

Index

A

access

- constraining, 407
- content, 88–90
- control, 88

ACLs, 89

Action, 240, 400

Actions, 400

.ACTIONS, 396–401

activities. *See also* role/activity modeling

- information, 11
- role/activity modeling, 8–12
- workflow, 377–380

Add, 305, 306

AddToHold, 306

Aliases, 104

All, 256

AllowDeletion, 104, 105

Annual Report, 172, 175, 177

Application Management, 171

Application Pool Recycler, 21

ApplyHold, 380

APPPool, 162

Archive, 245

args, 305

artifacts, 13–14

.ASCX, 224–225

ASP.NET, 225

ASPX, 97

- file plans, 164
- submission, 172

AssemblyName, 55, 306

Asset Tracking, 135–136

attribute classes, 56, 59–63

attributes, 218

AttributeTargets, 56

Audit History, 110–112

Audit Viewer, 262–271

auditability, 3, 11

AuditEntry, 272

AuditEntryField, 265

AuditHistory.aspx, 273–274

AuditHistoryGrid, 274

AuditHistoryGrid.Refresh, 274–276

auditing

- content types, 277–279
- policy, 255–279
- Records Center, 262–276
- web parts, 262–271

AuditMaskChange, 260

AuditViewerWebPart, 274

<authorizedType>, 396

AuthorizeToUpdate, 258–259

AvailableContentTypes, 54

B

Bar Coded, 151

Barcode, 283–284

BarcodePolicy, 288

BeforePrint, 230

behavior, 43, 97

bool, 106

Brief, 125–126, 128, 172

browser utility, 51–55

btnExecute_Click, 168–169

btn_Submit_Click, 189

BuiltInExpirationAction, 248

ButtonSection, 166

byte(), 106

Bytes, 106

C

C#, 33, 72, 142

CAML. *See* Collaborative Application Markup Language

CAML.NET Intellisense, 22–23

Catch, 326–327, 328

Category, 14

Category, 42, 112

Central Administration, 171, 197, 243

CheckBoxTemplate, 186

CheckIn, 256, 260
check-in, 67–68
CheckOut, 256, 260
check-out, 67–68
child, 197
ChildDelete, 256, 260
ChildMove, 261
CHOICE, 61
classes, 142–157, 217–223. *See also* wrapper classes
 attribute, 56, 59–63
 schema, 36–37
ClassName, 55, 306
code-beside model, 33
Collaborative Application Markup Language (CAML)
 content types, 48–51
 FieldRef, 59
 FilePlan.xsn, 157–158
 keyword queries, 306
 schema, 48
 SchemaXml, 209, 214
 XML, 47
ColumnInfo, 264, 265–271
ColumnInfo Update, 268
ComputeExpireDate, 239
Configuration, 103
Configure Exchange, 359
content
 access, 88–90
 managed, 363–366
 modeling, 3–14
 security, 83–91
 validation, 325–353
Content Type Explorer, 53
Content Type gallery, 173–174
content types, 42–63, 150–152
 auditing, 277–279
 child, 197
 document libraries, 45, 153
 DoD 5015.2 Add-On Pack, 413
 ECM, 39, 97
 encapsulation, 42, 46
 folders, 285
 Global Event Disposition
 Instruction, 405
 Global Period Cutoff Instructions, 406
 hierarchy, 45–46
 lists, 65
 physical records, 154, 282–283
 policy, 205
 policy statement, 198

 sample, 64
 SPItemEventReceiver, 64
 traditional file plans, 125–129
 XML, 47, 152
ContentTypes, 53–54
Contract, 172
ControlMode, 412
Copy, 256, 261
Create, 124, 288
CreateContentTypes, 150–152, 249
CreateFromListItem, 35
CreateItemQuery(), 303
Custom, 261
 custom, 245
custom routing, 25, 108, 307–323
 file plans, 322–323
 requirements identification, 16
CustomAction, 162
customData, 200
CustomExpirationAction, 240–243, 248
CustomSettingsControl, 225
CustomXMLPart, 231
cut off processing, 404–406
Cutoff Approval, 414–415
Cutoff Approval Reverse, 415

