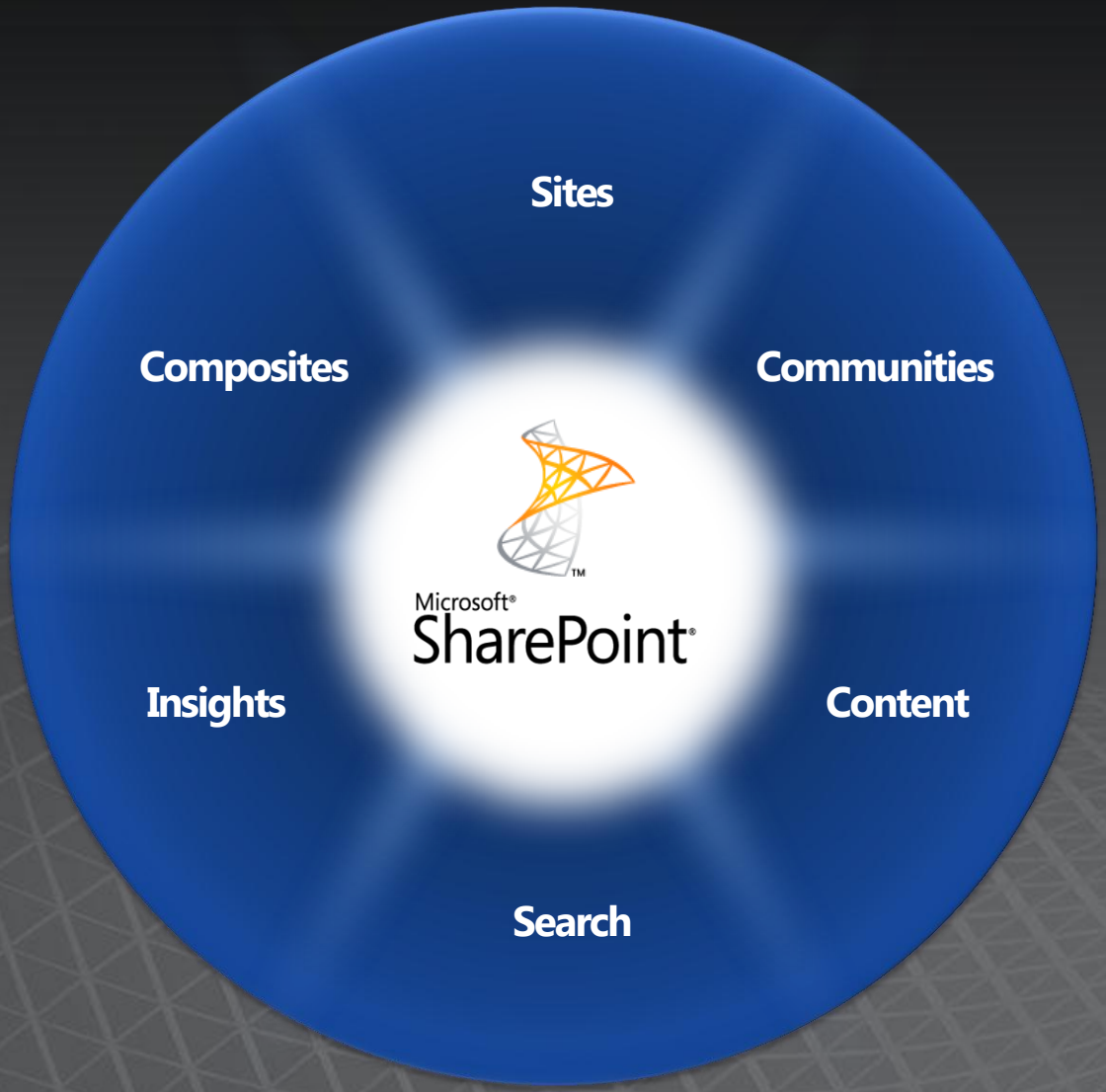
SharePoint 2010 Commonwealth of Virginia

Pablo Sáez
Microsoft Corporation

SharePoint Overview



SharePoint Content

User-centric

- *Intuitive interaction with content through Office*
- *Fast discovery using content metadata and tagging*
- *Rapid creation and publishing of web content*

Flexibility and Compliance

- *Pervasive records management and legal holds*
- *Enterprise-wide taxonomies and folksonomies*
- *Cross-farm policies and rules for all content types*

Management Efficiency

- *Metadata and tagging managed by same services*
- *Less storage and bandwidth for Office & binary content*
- *Interoperability framework to link legacy repositories*

SharePoint Search

Better Answers, Faster

- *Improved relevance based on usage and history*
- *Rich results-navigators for shorter search time*
- *Support for 400+ content types and 85 languages*

Knowledge Amplification

- *Phonetic and multi-lingual for global relevance*
- *Social connections driven by interests and expertise*
- *Secure access to content, whether internal or external*

Enterprise Deployment

- *Improved scale to meet any demand volume*
- *Deployment-specific tuning for best results*
- *Search-driven applications to enrich platform*

SharePoint Insights

Data interaction

- *Advanced analysis with Excel Services*
- *Richer data visualization and easy sharing*
- *Incorporation of LOB data in data analysis*

Decision Making

- *Powerful Self-Service capabilities and visualizations*
- *Compelling dashboards to drive business results*
- *Rich reports with access to millions of rows*

Organizational Effectiveness

- *Drive accountability and alignment with scorecards*
- *Identify issues and opportunities with real-time access*

SharePoint Composites

User-Driven Solutions

- *Enhanced toolset for end-user solutions*
- *Process automation and data validation with Forms*
- *Visio services integration for data visualization*

Data Connectivity

- *Business Connectivity Services for LOB data exchange*
- *LOB data in Outlook, Word & Workspace without code*
- *SharePoint data exposed through web services & APIs*

Solution Deployment

- *Sandboxed Solutions for self-service and fast installation*
- *Platform stability with resource quota-management*
- *Standards support for integration and accessibility*

Tour of Office 2010 and SharePoint 2010 Integration

demo

City of Contoso Intranet - Home - Windows Internet Explorer

http://intranet.contoso.com/SitePages/Home.aspx

Bing

Favorites | City of Contoso Intranet ... | Search Center : document

Page | Safety | Tools

Site Actions | Browse | Page

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Contoso

City of Contoso Intranet ▸ Home

I Like It

City of Contoso Intranet | Permits | Insights | Content Management | City Council | Departments | NCE

Search this site...

Libraries
- Site Pages
- Shared Documents

Lists
- Calendar
- Tasks
- Chart

Discussions
- Team Discussion

Recycle Bin

All Site Content

Welcome to the Contoso intranet!

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Below is the results of our survey. We asked our staff now many councillors should be assigned to project X. Thank you to every one for their valuable contibution.

Data & Appearance | Advanced Properties

Quick Links

Search document store

Link to Document store

Local intranet | Protected Mode: On

Search Results : transportation - Windows Internet Explorer

http://intranet.contoso.com/sites/EcmAllUp/FASTSearch/Pages/results.aspx?k=transportation&cs=This%20Site&u

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Site Actions

Contoso FASTSearch ▸ Search Results

Kevin Kennedy

All Sites | People

transportation

Preferences
Advanced

City of Contoso

1-10 of 41 results

Sort by: Relevance

Result Type
- Any Result Type
- Adobe PDF (28)
- Microsoft Word (7)
- Microsoft Po... (5)
- Web Page (1)

Site
- Any Site
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Author
- Any Author
- System Account (41)
- Nina Weston (6)
- nationkf (4)
- HARRISKF (3)
- show more

Transportation
National Overview Top 10 States - Fatalities Top 10 States - Incidents Top 10 States - Injuries
Authors: System Account Date: 7/26/2010 Size: 87KB
http://intranet.contoso.com/sites/pp/Dashboards/NJ/National Overview.aspx

Transportation - Crash Facts
... Illinois Department of **Transportation** (IDOT) is committed to ... R. Stout Secretary of **Transportation** Director of Traffic Safety ... Illinois Department of **Transportation** Division of Traffic Safety ...
Authors: System Account sanderjt Date: 9/29/2008 Size: 1MB
http://intranet.contoso.com/sites/ECMAllUp/Docs/Documents/Transportation - Crash Facts.pdf

Department of Transportation
... Enterprises in Department of **Transportation** Programs; Final Rule ... Enterprises in Department of **Transportation** Programs AGENCY: Office ... revises the Department of **Transportation**'s regulations for ...
Authors: System Account U.S. Government Printing Office Date: 12/2/1999 Size: 370KB
http://intranet.contoso.com/sites/ECMAllUp/Docs/Documents/Department of Transportation.pdf

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Authors: System Account ANDERSONCS Date: 5/27/2010 Size: 14KB
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policystatement

People Matches

Adam Barr
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Diane Tibbot
Contoso Town
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Transport - Wikipedia, th
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Site Actions

Contoso FASTSearch ▸ Search Results

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Advanced

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1-5 of 5 results

Sort by: Relevance

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System Account (5)
Craig Wills (2)
danielchan (1)
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show more

Modified Date
Any Modified Date

Contoso Overview

... Abu-Dhabi Weather & Meteorology Authority Massachusetts Executive Office of **Transportation** Kingdom of Saudi Arabia City of Camden, New Jersey NYS Department of Environmental ...
Authors: System Account danielchan Date: 5/25/2010 Size: 21MB
http://intranet.contoso.com/sites/ECMAllUp/Docs/Documents/Contoso Overview.pptx
Preview | View In Browser

CSP Technology Value and Key Features

... resources Social services, public health Regulation, licensing, inspection **Transportation**, transit, motor vehicles LOB Departmental Applications LOB Departmental Applications ...
Authors: System Account Craig Wills Date: 1/6/2010 Size: 11MB
http://intranet.contoso.com/sites/ECMAllUp/ ... /02 - Technology Value and Key Features.pptx
Preview | View In Browser

CSP Intro and BDM

... resources Social services, public health Regulation, licensing, inspection **Transportation**, transit, motor vehicles LOB Departmental Applications LOB Departmental Applications ...
Authors: System Account Craig Wills Date: 12/30/2009 Size: 8MB
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transportation

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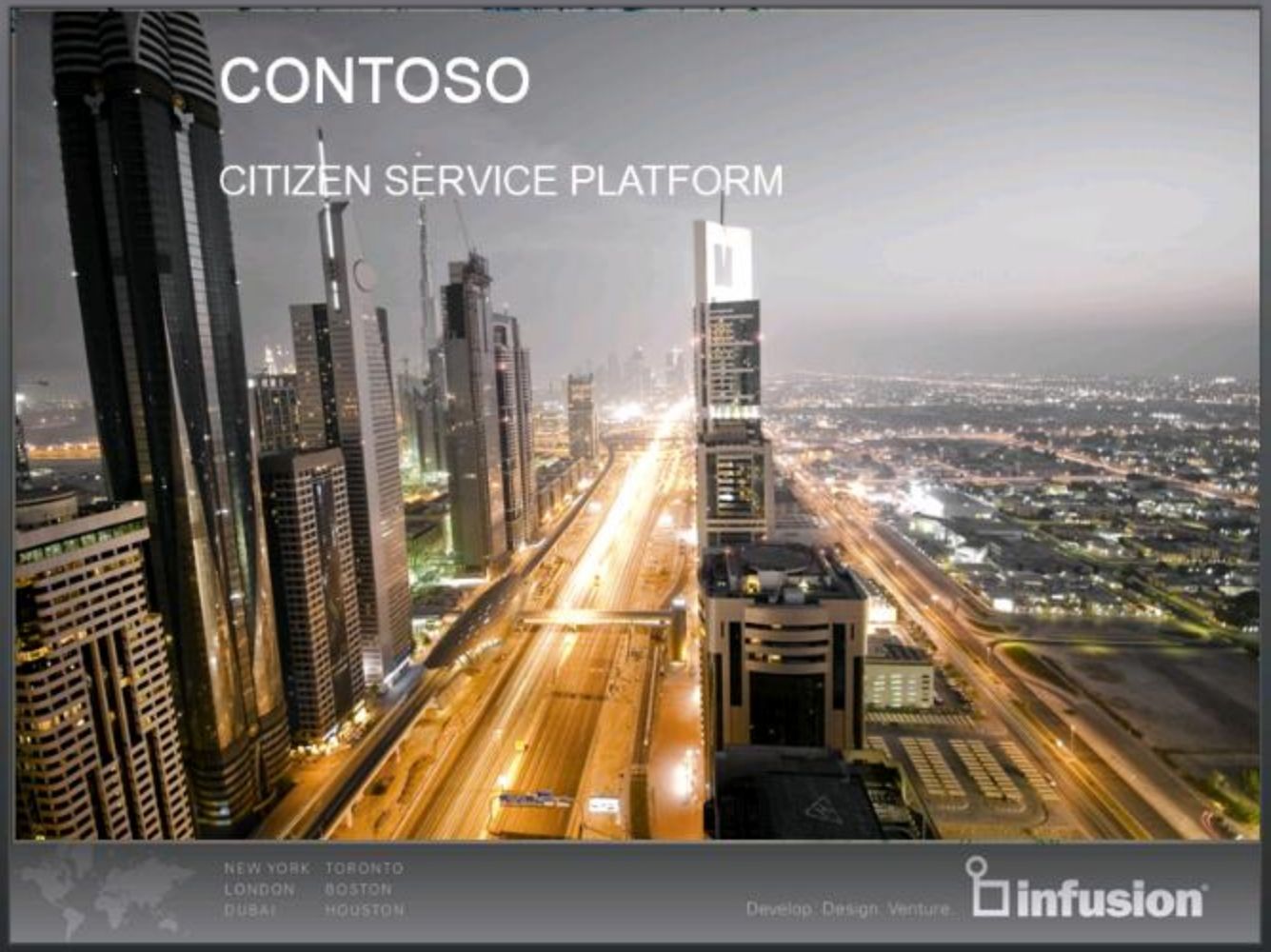
Microsoft PowerPoint Web App

File | Open in PowerPoint | Edit in Browser | Start Slide Show



Slide 1 of 42 | Notes

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Contoso

Documents

I Like It

City of Contoso | Documents | Small Business Development | Blogs | FASTSearch | Projects | Home | Search this site...

Documents
Documents

Lists
Tasks

Recycle Bin
All Site Content

Welcome to the Document Center

Use this site to create, work on, and store documents. This site can become a collaborative repository for authoring documents within a team, or a knowledge base for documents across multiple teams.

Upload a Documen

WXTDN-1-1
Find by Document ID

Newest Documents

- 02 - Technology Value and Key Features
- 01 - Intro and BDM
- Contoso Overview
- 04 - Dynamics CRM Deep Dive AG
- 03 - Engagement Framework
- 01b - Business Value Framework2
- Voluntary Termination Statement
- Voluntary Surrender of Notary Public Commission
- Veterans Organization Solicitor's Registration Statement

Highest Rated Documents

- Benefits and Applications
- Surety Account Notice for a Credit Services Organization
- Third-Party Debt Collector Bond
- Trust Account Notice
- Voluntary Surrender of Notary Public Commission
- Contoso Overview
- Communication Reforms
- Register Update Form
- Athlete Agent Surety Bond

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Open in PowerPoint | Office

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Picture Tools

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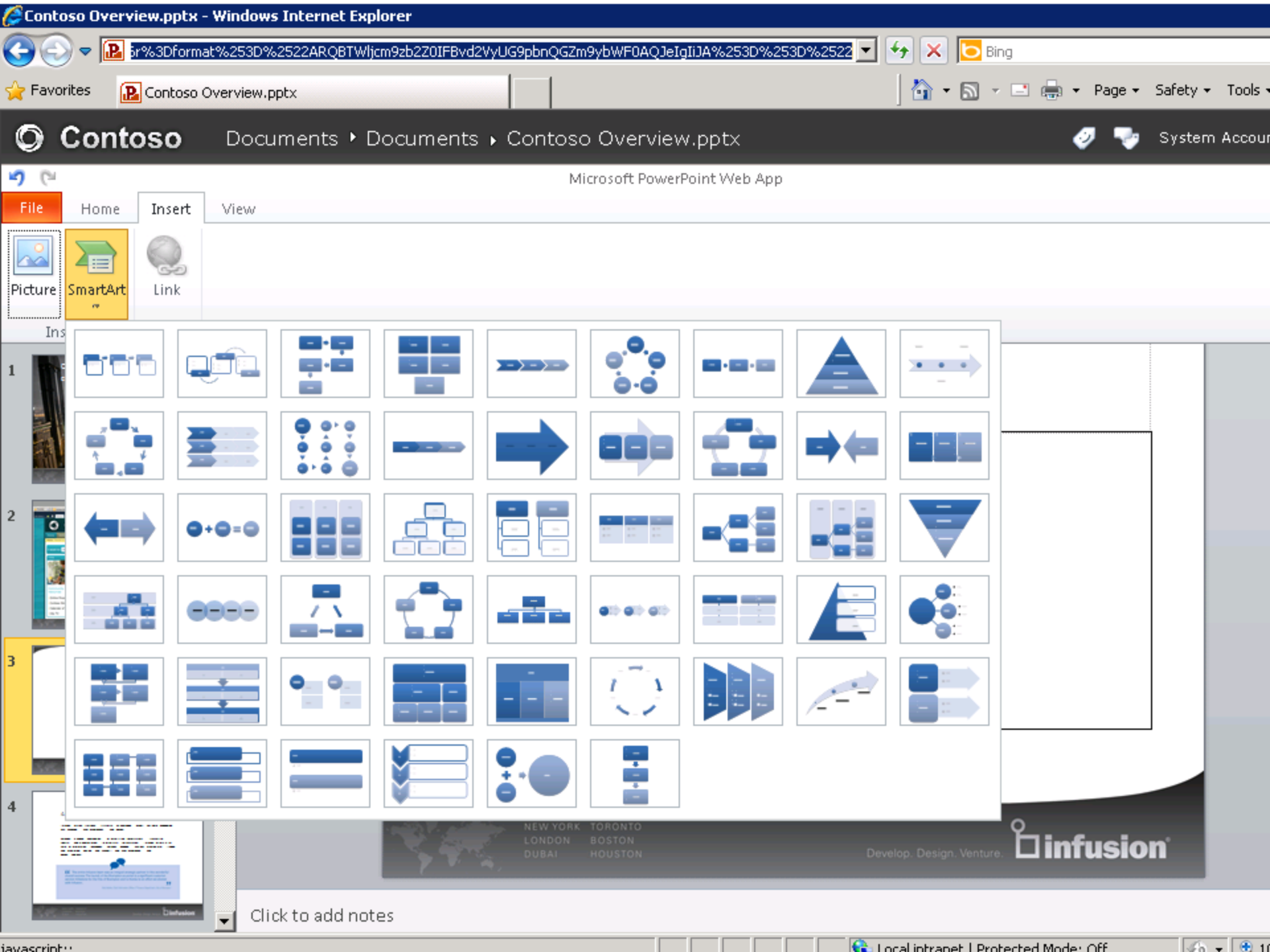
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Slides | Outline

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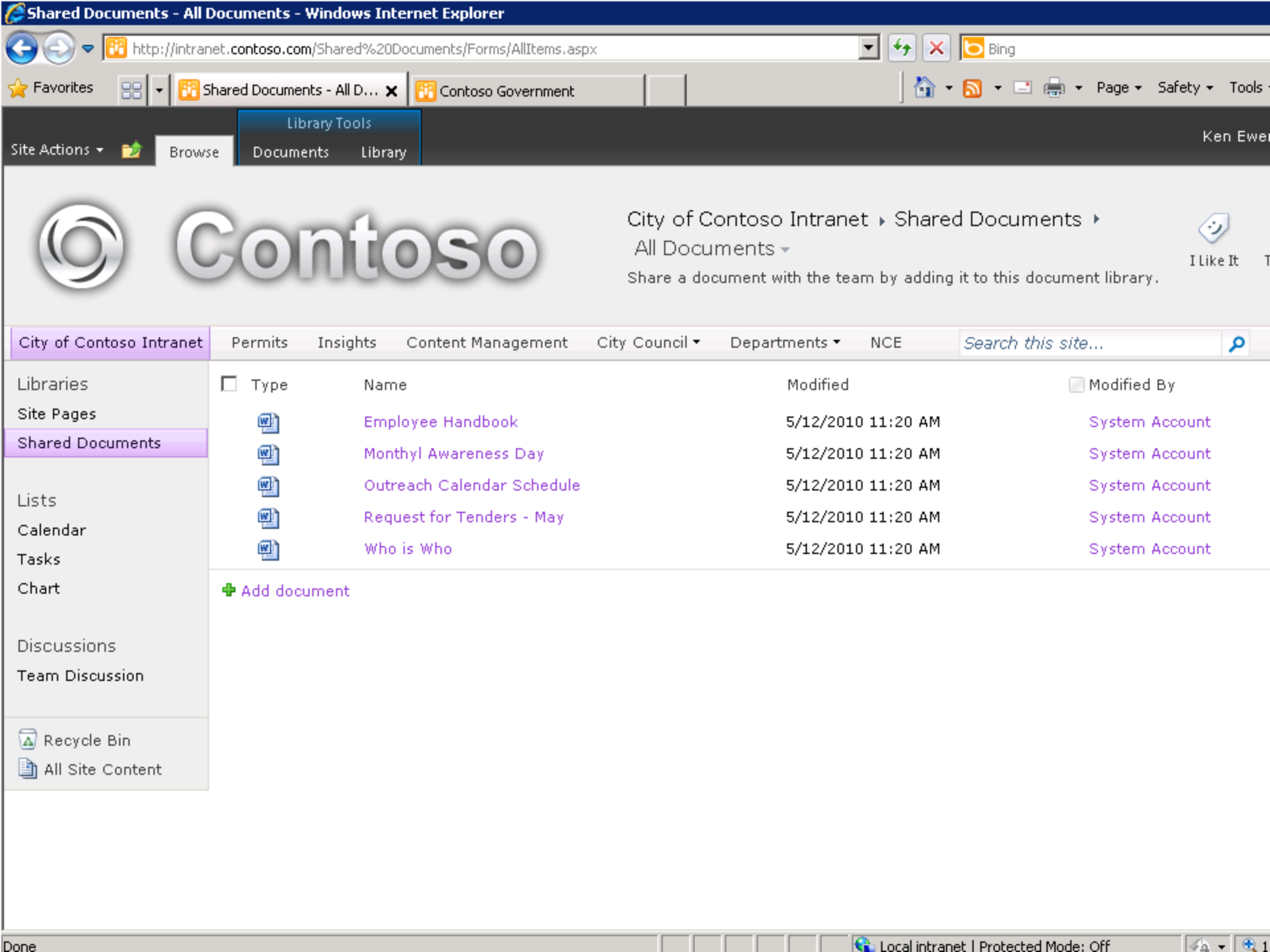
CONTOSO

