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Microsoft® SharePoint® Foundation 2010

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Olga Londer and Penelope Coventry

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Microsoft® SharePoint® Foundation 2010

Step by Step

Olga Londer
Penelope Coventry

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Acknowledgments

This book is the result of the collective effort of many people. We'd like to start with thanking Kim Spilker and Devon Musgrave of Microsoft Press, who initially approached us about updating the previous version of the book and provided invaluable assistance in getting this project off the ground.

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Sincerely,

Olga Londer and Penelope Coventry

Features and Conventions of This Book

This book has been designed to lead you step by step through many of the tasks you're most likely to want to perform in Microsoft SharePoint Foundation 2010. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to create and work with a wide range of SharePoint Foundation features. However, each topic is self contained. If you have worked with a previous version of SharePoint Foundation, or if you completed all the exercises and later need help remembering how to perform a procedure, the following features of this book will help you locate specific information:

- **Detailed table of contents** Search the listing of the topics and sidebars within each chapter.
- **Chapter thumb tabs** Easily locate the beginning of the chapter you want.
- **Topic-specific running heads** Within a chapter, quickly locate the topic you want by looking at the running heads at the top of odd-numbered pages.
- **Detailed index** Look up specific tasks and features in the index, which has been carefully crafted with the reader in mind.

You can save time when reading this book by understanding how the *Step by Step* series shows exercise instructions, keys to press, buttons to click, and other information.

Convention	Meaning
Practice Files	These paragraphs provide information about the practice files that you will use when working through the exercises in a chapter.
SET UP and BE SURE TO	These paragraphs preceding a step-by-step exercise indicate any requirements that you should attend to or actions that you should take before beginning the exercise.
CLEAN UP	This paragraph following a step-by-step exercise provides instructions for saving and closing open files or programs before moving on to another topic.
1 **2**	Blue numbered steps guide you through hands-on exercises in each topic.
1 2	Black numbered steps guide you through procedures in sidebars and expository text.
Important	This paragraph points out information that you need to know to complete a procedure.

Convention	Meaning
Note	This paragraph describes information that merits special attention.
See Also	This paragraph directs you to more information about a topic in this book or elsewhere.
Tip	This paragraph provides a helpful hint or shortcut that makes working through a task easier.
Troubleshooting	This paragraph explains how to fix a common problem that might prevent you from continuing with an exercise.
CTRL+G	A plus sign (+) between two keys means that you must press those keys at the same time. For example, "Press **CTRL+G**" means that you should hold down the **CTRL** key while you press the G key.
Create View	Pictures of buttons appear in the margin the first time the button is used in a chapter.
Black bold	In the hands-on exercises, the names of program elements, such as buttons, commands, windows, and dialog boxes, as well as files, folders, or text that you interact with in the steps, are shown in black bold type.
Blue bold	In the hands-on exercises, text that you should type is shown in blue bold type.
Blue bold italic	Important terms are formatted this way.

Using the Practice Files

Before you can complete the exercises in this book, you need to copy the book's practice files to your computer. These practice files, as well as other information, can be downloaded from the book's catalog page, located at *http://www.microsoft-pressstore.com/title/9780735627260.* □

The following table lists the practice files that are required to perform the exercises in this book.

Chapter	**File**
Chapter 1: Introduction to SharePoint Foundation 2010	No practice files
Chapter 2: Navigating a SharePoint Site	Chapter02_Starter.wsp
Chapter 3: Creating and Managing Sites	No practice files
Chapter 4: Working with Lists	No practice files
Chapter 5: Working with Libraries	OakChest.docx OakDesk.docx OakEndTable.docx OakNightStand.docx Pjcov.jpg WideWorldInvoice.dcox WideWorldPurchaseOrder.xsn
Chapter 6: Working with Web Pages	Chapter06_Starter.wsp Pjcov.jpg
Chapter 7: Working with List Settings	No practice files
Chapter 8: Working with Library Settings	Contoso Proposal.docx ProposalsTemplate.docx WideWorldImportersLogo.png
Chapter 9: Working with List and Library Views	Chapter09_Starter.wsp
Chapter 10: Working with Surveys and Discussion Boards	No practice files
Chapter 11: Working with Workflows	No practice files
Chapter 12: Working with Workspaces and Blogs	No practice files
Chapter 13: Using SharePoint Foundation with Outlook 2010	Chapter13_Starter.wsp

Chapter	File
Chapter 14: Using SharePoint Foundation with Excel 2010 and Access 2010	ExpImpWideWorldImporters2010.accdb Furniture_Price.xlsx MoveWideWorldImporters.accdb Sales_Figures.xlsx
Chapter 15: Using SharePoint Foundation with InfoPath 2010	Chapter15_Starter.wsp Purchase Order Template.xsn
Chapter 16: Finding Information on the SharePoint Site	Chapter16_Starter.wsp

In addition to the files required to perform the exercises, the following files contain reference information that will enhance your ability to get the most out of this book and Microsoft SharePoint Foundation:

- A comparison of the SharePoint 2010 editions is provided in the file SharePoint2010EditionComparison.xlsx, which is located in the Chapter01 practice folder.
- A SharePoint Foundation 2010 ribbon reference is provided in the file SharePoint_Command_Mapping_Guide.xslx, which is located in the Chapter02 practice folder.

Software Requirements

This section details the software requirements for both your client computer and the server that is running SharePoint Foundation 2010.

Important **You must have access to a SharePoint Foundation 2010 installation on the server before performing exercises in this book.**

Client Computer

To perform the exercises in this book, your client computer should meet the following requirements:

- Operating system
    - Windows 7 is recommended. However, you can also use Windows Vista, Windows XP, Windows Server 2008, or Windows Server 2003.

- Software
    - Internet Explorer 8 or later is recommended; however, you can use Internet Explorer 7. Other browsers, such as Mozilla Firefox and Safari, can be used with some limitations. For a list of known limitations, refer to *http://technet.microsoft.com/en-gb/library/cc288142.aspx*.
    - Microsoft Word 2010, Microsoft Outlook 2010, Microsoft Excel 2010, Microsoft Access 2010, and Microsoft InfoPath 2010.
- Disk space
    - 10 megabytes (MB) of available hard disk space is recommended for the practice files.

Server Deployment

To perform the exercises in this book, you should have access to a SharePoint Foundation 2010 deployment that can be a single-server installation, a farm deployment, or a hosted service. The server should meet the following requirements:

- Operating system
    - The 64-bit edition of Windows Server 2008 Standard, Enterprise, Data Center, or Web Server with SP2, or the 64-bit edition of Windows Server 2008 R2 Standard, Enterprise, Data Center, or Web Server.
    - Microsoft .NET Framework 3.5.
- Software
    - SharePoint Foundation 2010

See Also For a complete list of hardware and software requirements for SharePoint Foundation 2010, refer to *http://technet.microsoft.com/en-gb/library/cc288955.aspx*.

Important The catalog page for this book does not contain SharePoint Foundation 2010. SharePoint Foundation 2010 is available as a free download from the Microsoft website at *http://www.microsoftpressstore.com/title/9780735627260*.

Installing the Practice Files

You need to install the practice files in the correct location on your hard disk before you can use them in the exercises. The default location for the practice files used throughout this book is Documents\Microsoft Press\SPF_SBS.

Important If you install the practice files to a location other than the default, you will need to substitute that path in the instructions for the exercises.

To install the practice files to their default location, follow these steps:

1. On the Windows taskbar, click the **Start** button, and then click **Documents**. Windows Explorer opens.
2. In your **Documents** folder, create a new folder by right-clicking and selecting **New – Folder**. Name the new folder **Microsoft Press**. However, if the Microsoft Press folder already exists, then skip to the next step.
3. Double-click the **Microsoft Press** folder to open it. In the **Microsoft Press** folder, create a new folder and name it **SPF_SBS**.
4. Open your browser and navigate to the book's catalog page: *http://www.microsoft-pressstore.com/title/9780735627260*.
5. On the book's catalog page, click the **Practice Files** link.
6. On the **Practice Files** page, click **Download the practice files**. The File Download dialog box opens.
7. In the **File Download** dialog box, click **Save**. The Save As dialog box opens.
8. In the **Save As** dialog box, choose **Desktop**, and then click **Save**.
9. Locate the file **SharePointFoundation2010SBS.zip** on your Desktop, right-click it, and select **Extract All.** The Extract Compressed (Zipped) Folders wizard starts.
10. Click **Browse** and navigate to the folder **Documents\Microsoft Press\SPF_SBS** that you created in steps 1–3.
11. Make sure that the option **Show extracted files when complete** is selected, and then click **Extract**. Windows Explorer opens.
12. In Windows Explorer, validate that the chapter-specific folders have been created under **Documents\Microsoft Press\SPF_SBS** and that the practice files have been extracted in the chapter-specific folders.

✖ **CLEAN UP** Close the browser, and then close Windows Explorer.

Using the Practice Files

The practice files for this book are stored on your hard disk in chapter-specific subfolders under Documents\Microsoft Press\SPF_SBS. Each exercise in a chapter includes a paragraph that lists the files needed for that exercise and explains any preparations needed before you start working through the exercise.

Whenever possible, we start each chapter with a standard SharePoint Foundation Team site, which occasionally must be a top-level team site. If you follow all the exercises in all the chapters in sequence, you do not have to start with a new Team site for every chapter. For most of the chapters, you can just use the same site throughout the book.

However, if you choose to do exercises independently and not in sequence, there are a couple of exercises that depend on other exercises performed earlier in the book. If this is the case, we will tell you where the prerequisite exercise is located in the book so that you can complete the prerequisite exercises. However, you may not want to do the prerequisite exercise, and this is where the starter WSP files will come in handy.

If you have sufficient rights, you can create a new practice site (see the following section titled "Using the WSP Templates") from the chapter's starter WSP file that is provided in the practice folder for the chapter. The starter WSP files contain lists, libraries, files, and pages that you will require during the exercises. The resulting child site will have the prerequisite exercises already completed for you where needed. For chapters that require the creation of a site based on the WSP file, we will tell you at the beginning of the chapter that you need to install the practice site from the starter WSP file for the chapter.

Exercises in some chapters use a subsite in addition to the standard Team site. If this is the case, the practice folder for the chapter contains a WSP file for the subsite.

Using the WSP Templates

To create a practice site for a chapter based on a starter WSP file, perform the following steps:

BE SURE TO verify that you have sufficient rights to upload to the site template gallery of a site collection. If in doubt, refer to the Appendix at the back of this book.

1. In the browser, open the top-level SharePoint site to which you would like to upload the WSP file. If prompted, type your user name and password, and click **OK**.
2. On the **Site Actions** menu, click **Site Settings**. The Site Settings page of the top-level site is displayed.
3. In the **Galleries** section, click **Solutions**. The Solution Gallery – Solutions page is displayed.
4. On the **Solution Gallery – Solutions** page, click the **Solutions** tab on the Ribbon, and then click the **Upload Solution** button. The Solution Gallery – Upload Solution dialog is displayed.
5. In the **Solution Gallery – Upload Solution** dialog, click the **Browse** button.

6. In the **Choose File to Upload** dialog box, navigate to the practice files folder **Documents\Microsoft Press\SPF_SBS\Chapter*NN*** (where *NN* is the chapter number), click the WSP file that you want to use to create the new site, and then click the **Open** button.
7. In the **Solution Gallery – Upload Solution** dialog, click **OK** to complete the upload.

   The **Solution Gallery – Activate Solution** dialog is displayed.
8. In the **Solution Gallery – Activate Solution** dialog, on the **View** tab, click **Activate**.

   The Solution Gallery – Solutions page is displayed. Validate that the practice site WSP file has been uploaded.

You can now create a new practice child site based upon the uploaded WSP template, as follows.

1. Browse to the SharePoint site that you'd like to be the parent of the new practice site.
2. On the **Site Actions** menu, click **New Site**. The Create dialog appears.
3. In the central pane of the **Create** dialog, click the **Chapter*NN*** starter site template that is now available, and then click **More Options**.
4. In the **Title** text box, type a logical name for the new site. You could simply provide the chapter number if you like, such as **Chapter09**.
5. Optionally, in the **Description** text box, type a description, such as **SharePoint SBS Chapter 9 Practice Site**.
6. In the **URL name** text box, repeat the same name that you typed in the **Title** text box.
7. You can leave all the other options as their default values. Click the **Create** button.