D

DataTable, 265, 267, 274
DateCalculator, 240
DateTime, 177, 296
Default, 104
default expiration actions, 103, 105
Default Record Series, 105
Delete, 245, 248, 256, 261, 276
Department of Defense. *See* DoD 5015.2 Add-On Pack
dependencies, 86–87, 384
Description, 104, 105
de-serialization, 144–146, 167
 wrapper classes, 142
 XML, 33
Designer, 6
DesignerType, 401
destinationSPList, 319
diagnostic tracing, 21
_dic_RepositoryUsersGroup, 104
differencing engine, 65
disposition, 15, 404–406
Disposition Approval, 105
Disposition Approval Transfer, 416

Document, 150, 153

document(s)

- categories, 16
- check-out, 66, 67–68
- groups, 16
- metadata, 4
- MOSS, 97
- properties, 41–42
- Records Center, 11
- sessions, 67
- sources, 16–17
- uploads, 66
- users, 11
- versioning, 67

document libraries, 40–42

- content types, 45, 153
- holding zone, 104
- I/O, 96
- property storage, 108
- Record Routing Table, 281
- submissions, 92, 175, 178
- traditional file plans, 125–129
- Unclassified Records, 105
- versioning, 82

document parser, 42, 112, 115, 296

document retention policy statement, 46

DocumentGrid.cs, 182–186

DocumentGrid_RowDataBound, 187

DoD 5015.2 Add-On Pack, 19–20, 403–420

- content types, 413
- timer job, 413–414
- workflow, 414–417

.DOTX, 97

DropDownList, 412

DVDs, 285

dynamic file plans, 15, 117, 130–169

- expiration policies, 245–253
- workflow, 388–391

E

ECB. See Edit Control Block

ECM. See Enterprise Content Management

ECM Starter Kit, 372–373

ECM2007, 23–25

ECM2007.ContentTypes, 24

ECM2007.CustomRouting, 309

ECM2007.DocumentGrid, 188

ECM2007.FeatureWizard, 28–31

ECM2007.InformationPolicy, 288

ECM2007.InformationPolicy.

SharePointPolicyFeature, 218

ECM2007.OfficialFileSend, 188

ECM2007.PrinterControlPolicyFeaure, 224

ECM2007.RecordsManagement, 25, 310

ECM2007.Versioning, 25, 79

ECM.InformationPolicy, 24

Edit Control Block (ECB), 157, 171

- auditing, 271
- File Plan Execution, 158
- JavaScript, 296
- Send To, 109

Edit Properties, 42

elements.xml, 180–182, 273

e-mail, 355–369

E-mail Router, 410

EnableBarcodePolicy, 381

EnableLabelPolicy, 381

EnableViewState, 186

encapsulation, 42, 46

- ECM, 39

encryption, 91

End Date, 128

enhanced search, 408–409

Enterprise Content Management (ECM), 21

- access control, 88
- content types, 39, 97
- encapsulation, 39
- workflow, 372, 396

Eval, 334, 350

event handler, 185, 187

event receiver, 52, 154–157

EventData, 259

EventsDeleted, 261

Excel, 6, 13, 382

Excel Markup Language (ExcelML), 260

- Holds Reports, 302

ExcelML. See Excel Markup Language

Exception, 329–330

Exchange, 357–368

Exchange Management Console, 357

ExchangeManagementShell, 360–363

Execute, 401

ExecuteFilePlan, 380

Expiration, 246

expiration actions, 240–243

expiration formulas, 238–239

expiration policies, 245–253

Expiration Policy Feature, 203, 235–236

ExpirationAction.cs, 252–253

ExpirationFormula

ExpirationFormula, 246–248
ExpirationFunction, 246–248
ExpirationPeriod, 246–248
ExpirationPolicy, 246
ExpirationPolicy.cs, 250–251
ExpirationPolicyFeature, 246
ExpirationPolicyFeature.cs, 249–250
Expression, 328, 350
extensibility, 44, 203
 payload, 97
extension methods, 71
 C#, 72
 .NET Framework, 72
 versioning metrics, 79–82

