of Study: Select... \* Country of Origin: Select...

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**Paper Information:**

Course: Select... \* Section: \* Professor: \*

Paper Type: Select... \* Length: Select... \*

Reason for use:
 

- Grammar
- Structure
- Spelling
- Other

Assignment Description, including formatting, length, and all content requirements (may be copied from your course Blackboard documents and pasted in the space below):

Purpose for Submission, including a list of any questions or concerns you have about this assignment (let us know what sort of help you hope to get from the GWC):

**Live Assistance:**

Preferred Communication Method: Select...

Username: Re-enter username:

(Indicate above which messenger program you wish to use for your live session and your username for that program. This will be used by your tutor to contact you via your selected messenger program.)

Available time slots

Date: 5/6/2008 Start Time: 8:00 AM End Time: 8:30 AM

[Click here to add additional time slots](#)

Please note that all time slots appear only in Eastern Standard Time between the hours of 8 pm and 5 pm. You are responsible for calculating your own local meeting time. Appointments are always scheduled for one hour, no more or less. **Click on the large arrow that will appear to the left in order to remove extra time slots.**

# Content Types Components

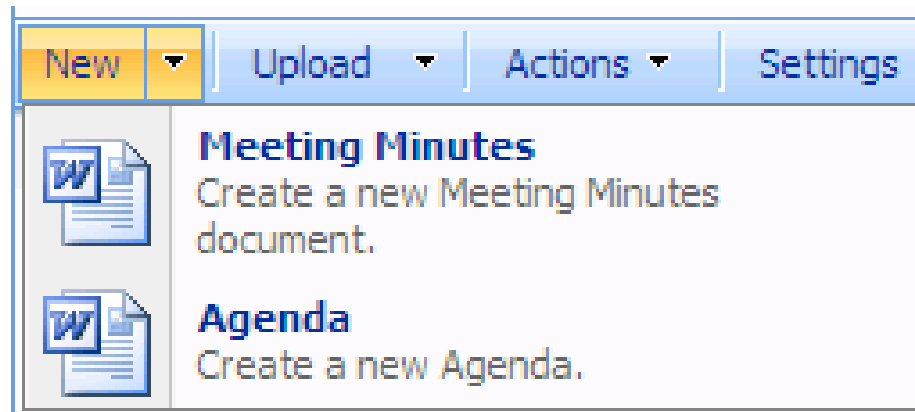
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- A single content type consists of the following core elements:
  - Document Template
  - Set of Metadata
  - Set of Workflows
  - Information Management Policies
  - Document Conversion
  - Custom Features (not covered in this presentation)

You pick which elements are necessary for your content type!

# Document Templates

- Specify document type and template
- 1 document template per content type
- Many document templates, 1 document library



# Metadata

- Classify your content in a document library
- “columns” in the list or document library
- Different columns for each content type in a document library

<b>Content Type</b>	Meeting Minutes <input type="button" value="v"/> Create a new Meeting Minutes document.	<b>Content Type</b>	Agenda <input type="button" value="v"/> Create a new Agenda.
<b>Name *</b>	Project Meeting Minutes .doc	<b>Name *</b>	Project Meeting Minutes .doc
<b>Full Name(s)</b>	<input type="text"/>	<b>Full Name(s)</b>	<input type="text"/>
<b>Author</b>	<input type="text"/> The primary author	<b>Subject</b>	<input type="text"/>
<b>Publisher</b>	<input type="text"/> The person, organization or service that pu	<b>Comments</b>	<input type="text"/>
<b>Revision</b>	<input type="text"/>	A summary of this resource	
<b>Status</b>	<input checked="" type="radio"/> Not Started <input type="button" value="v"/> <input type="radio"/> Specify your own value: <input type="text"/>		

# Workflows

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- Initiated for a document of that content type
- Advantage: reuse workflow settings across libraries
- Configure to initiate automatically or manually

## Workflows



Workflow Name (click to change settings)

Agenda Approval

Workflows in Progress

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- [Add a workflow](#)
- [Remove a workflow](#)
- [View workflow reports](#)

# Information Management Policies

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- Set of rules to manage content for:
  - Auditing
  - Retention
  - Bar codes
  - Document labels
- Common applications:
  - Document Auditing Policies
  - Expiration Policies for documents

## Specify the Policy

Specify the information management policy for this content type. If you would like to use one of this site's predefined policies then select "Use a site policy". Alternatively, you can directly create or edit the policy settings.