   The new practice site has been created and its home page is displayed.

CLEAN UP Close the browser.

Removing the WSP Templates

To remove the chapter starter WSP template from the Solution gallery, perform the following steps.

BE SURE TO verify that you have sufficient rights to delete WSPs from the Solution gallery of a site collection. If in doubt, refer to the Appendix at the back of this book.

1. In the browser, open the top-level SharePoint site where you previously uploaded the WSP files. If prompted, type your user name and password, and click **OK**.
2. On the **Site Actions** menu, click **Site Settings**. The Site Settings page is displayed.
3. In the **Galleries section**, click **Solutions**. The Solution Gallery – Solutions page is displayed.
4. On the **Solution Gallery – Solutions** page, hover the mouse over the template that you wish to remove, and click the arrow that appears on the right to display the context menu. On the context menu, click **Deactivate**.

   The Solution Gallery – Deactivate Solution dialog appears.
5. In the **Solution Gallery – Deactivate Solution** dialog, on the **View** tab, click **Deactivate**.
6. On the Solution Gallery – Solutions page, once again hover the mouse over the template that you wish to remove, and click the arrow that appears on the right to display the context menu. On the context menu, click **Delete**. In the confirmation message box, click **OK** to complete the removal of the site template.

   The Solution Gallery – Solutions page is displayed again. Verify that the practice site template has been removed.
7. Repeat steps 4–6 to remove each practice site template that you no longer require.

CLEAN UP Close the browser.

Deleting a Practice Site

If you created a practice site that you no longer require, you can delete it. Perform the following steps to delete a practice site.

BE SURE TO verify that you have sufficient rights to delete a site. If in doubt, see the Appendix at the back of this book.

1. In the browser, open the SharePoint site that you wish to delete. If prompted, type your user name and password, and click **OK**.
2. On the **Site Actions** menu, click **Site Settings**. The Site Settings page is displayed.
3. In the **Site Actions** section, click **Delete this site**. The Delete This Site confirmation page is displayed.
4. Click the **Delete** button to delete the site.
5. In the message box that appears, click **OK** to confirm the deletion of the site.

The site has been deleted.

✖ **CLEAN UP** Close the browser.

Removing the Practice Files

After you have completed the exercises for this book, you can free up hard disk space by removing the practice files that were installed from the book's catalog page. This process deletes the downloaded files, as well as the files that you might have created in the chapter-specific folders while working through the exercises. Follow these steps:

1. On the Windows taskbar, click the **Start** button, and then click **Documents**. Windows Explorer opens.
2. In the **Documents** folder, double-click the **Microsoft Press** folder to open it.
3. In the **Microsoft Press** folder, right-click the **SPF_SBS** folder and select **Delete**.
4. In the **Delete Folder** message box, click **Yes** to confirm that you would like to move this folder to the Recycle Bin.
5. If the Microsoft Press folder is not empty and contains practice files for other books, skip to the next step. However, if the Microsoft Press folder is empty, then delete it using instructions in steps 3–4 as a guide.
6. In Windows Explorer, navigate to the **Desktop**. Right-click the compressed folder **SharePointFoundation2010SBS.zip** and select **Delete**. In the **Delete Folder** message box, click **Yes** to confirm that you would like to move this folder to the **Recycle Bin**.

   You have removed the practice files for this book.

✖ **CLEAN UP** Close Windows Explorer.

Your Companion eBook

The eBook edition of this book allows you to:

- Search the full text
- Print
- Copy and paste

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Getting Support and Giving Feedback

Getting Help with This Book and Its Practice Files

The practice files referred to throughout this book are available as web downloads. For more information, see "Using the Practice Files" at the beginning of this book.

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We've made every effort to ensure the accuracy of this book and its companion content. If you do find an error, please report it on our Microsoft Press site:

1. Go to *www.microsoftpressstore.com*.
2. In the Search box, enter the book's ISBN or title.
3. Select your book from the search results.
4. On your book's catalog page, find the Errata & Updates tab
5. Click View/Submit Errata.

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If your question is about Microsoft SharePoint Foundation 2010 (not about the content of this book or its practice files), please search Microsoft Support or the Microsoft Knowledge Base at:

http://support.microsoft.com

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http://support.microsoft.com/gp/selfoverview/

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The survey is short, and we read *every one* of your comments and ideas. Thanks in advance for your input!

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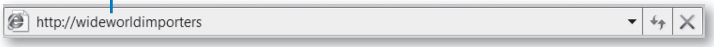
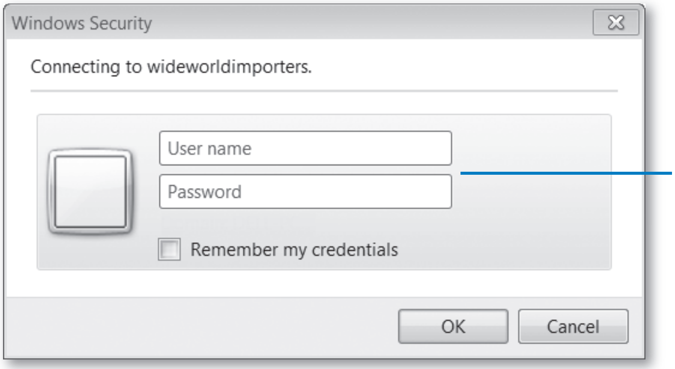
Chapter at a Glance

Locate your SharePoint site, page 3



http://wideworldimporters



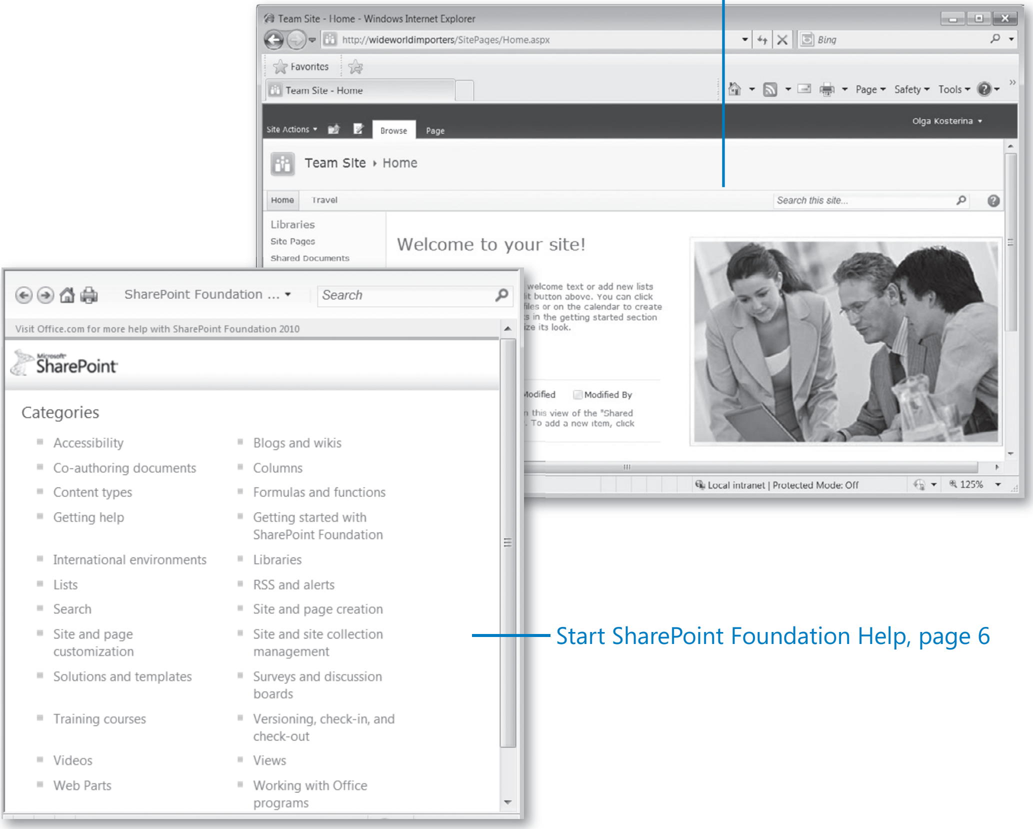
Windows Security

Connecting to wideworldimporters.

User name
Password
☐ Remember my credentials
OK
Cancel

Provide user name and password, page 4

Familiarize yourself with the SharePoint site home page, page 4



Team Site - Home - Windows Internet Explorer
http://wideworldimporters/SitePages/Home.aspx
Bing
Favorites
Team Site - Home
Page
Safety
Tools
Site Actions
Browse
Page
Olga Kosterina
Team Site › Home
Home
Travel
Search this site...
Libraries
Site Pages
Shared Documents
Local intranet | Protected Mode: Off
125%
SharePoint Foundation ...
Search
SharePoint

Welcome to your site!

Visit Office.com for more help with SharePoint Foundation 2010

Categories

- Accessibility
- Co-authoring documents
- Content types
- Getting help
- International environments
- Lists
- Search
- Site and page customization
- Solutions and templates
- Training courses
- Videos
- Web Parts
- Blogs and wikis
- Columns
- Formulas and functions
- Getting started with SharePoint Foundation
- Libraries
- RSS and alerts
- Site and page creation
- Site and site collection management
- Surveys and discussion boards
- Versioning, check-in, and check-out
- Views
- Working with Office programs

Start SharePoint Foundation Help, page 6

5

Working with Libraries

In this chapter, you will learn how to

- ✔ Create a document library.
- ✔ Create a new document.
- ✔ Edit documents.
- ✔ Add documents.
- ✔ Create a picture library and add pictures.
- ✔ Create a form library.
- ✔ Create a wiki page library.
- ✔ Create a new folder in a library.
- ✔ Check documents in and out.
- ✔ Work with version history.
- ✔ Use alerts.
- ✔ Delete and restore documents.
- ✔ Work offline with SharePoint Workspace.
- ✔ Work offline with Outlook.

One of the most useful features that Microsoft SharePoint Foundation 2010 provides is libraries. Libraries are a great place to store documents, pictures, forms, or web pages. In the business world, being able to work with documents quickly and effectively is of paramount importance. In the previous chapter, you learned that lists provide an effective way to work with all types of data. SharePoint libraries function similarly for documents and forms, such as Microsoft Word documents. Using Microsoft SharePoint document libraries, you can filter and group documents, as well as view metadata for documents stored in the library.

In this chapter, you will learn how to work with libraries and their documents in SharePoint Foundation 2010. This chapter focuses on creating libraries, adding documents and pictures, and working with documents in document libraries. In Chapter 8, "Working with Library Settings," we will focus on modifying and configuring document libraries.

Practice Files Before you can complete the exercises in this chapter, you need to download the Chapter 5 practice files from the book's catalog page to the following folder on your computer: Documents\Microsoft Press\SBS_SPF\Chapter05. See "Using the Practice Files" at the beginning of this book for more information.

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

Creating a Document Library

A ***library*** is a location on a site where you can create, collect, update, and manage files with other team members. Each library displays a list of files and key information about the files, which helps people to use the files to work together. SharePoint's information managing capabilities come through the document libraries and lists.

You can use ***document libraries*** to store your documents on a SharePoint site rather than on your local computer's hard disk 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.

When you create a new SharePoint site, a generic document library called Shared Documents is created. 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 other—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.

SET UP Open the SharePoint site in which you would like to create your document library. The exercise will use the *http://wideworldimporters* site, but you can use whatever site you want. If prompted, type your user name and password, and click OK.

BE SURE TO verify that you have sufficient rights to create a library in this site. If in doubt, see the Appendix at the back of this book.