F

feature stapling, 118
Feature Wizard, 179
FeatureActivated, 287, 309, 313, 317
 FeatureReceiver.cs, 222
 SPFeatureReceiver, 100
FeatureDeactivating, 223, 313, 317
FeatureId, 214, 239, 244
FeatureReceiver, 159–162, 287
FeatureReceiver.cs, 222, 322, 345–346
FEATURES, 179
feature.xml, 180, 286
Field, 22, 401
FieldBind, 401
FieldDataType, 330
FieldExpression, 328–329
FieldExpression.cs, 335–336
FieldRangeExpression, 328–329
FieldRef, 59–63
FieldRefAttribute, 24, 61
FieldValidator, 225
File Plan, 137–142
file plan(s), 14–17
 ASPX, 164
 custom routing, 322–323
 execution, 164–169
 expiration policies, 245
 physical records, 154
 Records Center, 146–149
 schema, 132–134
 traditional, 125–130
 Visual Studio, 140
File Plan Execute, 164–166

File Plan Execution, 131, 158, 167
File Plan gallery, 131, 157–163
FileLeafRef, 181
FilePlan, 132, 322
 data source, 140
 de-serialization, 144–146, 167
 Exchange, 359, 364–365
 serialization, 142–144
FilePlan.ConfigureExchange, 365, 366
FilePlan.cs, 142
FilePlanEx.cs, 144
FilePlan.Load, 167
FilePlan.xsd, 142
FilePlan.xsn, 157–158
FileTrackingRouter, 316
FilteringRouter, 310–313
FilteringRouter.OnSubmitFile, 311–314
Financial Document, 125, 129
Financial Statement, 172
folders
 content types, 285
 document libraries, 40
 managed, 357–363
 Outlook 2007, 368
 physical records, 284–286
forced check-out, 66
forms
 File Plan, 137–142
Forms Designer, 36
 InfoPath, 135–137
 Visual Studio, 138

G

GAC. See **Global Assembly Cache**
GenerateAuditReport, 381
GetHoldItemIndex(), 303
GetRecordRoutingCollection, 95
GetValidatedString, 412
GLBA. See **Gramm-Leach-Bliley Act**
Global Assembly Cache (GAC), 25, 32
Global Event, 404, 406
Global Event Disposition
 Instructions, 405
Global Period, 404
Global Period Cutoff Instructions, 406
Gramm-Leach-Bliley Act (GLBA), 20
grid, 267
GUID, 48

H

Health Insurance Portability and Accountability Act (HIPAA), 17, 20

helper methods
validation, 340–341

Helpers, 56

HIPAA. See Health Insurance Portability and Accountability Act

History List, 105

Hold, 298–301

Hold Reports List, 298

holder, 56

holding zone, 104–105
metadata, 103

Hold.RemoveHold, 304

holds

programs, 302–303
Records Management, 295–306

Holds List, 105, 297

Holds Reports, 297, 302

Hold.SetHold, 303

HoldsField, 296, 298, 304

HoldsFieldControl, 296, 298

HoldStatusField, 296, 298

HoldStatusFieldControl, 298

HTML, 49–51

I

ID, 181

ID="1", 103

IDE. See Integrated Development Environment

IExpirationAction, 203, 240

IExpirationFormula, 203, 237, 238

IISRESET, 317

IMAGES, 179

InfoPath, 134–142

Forms Designer, 135–137
SQL, 138
submission, 137
template, 138
WS, 138
XML, 131, 138, 141
XSL, 134