CITIZEN SERVICE PLATFORM

Click to add notes

Slide 1 of 42 | "1_Content Master" | 94%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All Documents
Share a document with the team by adding it to this document library.
I Like It
City of Contoso Intranet
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Content Management
City Council
Departments
NCE
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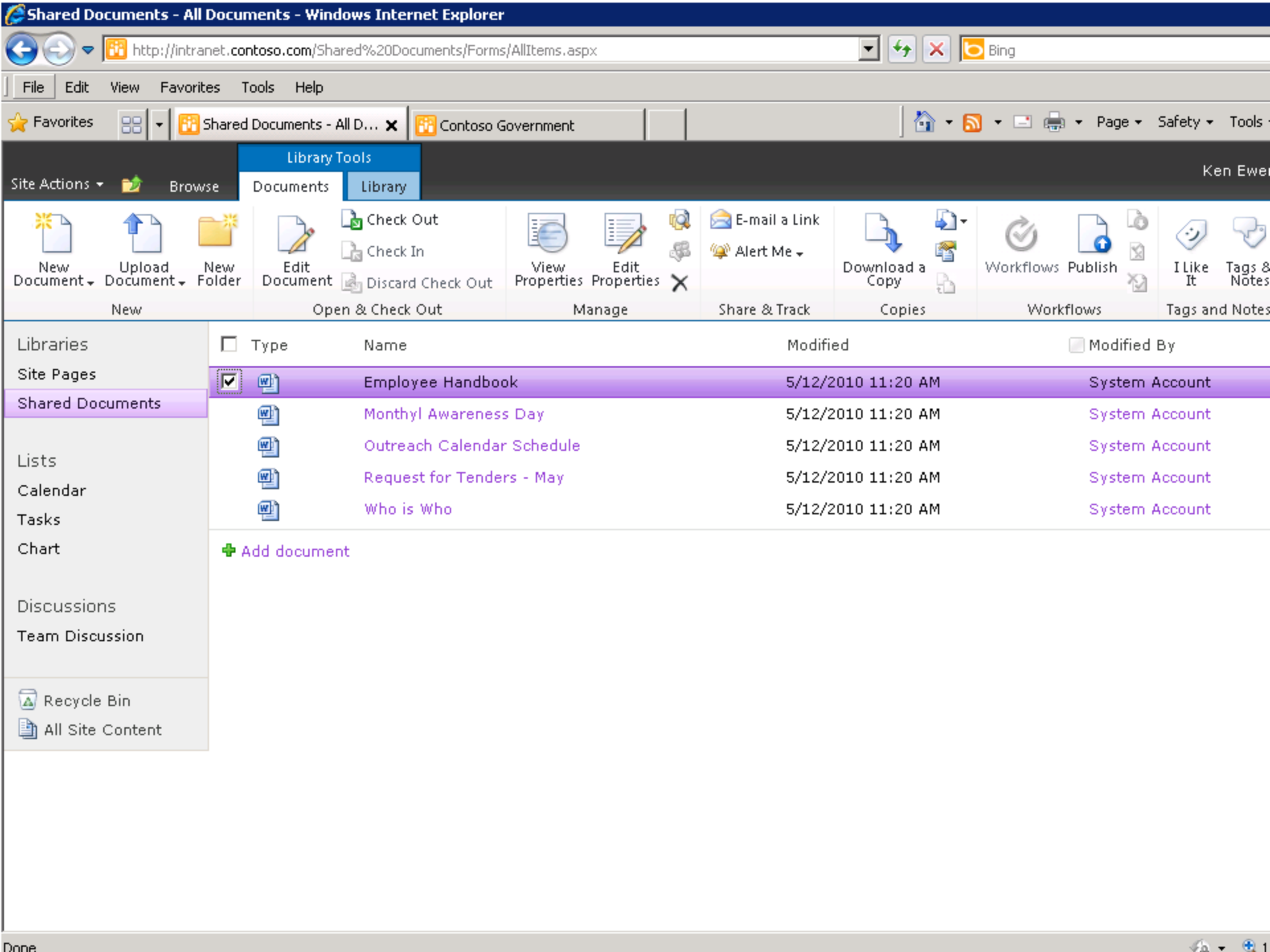
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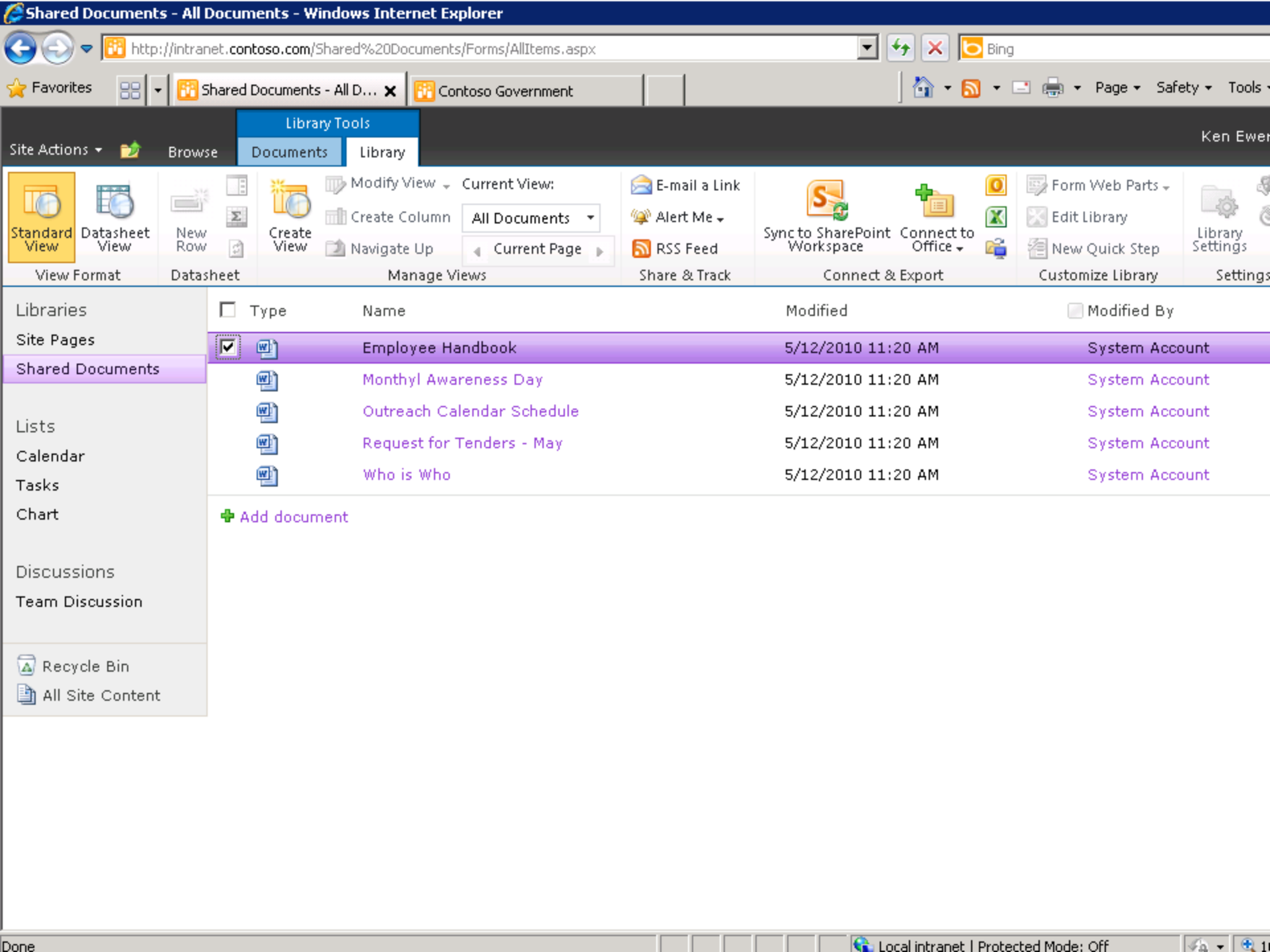
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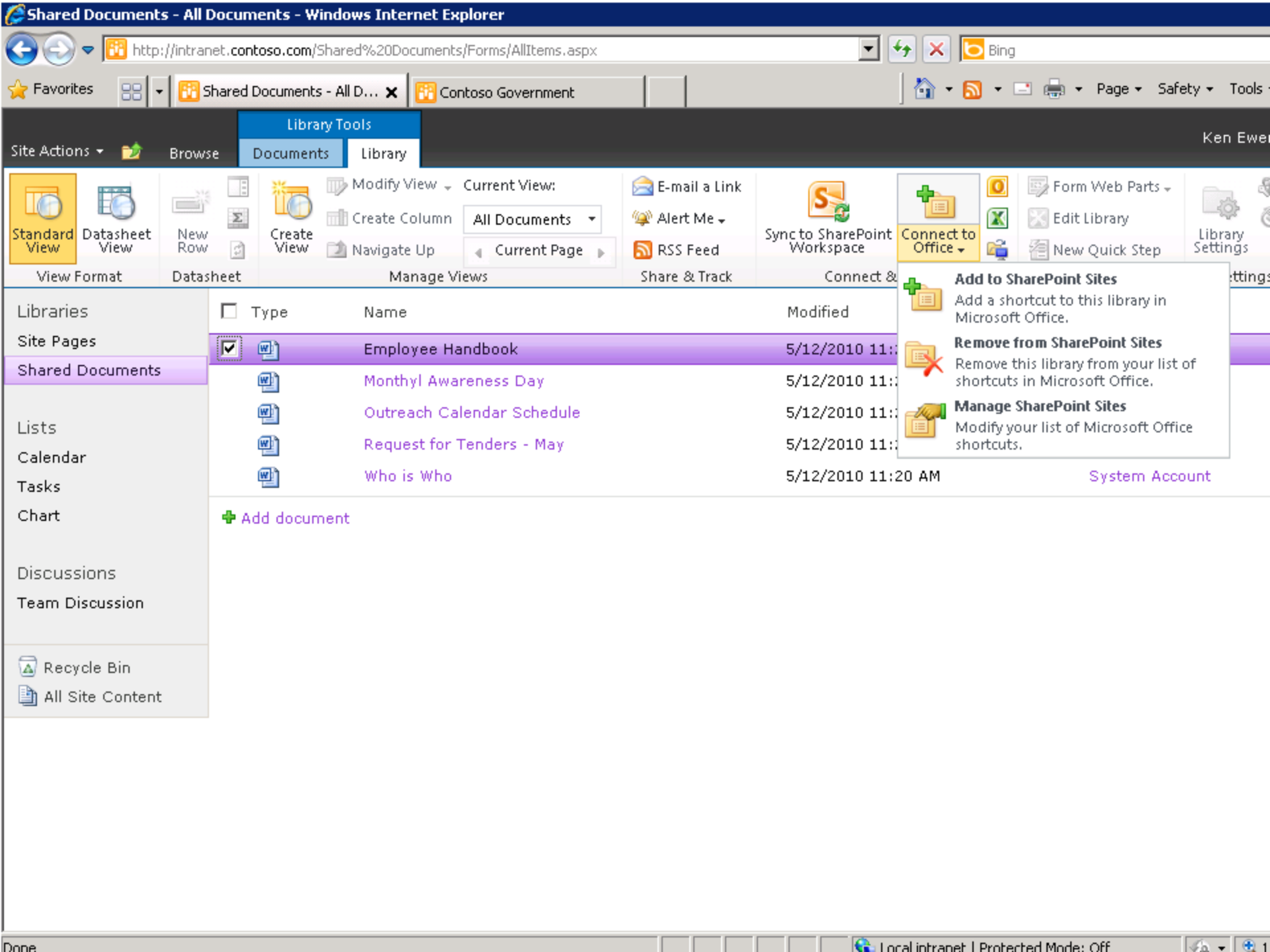
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Remove from SharePoint Sites
Remove this library from your list of shortcuts in Microsoft Office.
Manage SharePoint Sites
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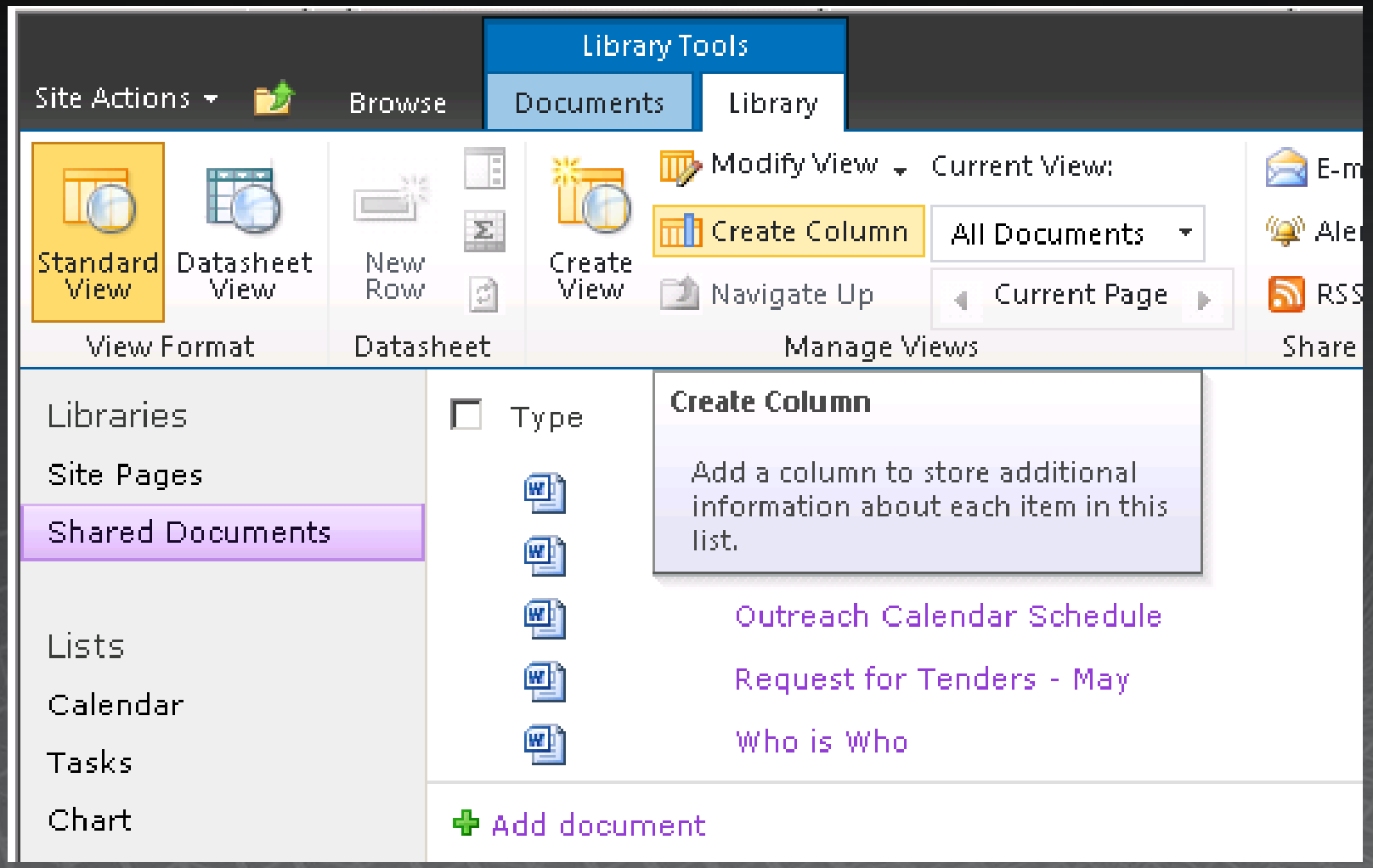
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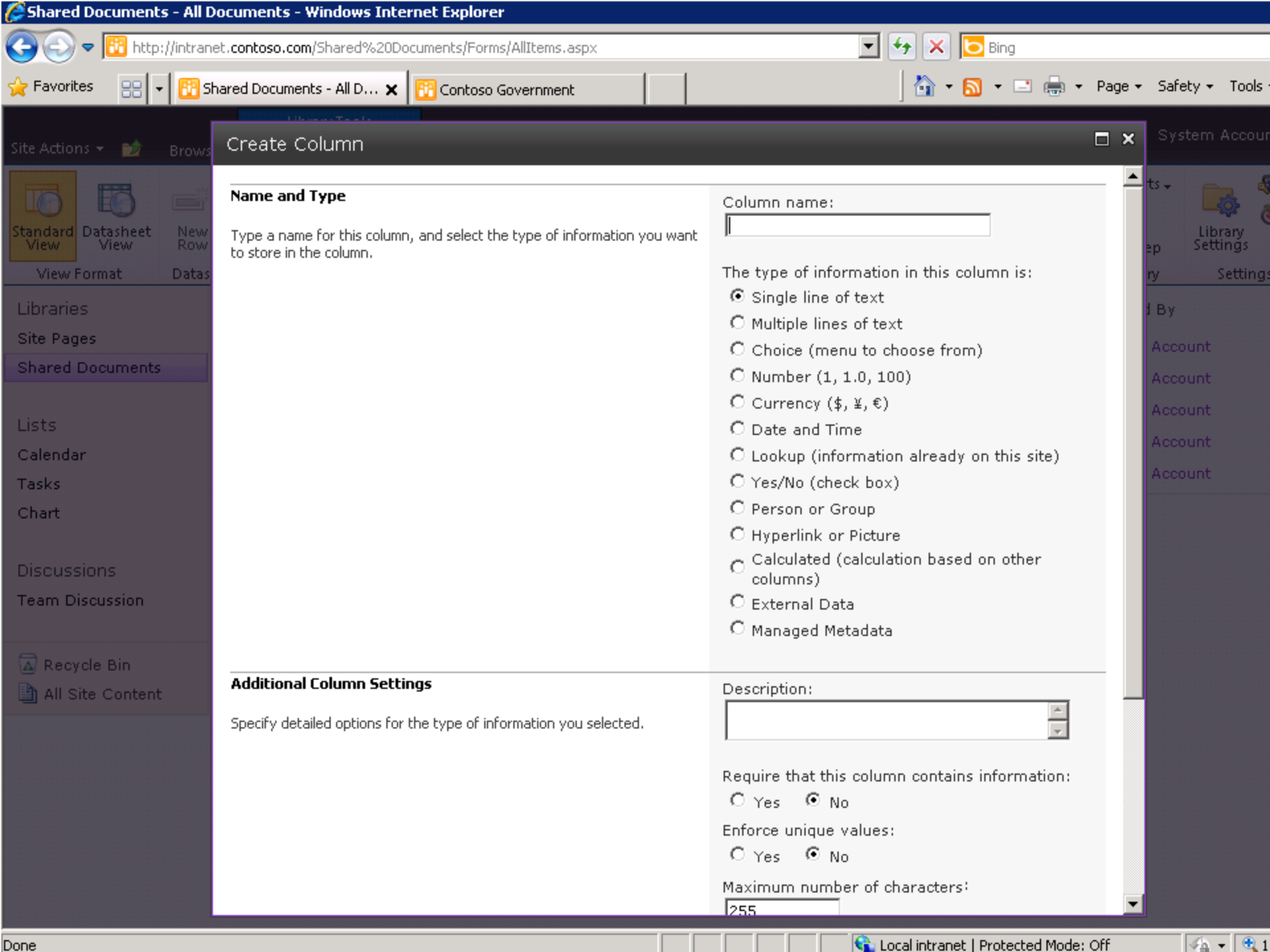
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Recycle Bin
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Create Column
Name and Type
Type a name for this column, and select the type of information you want to store in the column.
Column name:
The type of information in this column is:
Single line of text
Multiple lines of text
Choice (menu to choose from)
Number (1, 1.0, 100)
Currency ($, ¥, €)
Date and Time
Lookup (information already on this site)
Yes/No (check box)
Person or Group
Hyperlink or Picture
Calculated (calculation based on other columns)
External Data
Managed Metadata
Additional Column Settings
Specify detailed options for the type of information you selected.
Description:
Require that this column contains information:
Yes
No
Enforce unique values:
Yes
No
Maximum number of characters:
255
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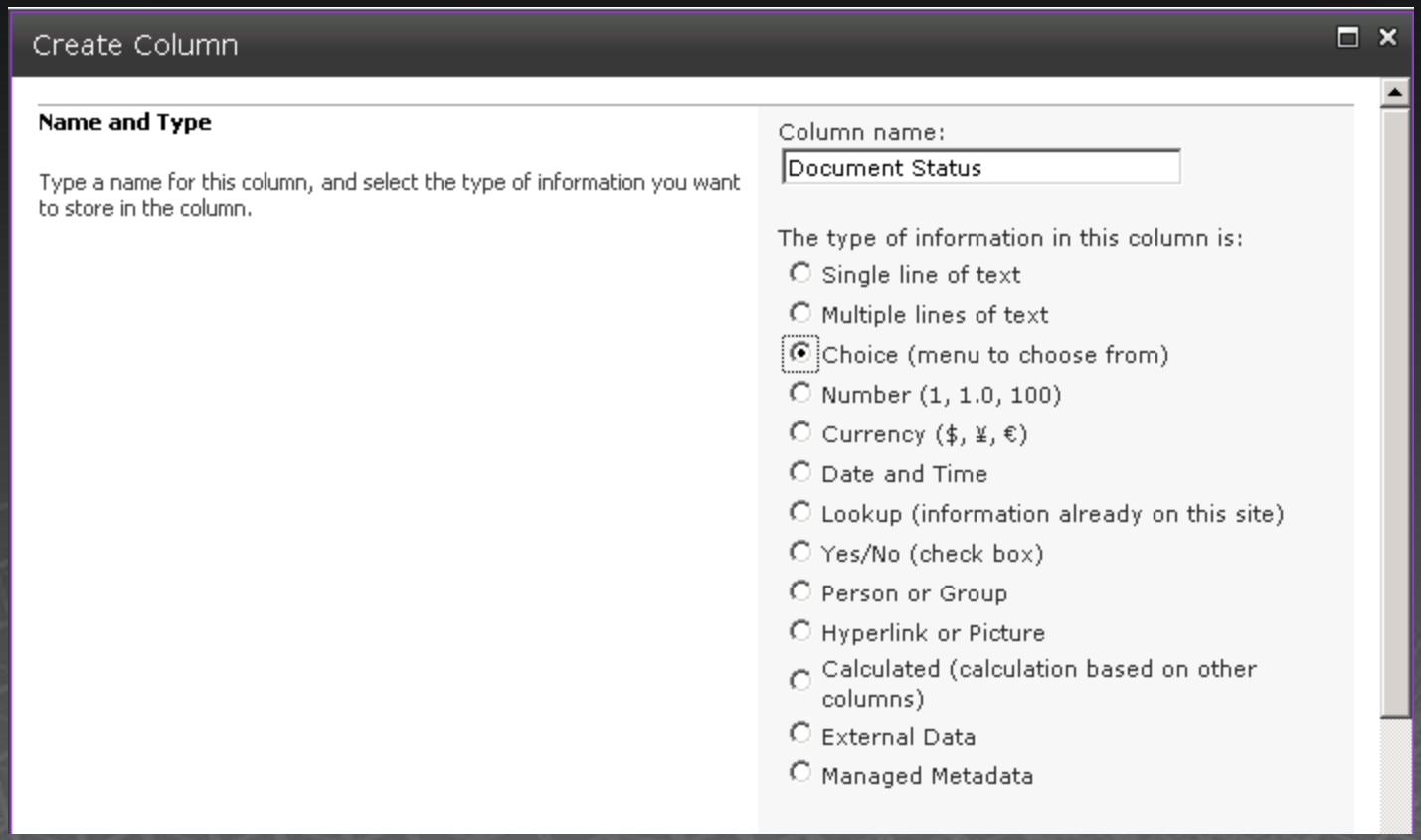
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Name and Type
Type a name for this column, and select the type of information you want to store in the column.
Column name:
Document Status
The type of information in this column is:
Single line of text
Multiple lines of text
Choice (menu to choose from)
Number (1, 1.0, 100)
Currency ($, ¥, €)
Date and Time
Lookup (information already on this site)
Yes/No (check box)
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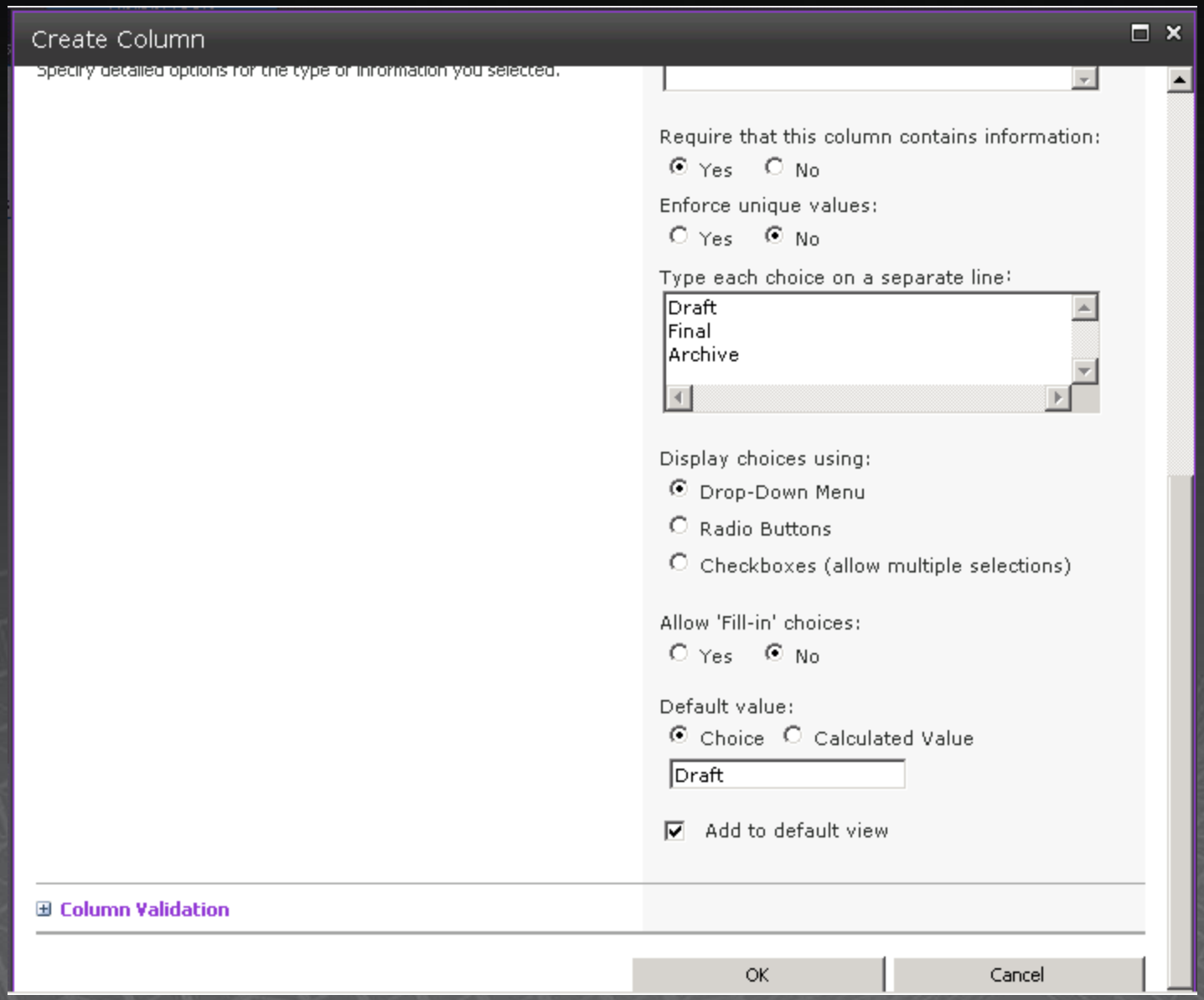
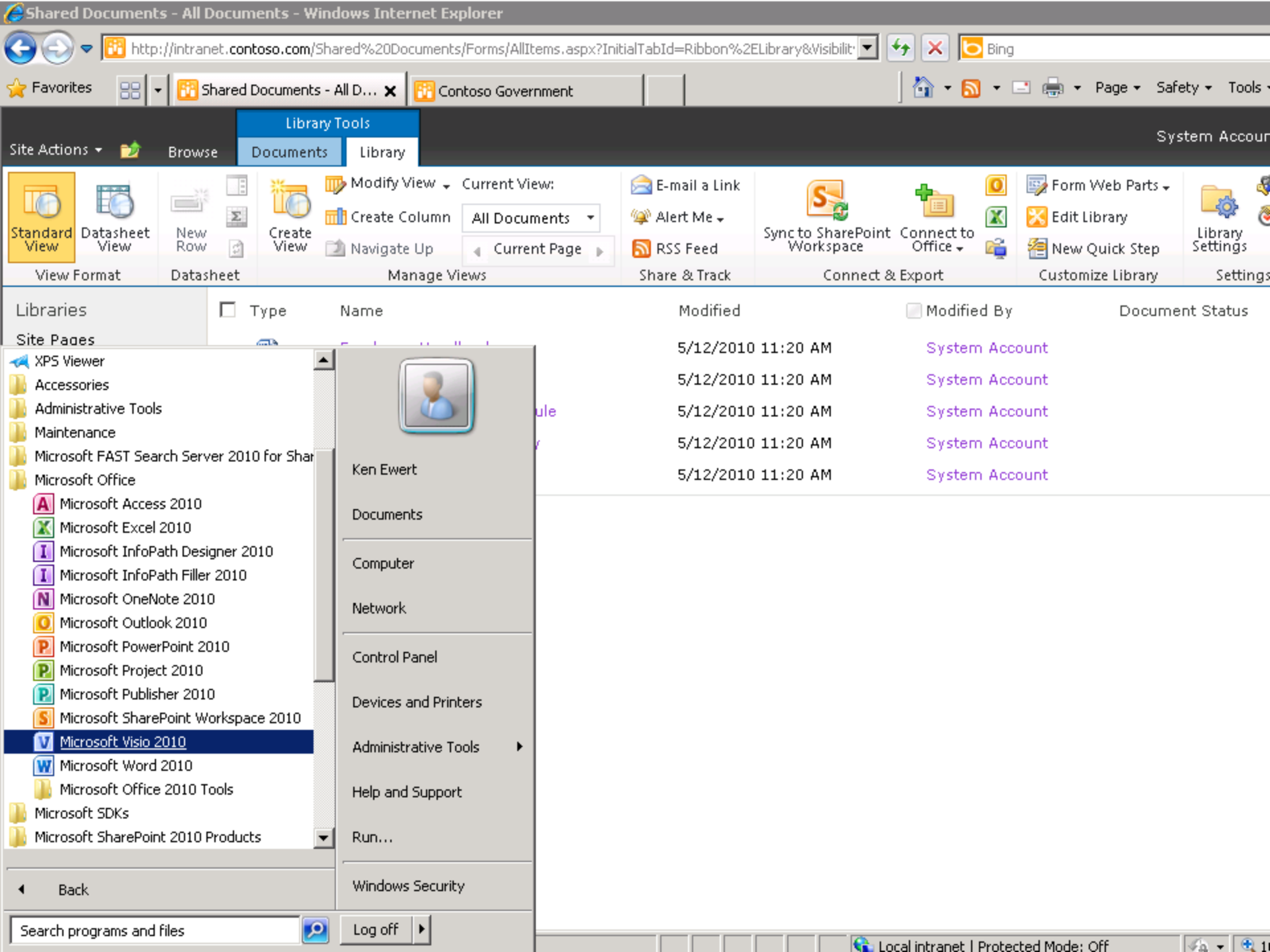