1. From the **Site Actions** menu, select **New Document Library**.

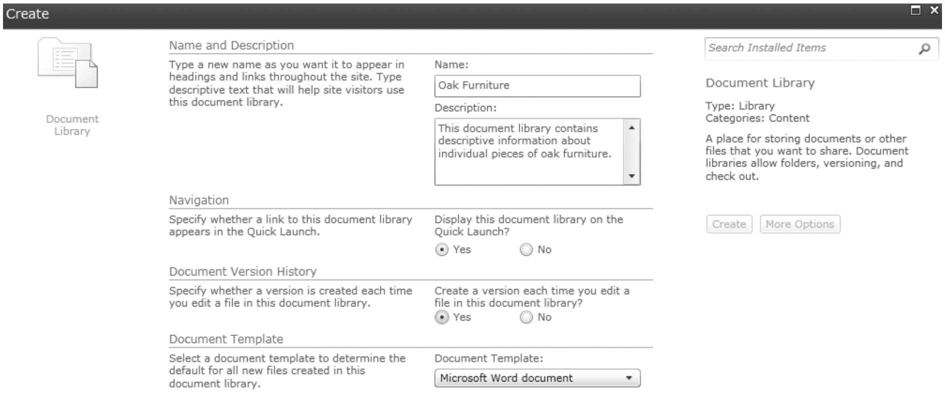
   Tip Alternatively, you can select More Options from the Site Actions menu. Then, in the left pane of the Create dialog, under Filter By, click Library. Make sure the Document Library is selected, and then click More Options.

2. The **Create** dialog opens and displays the options for your new library. In the **Name** box, type the name that you want to give to the new document library, such as **Oak Furniture**.

3. In the **Description** box, type the description of the document library, such as **This document library contains descriptive information about individual pieces of oak furniture.**

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

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



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? ● Yes ○ No

Document Version History

Specify whether a version is created each time you edit a file in this document library.

Create a version each time you edit a file in this document library? ● Yes ○ No

Document Template

Select a document template to determine the default for all new files created in this document library.

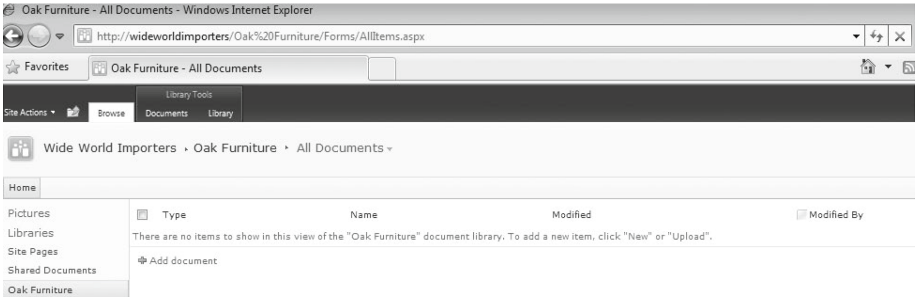
Document Template: Microsoft Word document

Document Library

Type: Library
Categories: Content

A place for storing documents or other files that you want to share. Document libraries allow folders, versioning, and check out.

5. Click **Create**. The new Oak Furniture document library has been created and is displayed in the browser. The link to this library is shown on the Quick Launch.



Oak Furniture - All Documents - Windows Internet Explorer

http://wideworldimporters/Oak%20Furniture/Forms/AllItems.aspx

Oak Furniture - All Documents

Wide World Importers › Oak Furniture › All Documents

There are no items to show in this view of the "Oak Furniture" document library. To add a new item, click "New" or "Upload".

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Creating a New Document

After a library has been created, you can populate it with documents. In this section, you will create a new document from the SharePoint document library. The new document will use the default template for the library.

See Also For more information about templates in document libraries, refer to Chapter 8.

The new document can be created in the Word 2010 client application that is installed on your computer, or in the online Word Web App using the browser.

Tip Microsoft Office Web Apps should be installed and configured on your SharePoint Foundation server to enable creating and editing documents in online Microsoft Word, Excel, or PowerPoint Web Apps. These Office Web Apps can be used from any device where a browser is available, but they have less functionality in comparison with associated client applications.

In the following exercise, you will create a new document from the SharePoint document library.

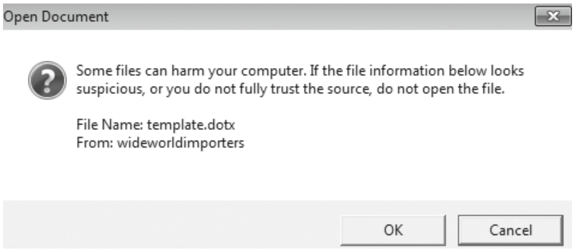
SET UP Open the SharePoint site where you want to create a new document. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient rights to create a document in this library. If in doubt, see the Appendix at the back of this book.

New Document

1. On the Quick Launch, click the **Oak Furniture** document library.
2. Click the **Documents** tab on the Ribbon, and then click **New Document**.

   Depending on your server settings, a new document will open either in the browser or in Word. If a new document opens in the browser, skip to step 7. Otherwise, continue to the next step.
3. A new document opens in Word. It is based on the default template for this SharePoint library called template.dotx. If a warning about this template appears in the Open Document message box, click OK to confirm that you want to proceed with opening a new file based on this template.

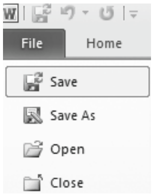


Open Document

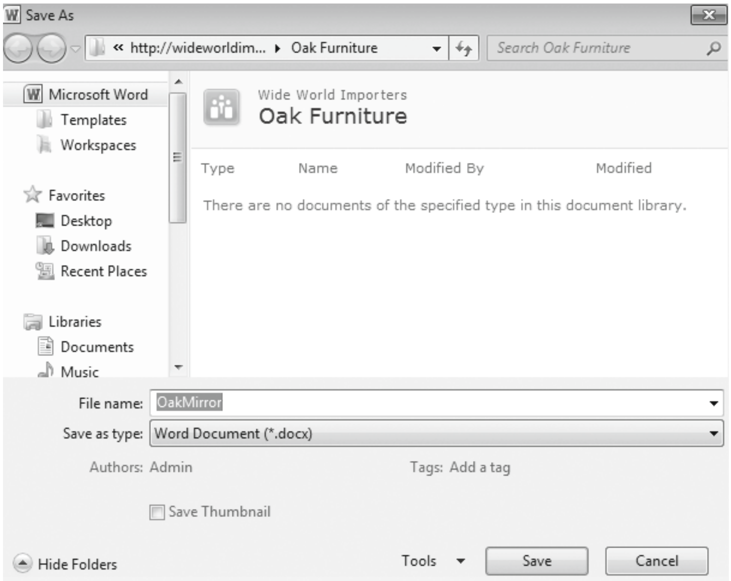
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open the file.

File Name: template.dotx
From: wideworldimporters

4. If prompted, provide your user name and password. Word opens. In the new document, type some text, such as **Oak Mirror**.
5. Click the File tab and then click Save to save the document to the Oak Furniture document library.


File
Home
Save
Save As
Open
Close

6. The Save As dialog box opens. Note that Location points to the Oak Furniture document library. Enter OakMirror as the name of your new document, and then click Save.


Save As
« http://wideworldim... ▸ Oak Furniture
Search Oak Furniture
Microsoft Word
Templates
Workspaces
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Wide World Importers
Oak Furniture
Type
Name
Modified By
Modified
Tools
Save
Cancel
Hide Folders

There are no documents of the specified type in this document library.

File name: OakMirror

Save as type: Word Document (*.docx)

Authors: Admin

Tags: Add a tag

☐ Save Thumbnail

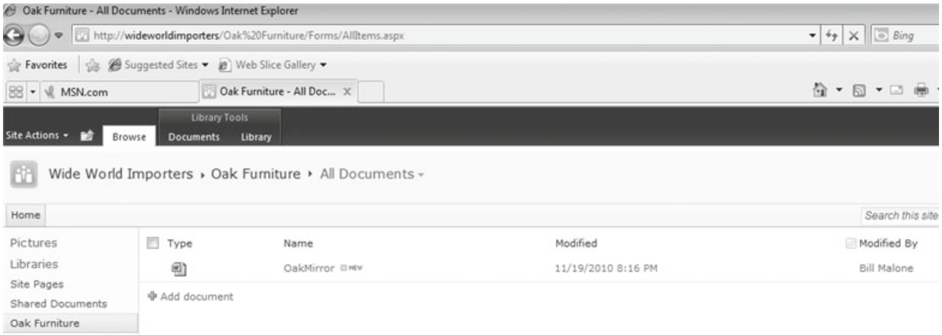
Go back to the browser where the Oak Furniture library is displayed, and then skip to step 9.

7. The browser opens an empty document based on the library's default template in the Word Web App. If prompted, provide your user name and password. The Word Web App interface is similar to Word's interface, and you can perform many light editing tasks in the Word Web App. In the new document, type some text, such as **Oak Mirror**.

8. Click the **File** tab and then click **Save** to save the document to the **Oak Furniture** document library. The Oak Furniture library is displayed.

NEW

9. Validate that OakMirror.docx is listed in the Oak Furniture library. There is a **New** flag next to the document, indicating that this document is a new addition to this library.


Oak Furniture - All Documents - Windows Internet Explorer
http://wideworldimporters/Oak%20Furniture/Forms/AllItems.aspx
Bing
Favorites
Suggested Sites
Web Slice Gallery
MSN.com
Oak Furniture - All Doc...
Library Tools
Site Actions
Browse
Documents
Library
Wide World Importers › Oak Furniture › All Documents
Home
Search this site
Pictures
Libraries
Site Pages
Shared Documents
Oak Furniture
Add document

Type	Name	Modified	Modified By
	OakMirror NEW	11/19/2010 8:16 PM	Bill Malone

CLEAN UP Close the browser and then close Word.

Editing Documents

Once documents are placed in the library, you can search 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. You will find at times that you have a need to edit a document in a SharePoint document library.

SharePoint allows you to edit documents in Office client applications, such as Word and Excel, or in the browser using Office Web Apps that provide online companions to Office client applications, such as Word Web App or Excel Web App. For in-browser editing to be available, Office Web Apps must be installed and configured on the SharePoint Foundation server.

In the following exercise, you will edit in Word the document called OakMirror.docx that was created in the previous exercise in the Oak Furniture library.

SET UP Open the SharePoint site where you'd like to edit a file in 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 edit a document in this library. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click the **Oak Furniture** document library.
2. Hover your mouse over a document that you would like to edit, such as **OakMirror.docx**. An arrow appears to the right of the document name. Click the arrow to open a drop-down menu and select **Edit in Microsoft Word**.
3. The document opens in Word. If a warning about the template appears in the Open Document message box, click **OK** to confirm that you want to proceed.
4. In Word, make some changes to the document. For example, select the text "Oak Mirror" and make it bold and centered.
5. Click **File, Save** to save the document back to the **Oak Furniture** document library, and then click **Save** to confirm the file name.
6. Go back to the browser and validate that the document has been saved to the document library.

✖ **CLEAN UP** Close Word. Leave the browser open if you are continuing to the next exercise.

When you're on the move, it is often very useful to be able to edit your document within the browser, without needing the client application to be installed on the device that you're using. In the following exercise, you will modify the OakMirror.docx document using in-browser editing in the Word Web App.

➜ **SET UP** Open the SharePoint site where you'd like to edit a file in a document library, if it is not already open. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient rights to edit a document in this library. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click the **Oak Furniture** document library.
2. Hover your mouse over a document that you would like to edit, such as **OakMirror.docx**. An arrow appears to the right of the document name. Click the arrow to open a drop-down menu and select **Edit in Browser**.

   Troubleshooting Office Web Apps must be installed and configured on your SharePoint Foundation server to enable in-browser editing. If the Edit In Browser option is not shown on the drop-down menu, it means that Office Web Apps have not been installed and activated in your environment. You will not be able to complete this exercise.

3. The document opens in the Word Web App in the browser. Make some changes to the document. For example, select the text "Oak Mirror" and make it italicized.
4. Click the **File** tab and then click **Save** to save the document back to the **Oak Furniture** document library.

5. Validate that the newly edited document has been saved to the document library by checking its time stamp.

CLEAN UP Close the browser.

Adding Documents

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. First, you need to ensure that your documents are uploaded to and available in the SharePoint library.

