

Microsoft® Windows® SharePoint® Services 3.0 Step by Step

*Olga Londer, Bill English,
Todd Bleeker, and
Penelope Coventry*

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GlossaryOn the CD

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5 Creating and Managing Libraries

In this chapter, you will learn to:

- ✓ Create libraries.
 - ✓ Add documents.
 - ✓ Add pictures.
 - ✓ Create a new folder in a library.
 - ✓ Check documents in and out from the document library.
 - ✓ Check documents in and out from the 2007 Microsoft Office suites.
 - ✓ Work with version history.
 - ✓ Create and configure a workflow.
 - ✓ Use a workflow.
 - ✓ Work with offline documents.
 - ✓ Synchronize documents with a Microsoft Office Groove workspace.
 - ✓ Delete and restore documents.
 - ✓ Use alerts.
-

One of the most compelling features that Microsoft Windows SharePoint Services provides is libraries. Libraries are a great place to store documents or forms. In the business world, being able to work with documents quickly and effectively is of paramount importance. In previous chapters, you learned that lists are an effective way to work with all types of data; libraries function similarly for documents and forms, such as Microsoft Office Word documents. Using SharePoint document libraries, you can filter and group documents as well as view metadata for documents stored in the library.

In this and the following chapter, you will learn how to work with documents in Windows SharePoint Services. This chapter focuses on creating libraries, adding documents and pictures to them, and working with documents in document libraries. In Chapter 6, “Working with Library Settings,” we will focus on modifying and configuring document libraries. You will use the libraries and views created in this chapter’s exercises to complete the exercises in Chapter 6.



Important Before you can use the practice sites provided for this chapter, you need to install them from the book’s companion CD to their default locations. See “Using the Book’s CD” on page xix for more information.

Important Remember to use your SharePoint site location in place of *http://wideworldimporters* in the following exercises.

Creating Libraries

You can use **document libraries** to store your documents on a SharePoint site rather than on your local computer’s hard drive so that other employees can find and work with them more easily. Libraries are used to store files whereas lists are used to store other types of content. Like lists, libraries contain metadata that allow you to filter, sort, and group items in the libraries easily.

Creating Document Libraries

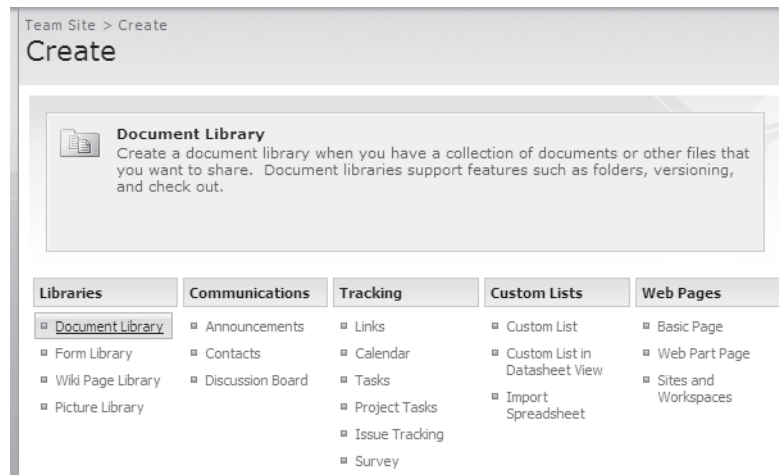
When you create a new SharePoint site, a generic document library called Shared Documents is created for you. Because this library lacks a descriptive name, you should create new libraries for a particular business category or subject instead. In the examples used in this book, Bill Malone of Wide World Importers could create a document library for documents describing different types of art that the company carries or one for company newsletters. You want to make sure that the name of a document library is descriptive and that each library has a specific topic to make it easier to find documents. Storing all documents together in the Shared Documents—or any—document library defeats the purpose of using SharePoint sites to make information easier to locate.

In the following exercise, you will open your SharePoint site and create a new document library called Oak Furniture.

➔ **OPEN** the SharePoint site in which you'd like to create a document library. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient rights to create a document library. If in doubt, see the Appendix on page 435.

1. On the **Site Actions** menu, click **Create**. The Create Page page appears.




2. In the **Libraries** column, click **Document Library**. The New Document Library page is displayed.
3. In the **Name** box, type the name that you want to give the document library, for example **Oak Furniture**.
4. In the **Description** box, type the description of the document library, for example, **This document library contains descriptive information about individual pieces of oak furniture.**

5. In the **Document Version History** area, under **Create a version each time you edit a file in this document library?**, select the **Yes** option.

Leave all other areas of the page at their default settings. You have entered all of the necessary information to create a document library.

Team Site > Create > New

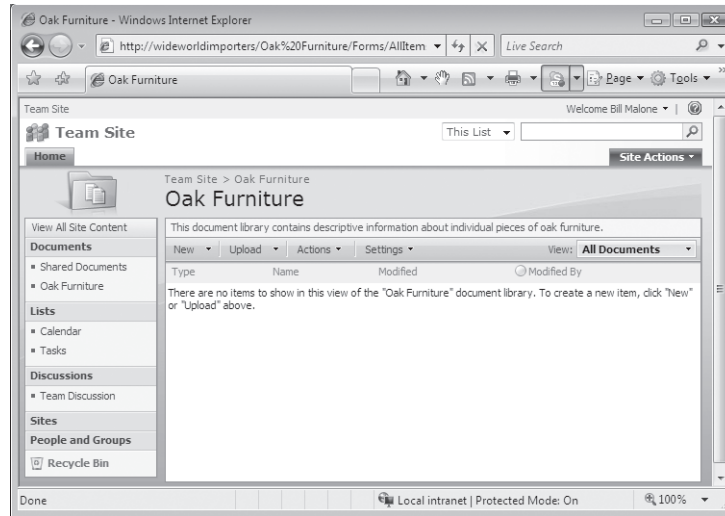
New

Name and Description Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this document library.	Name: Oak Furniture Description: This document library contains descriptive information about individual pieces of oak furniture.
Navigation Specify whether a link to this document library appears in the Quick Launch.	 Display this document library on the Quick Launch? <input checked="" type="radio"/> Yes <input type="radio"/> No
Document Version History Specify whether a version is created each time you edit a file in this document library. Learn about versions.	Create a version each time you edit a file in this document library? <input checked="" type="radio"/> Yes <input type="radio"/> No
Document Template Select a document template to determine the default for all new files created in this document library.	Document Template: Microsoft Office Word 97-2003 document

Create Cancel

6. Click the **Create** button.

The new Oak Furniture document library appears.



CLOSE the browser.

Creating Form Libraries

Form libraries function similarly to document libraries, but they store specific types of documents—forms—and have enhanced integration with Microsoft Office InfoPath, such as allowing you to create form libraries from Office InfoPath. Chapter 14, “Using Windows SharePoint Services with InfoPath 2007,” discusses in detail how Windows SharePoint Services and InfoPath work together.

Forms are a more structured type of information. They contain a set of fields that are filled out in a uniform manner. Form libraries are excellent repositories for structured documents, such as Purchase Orders or Vacation Requests. To obtain the full benefit of form libraries, you must use InfoPath for designing and filling out forms.

The following exercise walks you through creating a new form library by using Windows SharePoint Services. In this exercise, you will open the SharePoint site and create a new form library called Purchase Orders. You will then associate a Purchase Order form template with that library so that, when someone fills out the form, they are presented with the standard Purchase Order form.

Note that this is a long series of steps to perform, so please keep in mind that you will be accomplishing the following tasks.