Create Column
Specify detailed options for the type of information you selected.
Require that this column contains information:
Yes
No
Enforce unique values:
Yes
No
Type each choice on a separate line:
Draft
Final
Archive
Display choices using:
Drop-Down Menu
Radio Buttons
Checkboxes (allow multiple selections)
Allow 'Fill-in' choices:
Yes
No
Default value:
Choice
Calculated Value
Draft
Add to default view
Column Validation
OK
Cancel


Shared Documents - All Documents - Windows Internet Explorer
http://intranet.contoso.com/Shared%20Documents/Forms/AllItems.aspx?InitialTabId=Ribbon%2ELibrary&Visibilit
Bing
Favorites
Shared Documents - All D...
Contoso Government
Page
Safety
Tools
Library Tools
Site Actions
Browse
Documents
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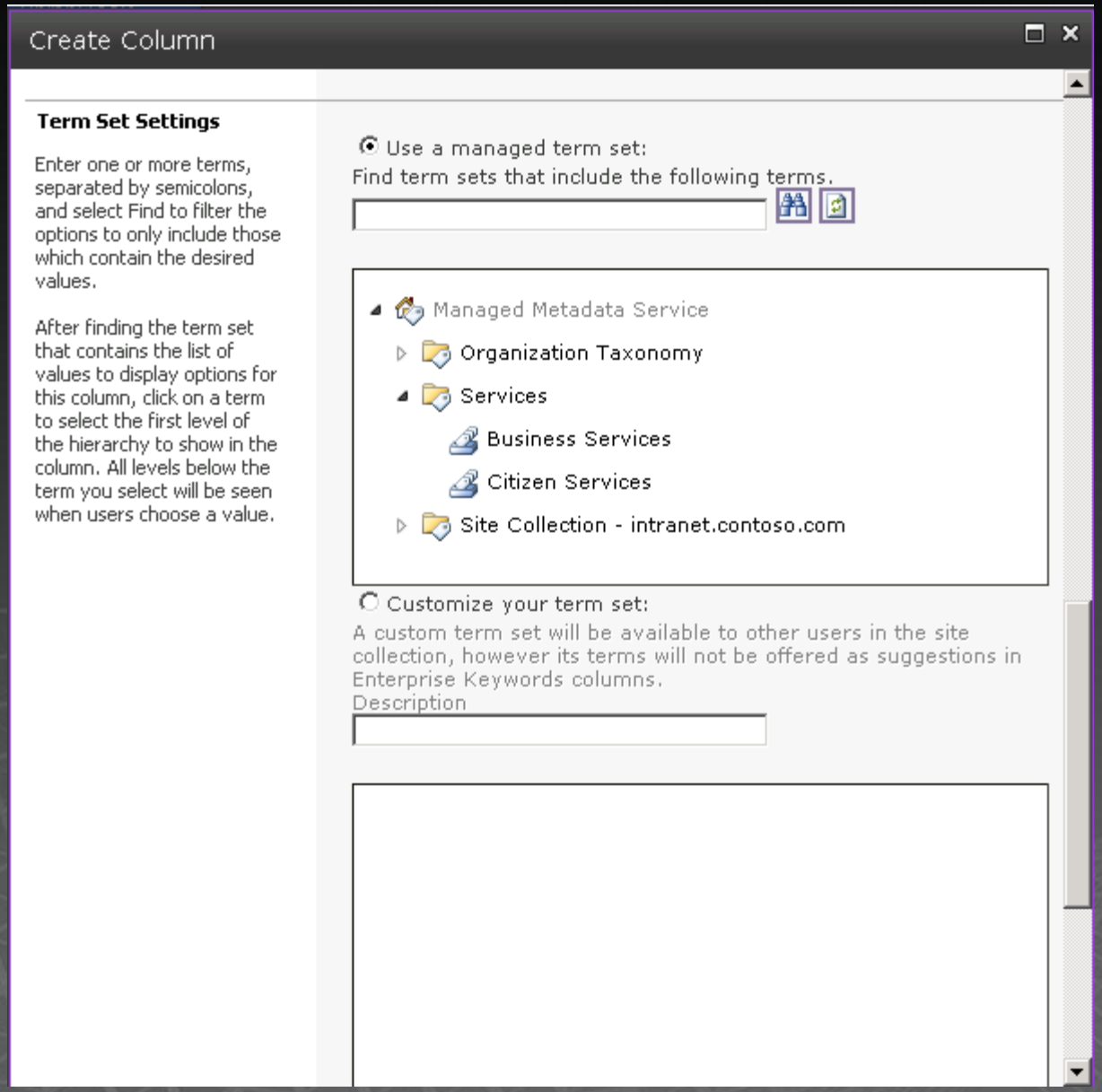
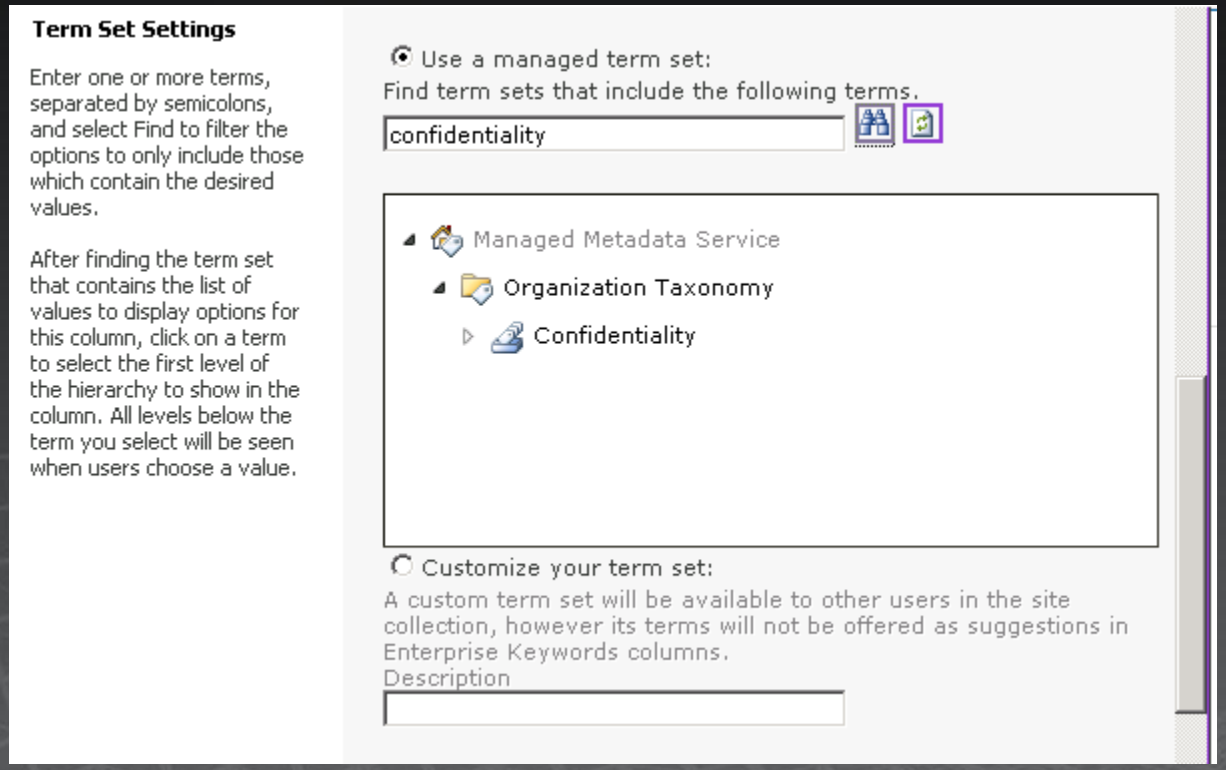
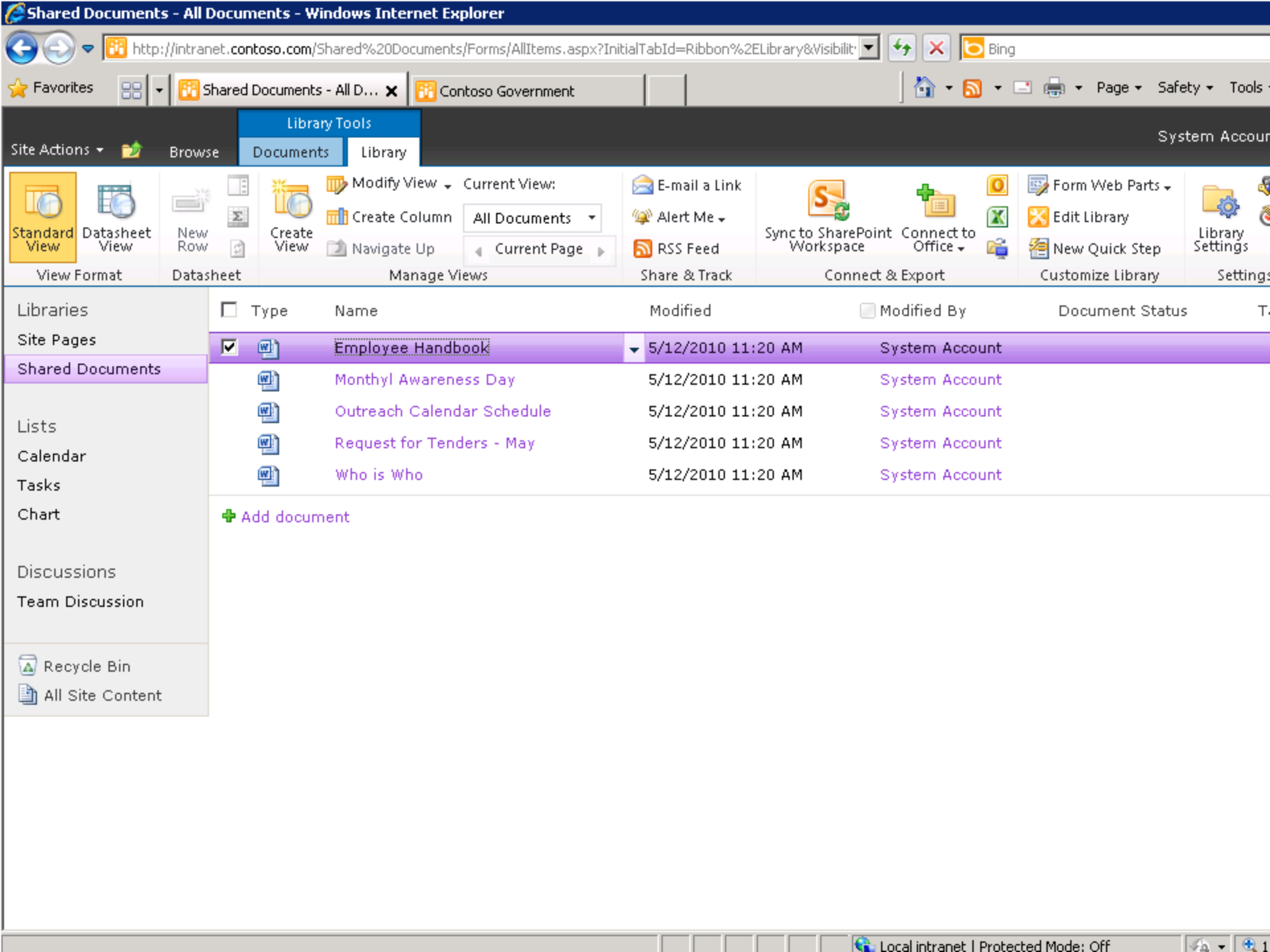
System Accoun
Standard View
Datasheet View
New Row
Create View
Modify View
Current View:
Create Column
All Documents
Navigate Up
Current Page
E-mail a Link
Alert Me
RSS Feed
Sync to SharePoint Workspace
Connect to Office
Form Web Parts
Edit Library
New Quick Step
Library Settings
View Format
Datasheet
Manage Views
Share & Track
Connect & Export
Customize Library
Settings
Libraries
Site Pages
Type
Name
Modified
Modified By
Document Status
5/12/2010 11:20 AM
System Account
XPS Viewer
Accessories
Administrative Tools
Maintenance
Microsoft FAST Search Server 2010 for Shar
Microsoft Office
Microsoft Access 2010
Microsoft Excel 2010
Microsoft InfoPath Designer 2010
Microsoft InfoPath Filler 2010
Microsoft OneNote 2010
Microsoft Outlook 2010
Microsoft PowerPoint 2010
Microsoft Project 2010
Microsoft Publisher 2010
Microsoft SharePoint Workspace 2010
Microsoft Visio 2010
Microsoft Word 2010
Microsoft Office 2010 Tools
Microsoft SDKs
Microsoft SharePoint 2010 Products
Back
Search programs and files
Ken Ewert
Documents
Computer
Network
Control Panel
Devices and Printers
Administrative Tools
Help and Support
Run...
Windows Security
Log off
Local intranet | Protected Mode: Off


Create Column
Term Set Settings
Enter one or more terms, separated by semicolons, and select Find to filter the options to only include those which contain the desired values.
After finding the term set that contains the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.
Use a managed term set:
Find term sets that include the following terms.
Managed Metadata Service
Organization Taxonomy
Services
Business Services
Citizen Services
Site Collection - intranet.contoso.com
Customize your term set:
A custom term set will be available to other users in the site collection, however its terms will not be offered as suggestions in Enterprise Keywords columns.
Description


Term Set Settings
Enter one or more terms, separated by semicolons, and select Find to filter the options to only include those which contain the desired values.
After finding the term set that contains the list of values to display options for this column, click on a term to select the first level of the hierarchy to show in the column. All levels below the term you select will be seen when users choose a value.
Use a managed term set:
Find term sets that include the following terms.
confidentiality
Managed Metadata Service
Organization Taxonomy
Confidentiality
Customize your term set:
A custom term set will be available to other users in the site collection, however its terms will not be offered as suggestions in Enterprise Keywords columns.
Description


Shared Documents - All Documents - Windows Internet Explorer
http://intranet.contoso.com/Shared%20Documents/Forms/AllItems.aspx?InitialTabId=Ribbon%2ELibrary&Visibilit
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Favorites
Shared Documents - All D...
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Safety
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Library Tools
Site Actions
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Standard View
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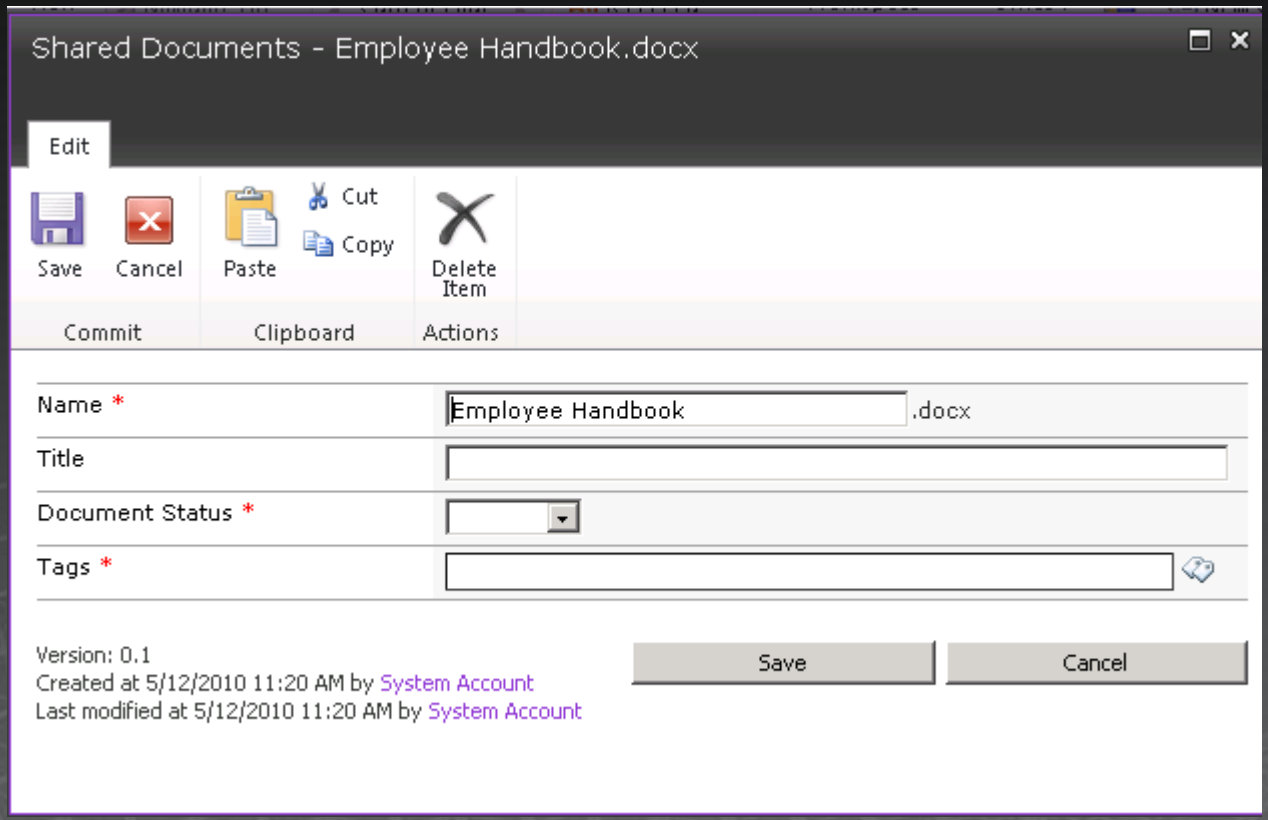
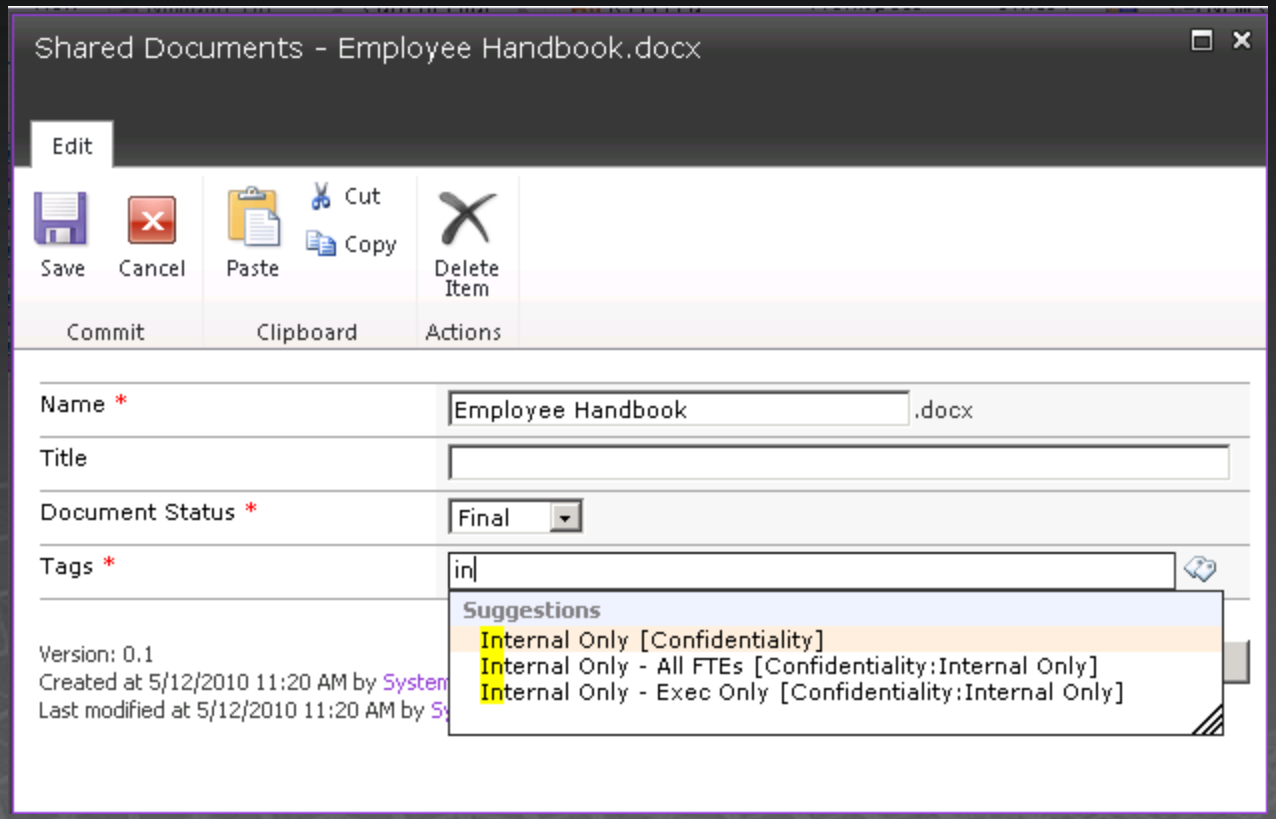
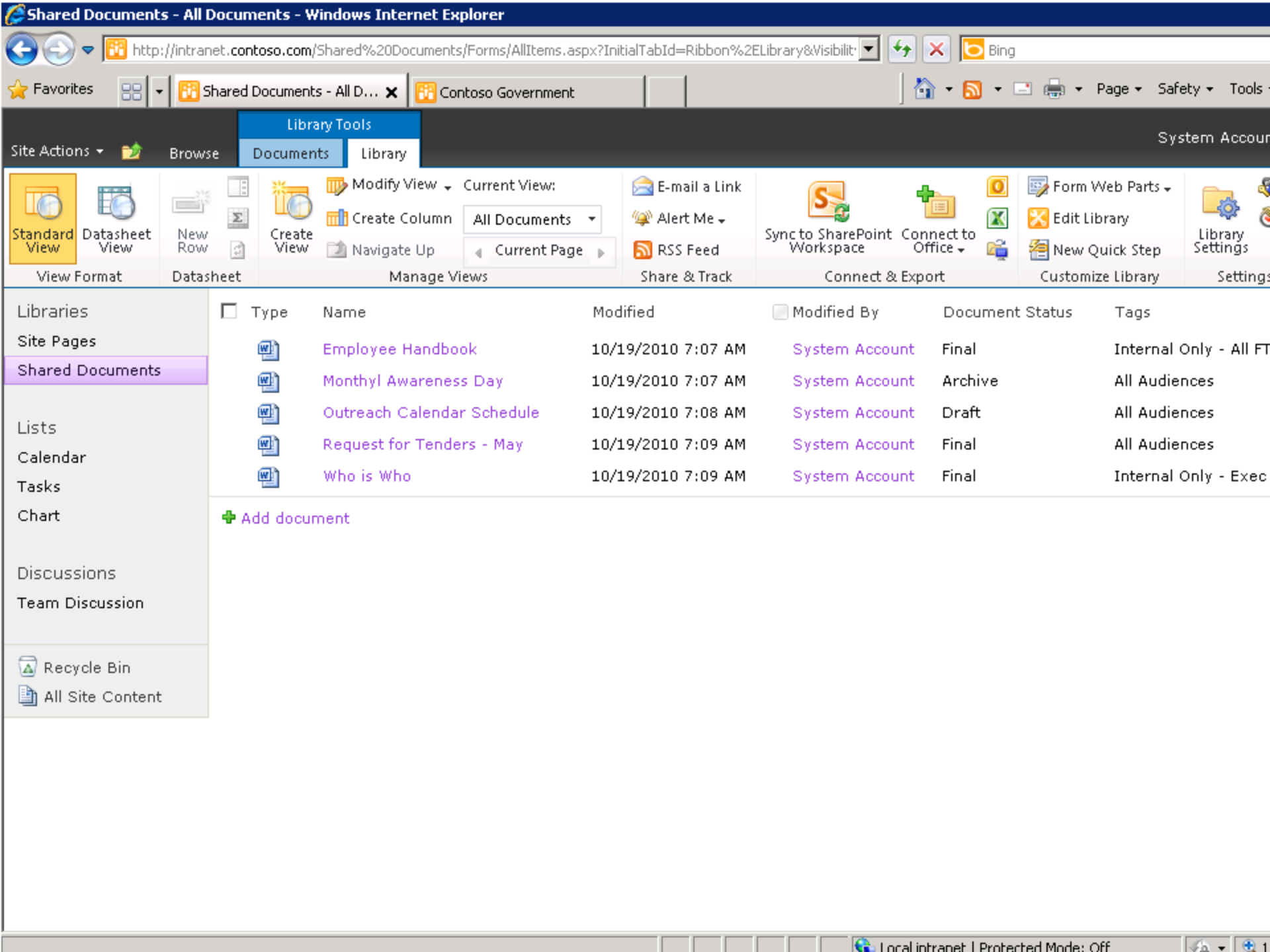
New Row
Create View
Modify View
Current View:
Create Column
All Documents
Navigate Up
Current Page
E-mail a Link
Alert Me
RSS Feed
Sync to SharePoint Workspace
Connect to Office
Form Web Parts
Edit Library
New Quick Step
Library Settings
View Format
Datasheet
Manage Views
Share & Track
Connect & Export
Customize Library
Settings
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Chart
Discussions
Team Discussion
Recycle Bin
All Site Content
Type
Name
Modified
Modified By
Document Status
Employee Handbook
5/12/2010 11:20 AM
System Account
Monthyl Awareness Day
5/12/2010 11:20 AM
System Account
Outreach Calendar Schedule
5/12/2010 11:20 AM
System Account
Request for Tenders - May
5/12/2010 11:20 AM
System Account
Who is Who
5/12/2010 11:20 AM
System Account
Add document
Local intranet | Protected Mode: Off


