



Yes Virginia, You Can Use Content Types...

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SARAH HAASE

Sarah Haase

Librarian & Enterprise
Collaboration Strategist

Favorite things:

- User adoption
- ROI
- Governance

blog.splibrarian.com



@sarahhaase



SharePoint holds documents & list items.

Content Types help you categorize these documents & list items.

How?

By giving you a reusable collection of settings for each type of document and list item you have.

Sick Leave
Request #112

Vacation Request
#123

Maternity Leave
Request #12

Maternity Leave
Request #11

Vacation Request
#125

Sick Leave
Request #110

Sick Leave
Request #113

Sick Leave
Request #111

Vacation Request
#124

Sick Leave
Request #112

Vacation Request
#123

Maternity Leave
Request #12

Maternity Leave
Request #11

Vacation Request
#125

Sick Leave
Request #110

Sick Leave
Request #113

Sick Leave
Request #111

Vacation Request
#124

Sick Leave
Request #112

Vacation Request
#123

Maternity Leave
Request #12

Maternity Leave
Request #11

Vacation Request
#125

Sick Leave
Request #110

Sick Leave
Request #113

Sick Leave
Request #111

Vacation Request
#124

Sick Leave
Request #112

Vacation Request
#123

Maternity Leave
Request #12

Maternity Leave
Request #11

Vacation Request
#125

Sick Leave
Request #110

Sick Leave
Request #113

Sick Leave
Request #111

Vacation Request
#124


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Content Types  EDIT LINKS

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All Documents

...

Find a file



<input checked="" type="checkbox"/>		Name	Modified	Modified By
		Vacation-Request-125 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Sick-Leave-Request-110 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Sick-Leave-Request-111 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Vacation-Request-124 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Maternity-Request-12 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Vacation-Request-123 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Sick-Leave-Request-112 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Sick-Leave-Request-113 	... A few seconds ago	<input type="checkbox"/> Sarah Haase
		Maternity-Request-11 	... A few seconds ago	<input type="checkbox"/> Sarah Haase

Content Types  EDIT LINKS


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 EDIT LINKS new document or drag files here

All Documents



Find a file



<input checked="" type="checkbox"/>	 Name	Content Type	Modified	Modified By
	 Maternity-Request-11 	... Maternity Leave Requests	2 minutes ago	<input type="checkbox"/> Sarah Haase
	 Maternity-Request-12 	... Maternity Leave Requests	About a minute ago	<input type="checkbox"/> Sarah Haase
	 Sick-Leave-Request-110 	... Sick Leave Requests	About a minute ago	<input type="checkbox"/> Sarah Haase
	 Sick-Leave-Request-111 	... Sick Leave Requests	About a minute ago	<input type="checkbox"/> Sarah Haase
	 Sick-Leave-Request-112 	... Sick Leave Requests	About a minute ago	<input type="checkbox"/> Sarah Haase
	 Sick-Leave-Request-113 	... Sick Leave Requests	About a minute ago	<input type="checkbox"/> Sarah Haase
	 Vacation-Request-123 	... Vacation Requests	A few seconds ago	<input type="checkbox"/> Sarah Haase
	 Vacation-Request-124 	... Vacation Requests	A few seconds ago	<input type="checkbox"/> Sarah Haase
	 Vacation-Request-125 	... Vacation Requests	A few seconds ago	<input type="checkbox"/> Sarah Haase

Content types enable...

Unique metadata
fields

Unique workflow
processing

Targeted
information
management
policies

Unique New Item
and Edit Item forms

Unique document
templates

Quick and easy
document tagging

USE CASE #1

Manage multiple types of content from 1 location.

DEMO

Benefits of Use Case #1

Manage multiple
types of content from
1 location

Store multiple
document templates
within a single
document library

Enable unique
metadata for
different document
types

DEMO

Steps to create this solution

1. Create 2 new content types.
2. Create your library.
3. Add content types to your library.
4. Create columns in your library.
5. Add columns to your content types.
6. Add document templates to your content types.