- Creating a new form library
- Associating a new form with the form library
- Setting this form as the primary form that is invoked when the New Form command is invoked



OPEN the SharePoint site in which you'd like to create a form library. If prompted, type your user name and password, and then click OK.

BE SURE TO have Microsoft Office InfoPath 2007 installed.

BE SURE TO verify that you have sufficient rights to create a form library. If in doubt, see the Appendix on page 435.

1. From the **Site Actions** menu, click **Create**. The Create Page page appears.
2. In the **Libraries** column, click **Form Library**. The New Form Library page appears.
3. In the **Name** box, type **Purchase Orders**.
4. In the **Description** box, type **Contains purchase orders**.

You have entered all of the necessary information to create a form library.

5. Click **Create**.

The form library is created, and you are taken to the new Purchase Orders form library. At this point, if you click New Document you will be presented with a blank form. You still need to associate a necessary form template with the newly created library. To associate a form template with a form library, it is necessary to create a new content type as the default selection when the New button is created.

6. From the **Site Actions** menu, click **Site Settings**.
7. Under **Galleries**, click the **Site Content Types** link. The Site Content Types Gallery appears.
8. Click **Create**.
9. In the **Name** input box, type **Purchase Orders**.
10. On the **Select Parent Content Type From:** drop-down list, click **Document Content Types**.

11. On the **Parent Content Type**: drop-down list, click **Form**. Leave the rest of the page at the default settings.

Team Site > Site Settings > Site Content Type Gallery > Site Content Type > Advanced Settings

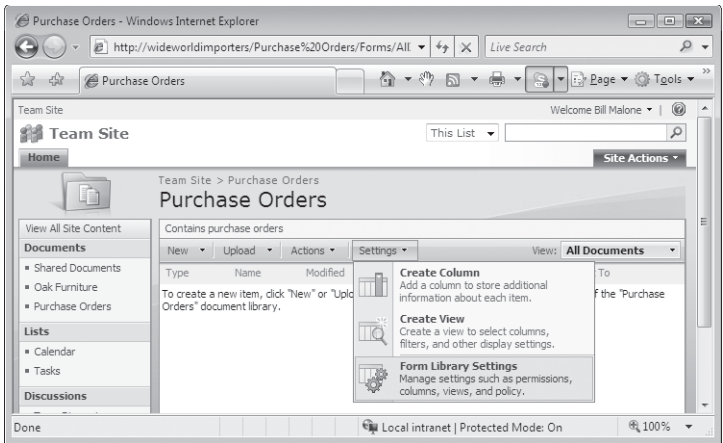
Site Content Type Advanced Settings: Purchase Order

Use this page to change advanced settings for this content type.

Document Template Specify the document template for this content type.	<input type="radio"/> Enter the URL of an existing document template: <input type="text"/> <input checked="" type="radio"/> Upload a new document template: <input type="text" value="C:\Program Files\Microsoft Office\Office12\INFORMS\1033\purchord.xsn"/> <input type="button" value="Browse"/>
Read Only Choose whether the content type is modifiable. This setting can be changed later from this page by anyone with permissions to edit this type.	Should this content type be read only? <input type="radio"/> Yes <input checked="" type="radio"/> No
Update Sites and Lists Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to the child site and list content types will be lost.	Update all content types inheriting from this type? <input checked="" type="radio"/> Yes <input type="radio"/> No

12. Click **OK**. The **Site Content Types: Purchase Orders** page appears.
13. Click the **Advanced Settings** link.
14. Select the **Upload a New Document Template** option.
15. Navigate to C:\Program Files\Microsoft Office\Office12\INFFORMS\1033 folder and select purchord.xsn template file. Note: Number 1033 in the path is a Locale ID (LCID) for English language. In this case, LCID is used as a folder name. If your Office installation is for language other than English, then the numbered folder name will be a LCID for the language used. For example, LCID for French is 1036, and LCID for Russian is 1049.
16. Click **Open**.
17. Click **OK**. You are taken to the **Site Content Type: Purchase Orders** page.
18. On the breadcrumb, click the **Team Site** link.
19. In the **Quick Launch**, click the **Purchase Orders** form library link.

20. From the **Settings** link, click **Form Library Settings**. The Customize Purchase Orders page will appear.



21. Click the **Advanced Settings** link. The Form Library Advanced Settings: Purchase Order page appears.
22. In the **Content Types** area, under **Allow Management of Content Types?**, select the **Yes** option.

Team Site > Purchase Orders > Settings > Advanced Settings

Form Library Advanced Settings: Purchase Orders

Content Types Specify whether to allow the management of content types on this form library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.	Allow management of content types? <input checked="" type="radio"/> Yes <input type="radio"/> No
Document Template Type the address of a template to use as the basis for all new files created in this document library. When multiple content types are enabled, this setting is managed on a per content type basis. Learn how to set up a template for a library.	Template URL: <input type="text" value="Purchase Orders/Forms/template.xml"/>
Browser-enabled Documents Specify how to display documents that are enabled for opening both in a browser and a client application. If the client application is unavailable, these documents will always be displayed as Web pages in the browser.	Opening browser-enabled documents <input checked="" type="radio"/> Open in the client application <input type="radio"/> Display as a Web page
Custom Send To Destination Type the name and URL for a custom Send To destination that you want to appear on the context menu for this list. It is recommended that you choose a short name for the destination.	Destination name: (For example, Team Library) <input type="text"/> URL: <input type="text"/>
Folders Specify whether the "New Folder" command appears on the New menu. Changing this setting does not affect existing folders.	Display "New Folder" command on the New menu? <input checked="" type="radio"/> Yes <input type="radio"/> No
Search Specify whether this form library should be visible in search results. Users who do not have permission to see these items will not see them in search results, no matter what this setting is.	Allow items from this form library to appear in search results? <input checked="" type="radio"/> Yes <input type="radio"/> No

OK Cancel

23. Leave the rest of the page at the default settings, and then click **OK**.

24. On the **Customize Purchase Orders** page, scroll down until you see the **Content Types** area. One content type, called **Form**, is associated with this form library.
25. Click the **Add From Existing Content Types** link. The **Add Content Types: Purchase Order** page appears.
26. From the **Available Site Content Types** list, click the **Purchase Order** content type.
27. Click the **Add** button, and then click **OK**.
28. Click the **Change New Button Order and Default Content Type** link.
29. On the **Position from Top** drop-down list, ensure that the **Purchase Order** content type is assigned the number one (1) and click **OK**.

Team Site > Purchase Orders > Settings > Change New Button Order

Change New Button Order and Default Content Type

Use this page to set the default content type and to control the order and visibility of content types on the new button.

Content Type Order	Visible	Content Type	Position from Top
Content types not marked as visible will not appear on the new button.	<input checked="" type="checkbox"/>	Form	2
Note: The first content type will be the default content type.	<input checked="" type="checkbox"/>	Purchase Orders	1

OK Cancel

30. On the breadcrumb, click the **Purchase Orders** link and then click the **New** button. This action invokes Office InfoPath 2007 (if it is installed on your computer), and the default Purchase Order form appears.



CLOSE the browser and InfoPath 2007.

Creating Picture Libraries

Picture libraries work in the same way as document libraries except that they are optimized for storing the picture file type. The picture library provides special views for looking at all of the pictures in the library as a slideshow. It also provides enhanced features for editing and downloading pictures by integrating with Microsoft Office Picture Manager.

In this exercise, you will open the SharePoint site and create a picture library for storing photographs of each employee.