Shared Documents - Employee Handbook.docx
Edit
Save
Cancel
Paste
Cut
Copy
Delete Item
Commit
Clipboard
Actions
Name *
Employee Handbook
.docx
Title
Document Status *
Tags *
Version: 0.1
Created at 5/12/2010 11:20 AM by System Account
Last modified at 5/12/2010 11:20 AM by System Account
Save
Cancel


Shared Documents - Employee Handbook.docx
Edit
Save
Cancel
Paste
Cut
Copy
Delete Item
Commit
Clipboard
Actions
Name *
Employee Handbook
.docx
Title
Document Status *
Final
Tags *
in
Suggestions
Internal Only [Confidentiality]
Internal Only - All FTEs [Confidentiality:Internal Only]
Internal Only - Exec Only [Confidentiality:Internal Only]
Version: 0.1
Created at 5/12/2010 11:20 AM by
Last modified at 5/12/2010 11:20 AM by


Shared Documents - All Documents - Windows Internet Explorer
http://intranet.contoso.com/Shared%20Documents/Forms/AllItems.aspx?InitialTabId=Ribbon%2ELibrary&Visibilit
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Favorites
Shared Documents - All D...
Contoso Government
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Safety
Tools
Library Tools
Site Actions
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New Row
Create View
Modify View
Current View:
Create Column
All Documents
Navigate Up
Current Page
E-mail a Link
Alert Me
RSS Feed
Sync to SharePoint Workspace
Connect to Office
Form Web Parts
Edit Library
New Quick Step
Library Settings
View Format
Datasheet
Manage Views
Share & Track
Connect & Export
Customize Library
Settings
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Chart
Discussions
Team Discussion
Recycle Bin
All Site Content
Type
Name
Modified
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Document Status
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Employee Handbook
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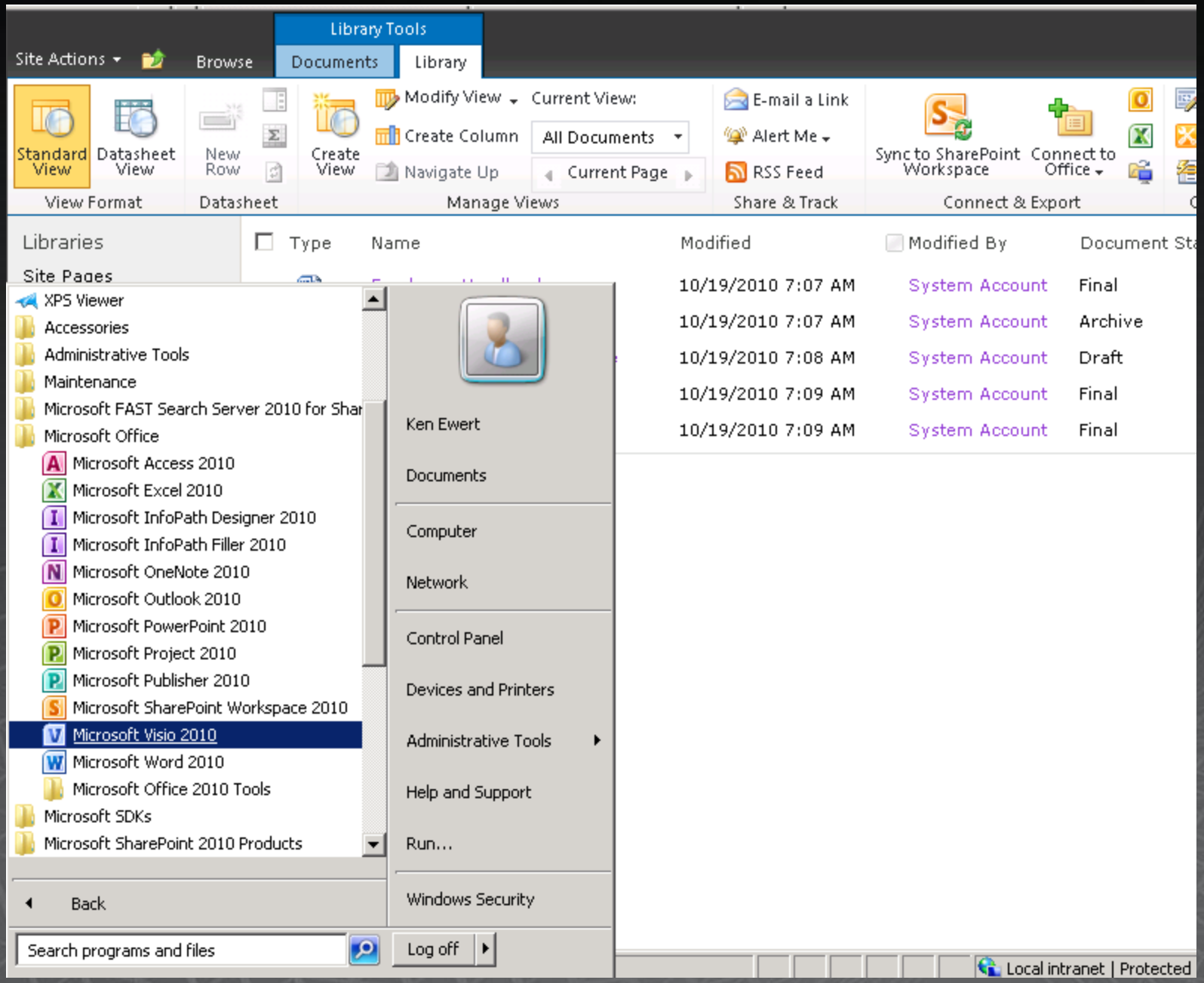
Internal Only - All FT
Monthyl Awareness Day
10/19/2010 7:07 AM
System Account
Archive
All Audiences
Outreach Calendar Schedule
10/19/2010 7:08 AM
System Account
Draft
All Audiences
Request for Tenders - May
10/19/2010 7:09 AM
System Account
Final
All Audiences
Who is Who
10/19/2010 7:09 AM
System Account
Final
Internal Only - Exec
Add document
Local intranet | Protected Mode: Off


Library Tools
Site Actions
Browse
Documents
Library
Standard View
Datasheet View
New Row
Create View
Modify View
Current View:
Create Column
All Documents
Navigate Up
Current Page
E-mail a Link
Alert Me
RSS Feed
Sync to SharePoint Workspace
Connect to Office
View Format
Datasheet
Manage Views
Share & Track
Connect & Export
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10/19/2010 7:07 AM System Account Archive
10/19/2010 7:08 AM System Account Draft
10/19/2010 7:09 AM System Account Final
10/19/2010 7:09 AM System Account Final
XPS Viewer
Accessories
Administrative Tools
Maintenance
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Microsoft Access 2010
Microsoft Excel 2010
Microsoft InfoPath Designer 2010
Microsoft InfoPath Filler 2010
Microsoft OneNote 2010
Microsoft Outlook 2010
Microsoft PowerPoint 2010
Microsoft Project 2010
Microsoft Publisher 2010
Microsoft SharePoint Workspace 2010
Microsoft Visio 2010
Microsoft Word 2010
Microsoft Office 2010 Tools
Microsoft SDKs
Microsoft SharePoint 2010 Products
Back
Search programs and files
Ken Ewert
Documents
Computer
Network
Control Panel
Devices and Printers
Administrative Tools
Help and Support
Run...
Windows Security
Log off
Local intranet | Protected

Microsoft Visio

File | Home | Insert | Design | Data | Process | Review | View

Save
Save As
Open
Close
Info
Recent
New
Print
Save & Send
Help
Options
Exit

Choose a Template

Home

Recently Used Templates

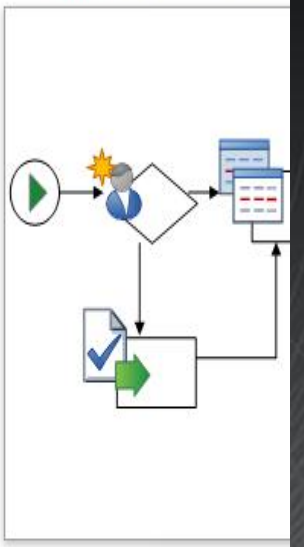
- Microsoft SharePoint Workflow (US units)
- Basic Flowchart (US units)
- Cross-Functional Flowchart (US units)
- Organization Chart (US units)

Template Categories

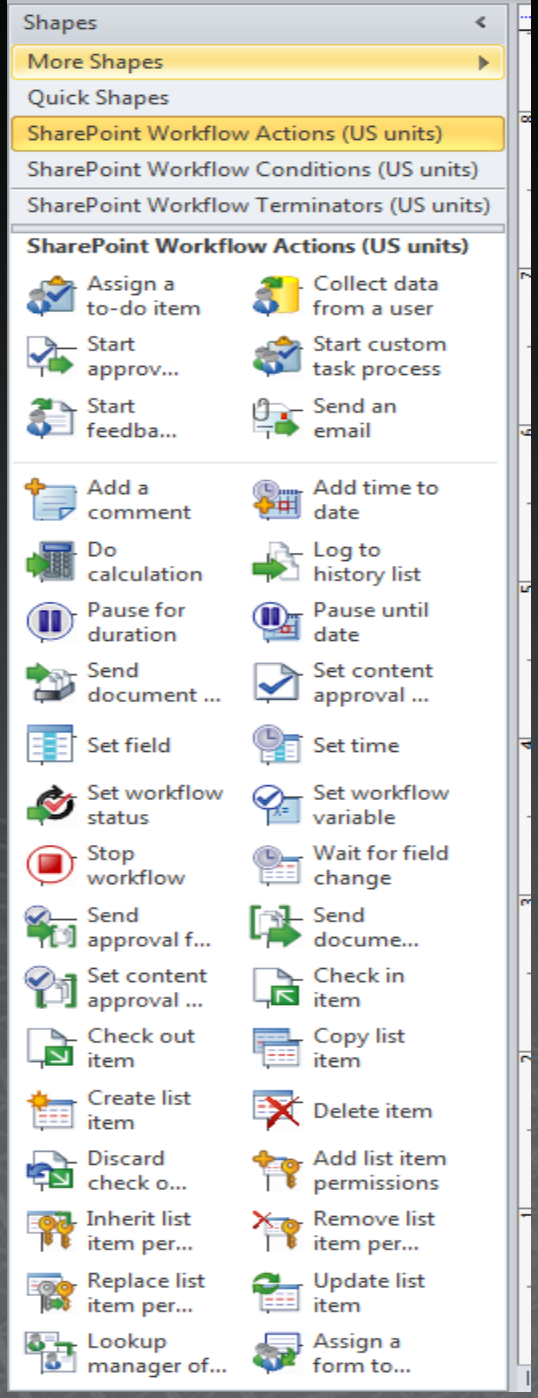
- Business
- Engineering
- Flowchart
- General
- Maps and Floor Plans
- Network
- Schedule
- Software and Database

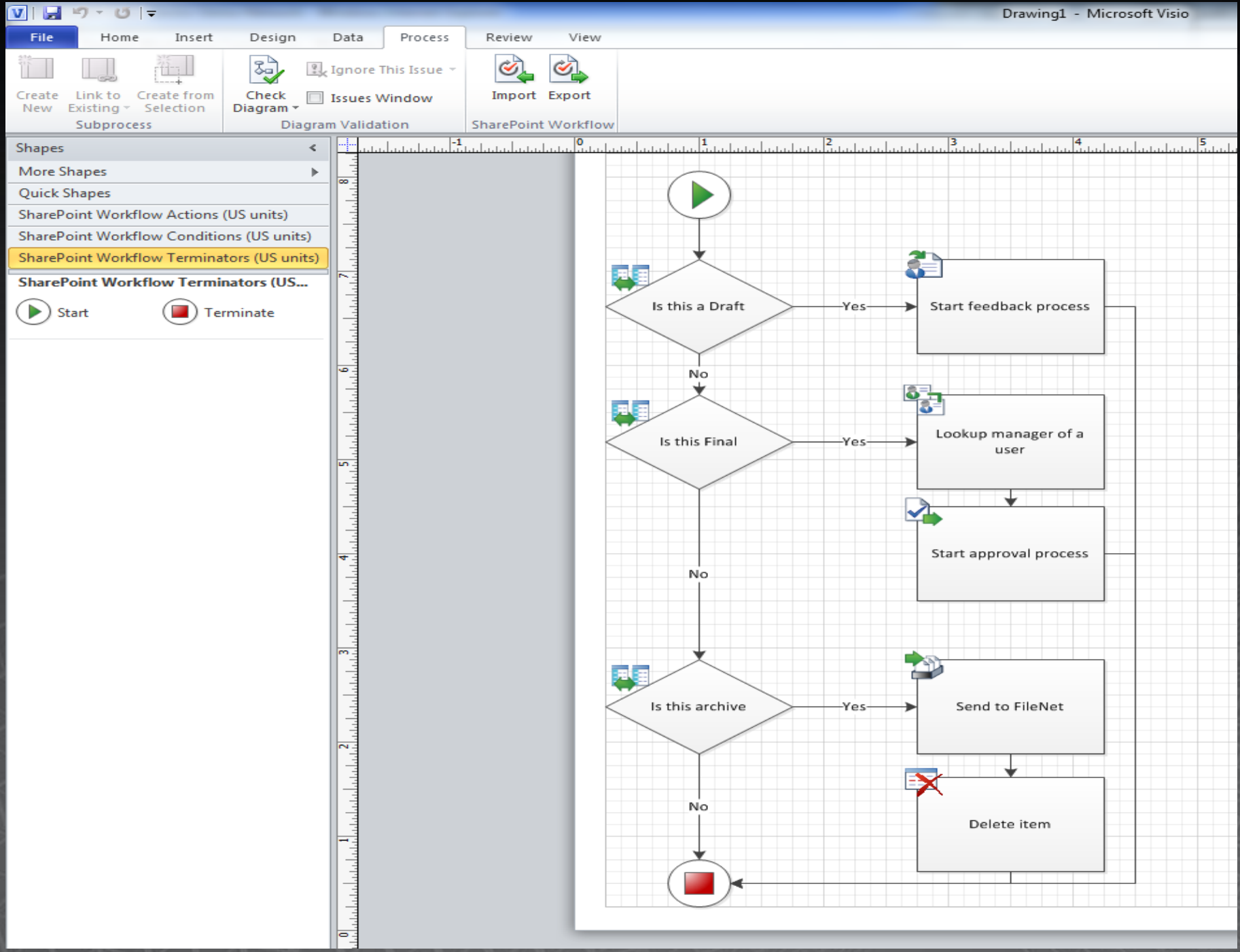
Microsoft SharePoint Workflo

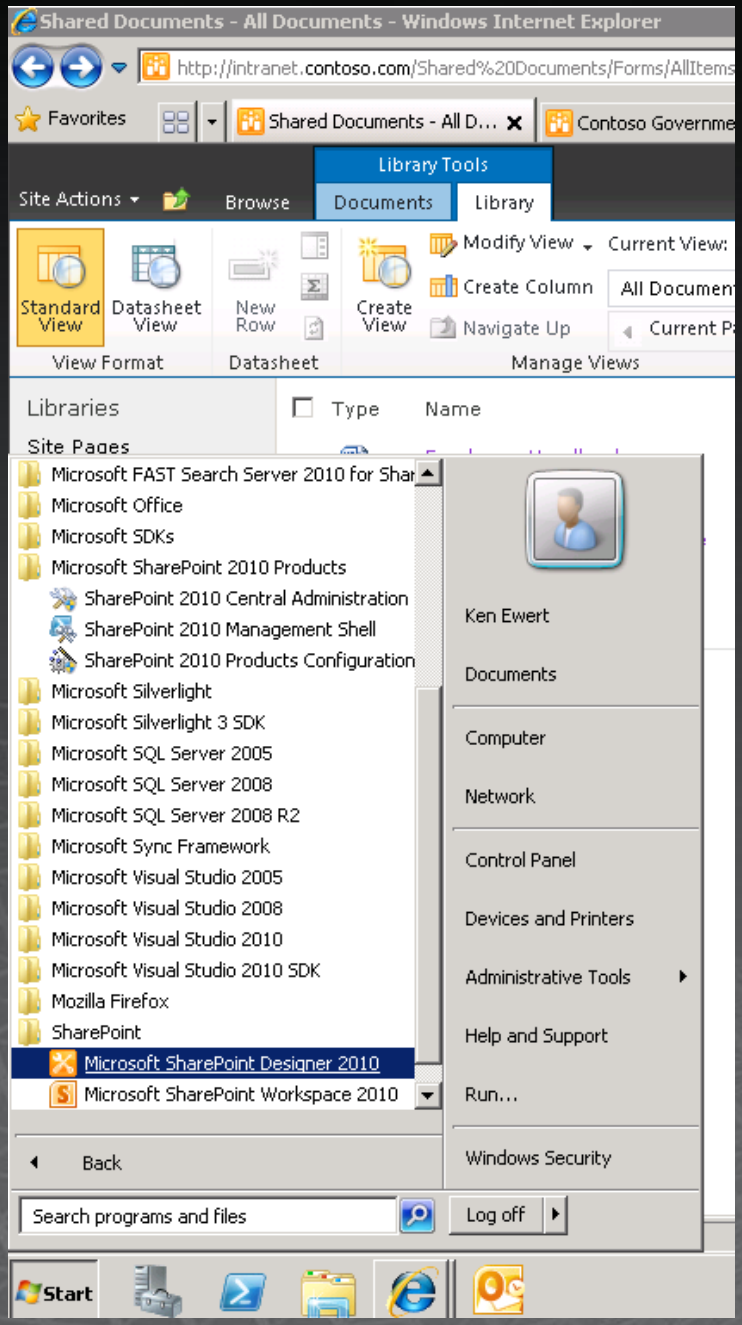
Create annotated workflow diagram
SharePoint Server 2010 and Microsof
Foundation 2010. Workflows can be
configuration in Microsoft SharePoi



Create


Shapes
More Shapes
Quick Shapes
SharePoint Workflow Actions (US units)
SharePoint Workflow Conditions (US units)
SharePoint Workflow Terminators (US units)
SharePoint Workflow Actions (US units)
Assign a to-do item
Collect data from a user
Start approv...
Start custom task process
Start feedba...
Send an email
Add a comment
Add time to date
Do calculation
Log to history list
Pause for duration
Pause until date
Send document ...
Set content approval ...
Set field
Set time
Set workflow status
Set workflow variable
Stop workflow
Wait for field change
Send approval f...
Send docume...
Set content approval ...
Check in item
Check out item
Copy list item
Create list item
Delete item
Discard check o...
Add list item permissions
Inherit list item per...
Remove list item per...
Replace list item per...
Update list item
Lookup manager of...
Assign a form to...


Drawing1 - Microsoft Visio
File
Home
Insert
Design
Data
Process
Review
View
Create New
Link to Existing
Create from Selection
Subprocess
Check Diagram
Ignore This Issue
Issues Window
Diagram Validation
Import
Export
SharePoint Workflow
Shapes
More Shapes
Quick Shapes
SharePoint Workflow Actions (US units)
SharePoint Workflow Conditions (US units)
SharePoint Workflow Terminators (US units)
SharePoint Workflow Terminators (US...
Start
Terminate
Is this a Draft
Yes
Start feedback process
No
Is this Final
Yes
Lookup manager of a user
Start approval process
No
Is this archive
Yes
Send to FileNet
No
Delete item


Shared Documents - All Documents - Windows Internet Explorer
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Library Tools
Site Actions
Browse
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Standard View
Datasheet View
New Row
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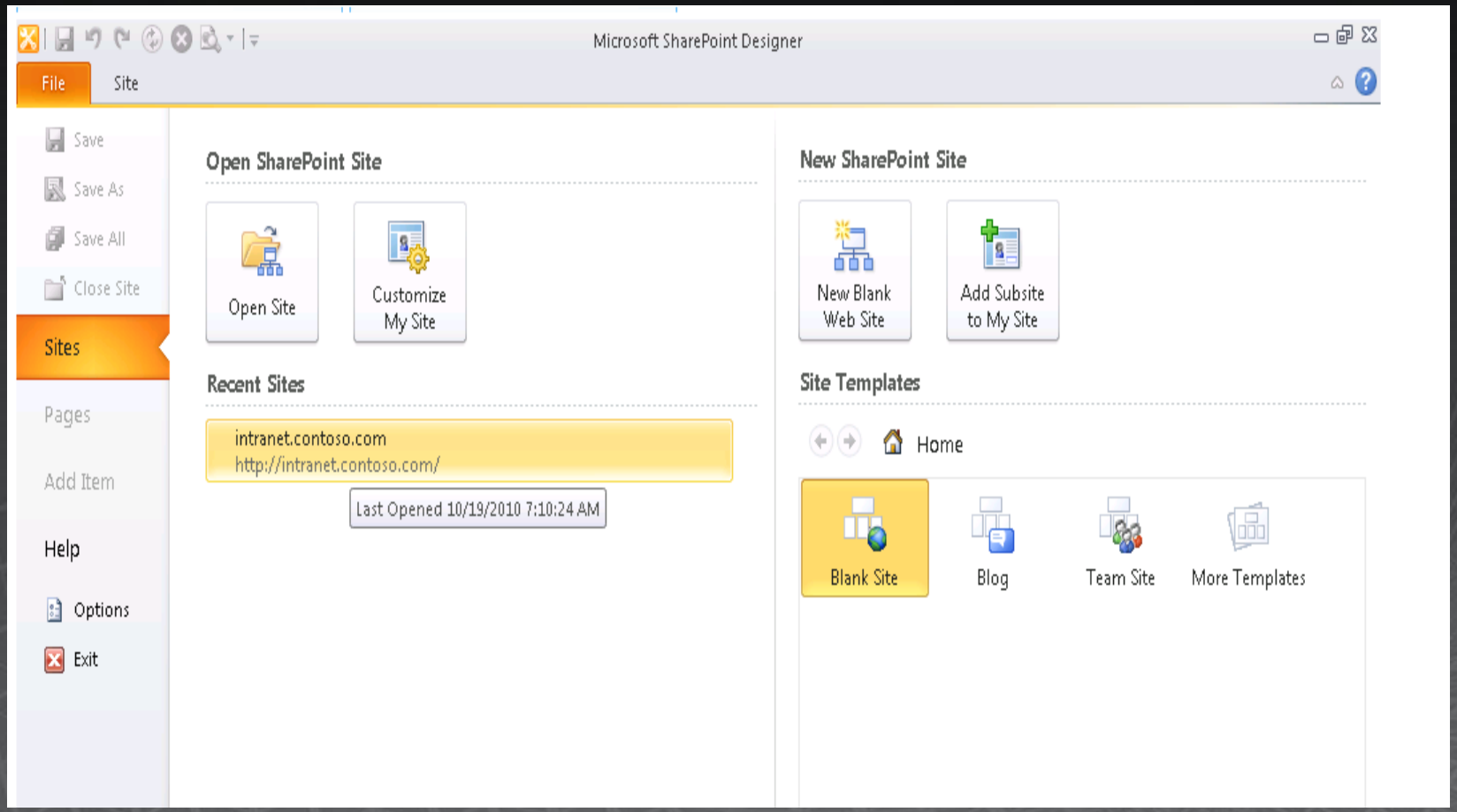
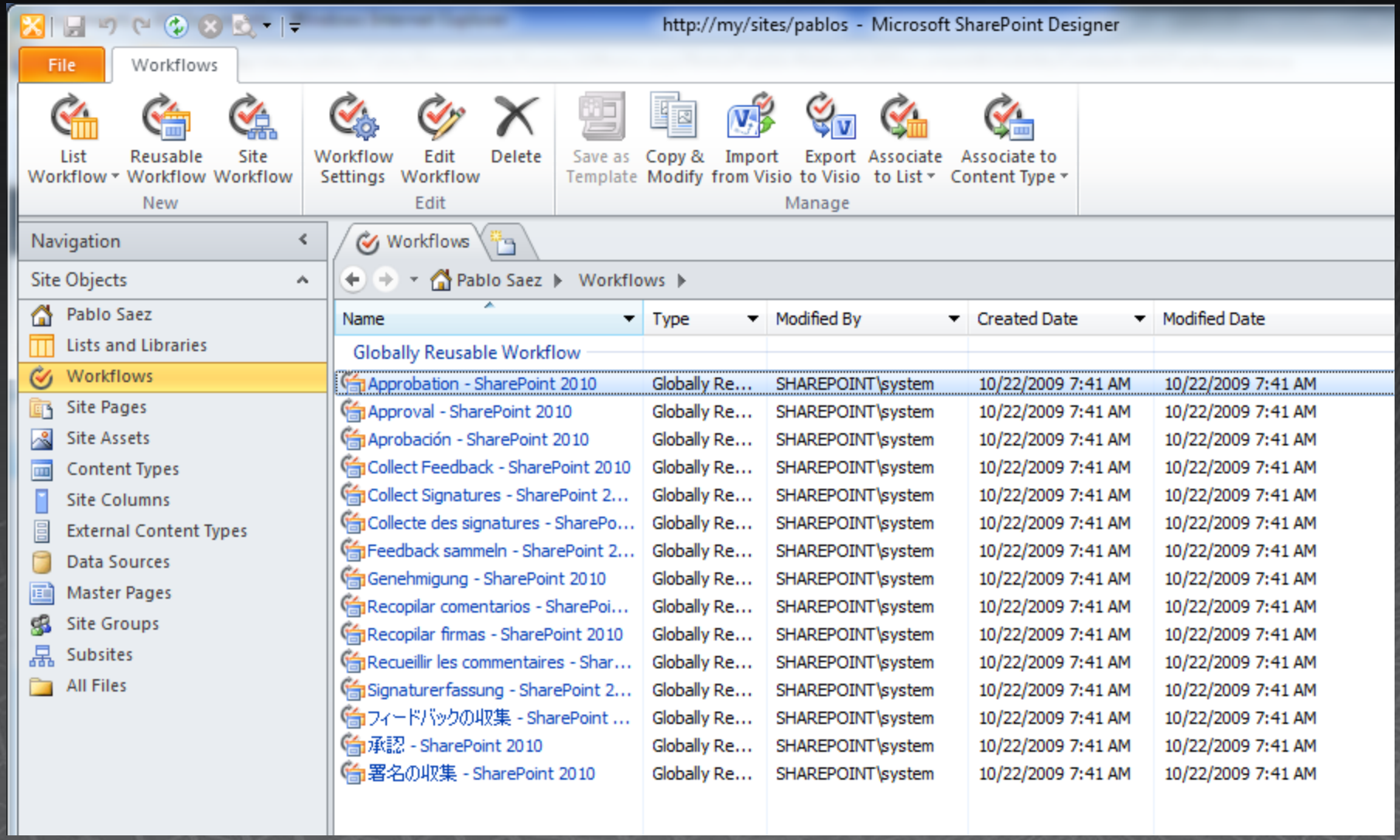
Navigate Up
View Format
Datasheet
Manage Views
Libraries
Site Pages
Type
Name
Microsoft FAST Search Server 2010 for Shar
Microsoft Office
Microsoft SDKs
Microsoft SharePoint 2010 Products
SharePoint 2010 Central Administration
SharePoint 2010 Management Shell
SharePoint 2010 Products Configuration
Microsoft Silverlight
Microsoft Silverlight 3 SDK
Microsoft SQL Server 2005
Microsoft SQL Server 2008
Microsoft SQL Server 2008 R2
Microsoft Sync Framework
Microsoft Visual Studio 2005
Microsoft Visual Studio 2008
Microsoft Visual Studio 2010
Microsoft Visual Studio 2010 SDK
Mozilla Firefox
SharePoint
Microsoft SharePoint Designer 2010
Microsoft SharePoint Workspace 2010
Back
Search programs and files
Ken Ewert
Documents
Computer
Network
Control Panel
Devices and Printers
Administrative Tools
Help and Support
Run...
Windows Security
Log off
Start