information

activities, 11
integrity, 3

policy, 195–233
spreadsheets, 15
workflow, 11

Information Policy. See policy

Information Rights Management (IRM), 90–91

InputFormControl, 166

InputFormSection, 166

Install, 215, 222

Installer

.NET Framework, 239

Installer, 228, 309

InstallProjectTemplate.bat, 31

InstallUtil, 204, 215, 217, 309

Installutil.exe, 239–40

Integer, 177

Integrated Development Environment (IDE), 382

IntelliSense, 22–23, 48

InvalidOperation, 205

I/O

document libraries, 96

IPolicyFeature, 25, 200–201, 236

IPolicyFeature

.OnGlobalCustomDataChange, 202

IPolicyFeature.ProcessListItem, 202

IPolicyFeature

.ProcessListItemRemove, 202

IPolicyFeature.Register, 202

IPolicyFeature.Unregister, 202

IPolicyResource, 236

IProcess, 306

IRM. See Information Rights Management

IRouter, 25, 308, 311

IRouter.OnSubmitFile, 108

ISAPI, 92, 198

ISharePointObject, 24, 55, 56

ISharePointPolicy, 24, 205

ISharePointPolicyFeature, 24, 209

ISharePointPolicyResource, 24, 212–216

IsHoldEnabled, 296

Item, 150, 153

Item Level Access Control, 407

ItemAdded, 151, 154–157, 218, 296

ItemAdding, 104, 296, 346

ItemDeleting, 104, 296

ItemEventReceiver, 24, 219, 221

ItemUpdated, 218

ItemUpdating, 104, 296, 346

IWizard, 28

J

JavaScript, 296

K

keyword queries, 306

Keywords, 42

L

Label, 225

Labeled, 151

LAYOUTS, 179, 224

LayoutsPageBase, 166

level, 74

life cycle

content, 4–5

content access, 88, 89–90

payload, 46

policy, 200–202

list(s)

content types, 65

permissions, 85

SPFile, 65

ListInstance, 158–159

ListItem, 334

ListItemValidator, 327, 332, 342, 350

Load, 144

LoadPostData, 227

Location, 104

location, 108

location-based records management systems, 2

LogicalExpression, 328–329

Lookup, 177

M

mailbox policy, 366–367

Managed By, 105

managed content, 363–366

Managed Folder Assistant, 357, 367–368

managed folders, 357–363

Management of Electronic Records (MoReq), 20

Match, 326–327, 328

Matter, 125–126

maxOccurs, 327

m_customData, 225

Messaging Records Management (MRM), 355–369

metadata

content type definition, 47

content types, 42, 43

document libraries, 40

documents, 4

encapsulation, 42

holding zone, 103

official records, 2

RecordsRepositoryProperties, 318

SPListItemVersion, 73

users, 11

validation, 391–395

XML, 176

Microsoft Office SharePoint Server (MOSS)

Auditing Policy, 255

content types, 45

documents, 97

Records Management, 97–115

Records Repository, 14–15

site provisioning, 117

versioning, 65

Microsoft.Office.Interop.Word

.Document, 231

Microsoft.Office.Policy, 92, 198, 217

Microsoft.Office.Policy.dll, 310

Microsoft.Office

.RecordsManagement, 92, 310

Microsoft.Office.RecordsManagement

.Holds, 297

Microsoft.Office.RecordsManagement

.InformationPolicy

IPolicyFeature, 200–201

Microsoft.Office.RecordsManagement

.InformationPolicy.Policy, 198

Microsoft.Office.RecordsManagement

.Internal, 306

Microsoft.Office.RecordsManagement

.PolicyFeatures, 237

Microsoft.Office.RecordsManagement

.PolicyFeatures.Expiration, 239

FeatureId, 244

Microsoft.Office.RecordsManagement

.RecordsRepository, 103, 308, 310

Microsoft.Office.RecordsManagement

.SearchAndProcess, 304–305

Microsoft.SharePoint, 310

Microsoft.SharePoint.OfficialFile, 171

Microsoft.SharePoint

.WorkflowActions, 379–380

Microsoft.SharePoint
 .WorkflowActions.dll, 375
 minOccurs, 327, 328
 MoReq. See Management of Electronic Records
 MOSS. See Microsoft Office SharePoint Server
 moss.development, 363
 Motion, 125–126, 128, 172
 Move, 256, 261
 MRM. See Messaging Records Management
 MSBuild, 21
 multiple records, 179–193

N

Name, 328, 400
 namespace, 44
 nested class, 219
 .NET
 attribute classes, 56
 workflow, 373
 wrapper classes, 33
 XML, 22, 24
 .NET Framework
 extension methods, 72
 Installer, 239
 VSTA, 138
 .NET Reflector, 51–52, 56, 373, 375
 New Managed Custom Folders, 358
 New Project Wizard, 230
 None, 256
 Note, 296

O

Official File Web Service, 92–96, 171
 OfficialFileCore.SubmitFile, 106
 Official Message, 365
 official records, 1–17
 content modeling, 3–14
 file plans, 14–17
 metadata, 2
 workflow, 376–381
 OfficialFileCore, 92
 OfficialFileCore.SubmitFile, 92
 OfficialFileResult.InvalidArgument, 107
 OfficialFileSelect.aspx, 188–189
 OfficialFileSelect.cs, 190–193
 OfficialFileSend.aspx, 187
 OnCustomDataChange, 212, 221

OnInit, 185, 186, 267
 OnSubmit, 316
 OnSubmitFile, 311, 318, 351
 out String, 106
 Outlook 2007, 368