➔ **OPEN** the SharePoint site in which you'd like to create a picture library. If prompted, type your user name and password, and then click OK.
BE SURE TO verify that you have sufficient rights to create a picture library. If in doubt, see the Appendix on page 435.

1. From the **Site Actions** menu, click **Create**. The Create Page page appears.
2. In the **Libraries** area, click **Picture Library**. The New Picture Library page appears.
3. In the **Name** box, type **Employee Photos**.
4. In the **Description** box, type **Contains photographs of each employee**.

You have entered all of the necessary information to create a picture library.

Team Site > Create > New

New

Name and Description
Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this picture library.

Name:
Employee Photos

Description:
Contains photographs of each employee

Navigation
Specify whether a link to this picture library appears in the Quick Launch.

Display this picture library on the Quick Launch?
☒ Yes ☐ No

Picture Version History
Specify whether a version is created each time you edit a file in this picture library. [Learn about versions.](#)

Create a version each time you edit a file in this picture library?
☐ Yes ☒ No

Create Cancel

5. Click **Create**.

The picture library is created, and you are taken to the Employee Photos picture library.

✕ **CLOSE** the browser.

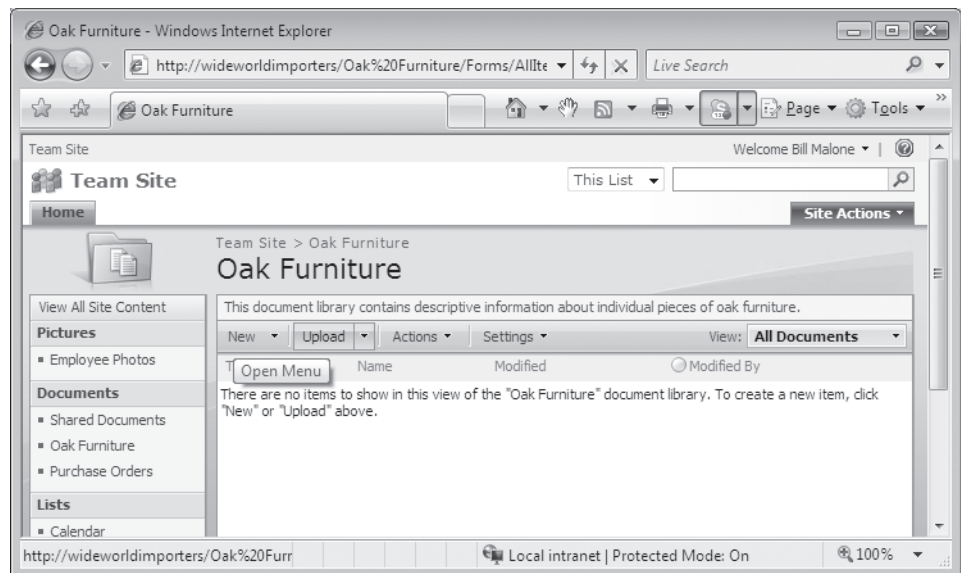
Adding Documents

After a library has been created, you can populate it with documents. Once documents are placed in the library, you can search for and filter them to make it easier to find what you are looking for, as well as collaborate with others to help develop the final version of the document. Document libraries give you the ability to keep track of new versions of a document as it is modified and revert to older versions if necessary. These topics will be covered in the next chapter. First, you need to ensure that your documents are uploaded and available in the SharePoint library.

In the following exercise, you will make two new furniture descriptions available to employees by uploading them to the Oak Furniture library.

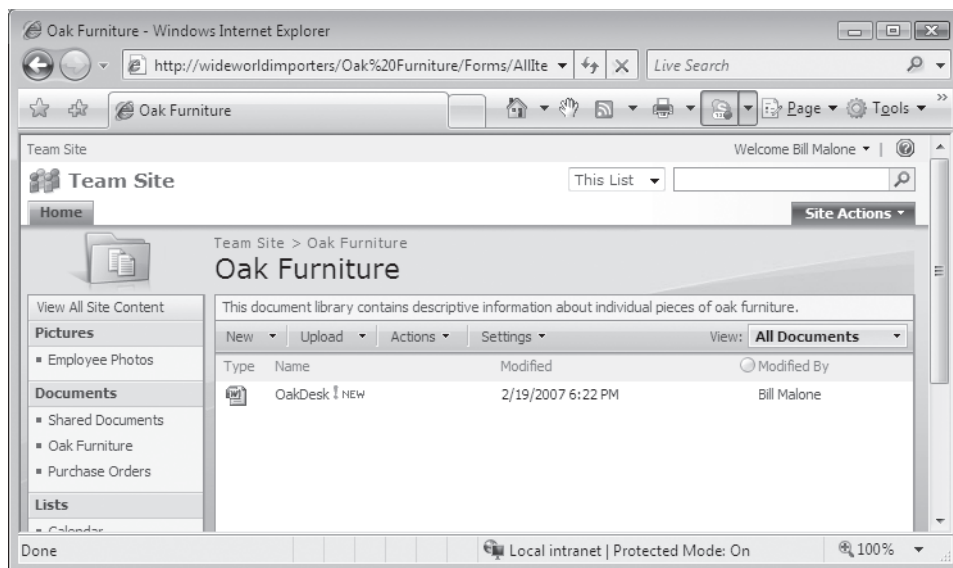
- ➔ **USE** the practice files OakDesk.docx and OakChest.docx located in the practice file folder for this chapter. The practice files are located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.
- OPEN** the SharePoint site to which you'd like to upload a file to a document library. If prompted, type your user name and password, and then click OK.

1. In the **Quick Launch** pane, click the **Oak Furniture** document library link.
2. In the **Oak Furniture** document library, click the **Upload** button. The Oak Furniture: Upload Document page appears.



To upload a single document, click the Browse button. To upload multiple documents from the same location at the same time, click the Upload Multiple Files link. In this exercise, we'll upload a single document.

3. Click the **Browse** button.
4. In the **Choose File** dialog box, browse to the file you would like to upload, such as **OakDeck.docx**, and then click **Open**.
5. Click **Save** and **Close** to return to the Oak Furniture library.



6. Repeat Steps 3–6 for the **OakChest.docx** file.



CLOSE the browser.

Tip You can also upload a document by copying and pasting from Windows Explorer and by using the Explorer view in Windows SharePoint Services, located on the left side of the document library page.

Adding Pictures

Adding pictures to a picture library is much like adding documents to a document library. In the following exercise, you will add an employee picture to the Employee Photos document library.



USE the practice file `pjcov.jpg` in the practice file folder for this chapter. The practice file is located in the `Documents\Microsoft Press\SBS_WSSv3\Chapter 05` folder.

OPEN the SharePoint site that you'd like to use to upload a picture to a picture library. If prompted, type your user name and password, and then click OK.

1. On the **Quick Launch**, click the **Employees Photos** picture library link. The Employee Photos document library appears.
2. Click **Upload**. The Add Pictures: Employee Photos page appears.
3. Click **Browse**.
4. In the **Choose File** dialog box, browse to the file you would like to upload, such as `pjcov.jpg`, and then click **Open**.

5. Click **OK**. The Employee Photos: `pjcov` page appears.

This page is used to populate metadata on the picture, including name, date, description, and keywords.

6. Fill in the metadata if needed, and then click **OK**.

The picture has been uploaded, and you are taken back to the Employee Photos picture library.



CLOSE the browser.

Creating a New Folder in a Library

When numerous documents exist in a library, you can create a new folder to help organize the documents in a more efficient way.