## Specify the policy:

- None
- Define a policy...
- Use a site collection policy:

# Document Conversion

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- Transform documents from one format to another
- Associate converters to a specific content type
- Implicitly convert to another format
- Common applications:
  - Convert Word documents to PDF
  - Convert documents to Web Page

# When Do Content Types Apply?

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- Ask yourself the following questions:
  - Do they share a common set of metadata?
  - Do you perform the same actions on these documents?
  - Do these documents have the same lifespan?
  - Do they follow the same audit policies?
- Other concerns:
  - Do the same kinds of documents live in different places?
    - Ex: You have project plans that belong each project.
  - Do different types of documents really belong together?
    - Ex: For one project, you have many types of documents.

# Why Use Content Types?

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- $1 + 1 = 3$
- Centralized and reusable
- Many content types in one list

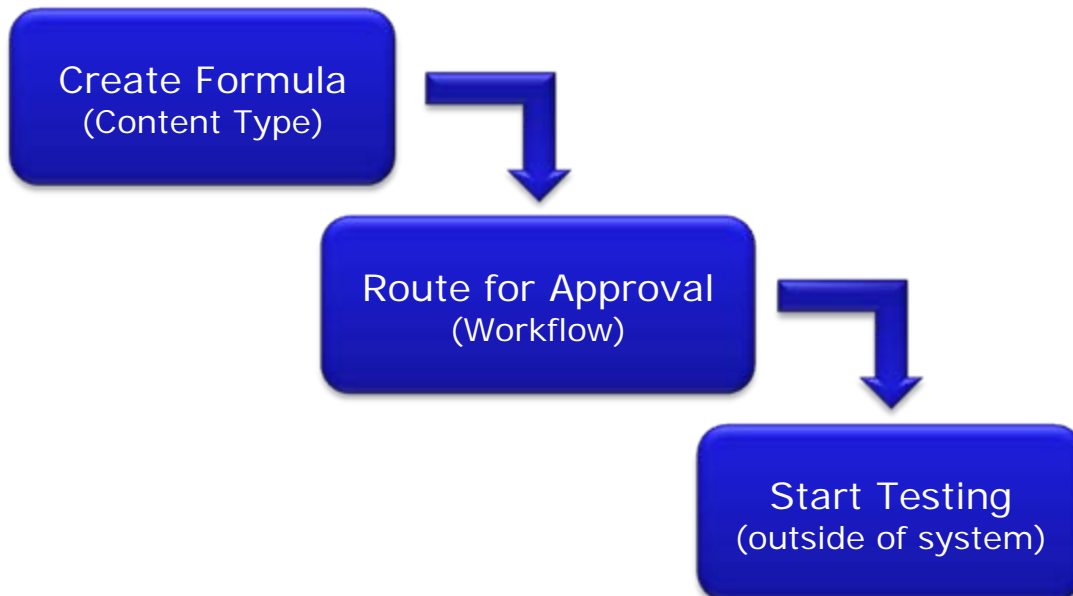
## Example 2: Manufacturing Process Optimization








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- Problems/Objectives:
  - Standardize production formula sheet and test results when producing a new type of ink to comply with ISO 9001 standards.
  - Productivity loss in locating and using correct template.
  - Difficult to manage 16 different types of formula sheets.
- Solution:
  - Single location for all ink formula sheets
  - Ensure latest version for all 16 formula sheets
  - Automate and track the approval process

## Example 2: Technical Components

- Document Library to hold formula sheets and test results
- Custom Workflows to route formulas
- Content Types to differentiate the 16 types of formulas
  - **Metadata:** Same across all formulas (base content type)
  - **Document Template:** Each formula has a different doc template
  - **Workflow:** Formulas require approval from production manager



Type	Name	Toner Type	Status
	Production 3-18-08 !NEW	3200	Draft
	Production 3-15-08 !NEW	3800	Reviewed
	Production 4-20-08 !NEW	3200	Not Started
	Production 4-25-08 !NEW	3800	Not Started
	Production 4-5-08 !NEW	3200	Reviewed
	Production 5-1-08 !NEW	3800	Draft
	Production 5-6-	3200	Final