P

PageIndexChanging, 270
 Parameter, 400, 401
 params, 74
 ParserEnabled, 112
 partial wrapper classes, 35
 payload, 43, 44. See also XML
 extensibility, 97
 life cycle, 46
 payload, 219
 PDF, 40
 Period Ending Date, 128
 Period Starting Date, 128
 permission levels, 83–84
 permission manifest, 88
 permissions, 83–87
 Active Directory, 6
 contributor, 105
 dependencies, 86–87
 inheritance, 84
 list, 85
 personal, 85
 records manager, 17
 site, 86
 submission, 172–173
 personal permissions, 85
 physical records, 281–294
 content types, 154, 282–283
 file plans, 154
 folders, 284–286
 ItemAdded, 154–157
 workflow, 292–294
 PhysicalRecord, 287
 PhysicalRecordsFeature, 289–291
 policy
 adherence, 3
 auditing, 255–279
 Barcode, 283–284
 content types, 205
 custom features, 203–232
 identifying, 15–16
 life cycle, 200

policy (continued)

- mailbox, 366–367
- retention, 235–279
- reusable components, 203–216
- utility method, 206
- virtual property, 206
- XML, 16

Policy, 205

- schema, 198–200
- XML, 198

Policy Configuration, 243

policy features, 236

- classes, 217–223
- custom settings, 224–229
- schema, 206–212
- XML, 208

policy resources, 212–216, 236

- schema, 213–214

policy statement, 46, 91

- content types, 198
- Create, 288

PolicyManifest, 205

Press Coordinator, 9

primitive activities, 377–380

PrinerPolicySettings.ascx, 224

print, 216

print monitor add-in, 229–232

PrintControlPolicyNamespace, 218

PrinterPolicyEventReceiver, 219

PrinterPolicyFeature, 218, 220

PrinterPolicyFeature.cs, 228

PrintPolicySettings, 225

ProcessAndReport, 302

processing layer, 103

Processing Results, 181–182, 186

ProcessItem, 305

ProcessList, 79

ProcessListItem, 211, 221

ProfileChange, 256, 261

programmatic, 245

programs

- holds, 302–303
- Records Center, 122–124
- submissions, 177–178
- versioning, 71–82

properties

- demotion, 41–42, 112–115
- documents, 41–42
- promotion, 41–42, 112–115
- standard, 42
- storage, 108–110

Properties, 106

properties, 350

Properties subfolder, 176

ProposalValidationRules.xml, 326–327

Provision, 124

ProvisionAssembly, 103

ProvisionClass, 103

provisioning layer

- Setup, 103
- workflow, 105

R

ReceiverAssembly, 286

ReceiverClass, 286

record(s). See also official records; physical records

- multiple, 179–193
- vital, 406–407

Record Relationship Templates, 407

Record Routing, 105

Record Routing List, 105

Record Routing Table, 104, 129–130, 177

- document libraries, 281
- SPListItem, 347
- storage, 281

Record Type, 14, 125–126

Record Type, 181

RecordCenterAddonPack_SiteWorkflows, 412

RecordCenterAddonPack_Web, 411

RecordCenterRouter, 411

RecordRelationshipsFieldControl, 407

RecordRouting, 177

Records Center

- auditing, 262–276
- building and configuring, 117–170
- components, 103–106
- documents, 11
- e-mail, 363
- E-mail Router, 418–419
- file plans, 146–149
- file processing, 106–115
- holds, 296
- programs, 122–124
- site definition, 102–103
- template, 15
- users, 11