Tip Windows SharePoint Services provides other mechanisms for organization, such as views and filters. However, people are often most familiar with folders and thus find it easier to create a folder structure.

In this exercise, you will create a folder for documents classified as In-Progress so that they can be differentiated from completed documents.



OPEN the SharePoint site that you'd like to use to add a folder to a document library. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient permissions to create a folder in the document library. If in doubt, see the Appendix on page 435.

1. In the **Quick Launch** pane, click **Oak Furniture**. The Oak Furniture document library appears.
2. Click on the **New** drop-down list, and then click **New Folder**. The New Folder: Oak Furniture page appears.
3. In the **Name** box, type the name of the folder you would like to create, such as **In Progress**.
4. Click **OK**.

The updated Oak Furniture page appears with the In Progress folder added to the page.

Team Site

Welcome Bill Malone

Team Site

This List

Home

Site Actions

Team Site > Oak Furniture

Oak Furniture

This document library contains descriptive information about individual pieces of oak furniture.

New Upload Actions Settings View: All Documents

Type	Name	Modified	Modified By
Folder	In Progress	2/19/2007 6:26 PM	Bill Malone
Document	OakDesk ! NEW	2/19/2007 6:22 PM	Bill Malone

View All Site Content

Pictures

- Employee Photos

Documents

- Shared Documents
- Oak Furniture
- Purchase Orders

Lists



CLOSE the browser.

Checking Documents In and Out from the Document Library

One of the features provided by Windows SharePoint Services is basic document management. **Checking out** and **checking in** documents lets others know what documents you are working on so that they don't work on them at the same time. When using check-in, you can also enter comments about what you've changed that others can then view.

In the following exercise, you will change the comments in a document to reflect that this is the final version of the document.



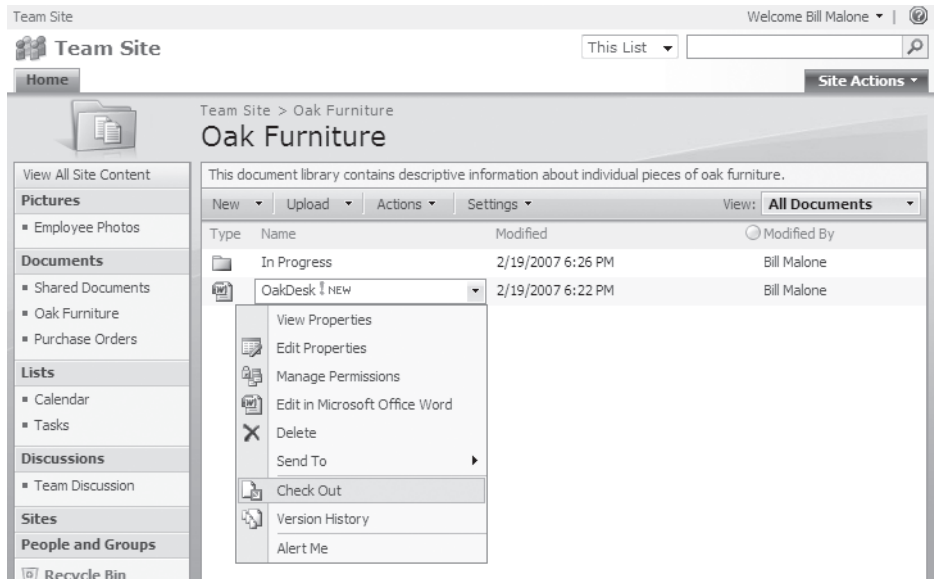
USE the practice file Oakchest.docx in the practice file folder for this chapter. The practice file is located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.

OPEN the SharePoint site from which you'd like to check in or check out a document. If prompted, type your user name and password, and then click OK.

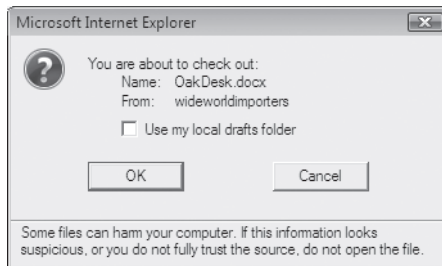
BE SURE TO verify that you have sufficient permissions to modify the properties of a document in the document library. If in doubt, see the Appendix on page 435.

1. On the Quick Launch, click **Oak Furniture**. The Oak Furniture document library appears.
2. Move your mouse over the document you would like to check out, such as **OakChest.docx**.

3. An arrow appears to the right of the document name. Click the arrow.
A menu of options available for working with the document appears.



4. Click **Check Out**. A dialog box appears informing you that the document will be placed in the local drafts folder.



5. Click **OK**.
6. Move your mouse over **OakChest.docx**. When an arrow appears to the right of the file name, click the arrow.
7. Click **Check in**. The Check In page appears.
8. Click **Check In Document**.

9. In the **Check In** comments box, type **This is the final version of this document.**

Team Site > Oak Furniture > OakDesk > Check In

Check in

Use this page to check in a document that you have currently checked out.

Document Check In
Other users will not see your changes until you check in. Specify options for checking in this document.

Keep the document checked out after checking in this version?
☐ Yes ☒ No

Comments
Type comments describing what has changed in this version.

Comments:
This is the final version of this document.

OK Cancel

10. Click **OK** to return to the Oak Furniture document library.



CLOSE the browser.

Checking Documents In and Out from the 2007 Microsoft Office Suite

Checking documents in or out by using the browser is a nice feature, but not nearly as useful as checking documents in and out using the Microsoft Office System. The 2007 Microsoft Office suite has built-in SharePoint integration, and you can easily check documents in and out using any of the Microsoft Office suite applications.

In the following exercise, you will open and check out a document from a SharePoint library in Office Word. You will make minor modifications to the document, save it, and then check it back in to the document library.

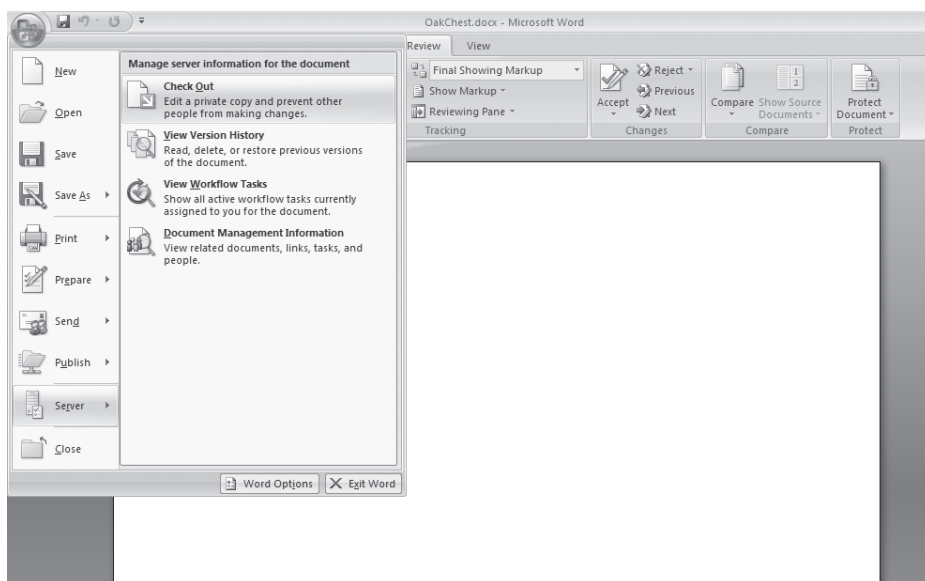


USE the practice file *Oakchest.docx* in the practice file folder for this chapter. The practice file is located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.