Microsoft SharePoint Designer
File
Site
Save
Save As
Save All
Close Site
Sites
Pages
Add Item
Help
Options
Exit
Open SharePoint Site
Open Site
Customize My Site
Recent Sites
intranet.contoso.com
http://intranet.contoso.com/
Last Opened 10/19/2010 7:10:24 AM
New SharePoint Site
New Blank Web Site
Add Subsite to My Site
Site Templates
Home
Blank Site
Blog
Team Site
More Templates


http://my/sites/pablos - Microsoft SharePoint Designer
File
Workflows
List Workflow
Reusable Workflow
Site Workflow
New
Workflow Settings
Edit Workflow
Delete
Edit
Save as Template
Copy & Modify
Import from Visio
Export to Visio
Associate to List
Associate to Content Type
Manage
Navigation
Site Objects
Pablo Saez
Lists and Libraries
Workflows
Site Pages
Site Assets
Content Types
Site Columns
External Content Types
Data Sources
Master Pages
Site Groups
Subsites
All Files
Workflows
Pablo Saez ▸ Workflows ▸
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Created Date
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Globally Reusable Workflow
Approbation - SharePoint 2010 Globally Re... SHAREPOINT\system 10/22/2009 7:41 AM 10/22/2009 7:41 AM
Approval - SharePoint 2010 Globally Re... SHAREPOINT\system 10/22/2009 7:41 AM 10/22/2009 7:41 AM
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Collect Signatures - SharePoint 2... Globally Re... SHAREPOINT\system 10/22/2009 7:41 AM 10/22/2009 7:41 AM
Collecte des signatures - SharePo... Globally Re... SHAREPOINT\system 10/22/2009 7:41 AM 10/22/2009 7:41 AM
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Recueillir les commentaires - Shar... Globally Re... SHAREPOINT\system 10/22/2009 7:41 AM 10/22/2009 7:41 AM
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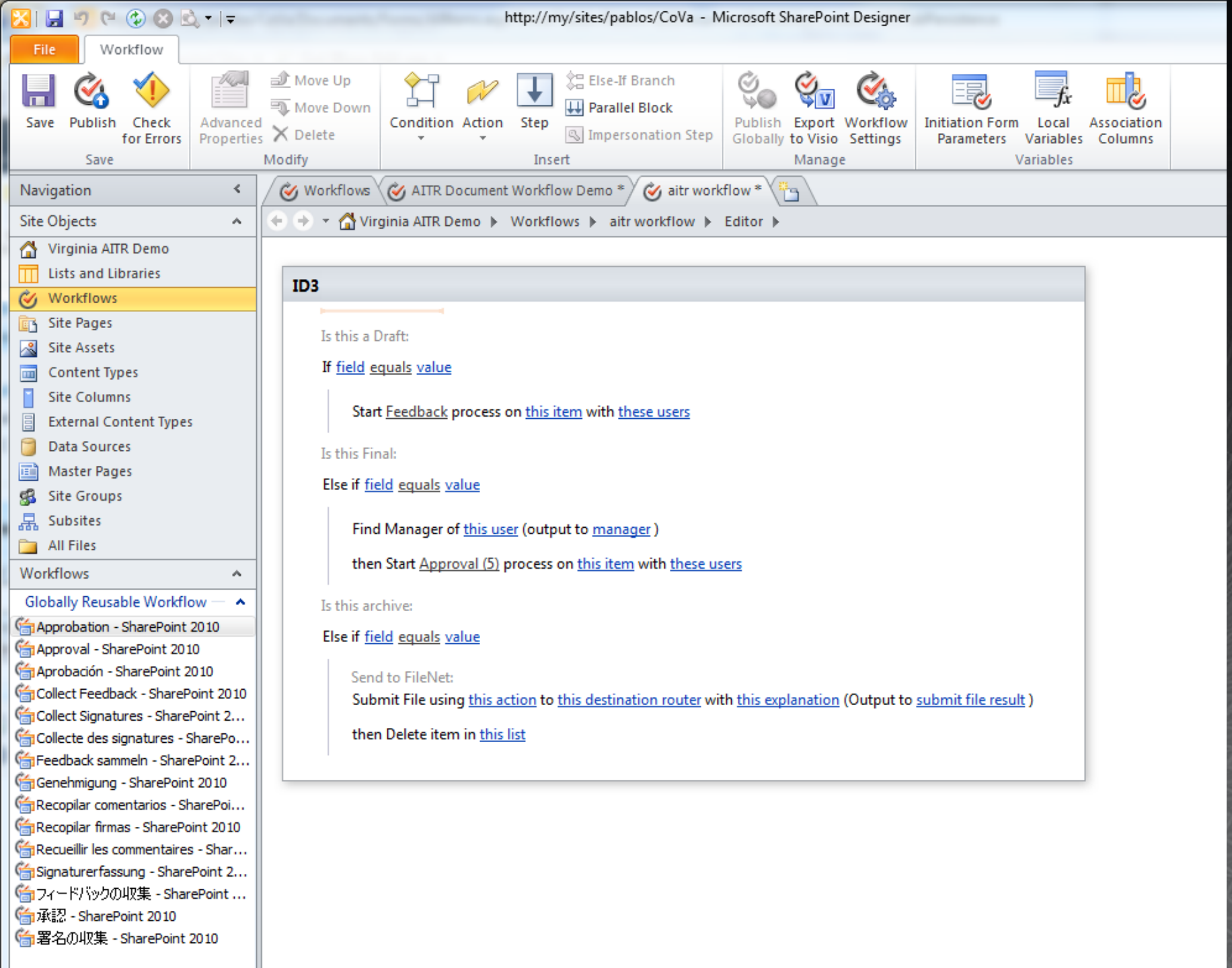
承認 - SharePoint 2010 Globally Re... SHAREPOINT\system 10/22/2009 7:41 AM 10/22/2009 7:41 AM
署名の収集 - SharePoint 2010 Globally Re... SHAREPOINT\system 10/22/2009 7:41 AM 10/22/2009 7:41 AM


http://my/sites/pablos/CoVa - Microsoft SharePoint Designer
File
Workflow
Save
Publish
Check for Errors
Save
Advanced Properties
Move Up
Move Down
Delete
Modify
Condition
Action
Step
Else-If Branch
Parallel Block
Impersonation Step
Insert
Publish Globally
Export to Visio
Workflow Settings
Manage
Initiation Form Parameters
Local Variables
Association Columns
Variables
Navigation
Site Objects
Virginia AITR Demo
Lists and Libraries
Workflows
Site Pages
Site Assets
Content Types
Site Columns
External Content Types
Data Sources
Master Pages
Site Groups
Subsites
All Files
Workflows
Globally Reusable Workflow
Approbation - SharePoint 2010
Approval - SharePoint 2010
Aprobación - SharePoint 2010
Collect Feedback - SharePoint 2010
Collect Signatures - SharePoint 2...
Collecte des signatures - SharePo...
Feedback sammeln - SharePoint 2...
Genehmigung - SharePoint 2010
Recopilar comentarios - SharePoi...
Recopilar firmas - SharePoint 2010
Recueillir les commentaires - Shar...
Signaturerfassung - SharePoint 2...
フィードバックの収集 - SharePoint ...
承認 - SharePoint 2010
署名の収集 - SharePoint 2010
Workflows
AITR Document Workflow Demo *
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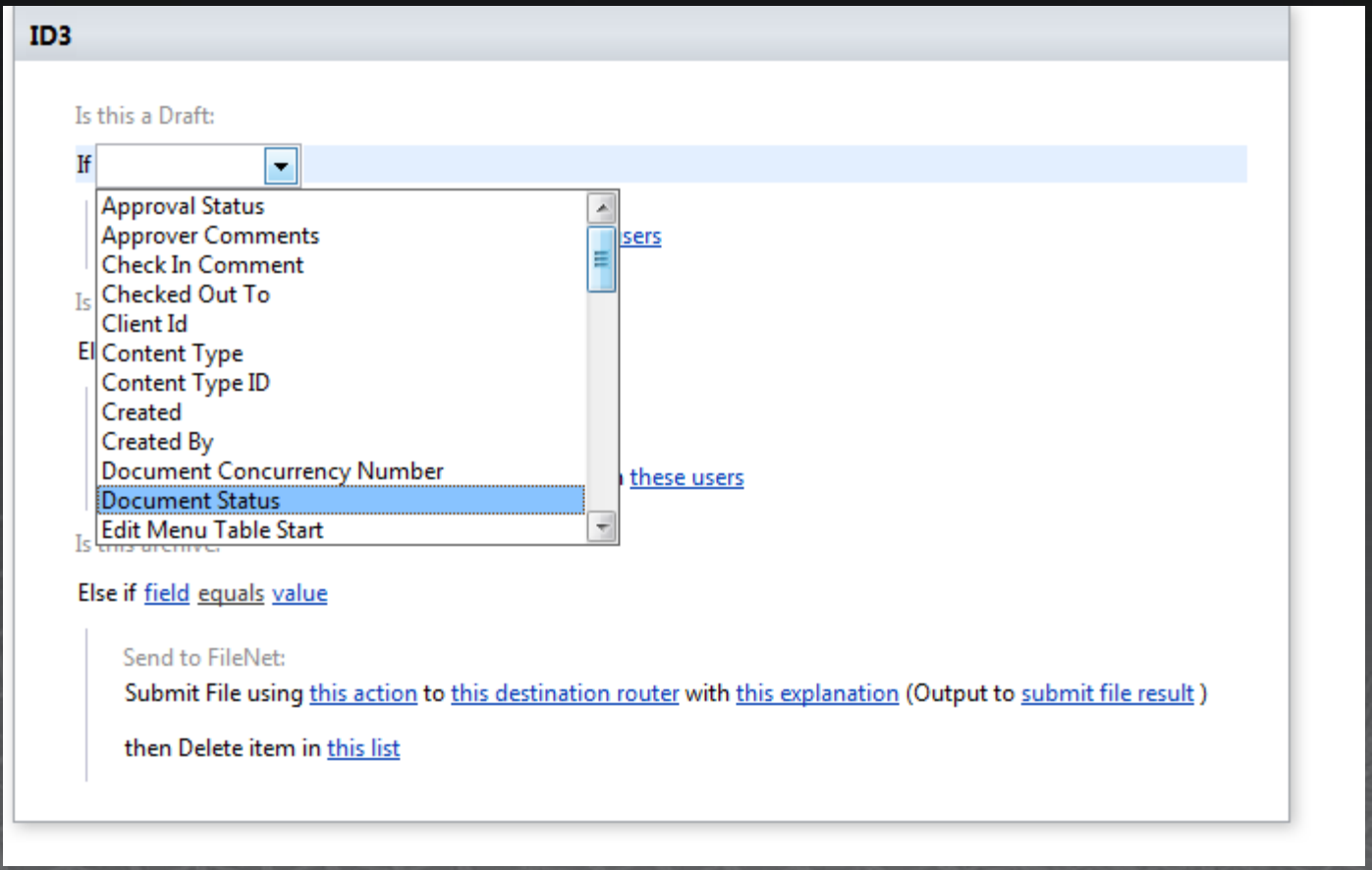
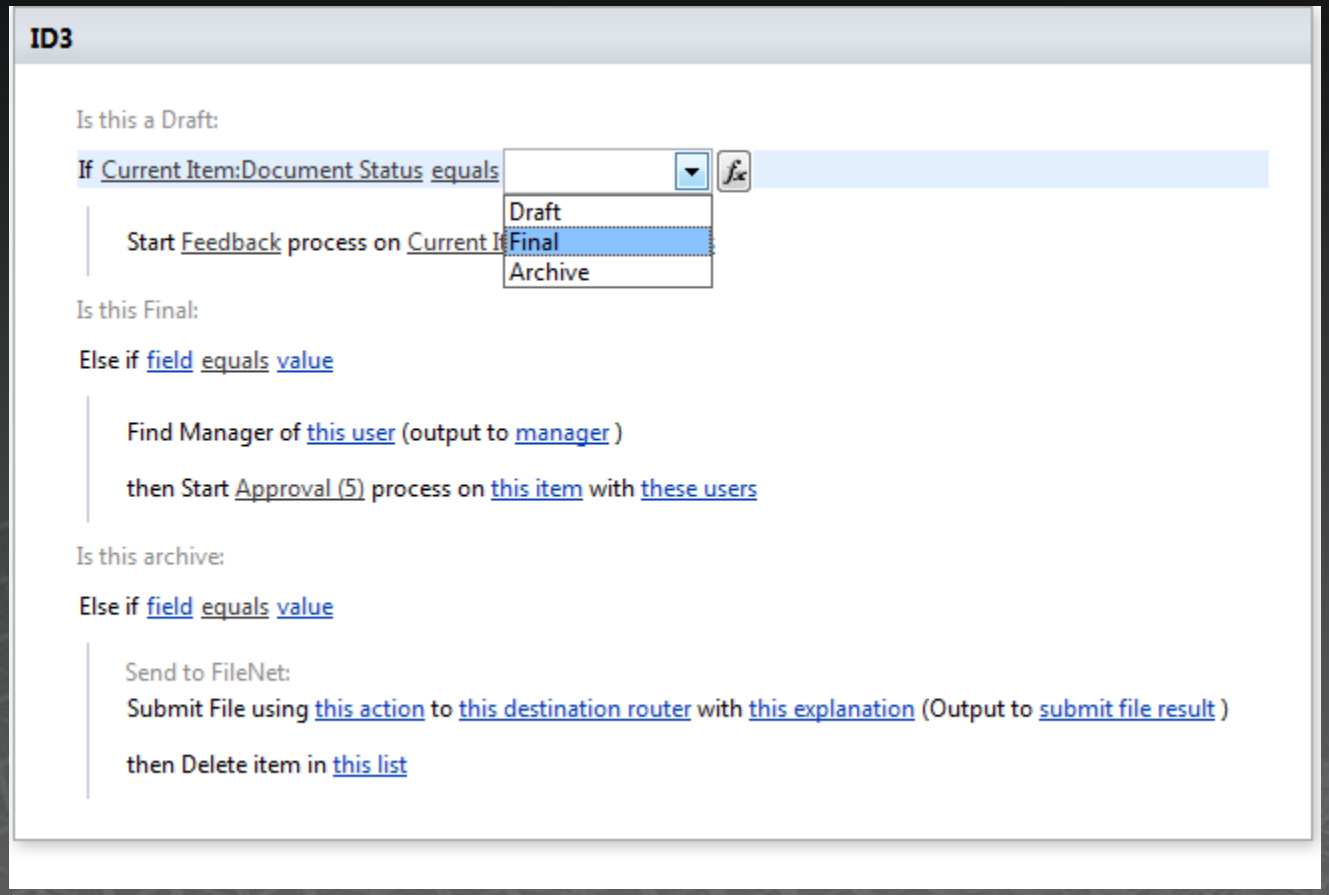
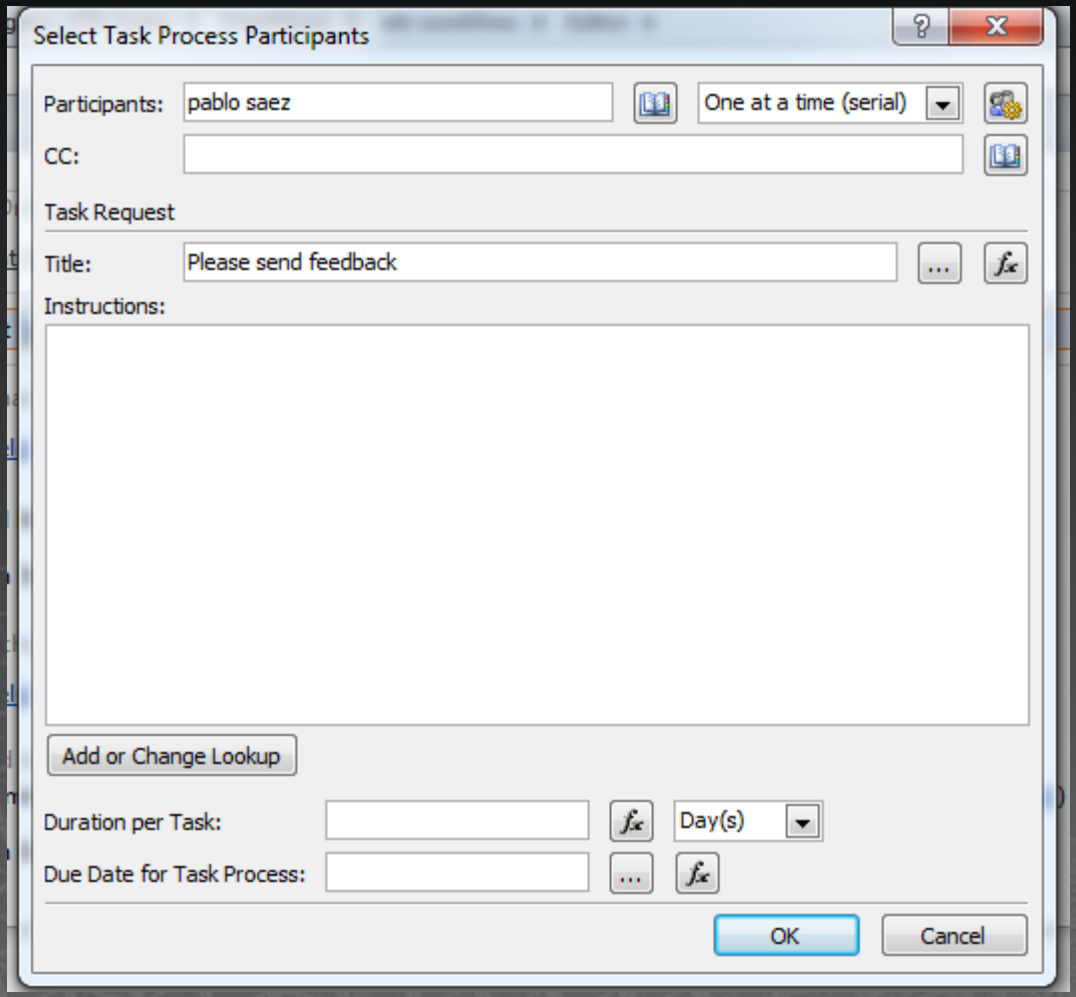
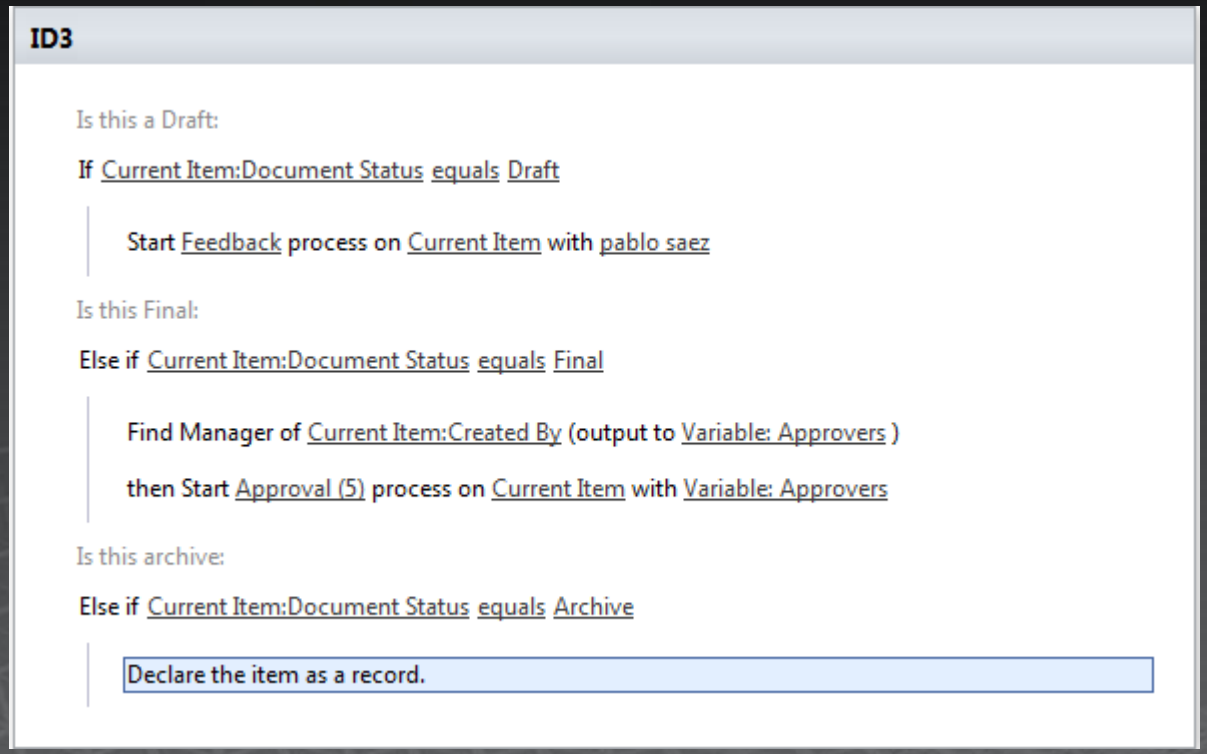
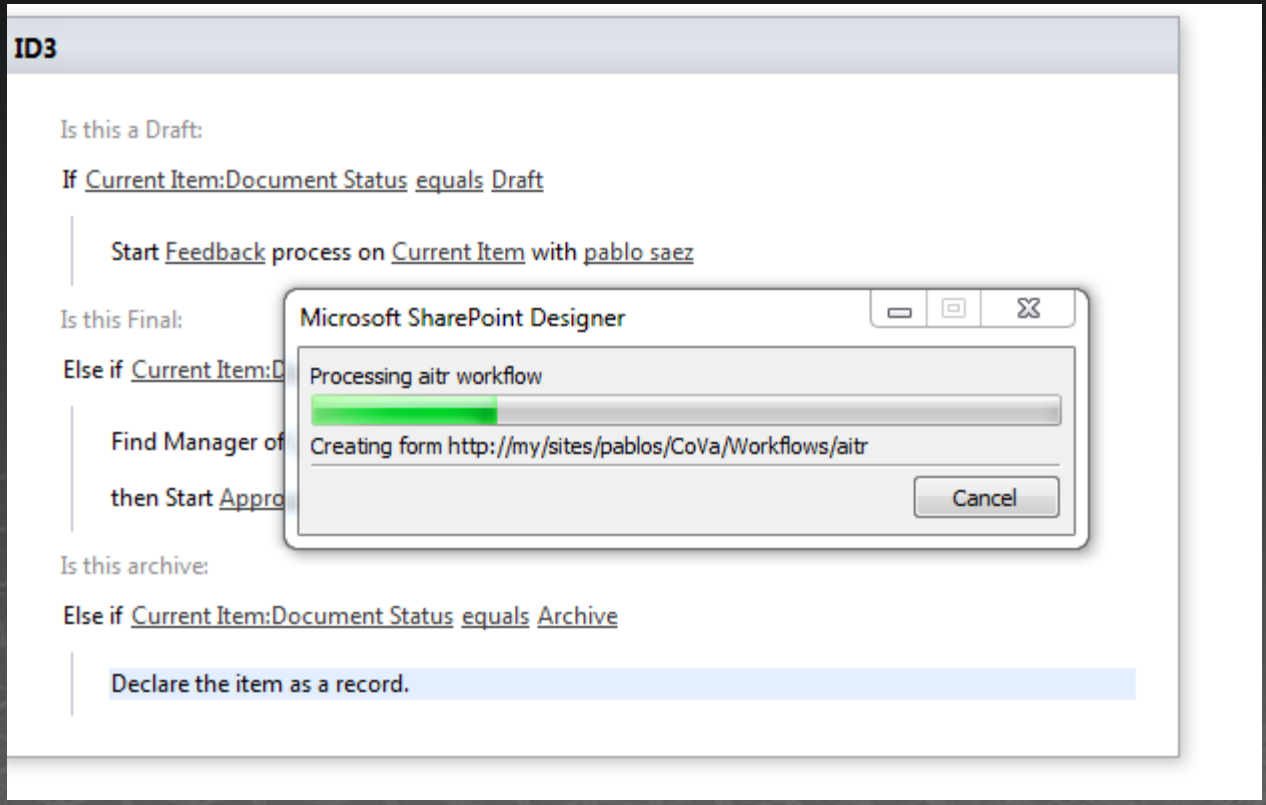
Virginia AITR Demo ▸ Workflows ▸ aitr workflow ▸ Editor ▸
ID3
Is this a Draft:
If field equals value
Start Feedback process on this item with these users
Is this Final:
Else if field equals value
Find Manager of this user (output to manager)
then Start Approval (5) process on this item with these users
Is this archive:
Else if field equals value
Send to FileNet:
Submit File using this action to this destination router with this explanation (Output to submit file result)
then Delete item in this list