Records Management, 92, 99–100

- custom actions, 100–101
- holds, 295–306
- MOSS, 97–115

Records Pending Submission, 104, 107

- Records Repository, 94, 117–170**
 - MOSS, 14–15
 - populating, 171–194
 - Records Repository Users Group, 103, 104**
 - RecordSeries, 348, 351**
 - RecordSeriesCollection, 103, 105**
 - recordSeriesName, 106**
 - RecordSpecification, 145–146, 167, 246, 322**
 - CreateContentTypes, 249
 - schema, 132–134
 - RecordSpecification**
 - .CreateContentTypes, 150–152
 - RecordSpecification.Execute, 145, 149–150**
 - RecordsRepositoryProperties, 318**
 - RecordsRepositoryProperty, 94, 310, 350**
 - RecordsRepositoryProperty[], 106**
 - RecordsSpecification, 169**
 - RedirectingRouter, 317–322**
 - ref, 108, 308**
 - Register, 210**
 - RejectFile, 309**
 - RemoveFromHold, 380**
 - RemoveHold, 304**
 - Reporting.aspx, 259**
 - reports, 45**
 - auditing, 259–261
 - ResourceType, 214, 239, 240**
 - resultDetails, 106, 309**
 - ResultTemplate, 186–188**
 - retention, 14, 235–279**
 - ReverseCutoff, 415**
 - Rights Management Services (RMS), 12, 90–91**
 - RMS. See Rights Management Services**
 - role/activity modeling, 6–14**
 - activities, 8–12
 - artifacts, 13–14
 - discovery process, 12–13
 - example, 10–12
 - responsibilities, 8–12
 - RMS, 12
 - roles, 7–8**
 - content access, 88–89
 - identifying, 15
 - Router, 322**
 - RouterResult, 309**
 - RouterResult**
 - .SuccessCancelFurtherProcessing, 107
 - RoutingList, 351**
 - RowDataBound, 185**
 - Rule, 327, 328**
 - RuleDesigner, 400**
 - RunInstaller, 215**
- ## S
- SafeControl, 270**
 - <SafeControls>, 396**
 - Sarbanes-Oxley (SOX), 11, 20**
 - SaveDocument, 320**
 - schema**
 - CAML, 48
 - classes, 36–37
 - content types, 48
 - file plans, 132–134
 - FilePlan, 132
 - living specification, 33
 - Policy, 198–200
 - policy features, 206–212
 - policy resources, 213–214
 - RecordSpecification, 132–134
 - validation, 327–330
 - Visual Studio, 33, 36–37
 - XML, 131
 - Schema Editor, 33**
 - SchemaChange, 256, 261**
 - SchemaXml, 55, 209, 213, 214**
 - sealed class, 52**
 - Search, 257, 261**
 - Search & Process, 304–306**
 - Search Keyword, 306**
 - SearchAndProcessItem, 305–306**
 - SecGroupCreate, 261**
 - SecGroupDelete, 261**
 - SecGroupMemberAdd, 261**
 - SecGroupMemberDel, 261**
 - SecRoleBindBreakInherit, 261**
 - SecRoleBindInherit, 261**
 - SecRoleBindUpdate, 261**
 - SecRoleDefBreakInherit, 261**
 - SecRoleDefCreate, 261**
 - SecRoleDefDelete, 261**
 - security, 17. See also permissions**
 - content, 83–91
 - Security Configuration, 197**
 - SecurityChange, 257**
 - Select, 181–182, 186**
 - Self-Validating Proposal, 342–347**
 - Sells, Chris, 36**
 - Send To, 109**
 - SendToOfficialFile.aspx, 171**