BE SURE TO verify that you have sufficient permissions to check out, modify, and check in a document in the document library. If in doubt, see the Appendix on page 435.

OPEN the SharePoint site from which you'd like to check in or check out a document. If prompted, type your user name and password, and then click **OK**.

1. From the **Quick Launch** click **Oak Furniture**. The Oak Furniture document library appears.
2. Move your mouse over the document that you would like to edit, such as **OakChest.docx**. When an arrow appears to the right of the document name, click the arrow.
3. Click **Edit in Microsoft Office Word**.
4. You might be prompted to re-enter your login credentials. If prompted to do this, re-enter your credentials and click **OK**. The file opens in Word.
5. You might be presented with a **User Name** dialog box to enter your name and initials. If so, enter your name and initials.
6. Click the **Office** button, point to **Server**, and then click **Check Out**.



7. Make a change to the document, such as bolding some text.
8. Click **Office**, and then click **Save**.
9. Click **Office**, point to **Server**, and then click **Check In**.
10. In the **Check In Comments** dialog box, type **This is the copy edited with Microsoft Office Word 2007**.
11. Click **OK**, and then close Word.



CLOSE the browser.

Working with Version History

When **versioning** is enabled, Windows SharePoint Services creates a separate copy of the document each time it is edited. Although this takes up extra space on the server, it also makes it easy to revert to an older version of the document if necessary. A more in-depth discussion of versioning will be covered in Chapter 6.

When you view a document's version history, you see a list of the occasions when this document was edited and saved as well as the author's comments on those changes.

In the following exercise, you will see what changes have been made to the OakChest.docx document and then revert back to the final copy of the document.



USE the practice file Oakchest.docx in the practice file folder for this chapter. The practice file is located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.

BE SURE TO verify that you have sufficient permissions to check out, modify, and check in a document in the document library. If in doubt, see the Appendix on page 435.

OPEN the SharePoint site for which you'd like to see the version history for a document. If prompted, type your user name and password, and then click OK.

1. From the **Quick Launch**, click **Oak Furniture**. The Oak Furniture document library appears.
2. Move your mouse over the document for which you want to see the version history, such as **OakChest.docx**. When an arrow appears to the right of the document name, click the arrow.

A drop-down menu appears.

3. Click **Version History**.

You are taken to the versions saved for the OakChest.docx page. Each version of the saved document, the date and time that version was created, and any comments for the version appear.

Team Site > Oak Furniture > OakDesk > Version History

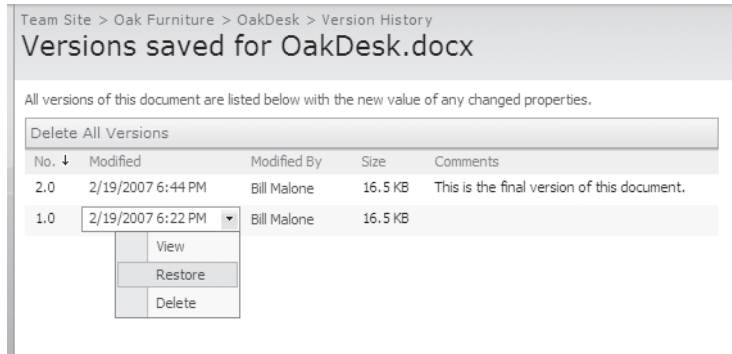
Versions saved for OakDesk.docx

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions

No. ↓	Modified	Modified By	Size	Comments
2.0	2/19/2007 6:44 PM	Bill Malone	16.5 KB	This is the final version of this document.
1.0	2/19/2007 6:22 PM	Bill Malone	16.5 KB	

4. Move the mouse over an earlier version of the document and click the arrow that appears.
5. On the drop-down menu, click **Restore**.



6. The dialog box that appears indicates that you are about to replace the current version with the selected version. Click **OK**.

There is now an additional, unpublished version. Windows SharePoint Services actually copies the version you want to restore and makes it the newest version. If you want to publish this version, you need to do so manually.



CLOSE the browser.

Deleting Documents

Documents accumulate over time, and you eventually need to delete those that are no longer needed. In this exercise, you will delete a document that is no longer in use.



USE the practice file Oakchest.docx in the practice file folder for this chapter. The practice file is located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.

BE SURE TO verify that you have sufficient permissions to check out, modify, and check in a document in the document library. If in doubt, see the Appendix on page 435.

OPEN the SharePoint site from which you'd like to delete a document. If prompted, type your user name and password, and then click OK.

1. From the **Quick Launch**, click **Oak Furniture**. The Oak Furniture document library appears.

2. Move your mouse over the document you would like to delete, such as **OakChest.docx**. When an arrow appears to the right of the document name, click the arrow.
3. On the drop-down menu, click **Delete**.
4. In the dialog box that asks whether you are sure you want to delete, click **OK**. The document is moved into your Recycle Bin.
5. To recover your document, on the **Quick Launch**, click the **Recycle Bin** link.
6. Select the check box next to the **OakChest.docx** document, and then click the **Restore Selection** link.



CLOSE the browser.

Working with Workflows

You might want to route a document through an approval process before publishing it. You can create workflows within the document library without contacting your System Administrator.

There are several different ways to create workflows; you'll create a new workflow associated with the Oak Furniture document library. To create this workflow, you first need to specify at least three stages for the new workflow.

In the following exercise, you will add a site column to the Oak Furniture document library that gives you a choice for each workflow state.



USE the practice file *Oakchest.docx* in the practice file folder for this chapter. The practice file is located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.

BE SURE TO verify that you have sufficient permissions to create a workflow in the document in the document library. If in doubt, see the Appendix on page 435.

OPEN the SharePoint site from which you'd like to delete a document. If prompted, type your user name and password, and then click OK.

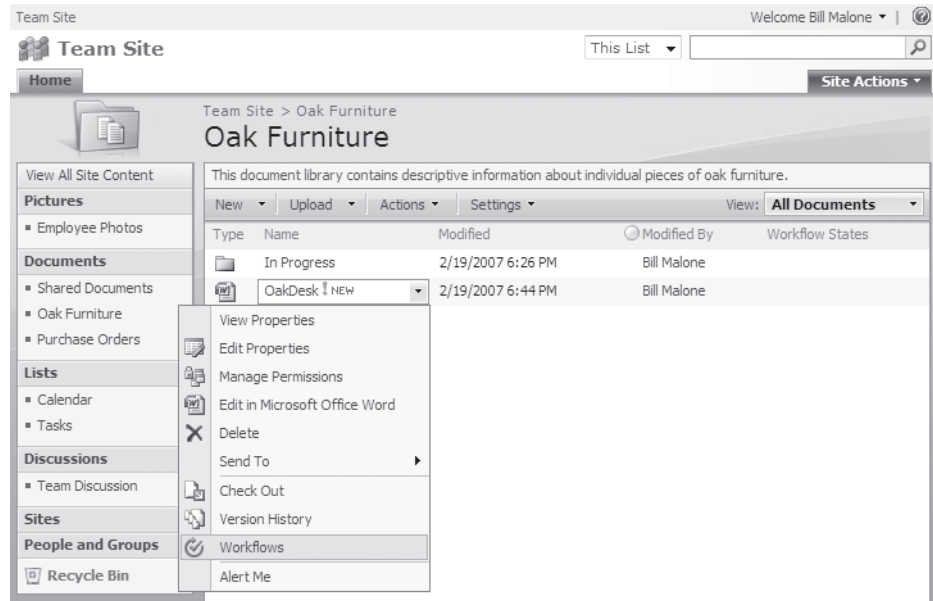
1. On the **Quick Launch** of the home page of **Team Site**, click the **Oak Furniture** library link.
2. Under the **Settings** menu options, click **Create Column**.
3. In the **Name** input box, type **Workflow States**.
4. Select the **Choice** option.