There are several ways to add documents to a document library, including the following:

- Use the browser to upload documents to the library via the SharePoint interface.
- Use Windows Explorer to copy or move documents into the library.
- Use a SharePoint Workspace to upload the documents stored offline.

You can also add a document to an email-enabled document library by sending it as an attachment to an email.

In this section, you will practice the first two methods: using the browser and using Windows Explorer. Later in this chapter, you will use the SharePoint Workspace to add a document to the library as well. We will cover email-enabling a library in Chapter 8.

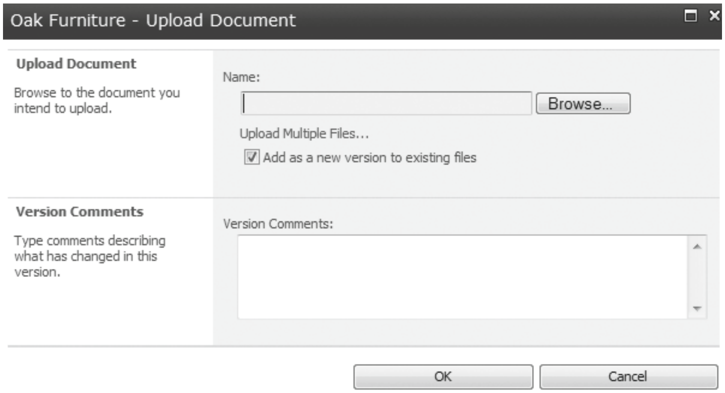
You will now add documents to the library using a browser. In the following exercise, you will upload two new furniture descriptions to the Oak Furniture library.

Practice Files You will use the practice files OakDesk.docx and OakChest.docx, located in the Documents\Microsoft Press\SBS_SPF\Chapter05 folder.

SET UP Open the SharePoint site where you'd like to upload a file to 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 add a document in this library. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click the Oak Furniture document library.
2. In the Oak Furniture document library, click the Add document link. The Oak Furniture - Upload Document dialog appears.



Oak Furniture - Upload Document

Upload Document

Browse to the document you intend to upload.

Name:

Upload Multiple Files…

☑ Add as a new version to existing files

Version Comments

Type comments describing what has changed in this version.

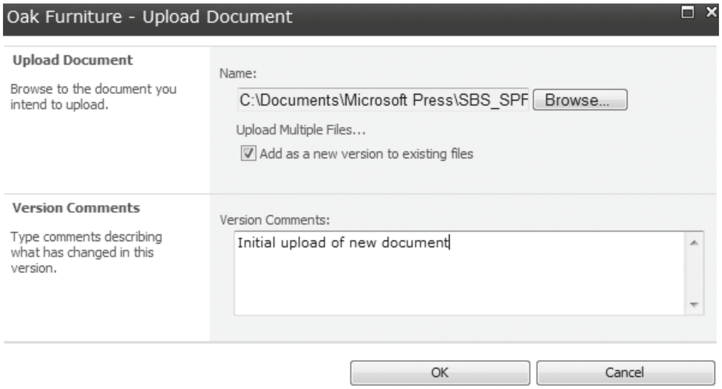
Version Comments:

3. Click **Browse**.

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

4. In the **Choose File to Upload** dialog, browse to the file that you would like to upload, such as **OakChest.docx**, select it, and then click **Open**.

5. In the **Upload Document** dialog, type a comment in the **Version Comments** text box stating that this is a new document for this library, such as **Initial upload of new document**.



Oak Furniture - Upload Document

Upload Document

Browse to the document you intend to upload.

Name: C:\Documents\Microsoft Press\SBS_SPF

Upload Multiple Files…

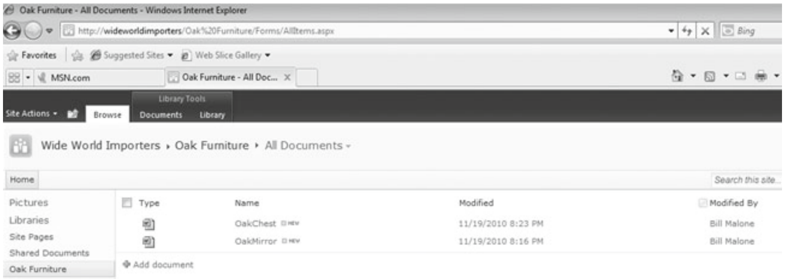
☑ Add as a new version to existing files

Version Comments

Type comments describing what has changed in this version.

Version Comments: Initial upload of new document

6. Click **OK** to confirm the upload and return to the **Oak Furniture** library.


Oak Furniture - All Documents - Windows Internet Explorer
http://wideworldimporters/Oak%20Furniture/Forms/AllItems.aspx
Bing
Favorites
Suggested Sites
Web Slice Gallery
MSN.com
Oak Furniture - All Doc...
Site Actions
Browse
Library Tools
Documents
Library
Wide World Importers › Oak Furniture › All Documents
Home
Search this site...
Pictures
Libraries
Site Pages
Shared Documents
Oak Furniture
Add document

Type	Name	Modified	Modified By
	OakChest NEW	11/19/2010 8:23 PM	Bill Malone
	OakMirror NEW	11/19/2010 8:16 PM	Bill Malone

7. Repeat steps 2–6 for the **OakDesk.docx** file. You have added two documents to the library using the browser.

Another way to add a document to the library is via Windows Explorer. In the following exercise, you will copy a document to the SharePoint library by using the Explorer view of the Oak Furniture document library.

Practice Files You will use the practice files OakEndTable.docx and OakNightStand.docx, located in the Documents\Microsoft Press\SBS_SPF\Chapter05 folder.

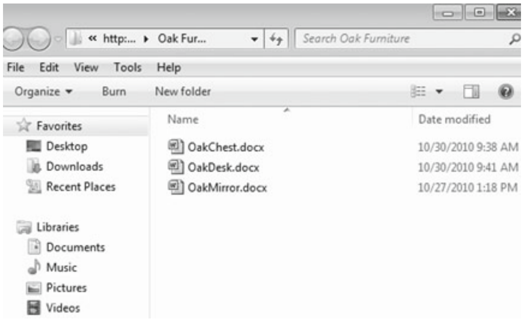
SET UP Open the SharePoint site where you'd like to add files to a document library. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient rights to add a document in this library. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click the **Oak Furniture** document library.

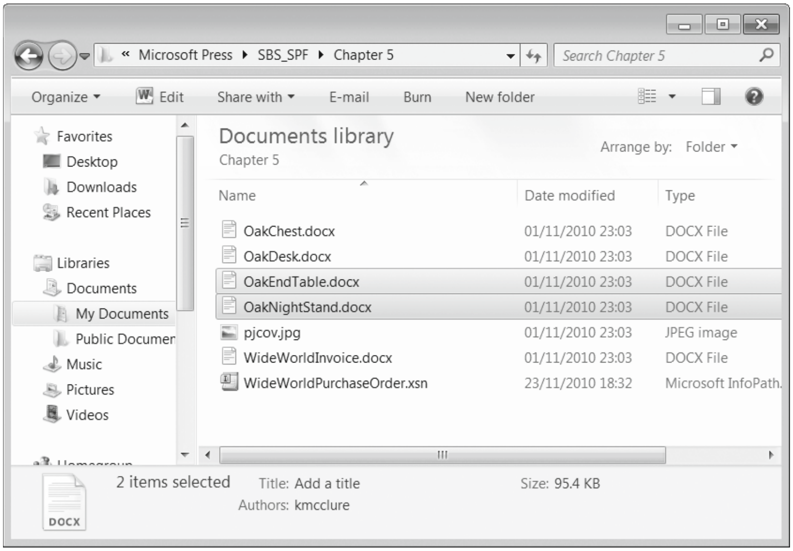
Open with Explorer

2. Click the **Library** tab on the Ribbon and then click **Open with Explorer**. The library content is displayed in Explorer view.


« http:... › Oak Fur...
Search Oak Furniture
File
Edit
View
Tools
Help
Organize
Burn
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos

Name	Date modified
OakChest.docx	10/30/2010 9:38 AM
OakDesk.docx	10/30/2010 9:41 AM
OakMirror.docx	10/27/2010 1:18 PM

3. Open a new **Windows Explorer** window and navigate to the folder on the file system where the documents are stored that you want to copy to the library, such as Documents\Microsoft Press\SBS_SPF\Chapter05.
4. Select the files titled **OakNightStand.docx** and **OakEndTable.docx** by clicking the first file and then holding down the **CTRL** key and clicking the second file.


« Microsoft Press ▸ SBS_SPF ▸ Chapter 5
Search Chapter 5
Organize
Edit
Share with
E-mail
Burn
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
My Documents
Public Documer
Music
Pictures
Videos
Homegroup
Documents library
Chapter 5
Arrange by: Folder
DOCX

Name	Date modified	Type
OakChest.docx	01/11/2010 23:03	DOCX File
OakDesk.docx	01/11/2010 23:03	DOCX File
OakEndTable.docx	01/11/2010 23:03	DOCX File
OakNightStand.docx	01/11/2010 23:03	DOCX File
pjcov.jpg	01/11/2010 23:03	JPEG image
WideWorldInvoice.docx	01/11/2010 23:03	DOCX File
WideWorldPurchaseOrder.xsn	23/11/2010 18:32	Microsoft InfoPath

2 items selected

Title: Add a title

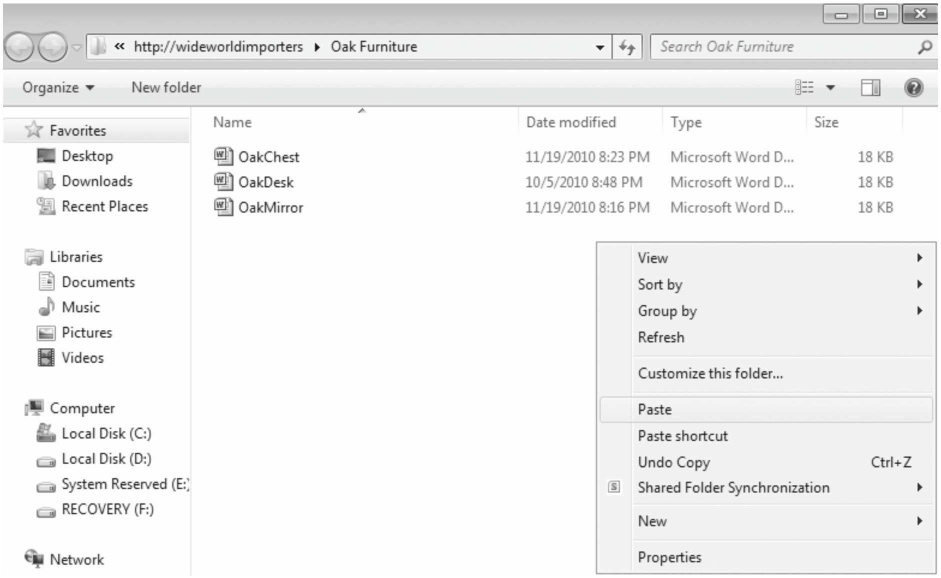
Authors: kmcclure

Size: 95.4 KB

5. Right-click in **Windows Explorer** and select **Copy**, or press **CTRL+C** on the keyboard.

Tip You can also drag files between Windows Explorer and SharePoint library in Explorer view to copy them.

6. Go back to the **Explorer** view of the **Oak Furniture** library. In the **Explorer** window that shows files in the **Oak Furniture** library, right-click and select **Paste**, or press **CTRL+V** on the keyboard, to add the files to the library.


« http://wideworldimporters ▸ Oak Furniture
Search Oak Furniture
Organize ▾
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Computer
Local Disk (C:)
Local Disk (D:)
System Reserved (E:)
RECOVERY (F:)
Network
View
Sort by
Group by
Refresh
Customize this folder...
Paste
Paste shortcut
Undo Copy Ctrl+Z
Shared Folder Synchronization
New
Properties

Name	Date modified	Type	Size
OakChest	11/19/2010 8:23 PM	Microsoft Word D...	18 KB
OakDesk	10/5/2010 8:48 PM	Microsoft Word D...	18 KB
OakMirror	11/19/2010 8:16 PM	Microsoft Word D...	18 KB

7. Go back to the browser where the **Oak Furniture** library is displayed and verify that **OakNightStand.docx** and **OakEndTable.docx** are shown. You might need to refresh the page to see the new files.