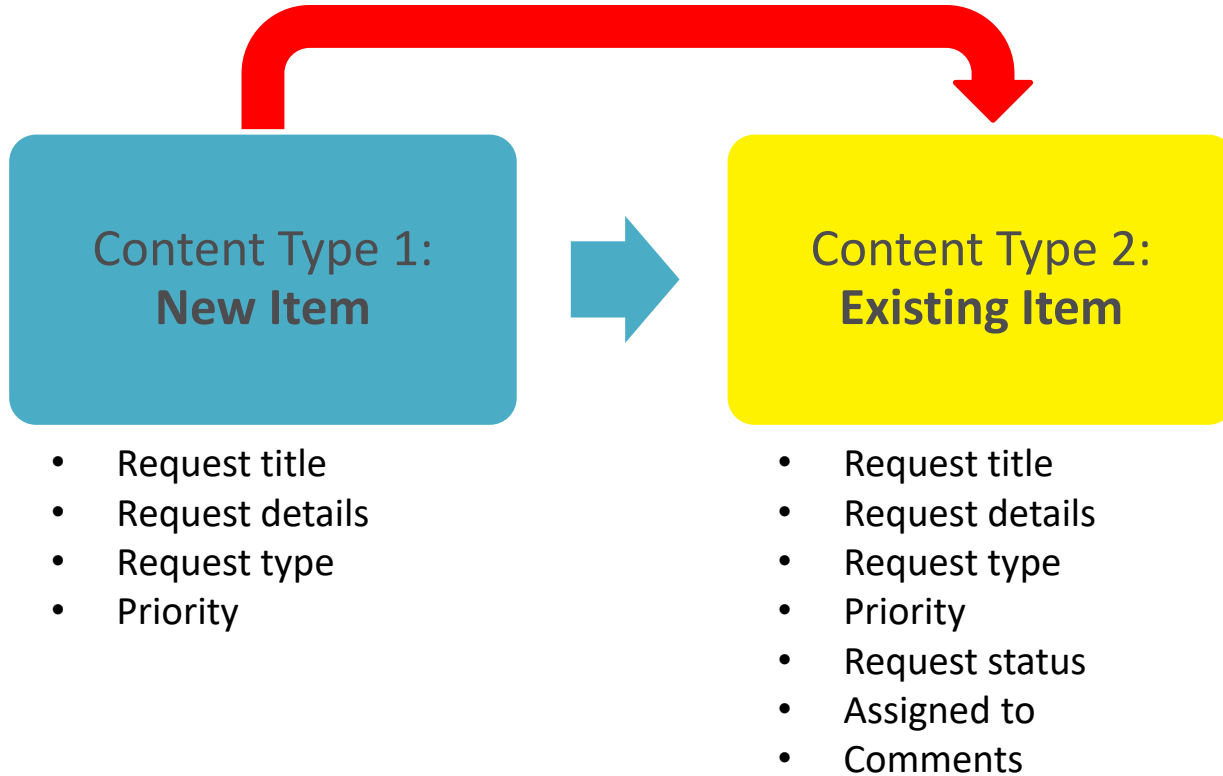
The fine print

- A single Content Type can be re-used many times
- You can configure your Content Types at the site level, the site collection or the farm level (Content Type Hub)
- Content Types are automatically inherited (but inheritance only rolls downhill)
- Changes made at the list or library level stay there

USE CASE #2

Use content types to build custom list forms and enable unique workflow routing. <http://tinyurl.com/6dwx47u>