5. In the **Type Each Choice on a Separate Line**: input box, enter three choices: **Submitted to Approver #1, Submitted to Approver #2 and Approved**. Be sure to delete the three pre-defined generic choices first.
6. Click **OK**.

Once the new column is created, you can create the new workflow.
7. From the **Settings** menu in the document library, click the **Document Library Settings** link.
8. Click the **Workflow Settings** link. The Add a Workflow: Oak Furniture page appears.

By default, one workflow appears named Three-State Workflow.
9. Type a new name for this workflow, such as **Approval Workflow**.
10. On the drop-down list of the **Select a task list**, select **New Task List**.
11. In the **Start** options, leave the selections at their default settings and click **Next**.
12. In the **Workflow States** area, the column you added to the Oak Furniture document library automatically appears with the three choices that you entered for the three states of the workflow. If it does not appear, from the **Select a Choice** drop-down list, click **Workflow States**.
13. Enter the initial, middle, and final states on the drop-down list if you needed to select the workflow states as directed at the end of Step 13.
14. Clear both of the **Send E-mail Message** check boxes and then leave the rest of the workflow creation page as is and click **OK**.

Now, when you click the drop-down list next to a document, a workflows selection appears from which you can choose the Approval workflow to route the document once it is ready to be approved.



CLOSE the browser.

Using Alerts

One of the most difficult obstacles encountered in the business world is knowing when information changes. Windows SharePoint Services can help with this problem by enabling you to subscribe to an **alert**. When a document changes to which you subscribe, you receive an e-mail message stating that the document has changed.

For example, you (Bill Malone in the example) may want to know when the OakChest.docx document is updated. In the following exercise, you will set up an alert for this document and then receive an alert that it has been changed.

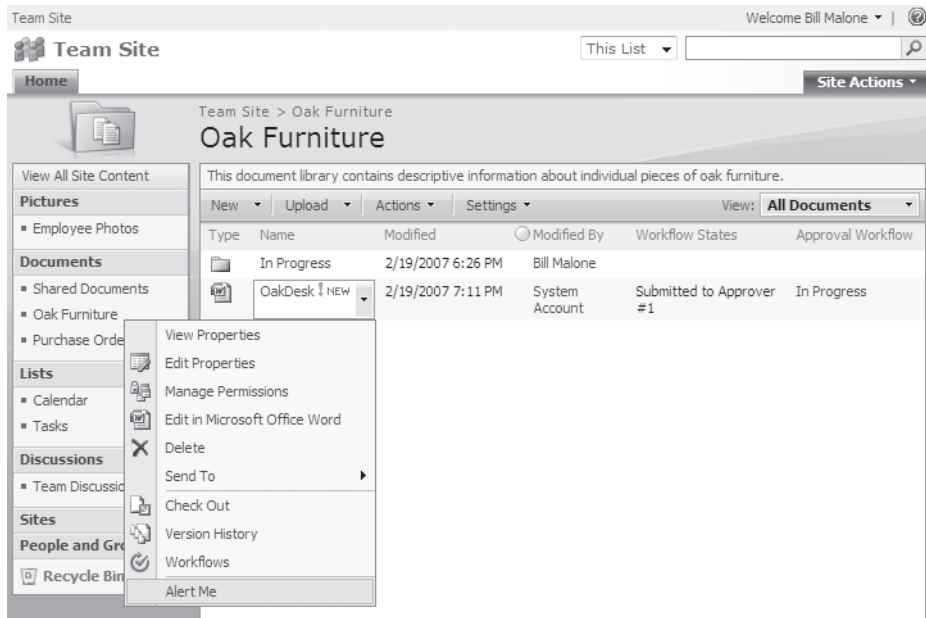


USE the practice file Oakchest.docx in the practice file folder for this chapter. The practice file is located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.

BE SURE TO verify that you have sufficient permissions to check out, modify, and check in a document in the document library, as well as create alerts in the site. If in doubt, see the Appendix on page 435.

OPEN the SharePoint site on which you'd like to set up an alert on a document. If prompted, type your user name and password, and then click OK.

1. From the **Quick Launch**, click **Oak Furniture**. The Oak Furniture document library appears.
2. Move your mouse over the document for which you would like an alert, such as **OakChest.docx**. When an arrow appears to the right of the document name, click the arrow.
3. Click **Alert Me**.



The New Alert: Oak Furniture: OakChest.docx page appears. You are given several options on the frequency of alerts as well as when to be alerted.

4. Retain the default values for this exercise and click **OK**.

Important If your server is not configured to send an e-mail message, an Error page will appear. If this page appears, you cannot complete the rest of the steps in this section.

You are returned to the Oak Furniture document library.

5. Move your mouse over **OakChest.docx**. When an arrow appears to the right of the document name, click the arrow.
6. Click **Edit in Microsoft Office Word**.
7. When the dialog box appears that displays a warning, click **OK** to open the file. The file will open in Word.

8. Click **File**, and then click **Check Out**.

You now make a change to this document.

9. Click **File**, and then click **Save**.

10. Click **File**, and then click **Check In**.

11. In the **Check In Comments** dialog box, click **OK**.

12. Close **Word**.

After a few minutes, you should receive two e-mail messages. The first message indicates that an alert was successfully created. The second message indicates that OakChest.docx has been modified.



CLOSE the browser.

Working with Offline Documents

There are two ways to work with offline documents in Windows SharePoint Services. The first method is to copy the documents to your Microsoft Office Outlook client. The second method is to synchronize your documents with a Microsoft Office Groove workspace.



USE the practice file Oakchest.docx in the practice file folder for this chapter. The practice file is located in the *Documents\Microsoft Press\SBS_WSSv3\Chapter 05* folder.

BE SURE TO verify that you have sufficient permissions to check out, modify, and check in a document in the document library. If in doubt, see the Appendix on page 435.

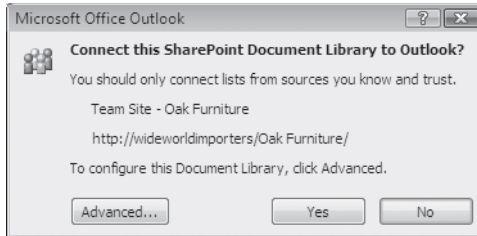
OPEN the SharePoint site on which you'd like to copy documents offline. If prompted, type your user name and password, and then click OK.

To take documents offline by using Office Outlook, you can perform the following steps.