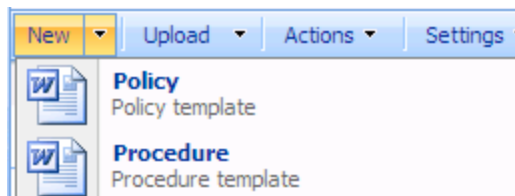
## Example 3: Policies and Procedures




- Problems/Objectives:
  - 400+ policies and procedures stored on SPS 2003 in various document libraries
  - Difficult to find correct policy or procedure
  - Inconsistent across various departments in the organization
- Solution:
  - Define standard template
  - Single place to search
  - Automate approval process



## Example 3: Technical Components

- Single Document Library
- 2 Content Types (Policy & Procedure)
  - **Metadata:** Each content type had a unique set that helped users organize and find content.
  - **Document Template:** Single place to update the template for a policy or procedure.
  - **Workflow:** Automatically initiated to get the document approved by the user's department manager.



Type	Name
+ Cont. Type : Policy (3)	
+ Cont. Type : Procedure (1)	
	How to Verify Funds Availability and Stop Payments ! NEW
	How to Open and Close Accounts ! NEW
	How to Make Wire Transfers ! NEW

# Questions?

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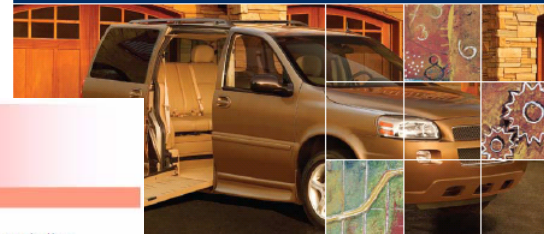
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Are You Getting  
the Most  
Out of  
SharePoint?



Performance Consulting  
Success Story



Alternative to the Big Four\*



Microsoft Office System  
Customer Solution Case Study



Hospital Improves Internal Communication  
and Business Processes with New Intranet

**Overview**  
Country or Region: United States  
Industry: Healthcare

**Customer Profile**  
St. Vincent Heart Center of Indiana provides a range of services to patients with cardiovascular disease. The 120-bed facility, owned by St. Vincent Health and The Ohio Group, has 470 employees and 200 contract workers.

**Business Situation**  
The medical facility was an HTML-based intranet. The use of HTML and time-consuming for St. Vincent Heart Center of Indiana staff to use when locating important information, including clinical forms and employee handbooks.

**Solution**  
St. Vincent Heart Center of Indiana used Microsoft Office SharePoint Server 2007 to build a new intranet. The new intranet is a consistent, organized way to communicate and interact with content, processes, and data.

**Benefits**

- Organized clinical information
- Improved productivity
- Streamlined employee relations
- Substantial increased security
- Streamlined content management

"Office SharePoint Server has improved our team members' productivity by offering users a streamlined intranet experience and has enhanced team member relations by providing information important to them."

—Joe Williams, Chief Information Officer, St. Vincent Heart Center of Indiana

When it opened in 2002, St. Vincent Heart Center of Indiana was the first freestanding hospital in Indiana to provide advanced treatment of cardiovascular disease. Until recently, the hospital used an HTML-based intranet to disseminate announcements, links, and other information to its 470 employees and 200 contract workers. Information on that system was difficult to find. With help from Crowe Horwath and Company, a Microsoft, Gold Certified Partner, the hospital deployed Microsoft Office SharePoint, Server 2007. In November 2007, the new, integrated and interactive solution provides easy access to information, enhances productivity, improves communication, and supports increased security for confidential information. In a March 2008 survey, 87 percent of St. Vincent Heart Center of Indiana team members and contractors who completed the survey responded favorably to the new solution.



## Answers to Questions Raised

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### **Q: Can you restrict Content Types based on security**

A: Content Types do not tie into the security model. Security must be applied at the Site, List or Item level.

### **Q: What products are available to convert to PDF?**

A: There are several partners that have products to help you. Here are a few:

- Bamboo Solutions has a solution - [Office to PDF Conversion Solution Accelerator](#)
- Aspose Components has a toolset. Here is an article to describes how their toolset can be leveraged: [Add DOC to PDF and Other Conversions to Microsoft Office SharePoint Server 2007 with Aspose Components](#)