CLEAN UP Close the browser and then close the two Windows Explorer windows.

Creating a Picture Library and Adding Pictures

A *picture library* is used to share a collection of pictures. Although picture files can be stored in other types of SharePoint libraries (such as document libraries), picture libraries are designed especially for storing image file types and therefore have several advantages. For example, from a picture library, you can view pictures in a slideshow, download pictures to your computer, and edit pictures with graphics programs that are compatible with SharePoint.

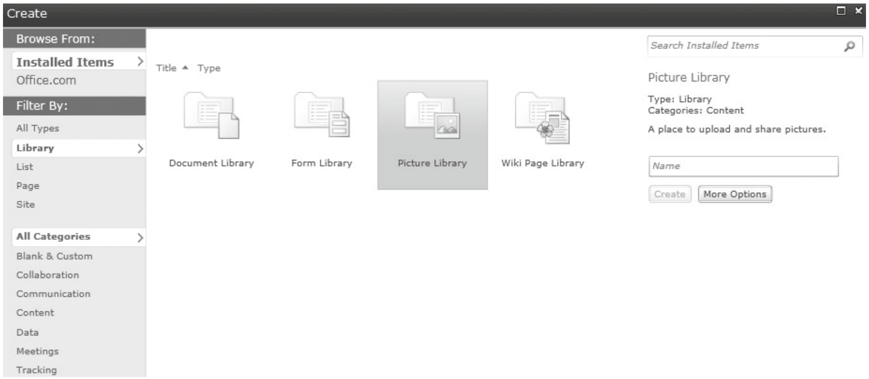
Picture libraries work in the same way as document libraries, except that they are geared to storing the image file types. The picture library provides special views for looking at all the pictures in the library as a slideshow. It also provides enhanced features for editing and downloading pictures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

In this exercise, you will create a picture library for storing photographs of employees.

SET UP Open the SharePoint site where 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 library in this site. If in doubt, see the Appendix at the back of this book.

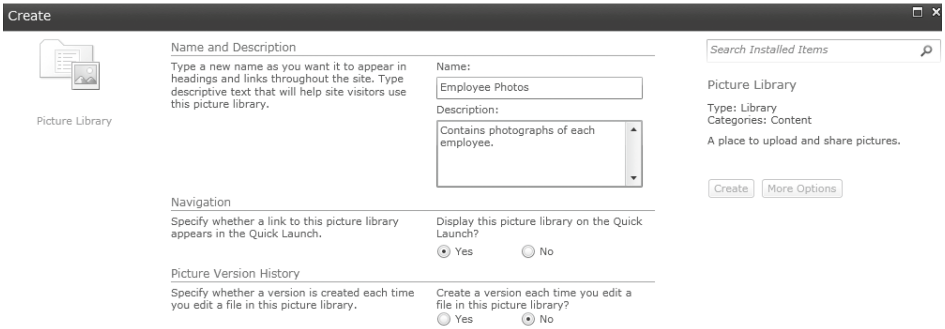
1. On the **Site Actions** menu, click **More Options**.
2. In the **Create** dialog, in the left pane, under **Filter By**, click **Library**.


Create
Browse From:
Installed Items
Office.com
Filter By:
All Types
Library
List
Page
Site
All Categories
Blank & Custom
Collaboration
Communication
Content
Data
Meetings
Tracking
Title
Type
Document Library
Form Library
Picture Library
Wiki Page Library
Search Installed Items
Picture Library
Type: Library
Categories: Content
Name
Create
More Options

A place to upload and share pictures.

3. Select **Picture Library**, and then click **More Options**.
4. In the **Create** dialog, in the **Name** box, type **Employee Photos**.
5. In the **Description** box, type **Contains photographs of each employee**.

   Leave all other options on the page at their default settings. You have entered all the necessary information to create a picture library.


Create
Picture Library
Name and Description
Navigation
Picture Version History
Search Installed Items
Picture Library
Type: Library
Categories: Content
Create
More Options

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.

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

Display this picture library on the Quick Launch? ● Yes ○ No

Specify whether a version is created each time you edit a file in this picture library.

Create a version each time you edit a file in this picture library? ○ Yes ● No

A place to upload and share pictures.

6. Click **Create**.

The picture library is created, and a new Employee Photos picture library is displayed in the browser.

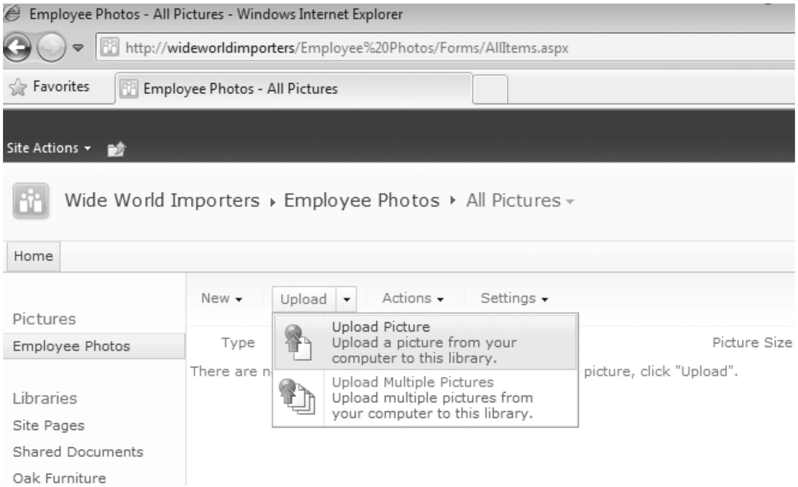
After the new library has been created, you can add pictures to it. Adding pictures to a picture library is like adding documents to a document library. In the following exercise, you will add an employee picture to the Employee Photos document library using the browser.

Practice Files You will use the practice file pjcov.jpg, located in the Documents\Microsoft Press\SBS_SPF\Chapter05 folder.

SET UP Open the SharePoint site where you'd like to upload a picture to a picture library. If prompted, type your user name and password, and then click OK.

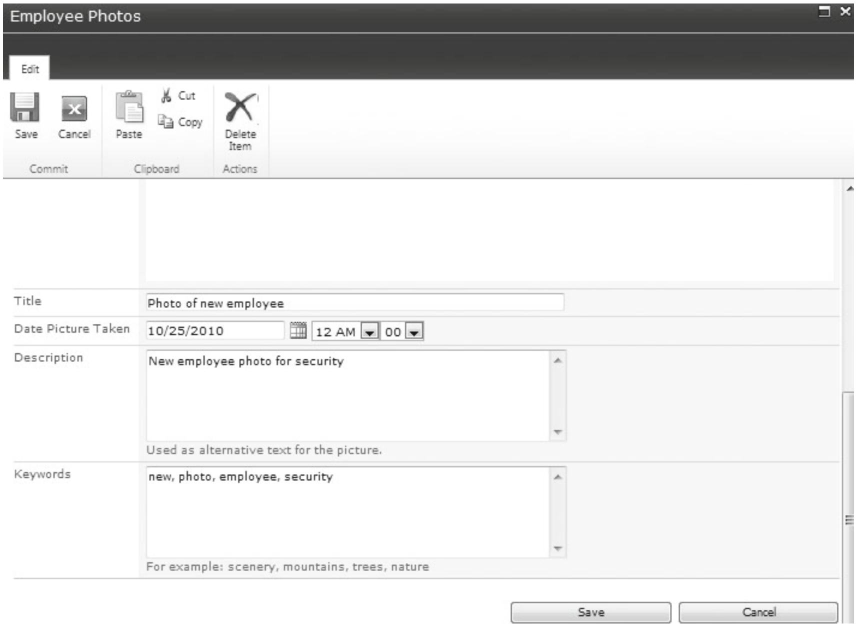
BE SURE TO verify that you have sufficient rights to add a picture to this library. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click the **Employees Photos** picture library. The Employee Photos picture library is displayed.
2. On the menu bar, click **Upload**, and then select **Upload Picture**.


Employee Photos - All Pictures - Windows Internet Explorer
http://wideworldimporters/Employee%20Photos/Forms/AllItems.aspx
Favorites
Employee Photos - All Pictures
Site Actions
Wide World Importers
Employee Photos
All Pictures
Home
New
Upload
Actions
Settings
Pictures
Employee Photos
Type
There are n
Upload Picture
Upload a picture from your computer to this library.
Upload Multiple Pictures
Upload multiple pictures from your computer to this library.
Picture Size
picture, click "Upload".
Libraries
Site Pages
Shared Documents
Oak Furniture

3. The **Employee Photos - Select Pictures:** dialog appears. Click **Browse**.
4. In the **Choose File to Upload** dialog, browse to the file that you would like to upload, such as **pjcov.jpg**, and then click **Open**.
5. Click **OK** to confirm the selection and upload of the picture. The Employee Photos: pjcov dialog appears.

   This page is used to provide metadata for the picture, including Name, Title, Date Picture Taken, Description, and Keywords.



Title	Photo of new employee
Date Picture Taken	10/25/2010 12 AM 00
Description	New employee photo for security Used as alternative text for the picture.
Keywords	new, photo, employee, security For example: scenery, mountains, trees, nature

6. Fill in the metadata if needed (Title, Date Picture Taken, Description, and Keywords), and then click **Save**.

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

CLEAN UP Close the browser.

Creating a Form Library

Form libraries function similarly to document libraries, but they store specific types of documents—forms—and have enhanced integration with Microsoft InfoPath, such as allowing you to create form libraries from InfoPath. Chapter 15, "Using SharePoint Foundation with InfoPath 2010," discusses in detail how SharePoint Foundation and InfoPath work together.

Forms are a more structured type of information than documents. 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 SharePoint Foundation. 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 keep in mind that you will be accomplishing the following tasks:

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

Practice Files You will use the practice file WideWorldPurchaseOrder.xsn, located in the Documents\Microsoft Press\SBS_SPF\Chapter05 folder.

SET UP Open the SharePoint site where you'd like to create a form library. If prompted, type your user name and password, and then click OK.

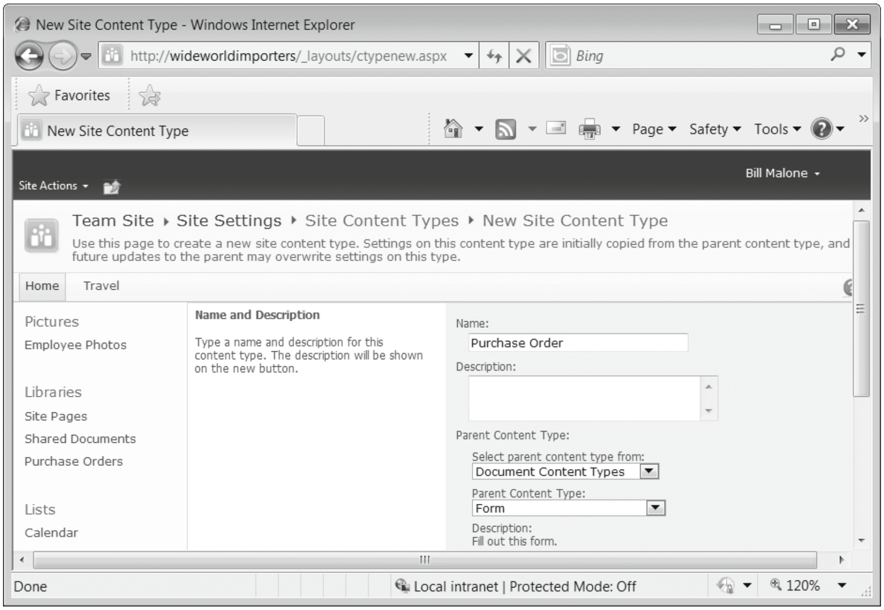
BE SURE TO verify that you have sufficient rights to create a form library and modify a content type on this site. If in doubt, see the Appendix at the back of this book.