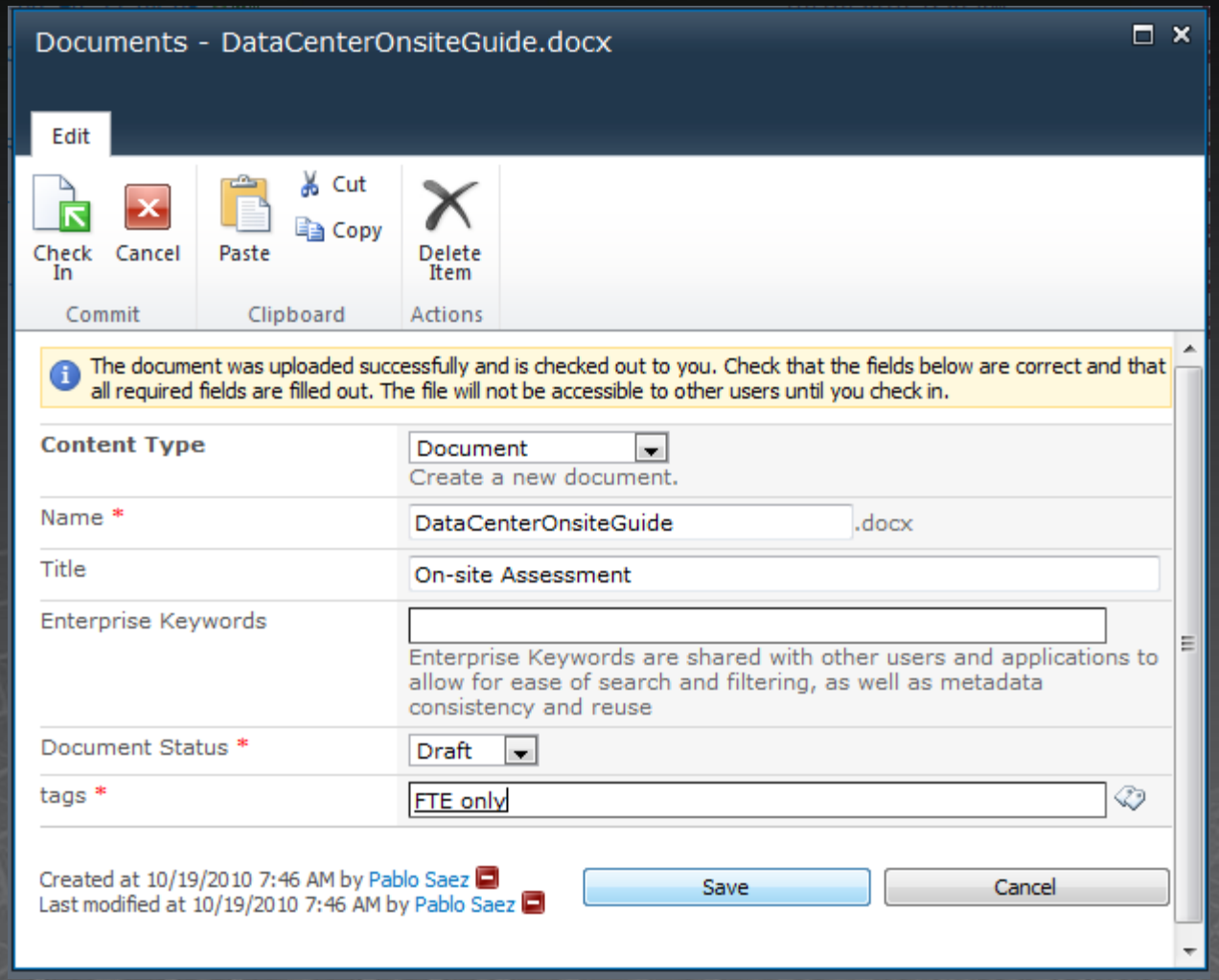

ID3
Is this a Draft:
If
Approval Status
Approver Comments
Check In Comment
Checked Out To
Client Id
Content Type
Content Type ID
Created
Created By
Document Concurrency Number
Document Status
Edit Menu Table Start
sers
these users
Else if field equals value
Send to FileNet:
Submit File using this action to this destination router with this explanation (Output to submit file result)
then Delete item in this list

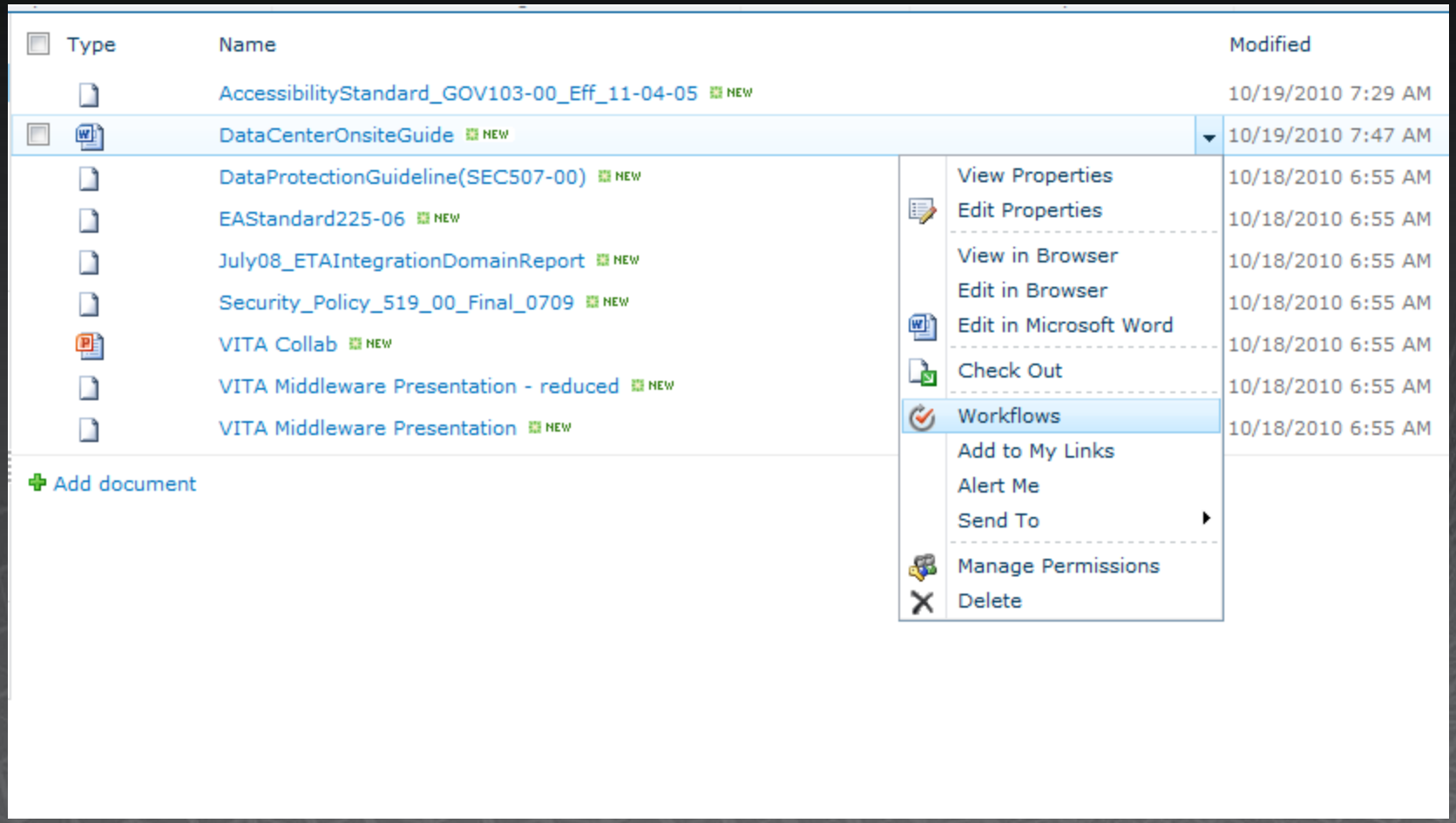

ID3
Is this a Draft:
If Current Item:Document Status equals
Draft
Final
Archive
Start Feedback process on Current It
Is this Final:
Else if field equals value
Find Manager of this user (output to manager)
then Start Approval (5) process on this item with these users
Is this archive:
Else if field equals value
Send to FileNet:
Submit File using this action to this destination router with this explanation (Output to submit file result)
then Delete item in this list

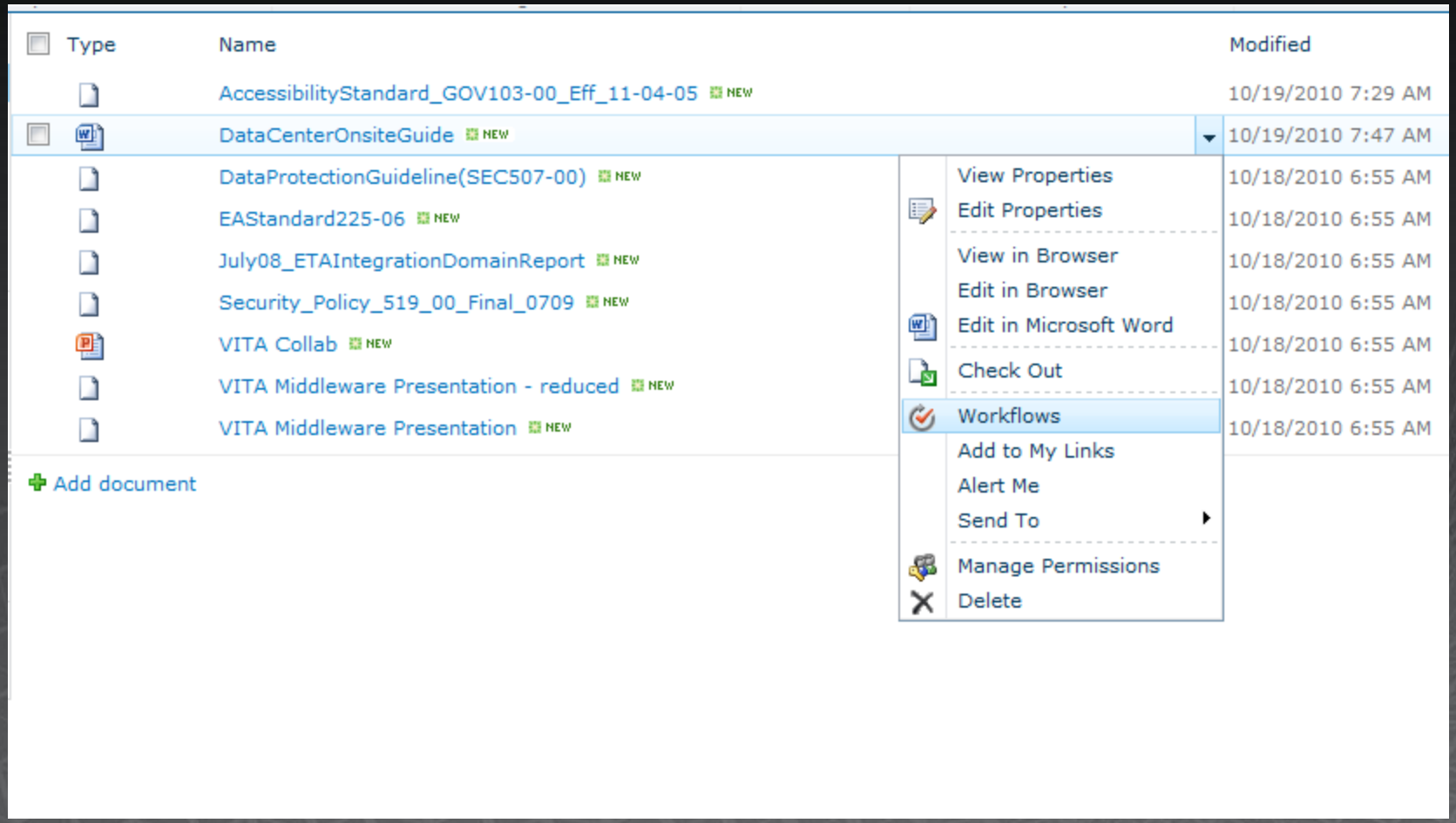

Select Task Process Participants
Participants:
pablo saez
One at a time (serial)
CC:
Task Request
Title:
Please send feedback
Instructions:
Add or Change Lookup
Duration per Task:
Day(s)
Due Date for Task Process:
OK
Cancel


ID3
Is this a Draft:
If Current Item:Document Status equals Draft
Start Feedback process on Current Item with pablo saez
Is this Final:
Else if Current Item:Document Status equals Final
Find Manager of Current Item:Created By (output to Variable: Approvers)
then Start Approval (5) process on Current Item with Variable: Approvers
Is this archive:
Else if Current Item:Document Status equals Archive
Declare the item as a record.


ID3
Is this a Draft:
If Current Item:Document Status equals Draft
Start Feedback process on Current Item with pablo saez
Is this Final:
Else if Current Item:D
Find Manager of
then Start Appro
Is this archive:
Else if Current Item:Document Status equals Archive
Declare the item as a record.
Microsoft SharePoint Designer
Processing aitr workflow
Creating form http://my/sites/pablos/CoVa/Workflows/aitr
Cancel


Documents - DataCenterOnsiteGuide.docx
Edit
Check In
Cancel
Paste
Cut
Copy
Delete Item
Commit
Clipboard
Actions
The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.
Content Type
Document
Create a new document.
Name *
DataCenterOnsiteGuide
.docx
Title
On-site Assessment
Enterprise Keywords
Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse
Document Status *
Draft
tags *
FTE only
Created at 10/19/2010 7:46 AM by Pablo Saez
Last modified at 10/19/2010 7:46 AM by Pablo Saez
Save
Cancel


Type
Name
Modified
AccessibilityStandard_GOV103-00_Eff_11-04-05 NEW
10/19/2010 7:29 AM
DataCenterOnsiteGuide NEW
10/19/2010 7:47 AM
DataProtectionGuideline(SEC507-00) NEW
10/18/2010 6:55 AM
EAStandard225-06 NEW
10/18/2010 6:55 AM
July08_ETAIntegrationDomainReport NEW
10/18/2010 6:55 AM
Security_Policy_519_00_Final_0709 NEW
10/18/2010 6:55 AM
VITA Collab NEW
10/18/2010 6:55 AM
VITA Middleware Presentation - reduced NEW
10/18/2010 6:55 AM
VITA Middleware Presentation NEW
10/18/2010 6:55 AM
Add document
View Properties
Edit Properties
View in Browser
Edit in Browser
Edit in Microsoft Word
Check Out
Workflows
Add to My Links
Alert Me
Send To
Manage Permissions
Delete


Type
Name
Modified
AccessibilityStandard_GOV103-00_Eff_11-04-05 NEW
10/19/2010 7:29 AM
DataCenterOnsiteGuide NEW
10/19/2010 7:47 AM
DataProtectionGuideline(SEC507-00) NEW
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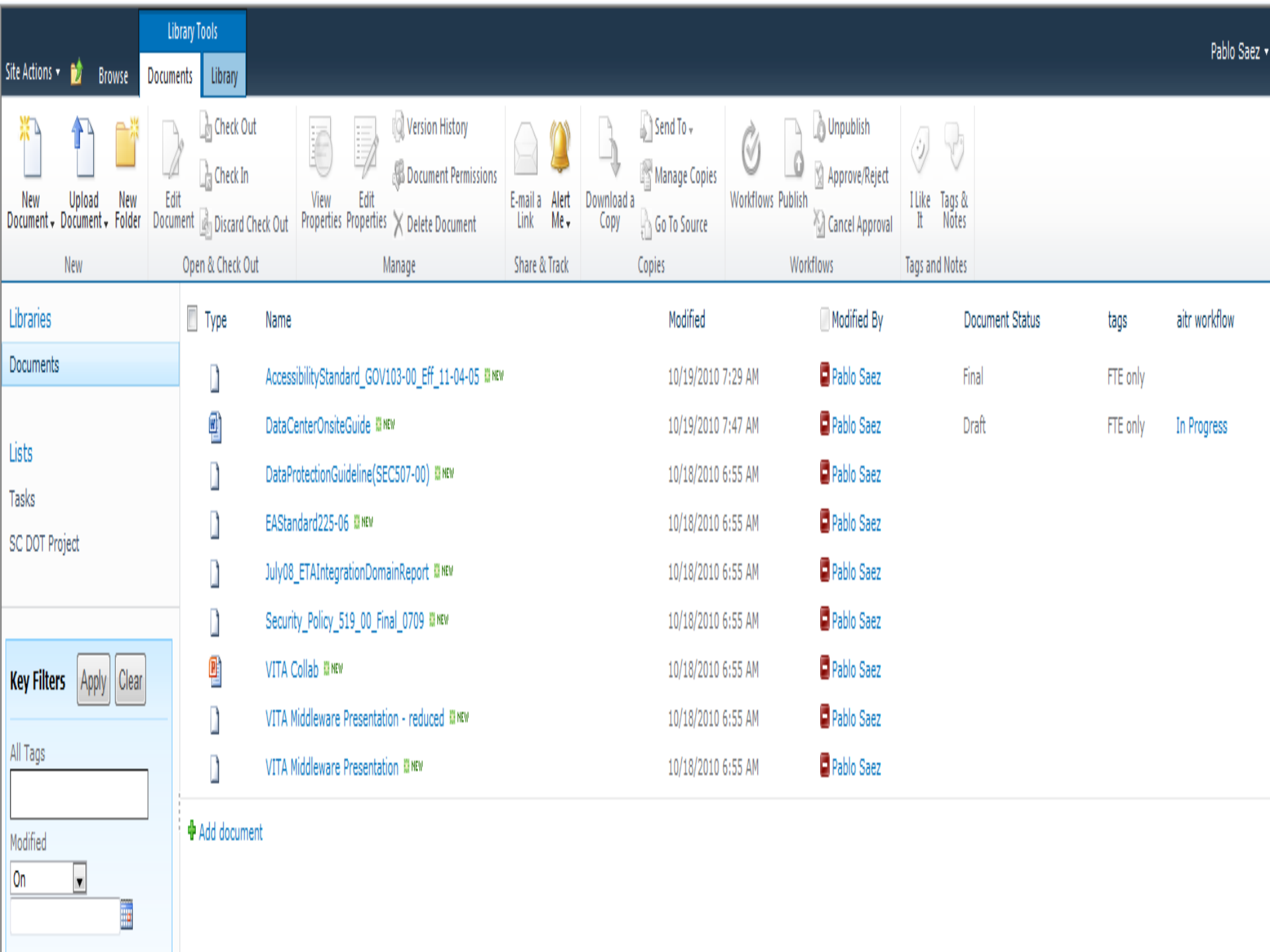
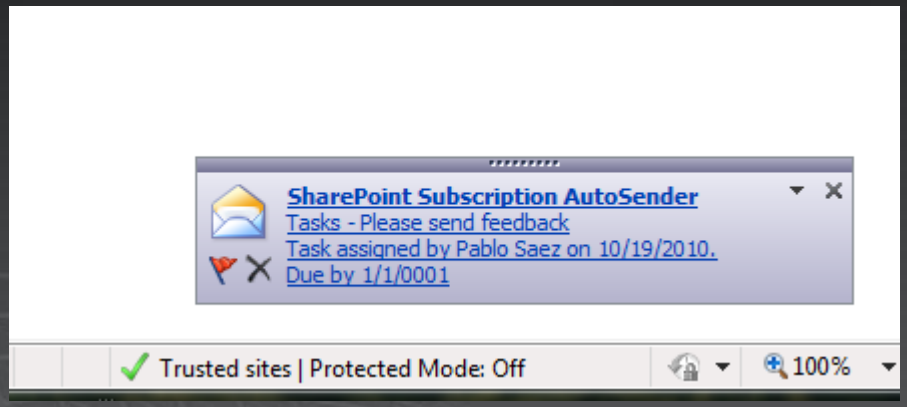
July08_ETAIntegrationDomainReport NEW
10/18/2010 6:55 AM
Security_Policy_519_00_Final_0709 NEW
10/18/2010 6:55 AM
VITA Collab NEW
10/18/2010 6:55 AM
VITA Middleware Presentation - reduced NEW
10/18/2010 6:55 AM
VITA Middleware Presentation NEW
10/18/2010 6:55 AM
Add document
View Properties
Edit Properties
View in Browser
Edit in Browser
Edit in Microsoft Word
Check Out
Workflows
Add to My Links
Alert Me
Send To
Manage Permissions
Delete

Processing...

Please wait while your workflow is started...


Site Actions
Browse
Library Tools
Documents
Library
Pablo Saez
New Document
Upload Document
New Folder
New
Edit Document
Check Out
Check In
Discard Check Out
Open & Check Out
View Properties
Edit Properties
Version History
Document Permissions
Delete Document
Manage
E-mail a Link
Alert Me
Share & Track
Download a Copy
Send To
Manage Copies
Go To Source
Copies
Workflows
Publish
Unpublish
Approve/Reject
Cancel Approval
Workflows
I Like It
Tags & Notes
Tags and Notes
Libraries
Documents
Lists
Tasks
SC DOT Project
Key Filters
Apply
Clear
All Tags
Modified
On
Type
Name
Modified
Modified By
Document Status
tags
aitr workflow
AccessibilityStandard_GOV103-00_Eff_11-04-05 NEW
10/19/2010 7:29 AM
Pablo Saez
Final
FTE only
DataCenterOnsiteGuide NEW
10/19/2010 7:47 AM
Pablo Saez
Draft
FTE only
In Progress
DataProtectionGuideline(SEC507-00) NEW
10/18/2010 6:55 AM
Pablo Saez
EAStandard225-06 NEW
10/18/2010 6:55 AM
Pablo Saez
July08_ETAIntegrationDomainReport NEW
10/18/2010 6:55 AM
Pablo Saez
Security_Policy_519_00_Final_0709 NEW
10/18/2010 6:55 AM
Pablo Saez
VITA Collab NEW
10/18/2010 6:55 AM
Pablo Saez
VITA Middleware Presentation - reduced NEW
10/18/2010 6:55 AM
Pablo Saez
VITA Middleware Presentation NEW
10/18/2010 6:55 AM
Pablo Saez
Add document


SharePoint Subscription AutoSender
Tasks - Please send feedback
Task assigned by Pablo Saez on 10/19/2010.
Due by 1/1/0001
Trusted sites | Protected Mode: Off
100%

Open this task...

Tasks - Please send feedback

SharePoint Subscription AutoSender

Sent: Tue 10/19/2010 10:48 AM

To: Pablo Saez

Task assigned by Pablo Saez on 10/19/2010.

Due by 1/1/0001

Feedback started by Pablo Saez on 10/19/2010 7:48 AM
Comment:

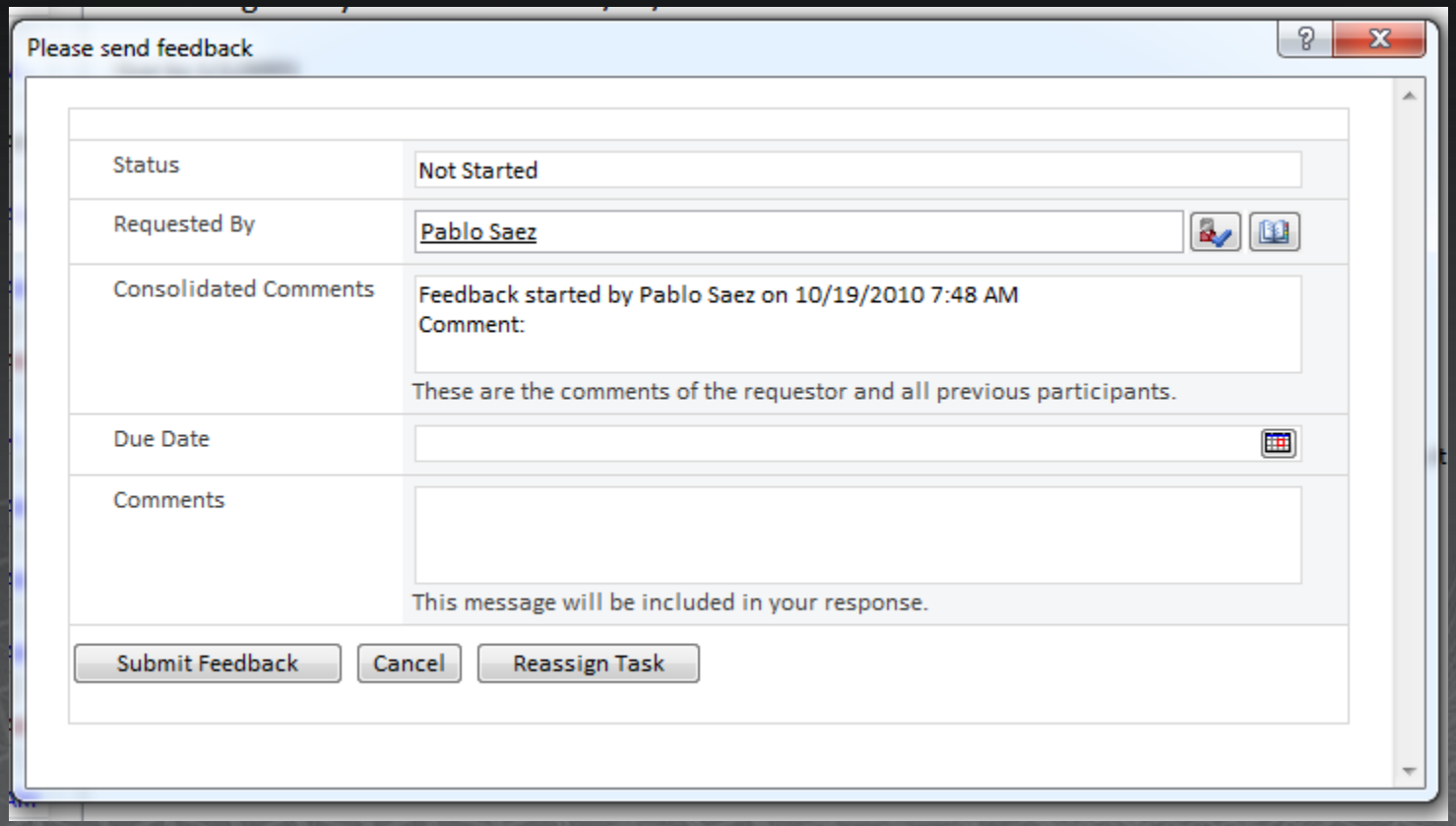
To complete this task:
1. Review DataCenterOnsiteGuide.
2. Perform the specific activities required for this task.
3. Use the **Open this task** button to mark the task as completed. (If you cannot update this task, you might not

Click on a photo to see social network updates and email messages from this person.

SharePoint Subscription ...

Pablo Saez

COLLABORATION SPECIAL...