On new item creation

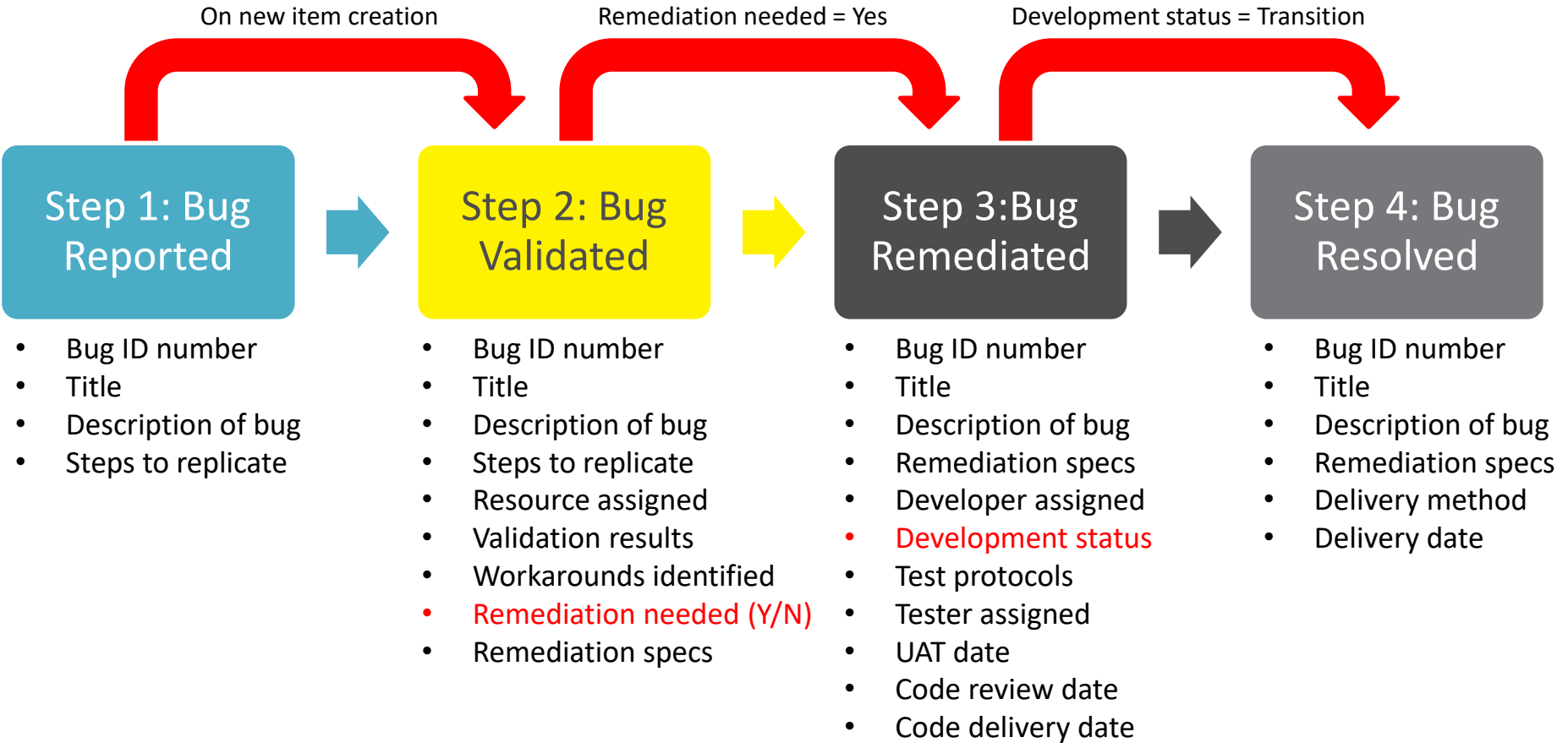


DEMO

Steps to create this solution

1. Create 2 new content types.
2. Create your list.
3. Add content types to your list.
4. Create columns in your list.
5. Add columns to your content types.
6. Create a SharePoint Designer workflow to automate the process of moving from one content type to another.
7. Go to **Advanced Settings** and set the **Management of content types** to No.

Blog post overview: <http://tinyurl.com/6dwx47u>



DEMO

Steps to create this solution

1. Create 1 content type for each step in your work stream
2. Add all content types to a new custom list
3. Create your list columns
4. Add columns to the appropriate content type. Set up columns to required or optional within each content type
5. Create SharePoint Designer workflows to automate the process of moving list items from one step to another
6. Go to **Advanced Settings** and set the **Management of content types** to No.

Benefits of Use Case #2

Easy way to
customize
New Item & Edit
Item forms

Metadata
targeting; it shows
users only the
fields they need

Unique workflow
processing based
on content type

The content type quiz.

Do you have...

- A “type” column in your list or library
- Multiple item types
- Mixture of common & unique metadata
- Fields you want to “hide”

Do you need...

- Custom New & Edit forms
- Workflow routing based on “type”
- Common reporting on documents in different libraries

Do you want...

- To limit the fields your users need to see
- To make fields required/optional based on contextual relevancy
- To apply unique information policies to documents of a similar type

Questions?



@sarahhaase

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