- SendToRecordsRepository, 380**
- Sentence, 400**
- sentViaSMTP, 106**
- SequenceActivity, 384**
- serialization**
 - classes, 142–157
 - FilePlan, 142–144
 - wrapper classes, 142–144
 - XML, 202
- sessions, 67**
- SetExpirationPolicy, 380**
- SetHold, 303, 304**
- Setup, 103**
- SetupExchangeFolder, 364**
- Shared Documents, 174**
- Shared Records Repository, 7**
- SharePoint Developer Network, 20**
- SharePoint Farm, 171**
- SharePoint Features Project, 21**
- SharePointContentType, 56, 57–59, 152, 287**
- SharePointList, 24, 289**
- SharePointObject, 24, 56, 204**
- SharePointPolicy, 24, 288**
- SharePointPolicyFeature, 25, 220, 222, 228**
- SharePointPolicyResource, 25, 214–216, 238**
- SharePointRouter, 25, 311, 313**
- SimpleFeature.vstemplate, 26–27**
- SimpleFeature.zip, 31, 32**
- Site, 262**
- Site Collection Policies, 197**
- site definition, 102–103**
- site permissions, 86**
- site provisioning, 117**
- `<site url>/_vti_bin/`
 - `officialfile.aspx, 93`
- Skills Manager, 10**
- Solution Explorer, 140**
- Source Url, 104**
- sourceUrl, 106**
- SOX. See Sarbanes-Oxley**
- SPAudit, 256**
- SPAuditEntry, 259, 265**
- SPAuditEntryGrid, 265, 274**
- SPAuditEventType, 260–261**
- SPAuditItemType, 261**
- SPAuditLocationType, 261**
- SPAuditMaskType, 256**
- SPAuditQuery, 265, 271**
- SPBasePermissions**
 - `.UpdatePersonalWebParts, 85`
- SPContentType, 52, 56**
- SPControlMode.Display, 412**
- SPDocumentLibrary, 41**
- SPFarm, 54**
- SPFeatureReceiver, 100, 287**
- SPFieldMultiChoiceValue, 303, 304**
- SPFile, 65**
 - de-serialization, 167
 - serialization, 144
- SPFileLevel, 74**
- SPFile.SendToOfficialFile, 171**
- SPFileVersion, 73**
- SPGridView, 181, 263**
 - AuditHistory.aspx, 273
 - SPAuditEntryGrid, 265
 - ViewState, 269
- SPItemEventDataCollection, 333, 335**
- SPItemEventProperties, 344**
- SPItemEventReceiver, 24, 64**
- SPList, 24, 40**
 - location, 108
 - ref, 308
 - SPDocumentLibrary, 41
- SPListEx, 25**
- SPListItem, 72, 348**
 - Record Routing Table, 347
 - serialization, 144
 - versioning metrics, 73–74
- SPListItemCollection, 72, 74–79, 303**
 - ECM2007.Versioning, 79
 - SetHold, 304
- SPListItemCollectionEx, 25**
- SPListItemCollectionEx.cs, 74–79**
- SPListItemVersion, 72–73**
- SPLongOperation, 168, 189**
- SPLongOperation.End, 169**
- spreadsheets, 12, 15**
- SPRoleAssignment, 83**
- SPSecurity**
 - `.RunWithElevatedPrivileges, 269`
- SPSite, 54, 222, 264**
- SPTraceView, 21**
- SPWeb, 54, 106, 169**
- SPWebApplicationBuilder, 124**
- SPWebApplicationBuilder.Create, 124**
- SPWeb.CreateDefaultAssociatedGroups, 84**
- SPWebProvisioningProvider, 103**

SQL, 138
standard properties, 42
Start Date, 128
StartWorkflow, 245
statement, 45–46. See also policy statement
Statement, 125–126, 129
static files, 15
storage
 auditing, 258
 properties, 108–110
 Record Routing Table, 281
 RecordSpecification.Execute, 150
 requirements, 17
String, 106
STSADM, 417–418
STSDEV, 21
Subject, 42, 112, 128
submissions
 ASPX, 172
 document libraries, 92, 175, 178
 forms, 137
 InfoPath, 137
 multiple records, 179–193
 Official File Web Service, 95–96
 permissions, 172–173
 programs, 177–178
 Records Repository, 94
 Setup, 103
SubmitFile, 106, 108, 308, 310
SuccessCancelFurtherProcessing, 309
SuccessContinueProcessing, 309
supplemental markings, 407
System.Attribute, 56
System.Configuration.Install, 24, 310
System.Configuration.Installer, 215
System.Management.Automation, 359
System.Web, 217
System.Web.UI.WebControls.WebParts
 .WebPart, 263
 <System.Workflow.ComponentModel
 .WorkflowCompiler>, 396
System.Xml.Serialization.
 .XmlSerializer, 144

T

Task List, 105
Team Builder, 9
TEMPLATE, 224
Template, 182

TemplateField, 186
templates
 Form Designer, 138
 Hold Reports, 302
 InfoPath, 138
 Records Center, 15
 Visual Studio, 25–32
 vstemplate, 26
Text, 177, 296
Text File, 224
TextBox, 225, 227–228
TextBoxPrinters, 225
this, 72
ThisAddIn_Startup, 230
timer job
 DoD 5015.2 Add-On Pack, 413–414
 expiration, 243–244
time-span, 245
Title, 42, 104, 105
ToString(), 250
ToStringEx, 72
TrackingRouter, 313–317
treeview, 55
TrustedPrintersFieldName, 218
Try, 326–327, 328
12 hive, 25, 92, 198
12/TEMPLATE, 179
12/TEMPLATE/FEATURES, 99
12/TEMPLATES/FEATURES/fields, 49
12/TEMPLATE/SiteTemplates/offfile, 102
Type, 329–330
TypeSpecifier, 330