Please send feedback
Status
Not Started
Requested By
Pablo Saez
Consolidated Comments
Feedback started by Pablo Saez on 10/19/2010 7:48 AM
Comment:
These are the comments of the requestor and all previous participants.
Due Date
Comments
This message will be included in your response.
Submit Feedback
Cancel
Reassign Task

Workflow Status - Windows Internet Explorer

http://intranet.contoso.com/_layouts/WrkStat.aspx?List=9bea8480-8bdc-4a4a-a342-efd3071a71d2&WorkflowIn

Bing

Favorites | Workflow Status | Contoso Government | Page | Safety | Tools

Site Actions | System Account

Site Pages
Shared Documents

Lists
Calendar
Tasks
Chart

Discussions
Team Discussion

Recycle Bin
All Site Content

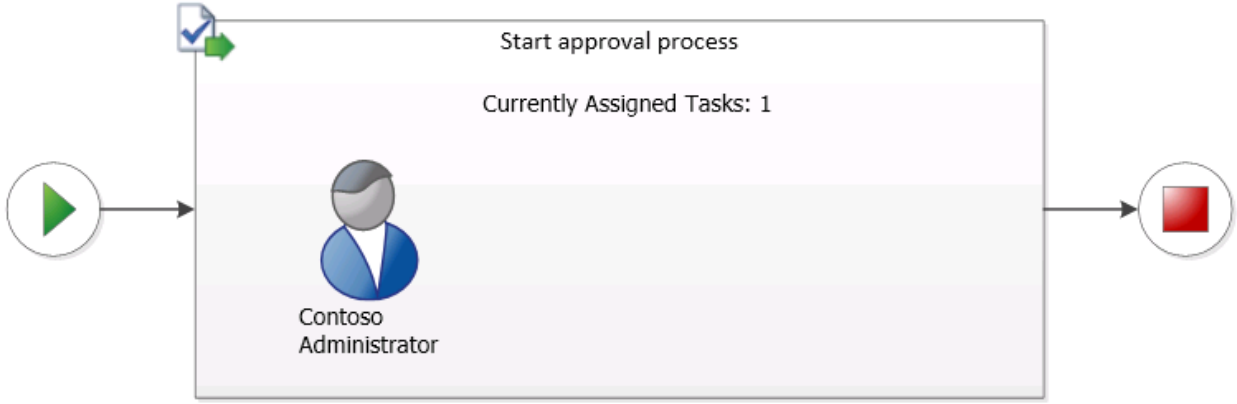
Initiator: System Account
Started: 10/19/2010 7:54 AM
Last run: 10/19/2010 7:55 AM

Document: Employee Handbook
Status: In Progress

Workflow Visualization

Open in Visio

119%

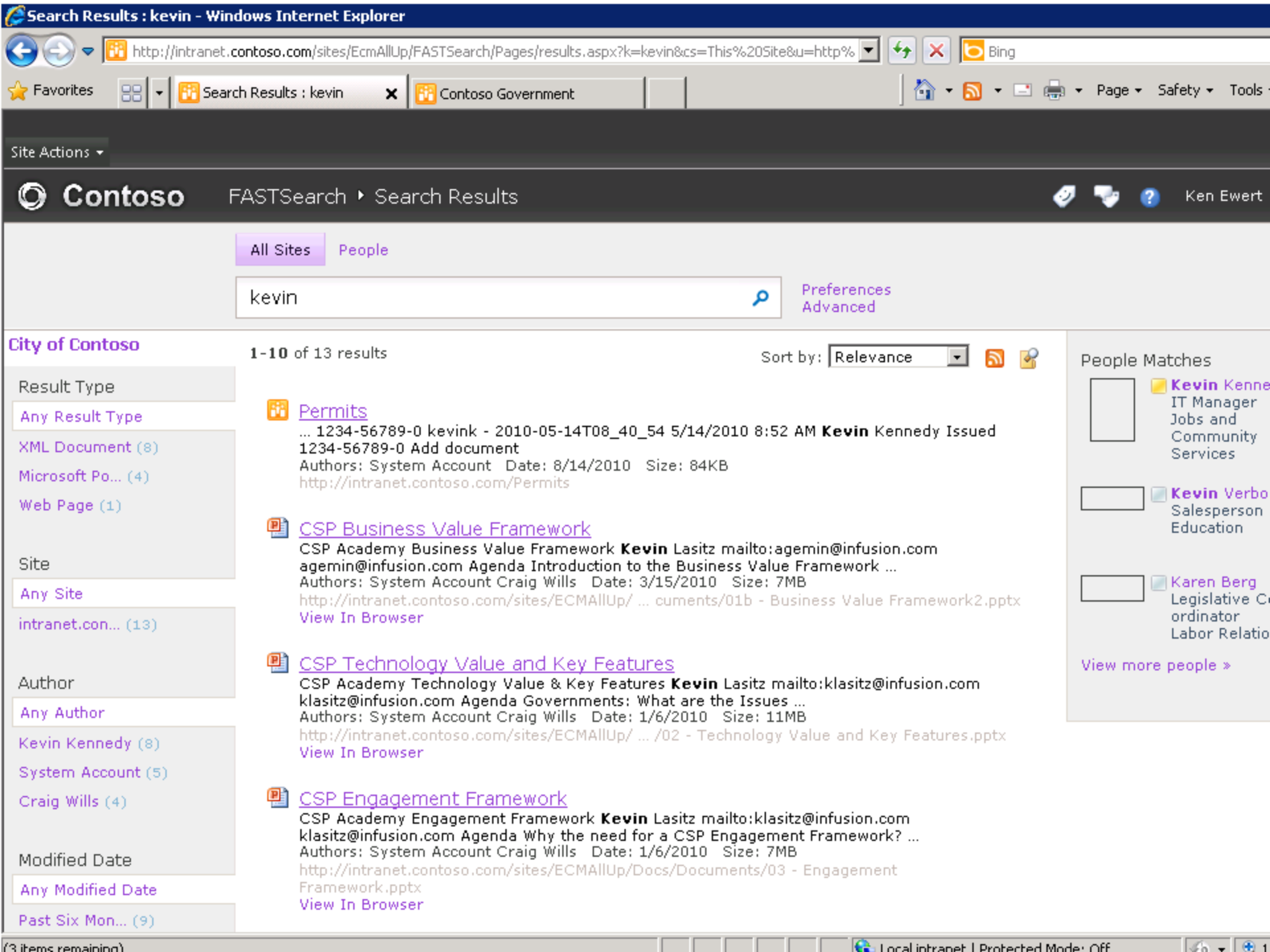


Add or update approvers of Approval

Done | Local intranet | Protected Mode: Off | 100%

Start

7:55 AM
10/19/2010


Search Results : kevin - Windows Internet Explorer
http://intranet.contoso.com/sites/EcmAllUp/FASTSearch/Pages/results.aspx?k=kevin&cs=This%20Site&u=http%
Bing
Favorites
Search Results : kevin
Contoso Government
Page
Safety
Tools
Site Actions
Contoso
FASTSearch ▸ Search Results
Ken Ewert
All Sites
People
kevin
Preferences
Advanced
City of Contoso
1-10 of 13 results
Sort by: Relevance
Result Type
Any Result Type
XML Document (8)
Microsoft Po... (4)
Web Page (1)
Site
Any Site
intranet.con... (13)
Author
Any Author
Kevin Kennedy (8)
System Account (5)
Craig Wills (4)
Modified Date
Any Modified Date
Past Six Mon... (9)
Permits
... 1234-56789-0 kevink - 2010-05-14T08_40_54 5/14/2010 8:52 AM Kevin Kennedy Issued 1234-56789-0 Add document
Authors: System Account Date: 8/14/2010 Size: 84KB
http://intranet.contoso.com/Permits
CSP Business Value Framework
CSP Academy Business Value Framework Kevin Lasitz mailto:agemin@infusion.com agemin@infusion.com Agenda Introduction to the Business Value Framework ...
Authors: System Account Craig Wills Date: 3/15/2010 Size: 7MB
http://intranet.contoso.com/sites/ECMAllUp/ ... cuments/01b - Business Value Framework2.pptx
View In Browser
CSP Technology Value and Key Features
CSP Academy Technology Value & Key Features Kevin Lasitz mailto:klasitz@infusion.com klasitz@infusion.com Agenda Governments: What are the Issues ...
Authors: System Account Craig Wills Date: 1/6/2010 Size: 11MB
http://intranet.contoso.com/sites/ECMAllUp/ ... /02 - Technology Value and Key Features.pptx
View In Browser
CSP Engagement Framework
CSP Academy Engagement Framework Kevin Lasitz mailto:klasitz@infusion.com klasitz@infusion.com Agenda Why the need for a CSP Engagement Framework? ...
Authors: System Account Craig Wills Date: 1/6/2010 Size: 7MB
http://intranet.contoso.com/sites/ECMAllUp/Docs/Documents/03 - Engagement Framework.pptx
View In Browser
People Matches
Kevin Kenne
IT Manager
Jobs and Community Services
Kevin Verbo
Salesperson
Education
Karen Berg
Legislative C
ordinator
Labor Relatio
View more people »
(3 items remaining)
Local intranet | Protected Mode: Off

Kevin Kennedy - Windows Internet Explorer

http://intranet.contoso.com/my/Person.aspx?accountname=contoso\kevink

Bing

Favorites | Kevin Kennedy | Contoso Government | Page | Safety | Tools

My Site | My Newsfeed | My Content | My Profile | My Peeps | Profile: Kevin Kennedy | Find People | Ken Ewe

Kevin Kennedy

IT Manager
Jobs and Community Services

(206) 555-7455
4170

kevink@contoso.com

More information

The VRIO Analysis Project increased my web and user interface design experience. I am currently the IT Manager for the Northern Region.

Follow Me

Overview | Organization | Content | Tags and Notes | Colleagues | Memberships

Ask Me About

Here are some topics Kevin Kennedy can help you with. To ask a question, click on the relevant topic below.

- CRM Administration
- SQL Server
- Wireless
- Web Methods
- Web and User Inte...
- TDD

Recent Activities

My Organization Chart

- Erika Cheley Manager
- Kelly J. Weadock CTO of Professional Services
- Arturo Lopez IT Director
  - Kevin Kennedy IT Manager
  - Heinrich Fischer IT Manager
  - Kai Axford IT Manager
  - Marie Dubois IT Manager

Done | Local intranet | Protected Mode: Off

Overview | Organization | Content | Tags and Notes | Colleagues | Memberships

Manager

Kelly J. Weadock
CTO of Professional Services

Arturo Lopez
IT Director

Heinrich Fischer
IT Manager
Fire Department

Kai Axford
IT Manager
Jobs and Community Services

Kevin Kennedy

IT Manager

The VRIO Analysis Project increased my web and user interface design experience. I am currently the IT Manager for the Northern Region.

Marie Dubois
IT Manager
Transportation

Rob Young
IT Manager
Public Health

My Site | My Newsfeed | My Content | My Profile | My Peeps | Find People | Ken Ewer

Meeting with Kevink on new Project

Ken Ewert

Manager
Archives

(206) 555-7698
4180

kene@contoso.com

More information

I enjoy streamlining complicated hardware and software processes. I am a Six Sigma Green Belt.

Edit My Profile

Overview | Organization | Content | Tags and Notes | Colleagues | Memberships

Add Colleagues | View Suggestions | Edit Colleagues | Remove Colleagues

Name ↑	Show To	My Team
General		
Erika Cheley Manager Registry	Everyone	Yes
Jon Grande Manager Registry	Everyone	Yes
Justin Thorp Manager Registry	Everyone	Yes
Kelly J. Weadock	Everyone	Yes

10:58 AM

Office Web App integration with Hotmail Rocks!

Edit My Profile

Pablo Saez

COLLABORATION SPECIALIST
US-SLG STU Collaboration-IW

+1 (425) 5381099 X81099
HOME OFFICE/N/A Orlando Area, Florida

pablos@microsoft.com

More information

I've been with Microsoft since '97, starting as an MCS Development Consultant, although typical MCS my first project was to migrate Circuit City's 5000 desktop from Banyan to Windows NT 4.0. I moved to the Hosting market pre-dot com days and helped develop the Windows Server share in data centers in the USA. I later took that knowledge and with my friend Chuck Chemis wrote the Gold Certified program for application service providers. The Assessment we wrote became the first Data Center assessment in the early MOF materials. My next assignment was to work with WorldCom to create a SIP based service in the cloud using Windows Messenger and the precursor to OCS (RTC). RTC was canned and I moved over to Public Sector covering the mid-
...

Ask Me About

Here are some topics Pablo Saez can help you with. To ask a question, click on the relevant topic below.

- Spanish
- Office & Sharepoint
- sharepoint 2010 demo
- MOSS 2007
- Hosting Competency
- SLG

Recent Activities

Yesterday October 18

Pablo Saez tagged BCA Scoring Template.xlsx. 10:59 AM

I like it, Scorecards and Business Analysis

Pablo Saez tagged VITA Collab.pptx with Virginia Information Technology Agency.

My Organization Chart

- Dean Iacovelli DIRECTOR COLLABORATION SALES
  - Pablo Saez COLLABORATION SPECIALIST
  - Allen Abrahamson UC SPECIALIST
  - Carl Solazzo UC SPECIALIST
  - Dave Rogers BPOS TEAM LEAD
  - Drea Ciarrochi COLLABORATION SPECIALIST
  - John Kelbley UC SPECIALIST
  - Julian Soh COLLABORATION SPECIALIST
  - Justin Williams (Aspect)
  - Mike Hacker COLLABORATION SPECIALIST
  - Scott Wold COLLABORATION SPECIALIST
  - Tim Gade COLLABORATION SPECIALIST

Organization Browser

10:59 AM

Office Web App integration with Hotmail Rocks!

Edit My Profile

Pablo Saez

COLLABORATION SPECIALIST
US-SLG STU Collaboration-IW

+1 (425) 5381099 X81099
HOME OFFICE/N/A Orlando Area, Florida

pablos@microsoft.com

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...

Refine by type:

All | Tags | Notes | Private | Public

Refine by tag:

Sort: Alphabetically | By Size

Enterprise Content Management (ECM) Exchange I like it Microsoft SharePoint Conference Microsoft SharePoint Server Moss 2010 Office 2010 Office 2010, SharePoint 2010, Collaboration, Social Networking Scorecards and Business Analysis SharePoint (all versions) Virginia Information Technology Agency wikis

Add SharePoint Tags and Notes Tool

This tool helps you conveniently tag or post notes on sites directly from your browser.

Activities for: October, 2010

Tagged BCA Scoring Template.xlsx... with Scorecards and Business A.... 10/18/2010
View Related Activities | Make Private | Delete

Tagged BCA Scoring Template.xlsx... with I like it. 10/18/2010
View Related Activities | Make Private | Delete

Tagged VITA Collab.pptx with Virginia Information Tech.... 10/18/2010
View Related Activities | Make Private | Delete

Posted a Note on Pablo Saez. 10/14/2010
I am doing Sharepoint 2010 training in DC
View Related Activities | Delete

Tagged enterprise wikis.pptx with SharePoint (all versions).... 10/13/2010
View Related Activities | Make Private | Delete

Signatures This document needs to be signed. View Signatures...

Workflow Task You have multiple workflow tasks associated with this document. Open the task list to complete your tasks. View Workflow Tasks...

Pilot Phase – Microsoft Confidential Internal Only
Do Not Forward
10/8/2010 2:52:00 PM

X

pablos@microsoft.com
sahreoint

Microsoft

Microsoft® Office SharePoint® Server 2007

<<Centralized Information Technology Agency>>

Onsite - Examiners Guide v1.0 [Compatibility Mode] - Microsoft Word

File | Home | New Tab | Afternoon | Insert | Page Layout | References | Mailings | Review | View | Morning

- Save
- Save As
- Open
- Close
- Info
- Recent
- New
- Print
- Save & Send
- Help
- Options
- Exit

Information about Onsite - Examiners Guide v1

http://my/sites/pablos/Shared Documents/Onsite - Examiners Guide v1.0.docx

View Tasks

Workflow Tasks

You have multiple workflow tasks associated with this document. Open the task list to complete your tasks.

Convert

Compatibility Mode

Some new features are disabled to prevent problems when working with previous versions of Office. Converting this file will enable these features, but may result in layout changes.

Protect Document

Permissions

Anyone can open, copy, and change any part of this document.

Check for Issues

Prepare for Sharing

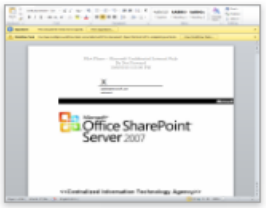
Before sharing this file, be aware that it contains:

- Document properties, document server properties, content type information, author's name and related dates
- Headers and footers
- Characters formatted as hidden text
- Custom XML data
- Content that cannot be checked for accessibility issues because of the current file type

Manage Versions

Versions and Check Out

1.0: 10/8/2010 2:52 PM by Pablo Saez (current)



Properties

Size	133KB
Pages	
Words	
Total Editing Time	10 Minutes
Title	On-site Assessment
Comments	Add comments
* Document Target	Miami Demo
* Demo Column	Required Field
Enterprise Keywords	Enter a keyword
* Demo Field	here is my data

Related Dates

Last Modified	10/8/2010 2:52 PM
Created	7/1/2009 8:09 AM
Last Printed	8/16/2000 10:09 AM

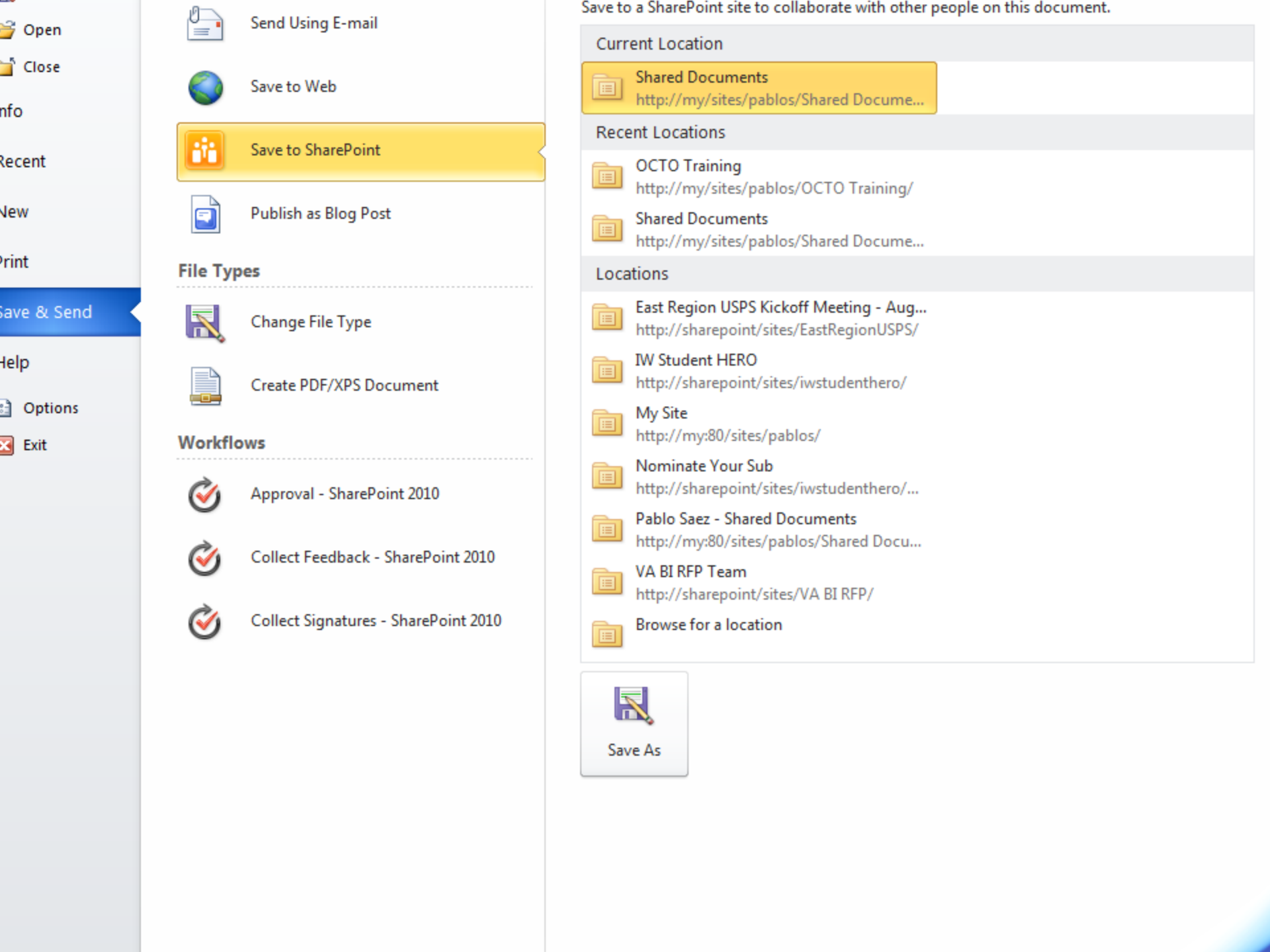
Related People

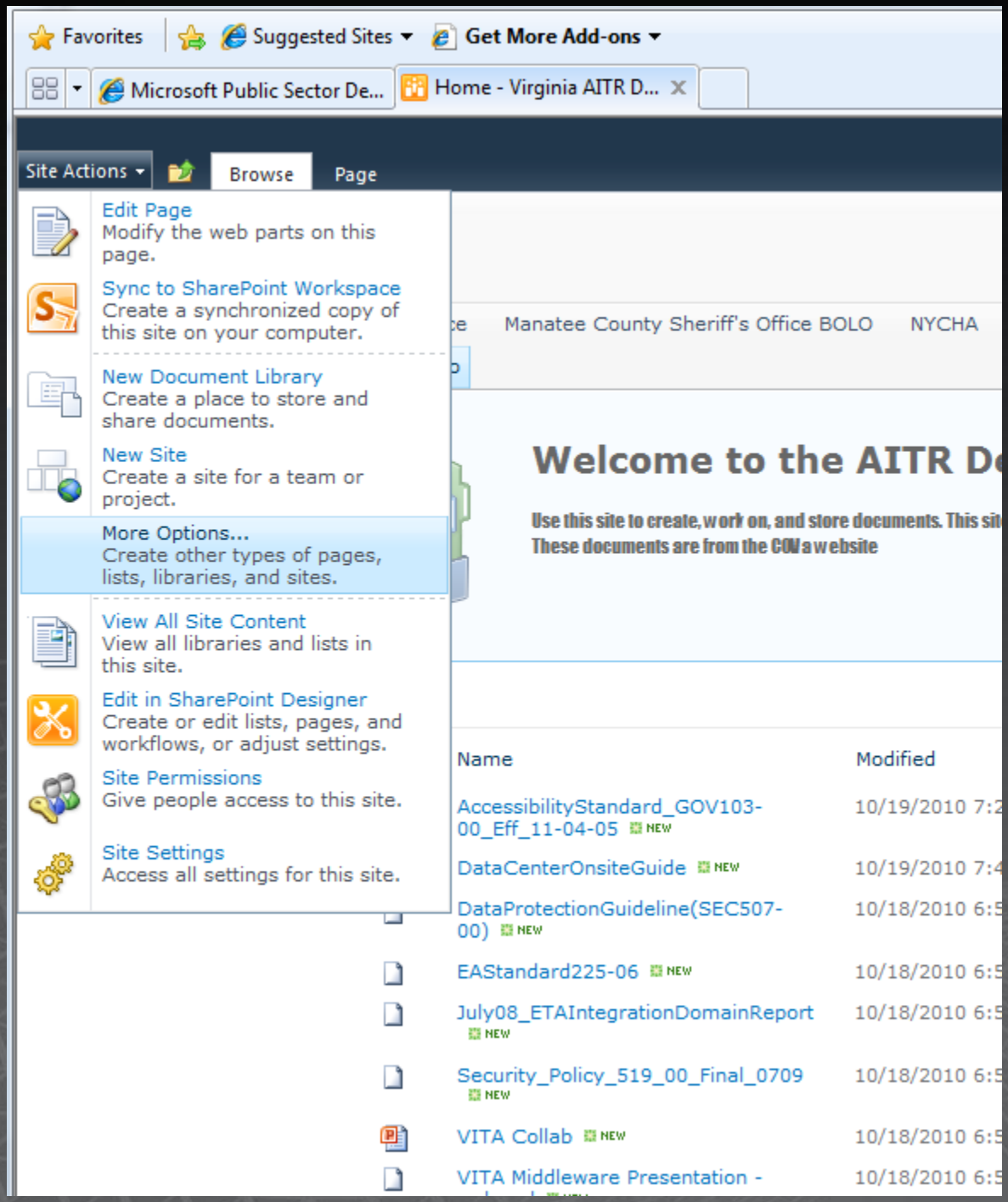
Author	Chuck Chemis, Pablo Saez
	Add an author
Last Modified By	Pablo Sáez Montequín

Related Documents

Open File Location

Show All Properties


Open
Close
nfo
Recent
New
Print
Save & Send
Help
Options
Exit
Send Using E-mail
Save to Web
Save to SharePoint
Publish as Blog Post
File Types
Change File Type
Create PDF/XPS Document
Workflows
Approval - SharePoint 2010
Collect Feedback - SharePoint 2010
Collect Signatures - SharePoint 2010
Save to a SharePoint site to collaborate with other people on this document.
Current Location
Shared Documents
http://my/sites/pablos/Shared Docume...
Recent Locations
OCTO Training
http://my/sites/pablos/OCTO Training/
Shared Documents
http://my/sites/pablos/Shared Docume...
Locations
East Region USPS Kickoff Meeting - Aug...
http://sharepoint/sites/EastRegionUSPS/
IW Student HERO
http://sharepoint/sites/iwstudenthero/
My Site
http://my:80/sites/pablos/
Nominate Your Sub
http://sharepoint/sites/iwstudenthero/...
Pablo Saez - Shared Documents
http://my:80/sites/pablos/Shared Docu...
VA BI RFP Team
http://sharepoint/sites/VA BI RFP/
Browse for a location
Save As


Favorites
Suggested Sites
Get More Add-ons
Microsoft Public Sector De...
Home - Virginia AITR D...
Site Actions
Browse
Page
Edit Page
Modify the web parts on this page.
Sync to SharePoint Workspace
Create a synchronized copy of this site on your computer.
New Document Library
Create a place to store and share documents.
New Site
Create a site for a team or project.
More Options...
Create other types of pages, lists, libraries, and sites.
View All Site Content
View all libraries and lists in this site.
Edit in SharePoint Designer
Create or edit lists, pages, and workflows, or adjust settings.
Site Permissions
Give people access to this site.
Site Settings
Access all settings for this site.
Manatee County Sheriff's Office BOLO
NYCHA
Welcome to the AITR D
Use this site to create, work on, and store documents. This sit
These documents are from the COVa website
Name
Modified
AccessibilityStandard_GOV103-00_Eff_11-04-05 NEW
10/19/2010 7:2
DataCenterOnsiteGuide NEW
10/19/2010 7:4
DataProtectionGuideline(SEC507-00) NEW
10/18/2010 6:5
EAStandard225-06 NEW
10/18/2010 6:5
July08_ETAIntegrationDomainReport NEW
10/18/2010 6:5
Security_Policy_519_00_Final_0709 NEW
10/18/2010 6:5
VITA Collab NEW
10/18/2010 6:5
VITA Middleware Presentation -
10/18/2010 6:5

Create

Browse From:

- **Installed Items**
- Office.com
- SharePoint Too...