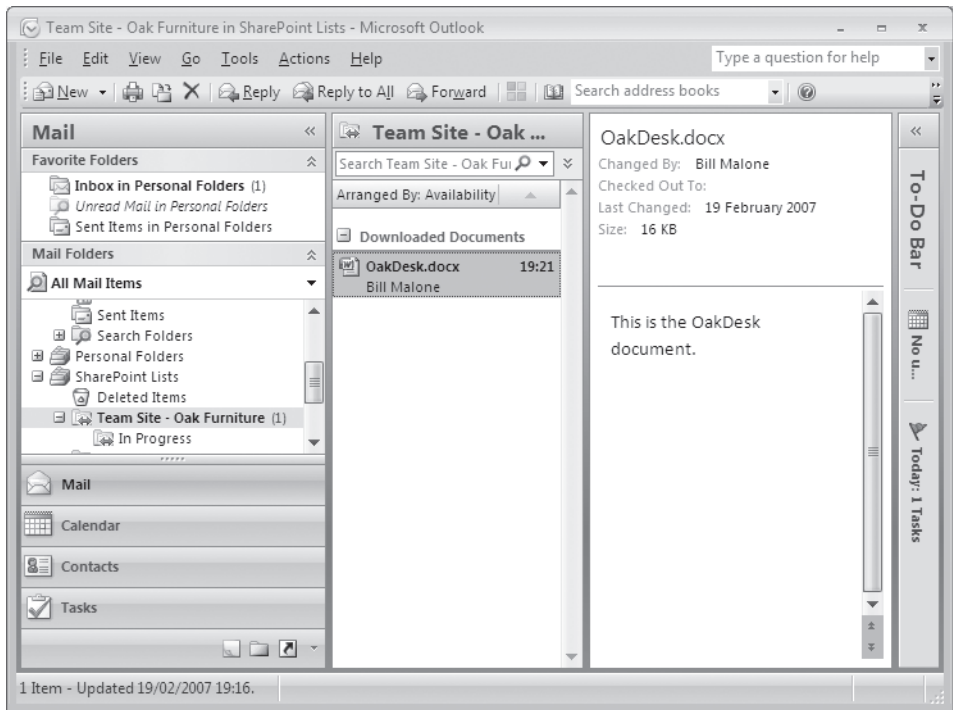
1. From the **Team Site** home page, click the **Oak Furniture** library link.

- Click the **Actions** menu, and then choose **Connect to Outlook**.

A dialog box appears asking whether you trust this source and want to connect this document library to Outlook.



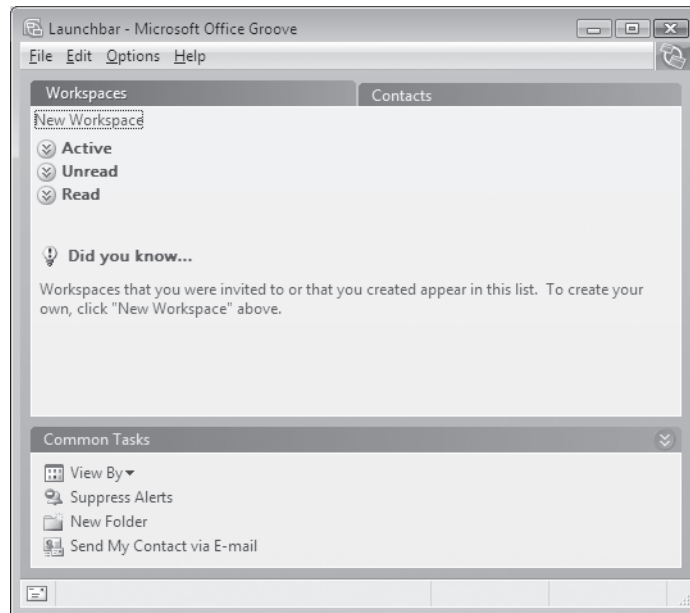
- When you select **Yes**, a SharePoint list is automatically created in Outlook, and the documents in the library are automatically downloaded into Outlook as attachments to e-mails.



CLOSE the browser.

The other method to take documents offline is to synchronize them by using an Office Groove workspace. This method is a bit more complex, but its advantage is that you can synchronize various lists from different sites to the same Groove workspace. To synchronize documents to a Groove workspace, complete the following steps.

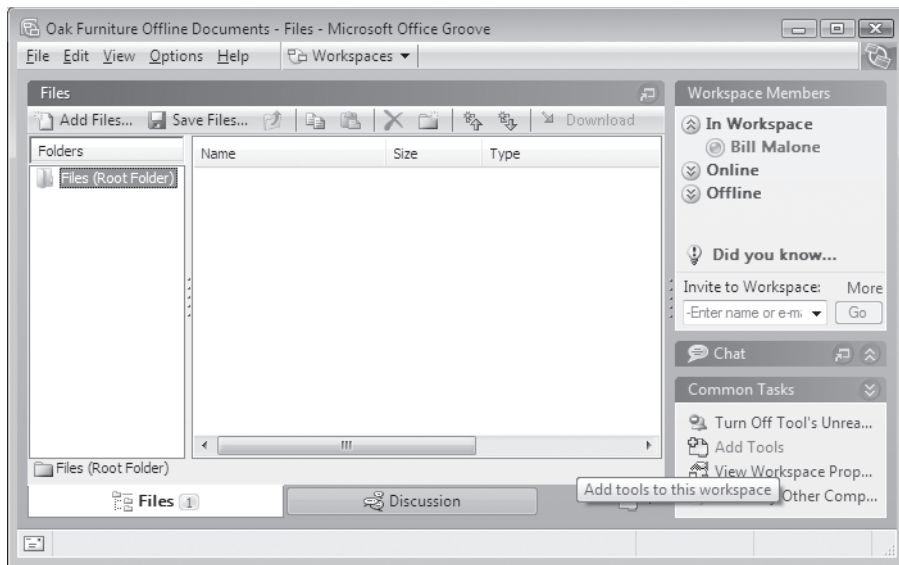
1. Open your **Groove** client. The shortcut can be found on the **All Programs** menu selection list inside the **2007 Microsoft Office suite** menu options.
2. In the **Groove** client, click **New Workspace**.



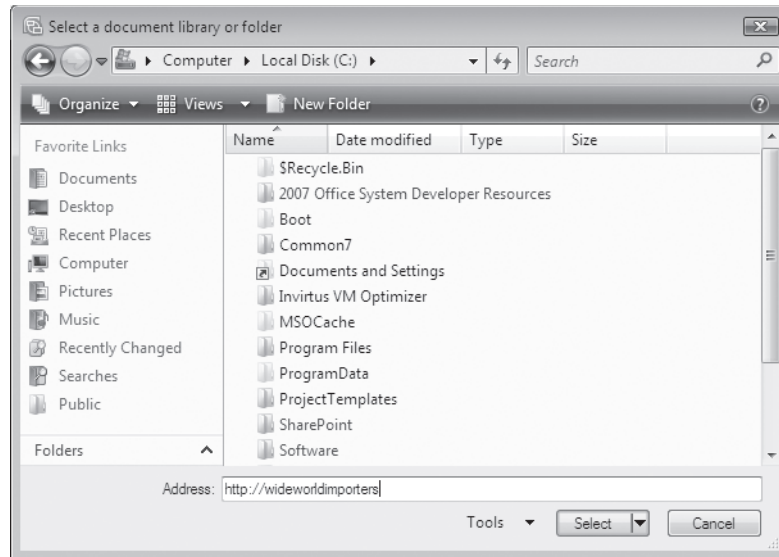
This invokes the Create New Workspace dialog box, where you can give the new workspace a name as well as specify the type of workspace you want to create.