1. On the **Site Actions** menu, click **More Options** to display the list and library templates in the **Create** dialog.
2. In the left pane, under **Filter By**, click **Library**. Select **Form Library** and then click **More Options**.
3. In the **Name** box, type **Purchase Orders**.
4. In the **Description** box, type **Contains purchase orders**.

   You have now entered all 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 page. At this point, if you click New Document on the Document tab on the Ribbon, 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 Document button is clicked.
6. On the **Site Actions** menu, click **Site Settings**.
7. Under **Galleries**, click the **Site Content Types** link. The Site Content Types page appears.
8. On the top of the page, click **Create**.
9. On the **New Site Content Type** page, in the **Name** box, type **Purchase Order**.

10. From the **Select Parent Content Type From:** drop-down list, select **Document Content Types**.
11. From the **Parent Content Type:** drop-down list, select **Form**. Leave the rest of the page at the default settings.


New Site Content Type - Windows Internet Explorer
http://wideworldimporters/_layouts/ctypenew.aspx
Bing
Favorites
New Site Content Type
Page
Safety
Tools
Site Actions
Bill Malone
Home
Travel
Pictures
Employee Photos
Libraries
Site Pages
Shared Documents
Purchase Orders
Lists
Calendar
Done
Local intranet | Protected Mode: Off
120%

Team Site ▸ Site Settings ▸ Site Content Types ▸ New Site Content Type

Use this page to create a new site content type. Settings on this content type are initially copied from the parent content type, and future updates to the parent may overwrite settings on this type.

Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name: Purchase Order

Description:

Parent Content Type:

Select parent content type from: Document Content Types

Parent Content Type: Form

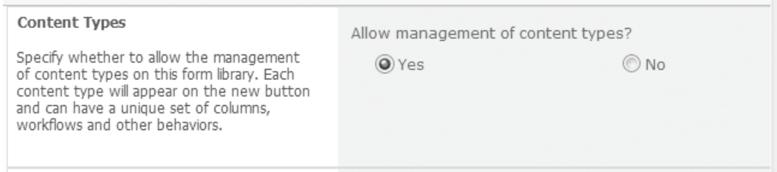
Description: Fill out this form.

12. Click **OK**. The **Site Content Types-Purchase Orders** page appears.
13. Under **Settings**, click **Advanced Settings**.
14. Select the **Upload a New Document Template** option.
15. Click **Browse** and navigate to the new form template, such as **WideWorldPurchaseOrder.xsn**.
16. Click **Open** to upload the template.
17. On the **Site Content Types-Purchase Orders-Advanced Settings** page, click **OK**. You are taken to the **Site Content Type-Purchase Orders** page.
18. On the Quick Launch, click the **Purchase Orders** form library.
19. On the **Purchase Orders** library page, under **Library Tools,** click the **Library** tab on the Ribbon.

Library Settings

20. Click the **Library Settings** button on the Ribbon. The Purchase Orders-Form Library Settings page appears.
21. Under **General Settings**, click **Advanced Settings**. The Advanced Settings page appears.

22. In the **Content Types** area, under **Allow management of content types?**, select **Yes**.



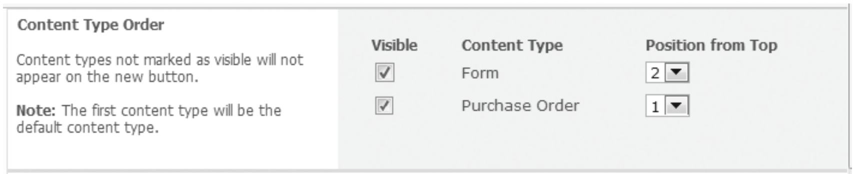
Content Types

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?

● Yes ○ No

23. Leave the rest of the page at the default settings, and then click **OK**.
24. On the **Purchase Orders-Form Library Settings** page, scroll down to the **Content Types** section. One content type, called Form, is associated with this form library.
25. Click **Add from existing site content types**. The Add Content Types page appears.
26. From the **Available Site Content Types** list, select the **Purchase Order** content type.
27. Click **Add**, and then click **OK**.
28. On the **Purchase Orders-Form Library Settings** page, in the **Content Types** section, 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 then click **OK**.



Content Type Order

Content types not marked as visible will not appear on the new button.

Note: The first content type will be the default content type.

Visible	Content Type	Position from Top
☑	Form	2
☑	Purchase Order	1

30. On the Quick Launch, click **Purchase Orders**. On the **Purchase Orders** library page, click the **Documents** tab, and then click the **New Document** button on the Ribbon.

    This action invokes InfoPath 2010 (if it is installed on your computer), and the default Wide World Importers Purchase Order form appears.

CLEAN UP Close the browser and InfoPath 2010.

Creating a Wiki Page Library

A *wiki* is a website containing wiki web pages that enable users to collect team knowledge, plan events, or work on projects together. Wikis are a way for many members of the community to come together and edit content collaboratively.

The very first wiki (pronounced *wee-kee*) site, WikiWikiWeb, was created for the Portland Pattern Repository in 1995 by Ward Cunningham, who devised a system that created web pages quickly and allowed users to create and edit web page content freely by using a web browser, as well as allowing users to create an interconnected collection of wiki pages. *Wiki* is the Hawaiian word for quick, and as Hawaiian words are doubled for emphasis, *wikiwiki* means very quick. WikiWikiWeb is the proper name of the concept, of which *wiki* and *wikis* are abbreviations.

Tip One wiki implementation is Wikipedia, from Wikimedia Foundation Inc. (*http://www.wikipedia.org*), which is an encyclopedia-like website that has inherited many of the nonencyclopedic properties of a wiki site.

Wiki page libraries can be created and used on any site in SharePoint Foundation 2010. We will look at creating wiki pages in detail in Chapter 6, "Working with Web Pages."

In the following exercise, you will create a wiki page library where employees can create and modify their own wiki pages.

→ **SET UP** Open the SharePoint site where you'd like to create a wiki page 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 library on this site. If in doubt, see the Appendix at the back of this book.

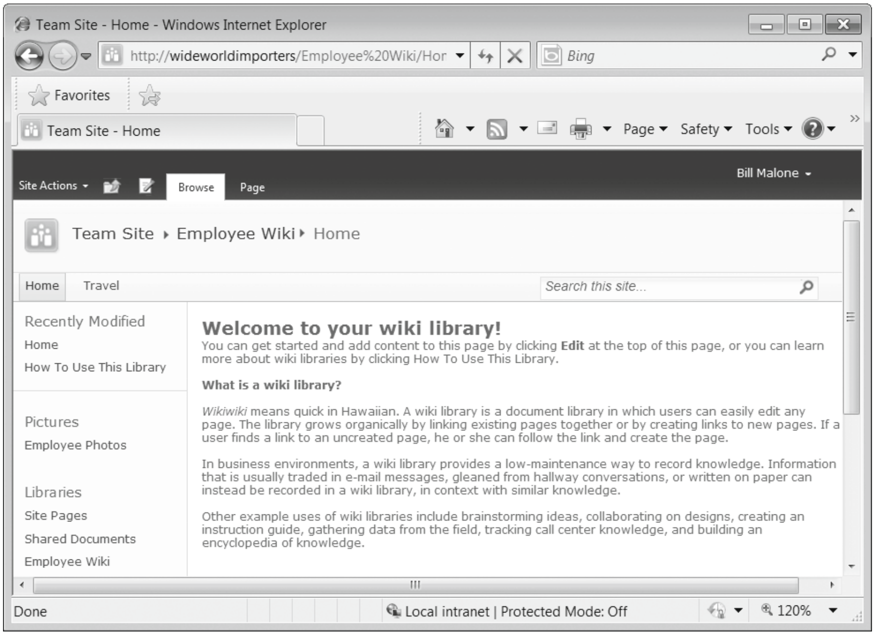
1. On the **Site Actions** menu, click **More Options** to display the list and library templates in the **Create** dialog.
2. In the left pane, under **Filter By**, click **Library**.
3. Select **Wiki Page Library** and then click **More Options**. The Create dialog appears.

   Tip There is no restriction on the number of copies of any library type that you can create in a site. You can create as many wiki page libraries as you like.

4. In the **Name** box, type **Employee Wiki**.
5. In the **Description** box, type **Contains wiki pages created by company employees**.

   You have entered all the necessary information to create a wiki page library.

6. Click **Create**. Your new wiki page library has been created and is displayed in the browser.


Team Site - Home - Windows Internet Explorer
http://wideworldimporters/Employee%20Wiki/Hor
Bing
Favorites
Team Site - Home
Page
Safety
Tools
Site Actions
Browse
Page
Bill Malone
Team Site
Employee Wiki
Home
Home
Travel
Search this site...
Recently Modified
Home
How To Use This Library
Pictures
Employee Photos
Libraries
Site Pages
Shared Documents
Employee Wiki
Done
Local intranet | Protected Mode: Off
120%

Welcome to your wiki library!

You can get started and add content to this page by clicking **Edit** at the top of this page, or you can learn more about wiki libraries by clicking How To Use This Library.

What is a wiki library?

Wikiwiki means quick in Hawaiian. A wiki library is a document library in which users can easily edit any page. The library grows organically by linking existing pages together or by creating links to new pages. If a user finds a link to an uncreated page, he or she can follow the link and create the page.

In business environments, a wiki library provides a low-maintenance way to record knowledge. Information that is usually traded in e-mail messages, gleaned from hallway conversations, or written on paper can instead be recorded in a wiki library, in context with similar knowledge.

Other example uses of wiki libraries include brainstorming ideas, collaborating on designs, creating an instruction guide, gathering data from the field, tracking call center knowledge, and building an encyclopedia of knowledge.

CLEAN UP Close the browser.

Creating a New Folder in a Library

Using folders provides a common way to organize documents in an efficient way. SharePoint 2010 allows you to create folders in a library.

Tip SharePoint Foundation 2010 provides other mechanisms for organizing your documents, such as views and filters. However, people often are most familiar with folders, and thus they may find it easier to create a folder structure.

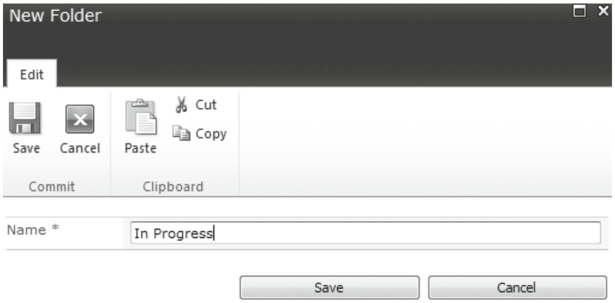
In this exercise, you will create a folder for documents classified as In Progress so that they can be differentiated from completed documents.

SET UP Open the SharePoint site where you'd like 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 at the back of this book.

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

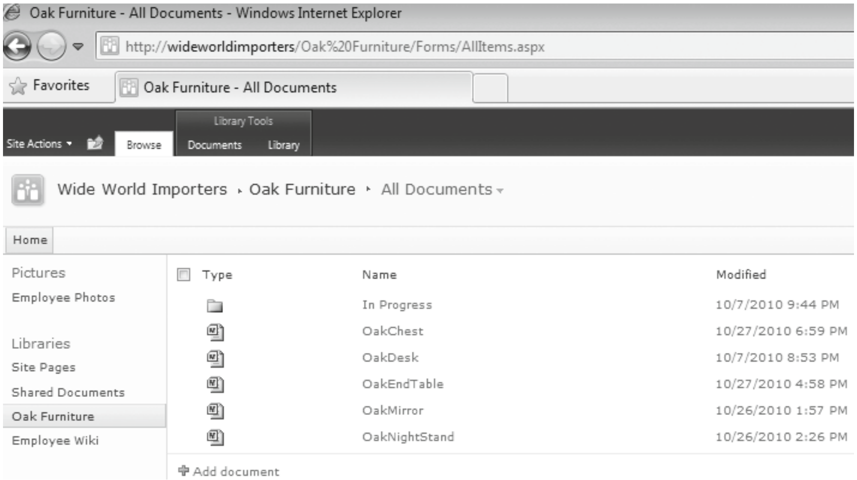
2. Click the **Document** tab on the Ribbon, and then click **New Folder**. The **New Folder** dialog appears.
3. In the **Name** box, type the name of the folder that you would like to create, such as **In Progress**.


New Folder
Edit
Save
Cancel
Cut
Copy
Paste
Commit
Clipboard
Save
Cancel

Name * In Progress

4. Click **Save**.

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


Oak Furniture - All Documents - Windows Internet Explorer
http://wideworldimporters/Oak%20Furniture/Forms/AllItems.aspx
Favorites
Oak Furniture - All Documents
Library Tools
Site Actions
Browse
Documents
Library
Wide World Importers › Oak Furniture › All Documents
Home
Pictures
Employee Photos
Libraries
Site Pages
Shared Documents
Oak Furniture
Employee Wiki
Add document

Type	Name	Modified
	In Progress	10/7/2010 9:44 PM
	OakChest	10/27/2010 6:59 PM
	OakDesk	10/7/2010 8:53 PM
	OakEndTable	10/27/2010 4:58 PM
	OakMirror	10/26/2010 1:57 PM
	OakNightStand	10/26/2010 2:26 PM

CLEAN UP Close the browser.

Checking Documents In and Out

One of the features provided by SharePoint Foundation 2010 is basic document management. *Checking out* and *checking in* a document allows you to work on a document exclusively, while letting others know that you are editing this document so that they don't try to change it at the same time. When a document is checked out, other users will not be able to open this document for editing, so your changes will not get overwritten. When you are checking in a document, you can also enter comments about what you've changed that others can then view.

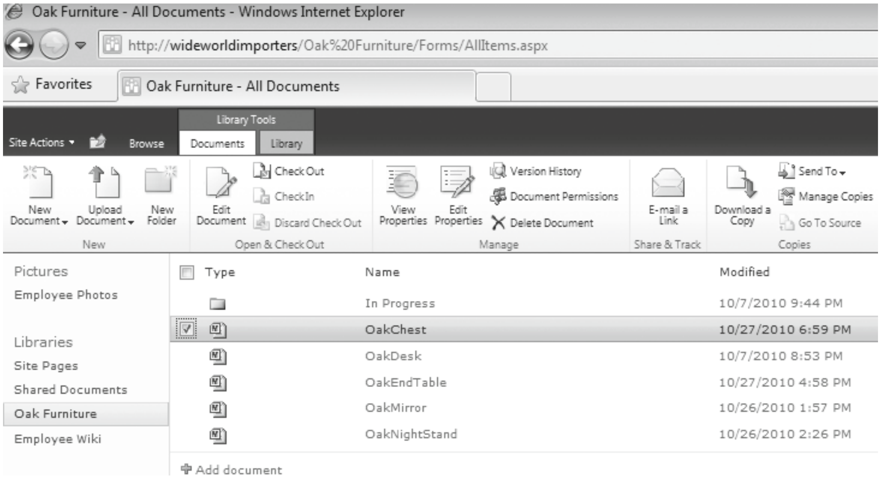
When you check out a file, you lock the file for editing to prevent other users from editing the file at the same time. When you have finished editing the file, you check the file back in, allowing other users to edit the file.

In the following exercise, you will check out a document from a document library, and then check it back in and change the comments to reflect that this is the final version of the document.

SET UP Open the SharePoint site where 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 the document library to check out and check in documents. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click **Oak Furniture**. The Oak Furniture document library appears.
2. Hover your mouse over a document that you would like to check out, such as **OakChest.docx**. A check box appears to the left of the document name. Click the check box to select the document.

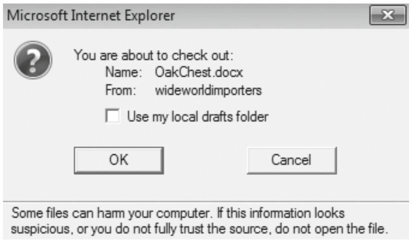


Oak Furniture - All Documents - Windows Internet Explorer
http://wideworldimporters/Oak%20Furniture/Forms/AllItems.aspx
Favorites
Oak Furniture - All Documents
Library Tools
Site Actions
Browse
Documents
Library
New Document
Upload Document
New Folder
New
Edit Document
Check Out
Check In
Discard Check Out
Open & Check Out
View Properties
Edit Properties
Version History
Document Permissions
Delete Document
Manage
E-mail a Link
Share & Track
Download a Copy
Send To
Manage Copies
Go To Source
Copies
Pictures
Employee Photos
Libraries
Site Pages
Shared Documents
Oak Furniture
Employee Wiki
Add document

☐	Type	Name	Modified
		In Progress	10/7/2010 9:44 PM
☑		OakChest	10/27/2010 6:59 PM
		OakDesk	10/7/2010 8:53 PM
		OakEndTable	10/27/2010 4:58 PM
		OakMirror	10/26/2010 1:57 PM
		OakNightStand	10/26/2010 2:26 PM

Check Out

3. Click **Check Out** on the **Documents** tab on the Ribbon.
4. Click **OK** in the confirmation message box that appears.



You are about to check out:
Name: OakChest.docx
From: wideworldimporters

☐ Use my local drafts folder

Some files can harm your computer. If this information looks suspicious, or you do not fully trust the source, do not open the file.

The document now has been checked out. The file icon in the Type column has changed and shows a green, downward-pointing arrow, indicating that the document is checked out.

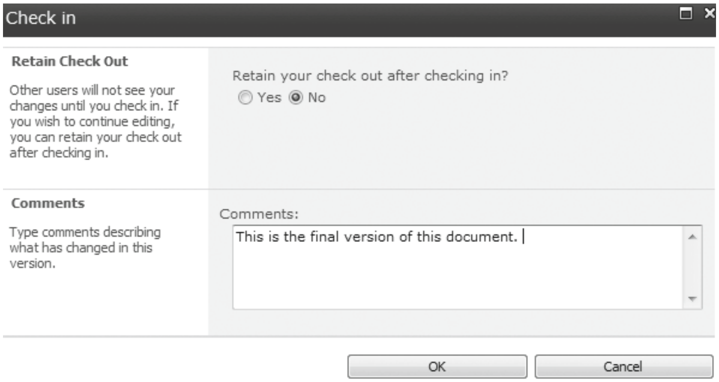
Hover the mouse over this icon. A tooltip is displayed, showing who has checked out the document (you, in this case). This is useful to know when you want to edit a document that is checked out to another user. For example, you can contact that person and ask him or her to check the document back in.

See Also With appropriate permissions, it is possible to enforce the check-in of a document that has been checked out by another user. For more information, refer to Chapter 8.

When you have a document checked out, no one else can change it, and no one else can see the changes you've made while you have it checked out.

You will now check the document back in.

5. In the browser window, select the document **OakChest.docx** (see step 2 for instructions on doing that, if necessary).
6. Click **Check in** on the **Documents** tab on the Ribbon. The Check In dialog appears.
7. In the **Check In** dialog, in the **Comments** box, type **This is the final version of this document**.



Retain Check Out

Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.

Retain your check out after checking in?
○ Yes ● No

Comments

Type comments describing what has changed in this version.

Comments:
This is the final version of this document.

8. Click **OK** to check the document in and return to the **Oak Furniture** document library. The document now has been checked in, and its icon no longer shows a green arrow.

CLEAN UP Close the browser.

Working with Version History

When *versioning* is enabled, SharePoint Foundation 2010 creates a separate copy of the document each time that 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.

You can keep major versions only, or major and minor versions. Major versions have whole numbers such as 1, 2, 3, and so on. Minor versions have decimal numbers such as 1.1, 1.2, 1.3, and so on. A major version number is associated with a version that has been published (in other words, with the version that is available in the library). A minor version number is associated with a version that is in progress but is not yet published.

See Also A more in-depth discussion of versioning will be covered in Chapter 8.

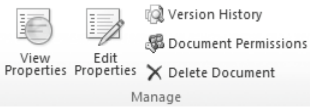
When you view a document's version history, you see a list of the occasions when this document was edited and saved, as well as the author's comments on those changes.

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

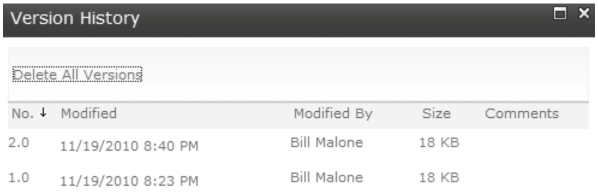
SET UP Open the SharePoint site where you'd like to see the version history for a document. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient permissions to the document library to check out, modify, and check in documents. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click **Oak Furniture**. The Oak Furniture document library appears.
2. Hover your mouse over a document that you would like to check out, such as **OakChest.docx**. A check box appears to the left of the document name. Click the check box to select the document.
3. On the **Documents** tab on the Ribbon, click **Version History**.



You are taken to the Version History dialog, which shows 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.

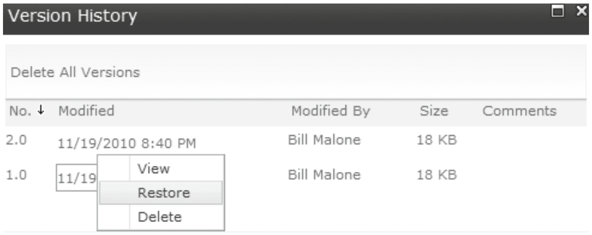


Version History

Delete All Versions

No. ↓	Modified	Modified By	Size	Comments
2.0	11/19/2010 8:40 PM	Bill Malone	18 KB	
1.0	11/19/2010 8:23 PM	Bill Malone	18 KB	

4. Hover the mouse over the time stamp in the **Modified** column that identifies an earlier version of the document, and then click the arrow that appears on the right of the time stamp.
5. On the drop-down menu, click **Restore**.



Version History

Delete All Versions

No. ↓	Modified	Modified By	Size	Comments
2.0	11/19/2010 8:40 PM	Bill Malone	18 KB	
1.0	11/19	Bill Malone	18 KB	

6. A message box appears, indicating that you are about to replace the current version with the selected version. Click **OK**.

Tip If minor versioning is enabled, then there is now an additional, unpublished version. SharePoint Foundation 2010 actually copies the version that you want to restore and makes it the newest minor version. If you want to publish this version, you need to do so manually, using the Publish button on the Ribbon.

CLEAN UP Close the browser.

Using Alerts

One of the most difficult obstacles encountered in the business world is knowing when information changes. SharePoint Foundation 2010 can help address this problem by allowing you to subscribe to an *alert*. When a document to which you subscribe changes, you receive a message stating that the document has changed.

Alerts are a great way for users to be notified when a document is changed or deleted. Users can specify if they want to receive the alert notification via email or as a text message (SMS). Users can also specify if they want to be notified immediately or receive a summary alert on either a weekly or monthly basis.

For example, you (Bill Malone, in this 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 via email that it has been changed.

→ **SET UP** Your server has to be configured to send email messages. Otherwise, you will not be able to complete the steps in this exercise.

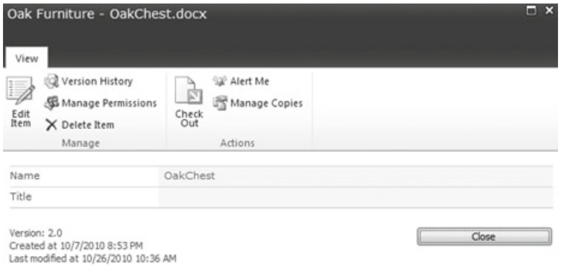
→ **SET UP** Open the SharePoint site where you'd like to set up an alert on a document. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient permissions to create alerts. If in doubt, see the Appendix at the back of this book.

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

View
Properties

2. Select the document for which you would like an alert, such as **OakChest.docx**, by hovering the mouse over it and clicking the check box that appears to the left of the document. Click **View Properties** on the **Documents** tab on the Ribbon. The Oak Furniture - OakChest.docx dialog appears.