U

ULS tracing, 21
UnaryLogicalExpression, 328
Unclassified Records, 105
Undelete, 257, 261
Uninstall, 215
Unregister, 210
Update, 257, 261, 265
uploads, 66
URL
 Official File Web Service, 171
 virtual paths, 68
U.S. regulations, 19–20
User, 296
user, 177
User Name, 105

userName, 106
using, 72, 79, 218, 314

V

ValidateContent, 312
ValidateListItem, 381
ValidateManifest, 198
ValidateMetadata, 312
Validating Router, 347–353
ValidatingRouter.cs, 352–353

validation

components, 330–341
content, 325–353
metadata, 391–395
schema, 327–330
Self-Validating Proposal, 342–347
Setup, 103
workflow, 391–395
XML, 325–326

ValidationFailed, 340

ValueType, 329

ValueType.cs, 337–340

VB.NET, 33

version history, 65

versioning, 64–82

document libraries, 82
metrics, 72–82
MOSS, 65
programs, 71–82
SPFile, 65

VersioningTestConsole.cs, 79–82

View, 257, 261

ViewState, 269

virtual methods, 209

virtual paths, 68

virtual property, 206

Visio, 6, 12

workflow, 382

Visual Studio, 20

.ASCX, 224–225
custom tools, 36–37
dependencies, 384
file plans, 140
Forms Designer, 138
IntelliSense, 48
schema, 33, 36–37
template, 25–32
12 hive, 25

WSS.XSD, 22
XML, 32–33
XSD.EXE, 33, 142

Visual Studio Extensions for SharePoint, 21

Visual Studio Tools for Office (VSTO), 138, 216

vital record indicator, 416

Vital Record Review, 416–417

vital records, 406–407

VSTA, 138

vstemplate, 26

VSTO. See **Visual Studio Tools for Office**

W

Web, 106

Web Components, 410

web parts

auditing, 262–271
personal permissions, 85
Setup, 103

Web Service Definition Language (WSDL), 171

Web Services (WS), 11, 138, 356

WebTemplateId, 289

WEBTEMPOFFICE.XML, 102

Windows PowerShell, 358, 359

Windows SharePoint Services (WSS), 21, 39–97

site definition, 102

WizardExtension, 28

Word, 14, 40, 67, 112–113, 229–232

workflow, 16, 105, 371–401

Cutoff Approval, 414–415
Designer, 6
Disposition Approval, 105
Disposition Approval Transfer, 416
DoD 5015.2 Add-On Pack, 414–417
ECM, 372
modeling, 381–382
.NET, 373
official records, 376–381
physical records, 292–294
primitive activities, 377–380
Setup, 103
validation, 391–395
Visio, 382
Vital Record Review, 416–417

Workflow Activity Library, 383–386

Workflow Design Wizard, 396–401

WorkflowExpirationAction, 248

wrapper classes, 142

Employee, 33–36
 .NET, 33
 partial, 35
 serialization, 142–144

WS. See Web Services

WSDL. See Web Service Definition Language

WSP Builder, 21

WSS. See Windows SharePoint Services

WSSACTIONS.XSD, 397–401

WSS=prefix, 310

WssTask, 380

WSS.XSD, 22

X

XML, 13–14, 16, 198

AuditEntry, 272
 CAML, 47
 content types, 47, 152
 customData, 200
 DataTable, 274
 de-serialization, 33
 document libraries, 40
 File Plan, 141
 GetRecordRoutingCollection, 95
 InfoPath, 131, 138, 141
 for maximum flexibility, 32–36

metadata, 176
 namespace, 44
 .NET, 22, 24
 OnCustomDataChange, 212
 policy features, 208
 property storage, 108
 Schema Editor, 33
 serialization, 202
 validation, 325–326
 virtual property, 206
 Visual Studio, 32–33

XMLDocument, 33, 219, 331, 344

XPath, 33

XPathNodeIterator, 95

xs:annotation, 22

xs:choice, 246

.xsd, 33

XsdClassGenerator, 36, 142, 167

xsd:dateTime, 176

XSD.EXE, 33, 142, 322, 332

XSD.exe, 246

xs:enumeration, 330

XSL, 134

XSLT, 49–51, 260

xs:sequence, 328

xs:string, 22–23, 327