3. Enter **Oak Furniture Offline Documents** as the name of the new workspace, and then click **OK**.

4. In the **Oak Furniture Offline Documents** workspace, under the **Common Tasks** list, click the **Add Tools** link.

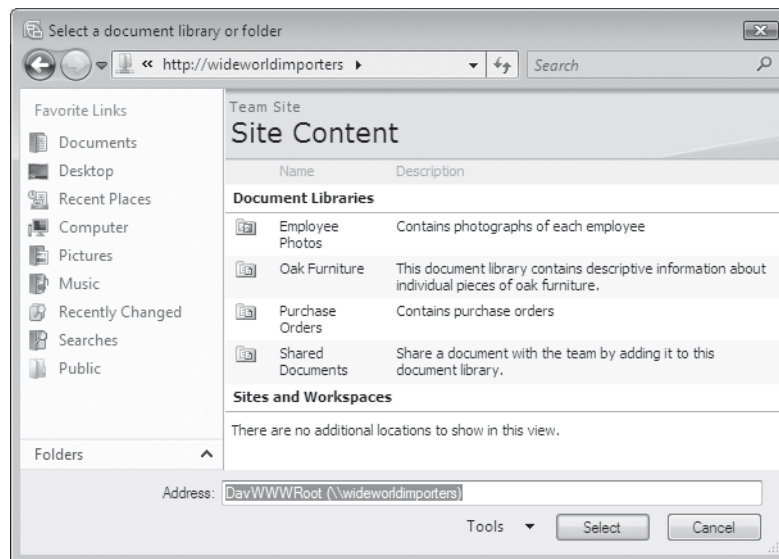


5. In the **More Tools** dialog box, select the **SharePoint Files** check box and click **OK**.
6. Click the **Setup** button that automatically appears.
7. In the **Address:** input box, enter the URL of the SharePoint site with which you wish to connect, such as <http://wideworldimporters>, and click **Select**.

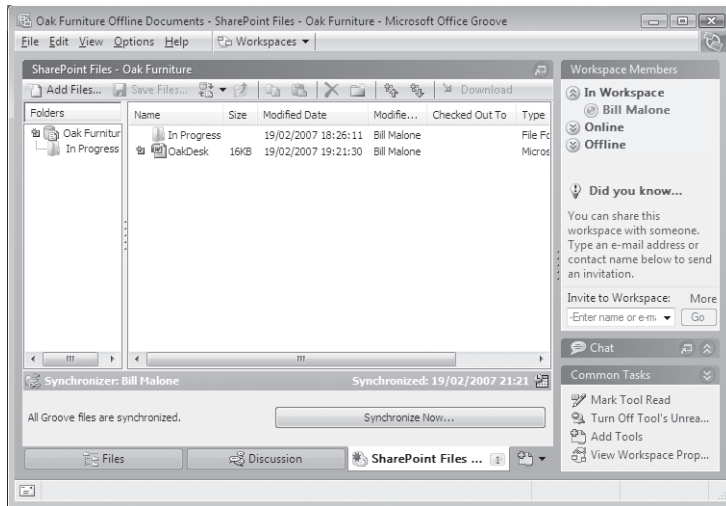


Once the Groove client connects to the SharePoint site, it delineates all of the lists and libraries in the site.

8. Choose the **Oak Furniture** document library by double-clicking the library.



9. Click **Select**, which causes the Oak Furniture items to be synchronized to your local hard drive.



Note that both files and folders are synchronized to the Groove client, which holds copies of its documents on your local hard drive. You can repeat these steps to connect to other SharePoint sites and synchronize their libraries and lists into a common workspace. Of course, if you do this, give your workspace a more intuitive name than that shown in this exercise.



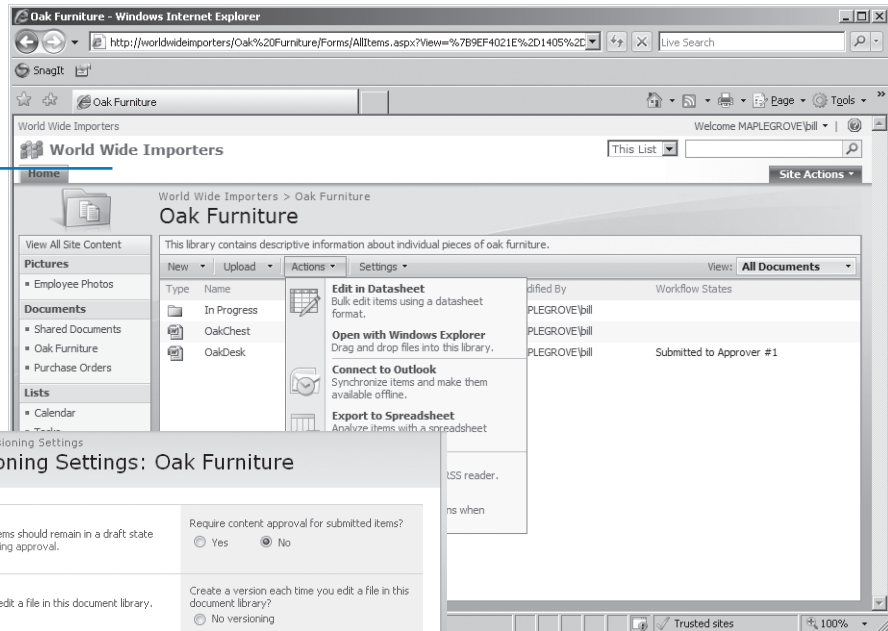
CLOSE the browser and your Groove client.

Key Points

- Libraries provide a central location to store documents, forms, and pictures so they can be shared easily.
- You can create document libraries for specific topics and give them a descriptive name.
- Remember to check out a document before you edit it.
- You can check in and check out documents by using Microsoft Office suite applications.
- Set up alerts on documents when you want to know that a document has been changed.

Chapter at a Glance

Configure a document library, page 166



Work with versioning, page 176

Team Site > Oak Furniture > Settings > Versioning Settings

Document Library Versioning Settings: Oak Furniture

Content Approval
Specify whether new items or changes to existing items should remain in a draft state until they have been approved. Learn about requiring approval.

Require content approval for submitted items?
☐ Yes ☒ No

Document Version History
Specify whether a version is created each time you edit a file in this document library. Learn about versions.

Create a version each time you edit a file in this document library?
☐ No versioning
☐ Create major versions
Example: 1, 2, 3, 4
☒ Create major and minor (draft) versions
Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:
☐ Keep the following number of major versions:

☐ Keep drafts for the following number of major versions:

Draft Item Security
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. Learn about specifying who can view and edit drafts.

Who should see draft items in this document library?
☒ Any user
☐ Only user
☐ Only user or author of

Require Check Out
Specify whether users must check out documents before making changes in this document library. Learn about requiring check out.

Require documents to be checked out?
☐ Yes

Securing a Document Library, page 179

Team Site > Purchase Orders > Settings > Permissions > Add Users

Add Users: Purchase Orders

Use this page to give new permissions.

Add Users
You can enter user names, group names, or e-mail addresses. Separate them with semicolons.
Add all authenticated users

Give Permission
Choose the permissions you want these users to have. You can add users to a SharePoint group (which is already assigned to a permission level), or you can add users individually and assign them to a specific permission level.
SharePoint groups are recommended as they allow for ease of permission management across multiple sites.

Send E-Mail
Use this option to send e-mail to your new users. You can personalize the message that is sent.
Links and information about the

Users/Groups:
Bill Malone

Give Permission
☒ Add users to a SharePoint group
Team Site Members [Contribute]
View permissions this group has on sites, lists, and items...
☐ Give users permission directly
☐ Full Control - Has full control.
☐ Design - Can view, add, update, delete, approve, and customize.
☐ Contribute - Can view, add, update, and delete.
☐ Read - Can view only.

☒ Send welcome e-mail to the new users
Subject:
Welcome to the SharePoint group: Team Site Members for site: Te
Personal Message: