



AVATAR SOFTWARE

from concept to reality

Welcome SharePoint Users Group
February 2011 Meeting

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Document Management with
SharePoint 2010.



Microsoft
SharePoint 2010



Microsoft
SQL Server 2008



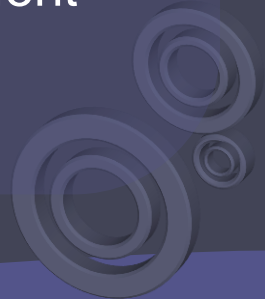
What is a Document Management System?

Wikipedia:

A **document management system** (DMS) is a computer system (or set of computer programs) used to track and store electronic documents and/or images of paper documents.

Modern Reality:

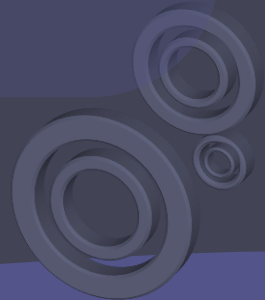
A **DMS** today must have features which allow for and enable collaboration, document tracking, information policy management and auditing policies (retention, eHold / eDiscovery) to be considered a full-featured DMS.



Key Components

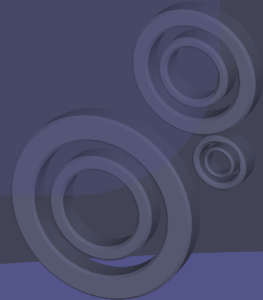
- Document Storage
- Index and Search / Retrieval
- Metadata
- Security
- Versioning

- Integration
- Collaboration
- Workflow
- Intelligent Retention / Archiving



Why Not SharePoint 2007?

- **Storage limitations:** 2-5 million docs per library, BUT, only 2000 per folder and 2000 per view (performance drops at >1000)
- **No Document ID's** (important feature of any DMS)
- **Limited Collaboration Options**
- **Limited Integration**
- **Limited Information Management Policies**



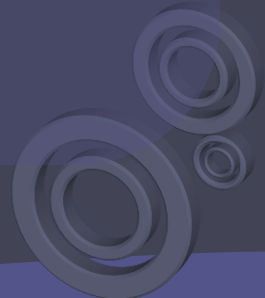
SharePoint 2010 makes it easier to get document management right

- Easier Document Retrieval (Doc ID's)
- Taxonomy Management (Cross-Site Collection!)
- New Collaboration Options
- Much, much easier workflow
- Document Sets
- Increased Document Library Capacity
(30 million per library, 5000 per view)



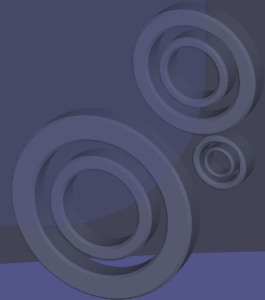
Collaboration – 3 scenario's – Demo's!

1. Comment and Review
2. “Formal” Co-Authoring (Word, PowerPoint)
3. “Semiformal” Co-Authoring (Excel, OneNote)



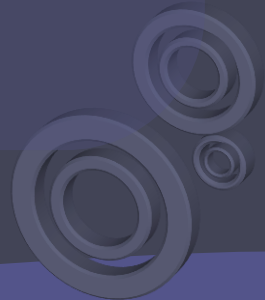
Other New Features - Demo's!

- Document ID's
- Document Sets
- Workflow
- Term Store
- Records Management
- Information Management Policies
(Retention, Auditing, Barcodes, Labels)
- eHold / eDiscovery



3rd-Party Tools / Enhancements

- TreeView
- External / Synced Library
- RBS – don't bother without a 3rd-party driver
Very good option for large files
Still has 2 GB file limit!



Conclusion

SharePoint 2010 is FINALLY a fully-featured DM solution.

Don't be afraid to click on stuff in SharePoint library and site collection settings – there are a LOT more features I didn't get into.

Migration Steps/Options

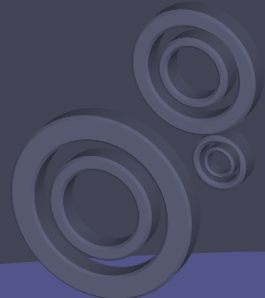
- ✓ Reorganize your current document repository.
- ✓ Make the “one location or two” decision. Or use something like the Bamboo File Share library to emulate one location.
- ✓ Don't forget Search!!!

Other things to consider

- ✗ Database / File size limitations
- ✗ Third-party file types. May be able to find iFilters for search, or may not.
- ✗ Pay careful attention to Microsoft's minimum server requirements for your particular level of required document management (size and count).

Thank you!

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Some useful links

- Document ID's and Records Management:
<http://blogs.msdn.com/b/mcsnoiwb/archive/2009/11/05/document-management-in-sharepoint-2010.aspx>
- Collaboration and Co-Authoring:
<http://office.microsoft.com/en-us/sharepoint-foundation-help/document-collaboration-and-co-authoring-HA101729921.aspx>
- I'll be digging more into Document Sets, Collaboration and Workflows in the coming weeks and posting this talk, including video, here:
http://www.avatar-soft.com/avatar_blog/default.aspx