Filter By:

- **All Types**
- Library
- List
- Page
- Site

- **All Categories**
- Blank & Custom
- Collaboration
- Communication
- Content
- Data
- Meetings
- Search
- Tracking
- Web Databases

Select Language: English

Search Installed Items

Title ▲ Type

Group Work Site | Import Spreadsheet | Issue Tracking

Issues Web Database

Links

Multipage Meeting Workspace

Page

Personalization Site

Picture Library

Project Tasks

Projects Web Database

Records Center

Announcements

Type: List
Categories: Communication

A list of news items, statuses and other short bits of information.

Name

Create | More Options

Create

Browse From:

- **Installed Items**
- Office.com
- SharePoint Too...

Filter By:

- **All Types**
- Library
- List
- Page
- Site

- **All Categories**
- Blank & Custom
- Collaboration
- Communication
- Content
- Data
- Meetings
- Search
- Tracking
- Web Databases

Select Language: English

Search Installed Items

Title ▲ Type

Group Work Site | Import Spreadsheet | Issue Tracking

Issues Web Database

Links

Multipage Meeting Workspace

Page

Personalization Site

Picture Library

Project Tasks

Projects Web Database

Records Center

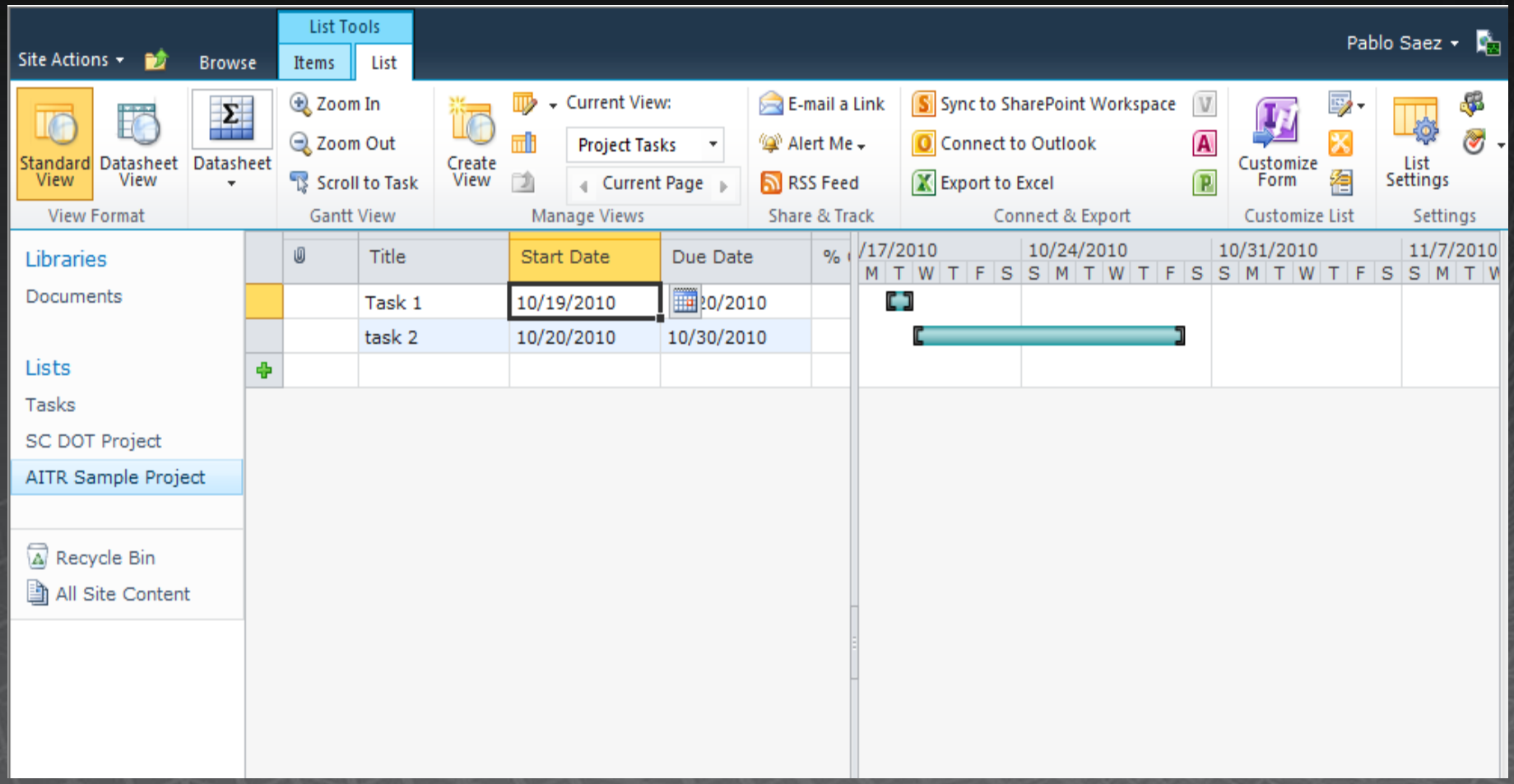
Project Tasks

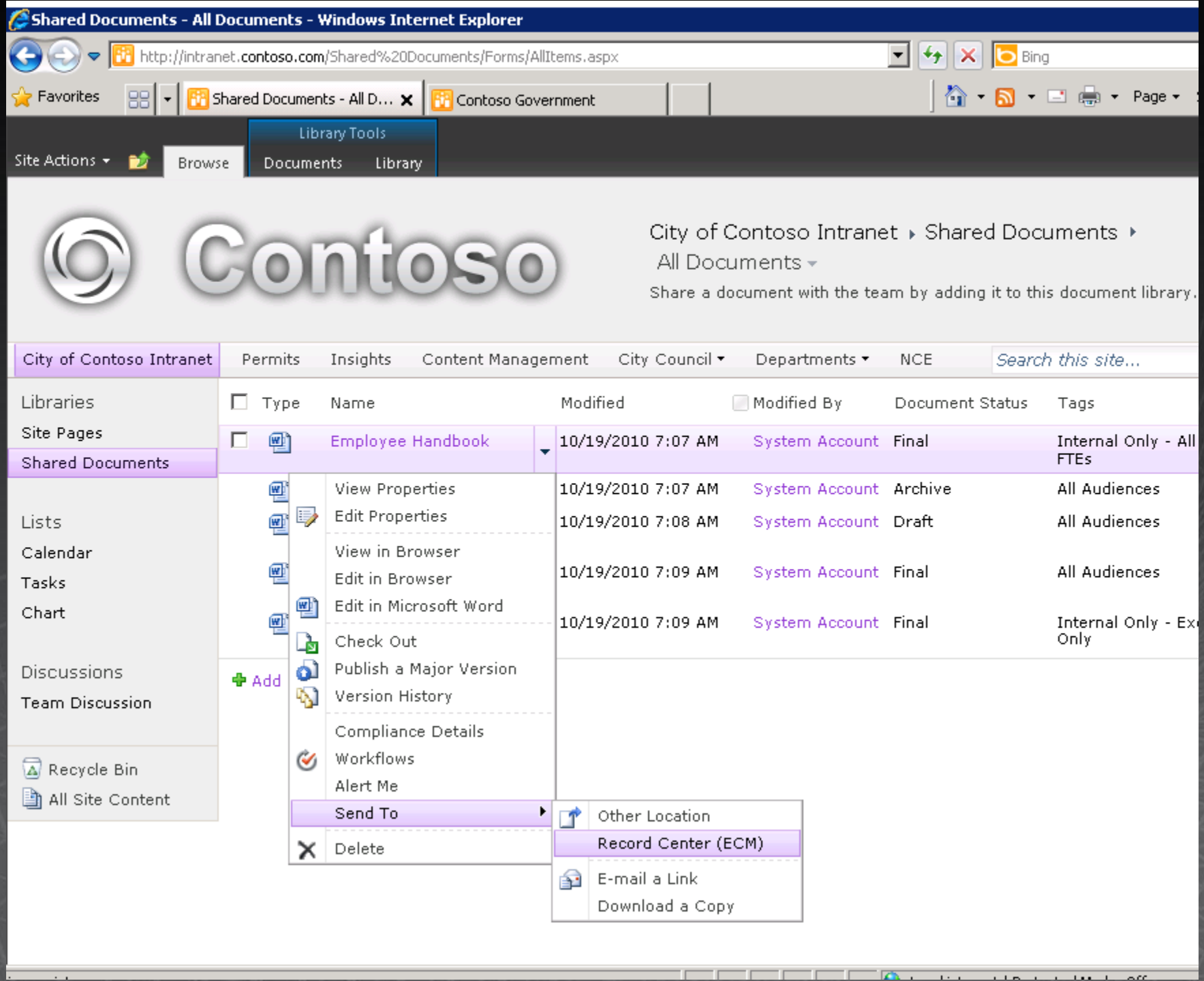
Type: List
Categories: Tracking

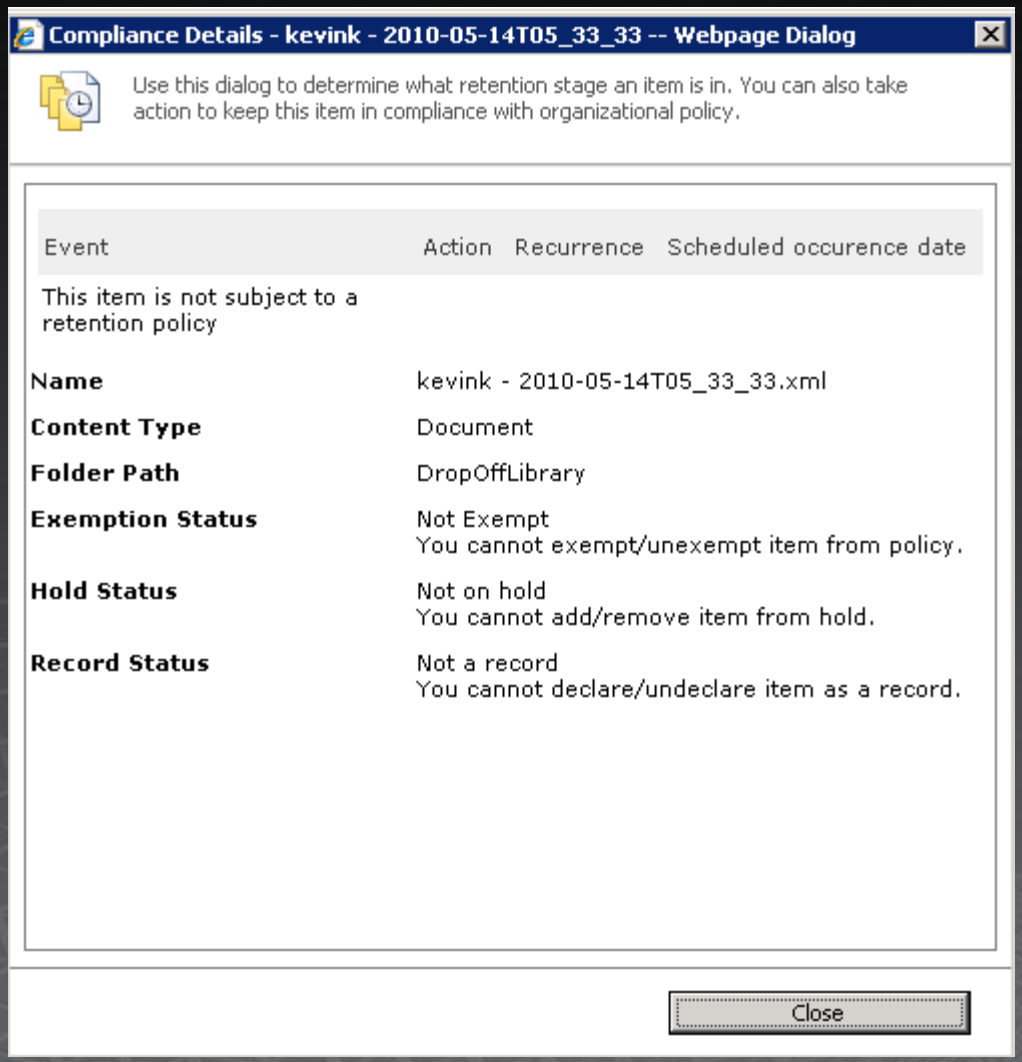
A place for team or personal tasks. Project tasks lists provide a Gantt Chart view and can be opened by Microsoft Project or other compatible programs.

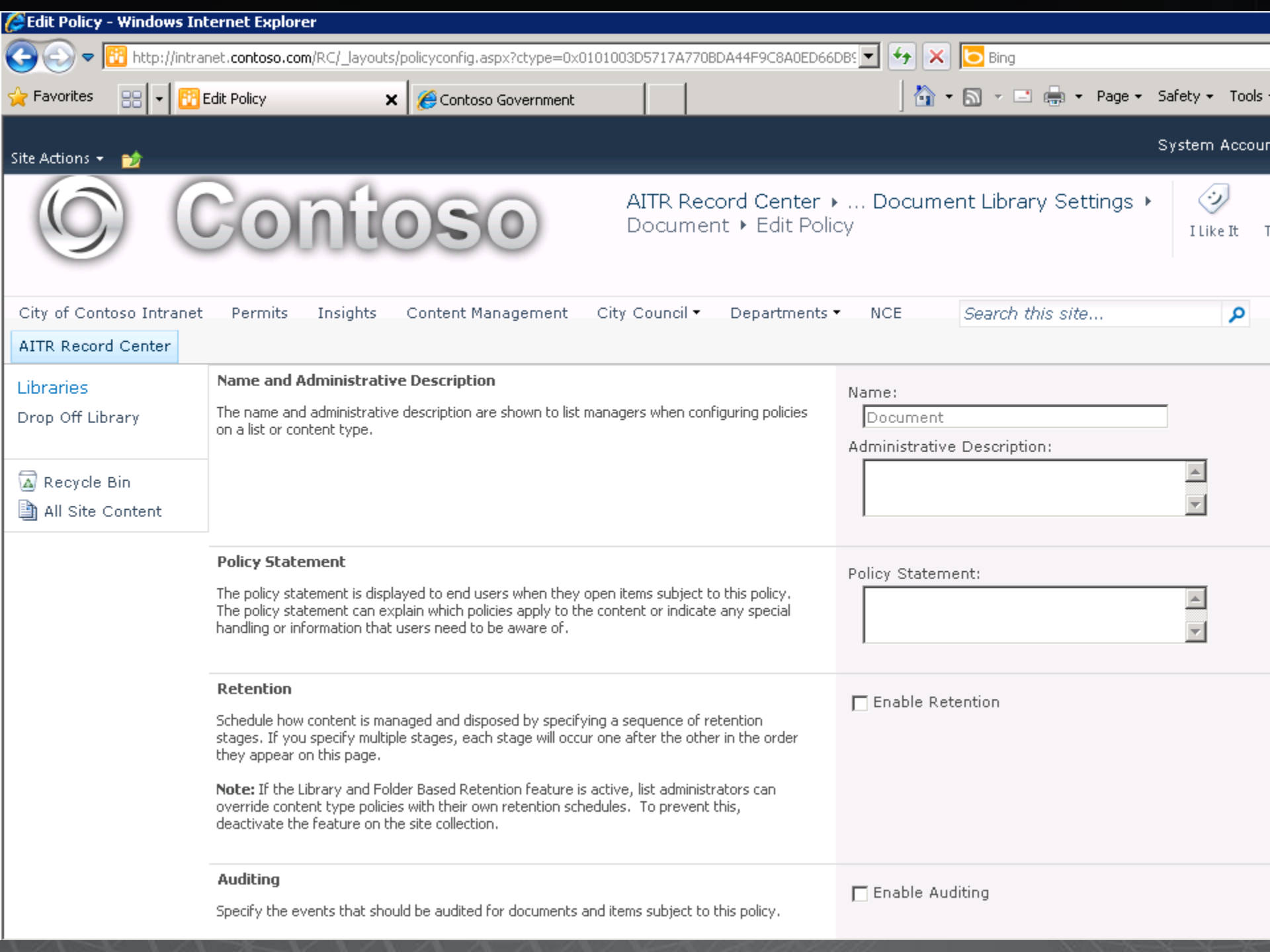
AITR Sample Project

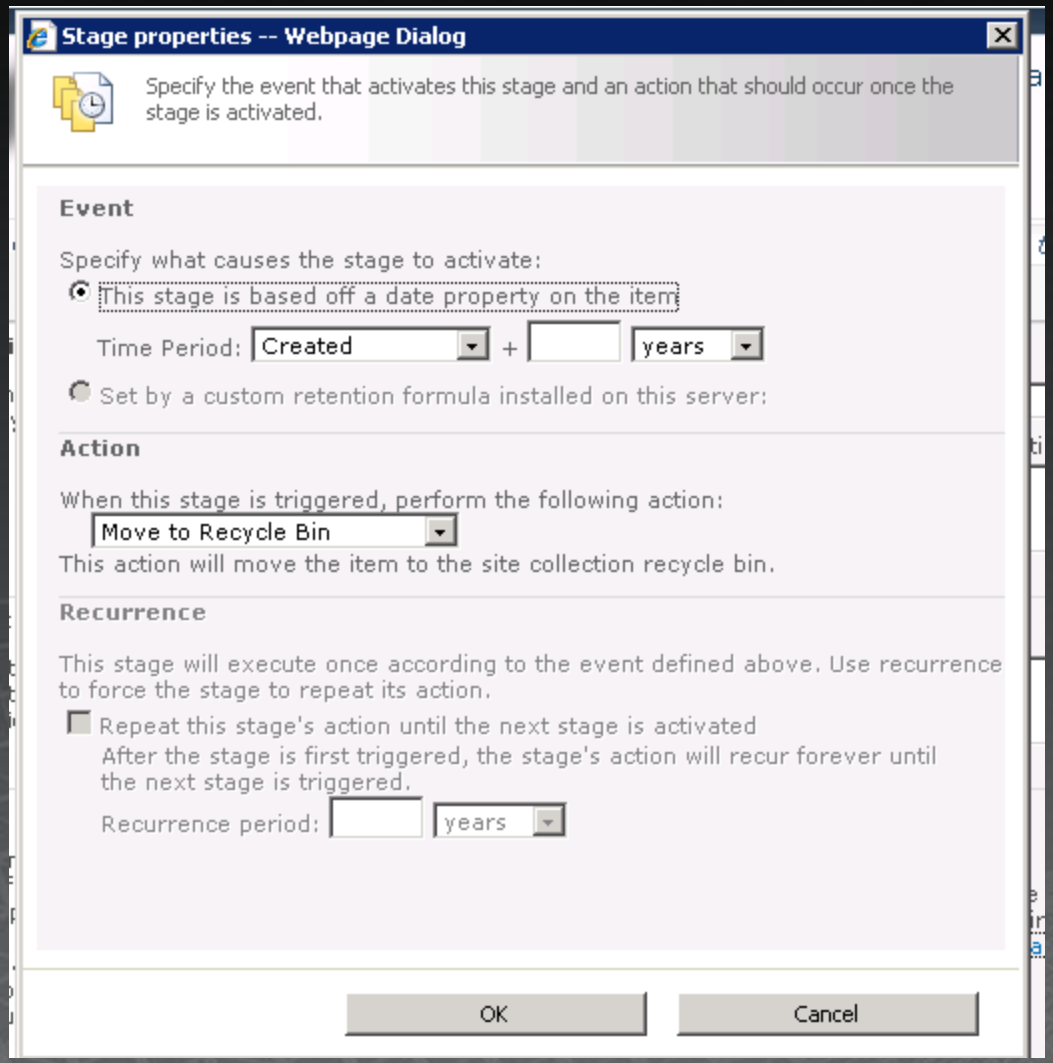
Create | More Options

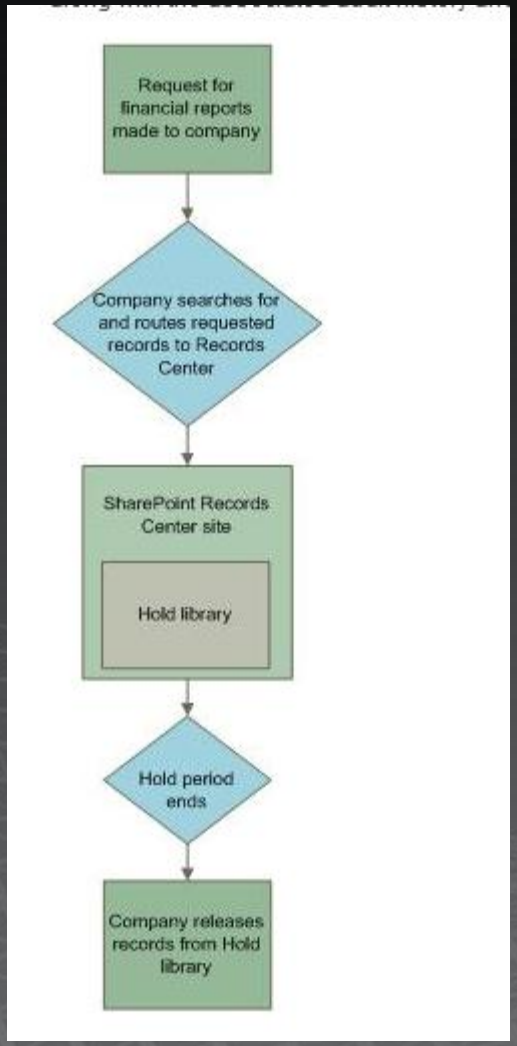

Site Actions
Browse
List Tools
Items
List
Pablo Saez
Standard View
Datasheet View
Datasheet
View Format
Zoom In
Zoom Out
Scroll to Task
Gantt View
Create View
Current View:
Project Tasks
Current Page
Manage Views
E-mail a Link
Alert Me
RSS Feed
Share & Track
Sync to SharePoint Workspace
Connect to Outlook
Export to Excel
Connect & Export
Customize Form
Customize List
List Settings
Settings
Libraries
Documents
Lists
Tasks
SC DOT Project
AITR Sample Project
Recycle Bin
All Site Content
Title
Start Date
Due Date
Task 1
10/19/2010
task 2
10/20/2010
10/30/2010
/17/2010
10/24/2010
10/31/2010
11/7/2010
M T W T F S S M T W T F S S M T W T F S S M T W


Shared Documents - All Documents - Windows Internet Explorer
http://intranet.contoso.com/Shared%20Documents/Forms/AllItems.aspx
Bing
Favorites
Shared Documents - All D...
Contoso Government
Page
Library Tools
Site Actions
Browse
Documents
Library
Contoso
City of Contoso Intranet ▸ Shared Documents ▸
All Documents
Share a document with the team by adding it to this document library.
City of Contoso Intranet
Permits
Insights
Content Management
City Council
Departments
NCE
Search this site...
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Chart
Discussions
Team Discussion
Recycle Bin
All Site Content
Type
Name
Modified
Modified By
Document Status
Tags
Employee Handbook
10/19/2010 7:07 AM
System Account
Final
Internal Only - All FTEs
10/19/2010 7:07 AM
System Account
Archive
All Audiences
10/19/2010 7:08 AM
System Account
Draft
All Audiences
10/19/2010 7:09 AM
System Account
Final
All Audiences
10/19/2010 7:09 AM
System Account
Final
Internal Only - Ex Only
Add
View Properties
Edit Properties
View in Browser
Edit in Browser
Edit in Microsoft Word
Check Out
Publish a Major Version
Version History
Compliance Details
Workflows
Alert Me
Send To
Delete
Other Location
Record Center (ECM)
E-mail a Link
Download a Copy


Compliance Details - kevink - 2010-05-14T05_33_33 -- Webpage Dialog
Use this dialog to determine what retention stage an item is in. You can also take action to keep this item in compliance with organizational policy.
Event
Action
Recurrence
Scheduled occurence date
This item is not subject to a retention policy
Name
kevink - 2010-05-14T05_33_33.xml
Content Type
Document
Folder Path
DropOffLibrary
Exemption Status
Not Exempt
You cannot exempt/unexempt item from policy.
Hold Status
Not on hold
You cannot add/remove item from hold.
Record Status
Not a record
You cannot declare/undeclare item as a record.
Close


Edit Policy - Windows Internet Explorer
http://intranet.contoso.com/RC/_layouts/policyconfig.aspx?ctype=0x0101003D5717A770BDA44F9C8A0ED66DB
Bing
Favorites
Edit Policy
Contoso Government
Page
Safety
Tools
Site Actions
System Accoun
Contoso
AITR Record Center ▸ ... Document Library Settings ▸
Document ▸ Edit Policy
I Like It
City of Contoso Intranet
Permits
Insights
Content Management
City Council
Departments
NCE
Search this site...
AITR Record Center
Libraries
Drop Off Library
Recycle Bin
All Site Content
Name and Administrative Description
The name and administrative description are shown to list managers when configuring policies on a list or content type.
Name:
Document
Administrative Description:
Policy Statement
The policy statement is displayed to end users when they open items subject to this policy. The policy statement can explain which policies apply to the content or indicate any special handling or information that users need to be aware of.
Policy Statement:
Retention
Schedule how content is managed and disposed by specifying a sequence of retention stages. If you specify multiple stages, each stage will occur one after the other in the order they appear on this page.
Note: If the Library and Folder Based Retention feature is active, list administrators can override content type policies with their own retention schedules. To prevent this, deactivate the feature on the site collection.
Enable Retention
Auditing
Specify the events that should be audited for documents and items subject to this policy.
Enable Auditing


Stage properties -- Webpage Dialog
Specify the event that activates this stage and an action that should occur once the stage is activated.
Event
Specify what causes the stage to activate:
This stage is based off a date property on the item
Time Period: Created + years
Set by a custom retention formula installed on this server:
Action
When this stage is triggered, perform the following action:
Move to Recycle Bin
This action will move the item to the site collection recycle bin.
Recurrence
This stage will execute once according to the event defined above. Use recurrence to force the stage to repeat its action.
Repeat this stage's action until the next stage is activated
After the stage is first triggered, the stage's action will recur forever until the next stage is triggered.
Recurrence period: years
OK
Cancel


Request for financial reports made to company
Company searches for and routes requested records to Records Center
SharePoint Records Center site
Hold library
Hold period ends
Company releases records from Hold library

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