Name: OakChest
Title:

Version: 2.0
Created at 10/7/2010 8:53 PM
Last modified at 10/26/2010 10:36 AM

3. Click **Alert Me** in the **Actions** section.

4. The Oak Furniture: OakChest.docx - New Alert dialog appears. You are given several options about the frequency of alerts, as well as when you want to be alerted. Retain the default values for this exercise and click **OK**.

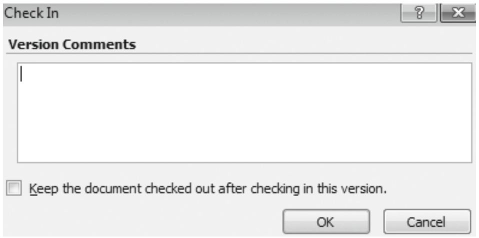
   Important If your server is not configured to send outgoing email, an error message will appear and you will be unable to complete step 4 of this exercise.

   You are returned to the Oak Furniture document library.

5. You will now modify the document, and then you will receive an alert that this document has been modified. Click the check box to the left of the **OakChest.docx** document to select it, and then, on the **Documents** tab on the Ribbon, click

Check Out, and then click **OK** in the message box that appears. Click the arrow to the right of the document name, and then select **Edit in Microsoft Word** from the drop-down menu.

6. The document opens in Word. If a warning about the template appears in the **Open Document** message box, click **OK** to confirm that you want to proceed.
7. Make some changes to the document. For example, make some text bold.
8. On the **File** tab, click **Save** to save the document back to the document library, and then click **Exit** to close Word.
9. Word prompts you to check in your document. Click **OK**.



☐ Keep the document checked out after checking in this version.

10. Open Outlook. You should receive two email messages. The first message indicates that an alert was created successfully. The second message indicates that OakChest.docx has been modified.

CLEAN UP Close the browser, and then close Outlook.

Deleting and Restoring Documents

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

The *Recycle Bin* provides a safety net when deleting documents, document sets, list items, lists, folders, and files. When you or other site members delete any of these items, the items are placed in the Recycle Bin instead of immediately being deleted permanently. Items remain in the Recycle Bin until you decide to delete them permanently from your site or until the items are deleted permanently after a set number of days, which is based on a schedule defined in SharePoint Central Administration. The default is 30 days.

If you click Recycle Bin in the left navigation pane, you can see all the items that you have deleted from your site. You can either restore or delete each item from the Recycle Bin. When you delete an item from the site Recycle Bin, the item is sent to the Site Collection Recycle Bin. Note that to retrieve items from the Site Collection Recycle Bin, you must contact the Site Collection Administrator.

In the following exercise, you will delete a document from the Oak Furniture library and then restore it from the site Recycle Bin.

SET UP Open the SharePoint site where you'd like to delete a document. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient permissions to delete a document in the document library. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, click **Oak Furniture**. The Oak Furniture document library appears.
2. Select the document that you would like to delete, such as **OakChest.docx**, by clicking the check box to the left of the document.

Delete Document

3. On the **Documents** tab on the Ribbon, click **Delete Document**.
4. In the message box that asks whether you are sure that you want to delete the document, click **OK**. The document is deleted from the library and placed into the site Recycle Bin.

Recycle Bin

5. To recover your document, click **Recycle Bin** in the left navigation pane.
6. In the Recycle Bin, select the **OakChest.docx** document by clicking the check box next to it, and then click the **Restore Selection** link. Click **OK** in the message box to confirm that you want to restore the document.
7. Go back to the **Oak Furniture** library and verify that the **OakChest.docx** document has been restored and is listed on the library page.

CLEAN UP Close the browser.

Working Offline with SharePoint Workspace

For mobile users, it's not always possible or convenient to connect to SharePoint every time they want to read or modify a document. SharePoint Foundation 2010 provides the ability to work with documents offline. We will look into two ways of taking your documents offline. The first way is to synchronize your documents with a SharePoint Workspace. The second way is to copy the documents to your Outlook client.

SharePoint Workspace allows mobile users to download SharePoint content to their local machine to work offline. This can be either an entire SharePoint site or a subset of a site defined by the user. You can synchronize various lists and libraries from different sites to the same Workspace.

When working offline, you can view and modify the content in the same way that you can when working in SharePoint. When connected back to the network, you can synchronize your changes back to SharePoint, either automatically or manually.

SharePoint Workspace also includes additional functionality to help you keep track of documents, such as notification icons to show which documents you have read and which ones have been modified recently.

Tip There are limits on the number of files and the size of each SharePoint Workspace. Each Workspace is limited to approximately 500 files and a maximum size of 2 gigabytes (GB). You cannot store more than 1,800 files in all your SharePoint Workspaces.

In this exercise, you will create an account and then synchronize documents to a SharePoint Workspace. You need to create an account only once on the first use of the SharePoint Workspace with the server.

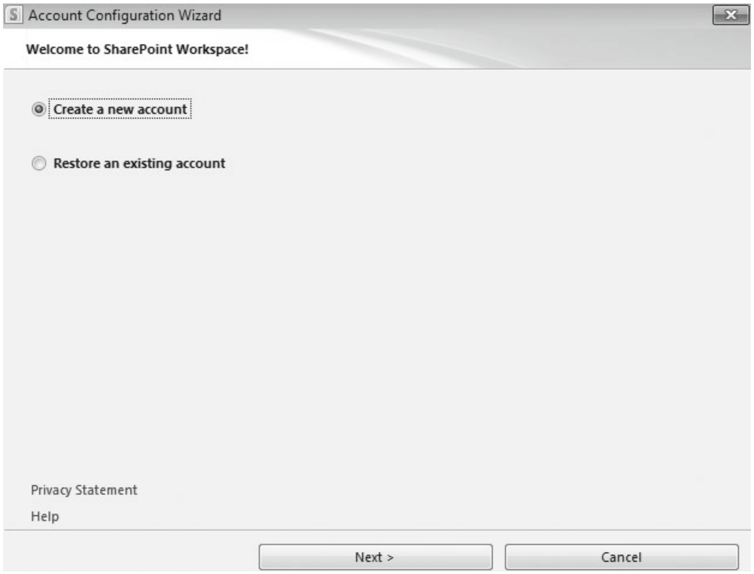
SET UP Open the SharePoint site that you want to synchronize to SharePoint Workspace. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient permissions to synchronize to SharePoint Workspace. If in doubt, see the Appendix at the back of this book.

Sync to SharePoint Workspace

1. On the Quick Launch, click the **Oak Furniture** library. On the **Library** tab on the Ribbon, in the **Connect & Export** section, click **Sync to SharePoint Workspace**.
2. The Account Configuration Wizard is displayed.

   Tip If the Account Configuration Wizard does not open, an indicator will be flashing on the taskbar.



Account Configuration Wizard

Welcome to SharePoint Workspace!

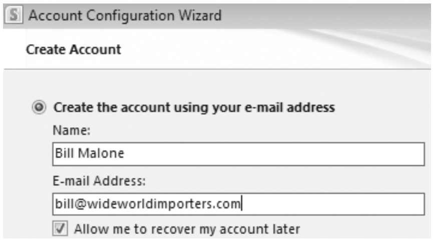
● Create a new account

○ Restore an existing account

Privacy Statement

Help

3. Leave the default option, **Create a new account**, selected and click **Next**.
4. Enter the appropriate information in the **Name** and **E-mail Address** boxes.



Account Configuration Wizard

Create Account

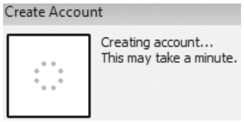
● Create the account using your e-mail address

Name: Bill Malone

E-mail Address: bill@wideworldimporters.com

☑ Allow me to recover my account later

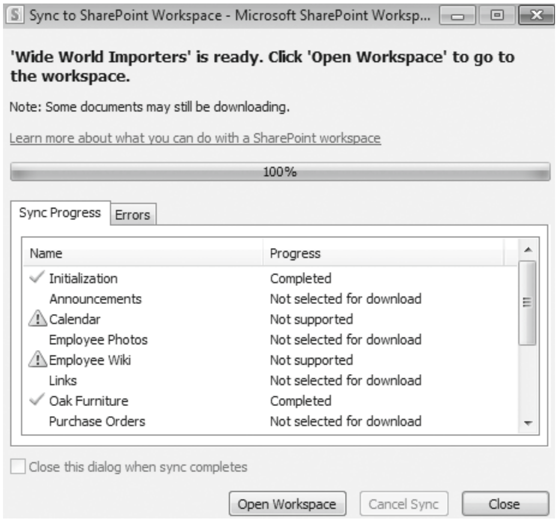
5. Click **Finish**. If prompted, provide your user name and password and then click **OK**. You will see the following dialog, indicating that the account is being created.



Create Account

Creating account...
This may take a minute.

6. In the **Sync to SharePoint Workspace** message box that appears, click **OK**.
7. A dialog appears, indicating that the Workspace is ready. Steps that have been completed are shown with a green check mark. Items that are not supported for offline editing are shown with an exclamation mark. Items that are available but have not been selected for download do not show any mark next to them. Click **Open Workspace**.



Sync to SharePoint Workspace - Microsoft SharePoint Worksp...

'Wide World Importers' is ready. Click 'Open Workspace' to go to the workspace.

Note: Some documents may still be downloading.

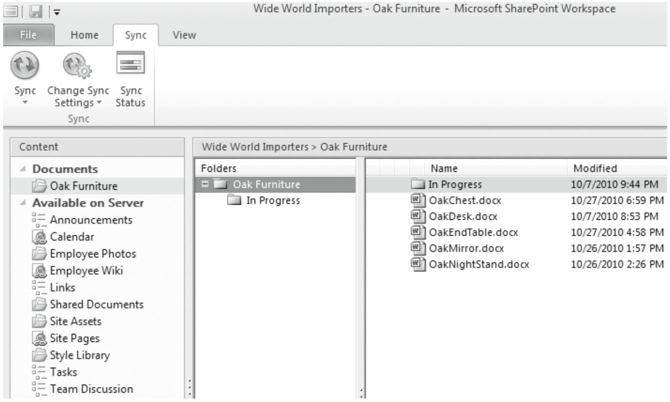
Learn more about what you can do with a SharePoint workspace

100%

Name	Progress
✓ Initialization	Completed
Announcements	Not selected for download
⚠ Calendar	Not supported
Employee Photos	Not selected for download
⚠ Employee Wiki	Not supported
Links	Not selected for download
✓ Oak Furniture	Completed
Purchase Orders	Not selected for download

☐ Close this dialog when sync completes

8. The Wide World Importers – Oak Furniture – Microsoft SharePoint Workspace window opens. You now have the Oak Furniture library and its contents available offline while you are not connected to the network. Click the **Oak Furniture** document library to see its contents.


Wide World Importers - Oak Furniture - Microsoft SharePoint Workspace
File
Home
Sync
View
Sync
Change Sync Settings
Sync Status
Sync
Content
Documents
Oak Furniture
Available on Server
Announcements
Calendar
Employee Photos
Employee Wiki
Links
Shared Documents
Site Assets
Site Pages
Style Library
Tasks
Team Discussion
Wide World Importers > Oak Furniture
Folders
Oak Furniture
In Progress

Name	Modified
In Progress	10/7/2010 9:44 PM
OakChest.docx	10/27/2010 6:59 PM
OakDesk.docx	10/7/2010 8:53 PM
OakEndTable.docx	10/27/2010 4:58 PM
OakMirror.docx	10/26/2010 1:57 PM
OakNightStand.docx	10/26/2010 2:26 PM

9. Note that all files and folders from the Oak Furniture library are synchronized to the SharePoint Workspace client, which holds copies of its documents on your local hard disk. You can repeat these steps to connect to other SharePoint sites and synchronize their libraries and lists into a common Workspace.

CLEAN UP Close the browser, and then close SharePoint Workspace.

After documents have been modified offline, they need to be synchronized with the server. In this exercise, you will upload an offline document to the Oak Furniture document library using SharePoint Workspace. First, you will add the document to the library in the SharePoint Workspace, and then you will synchronize the library with the server.

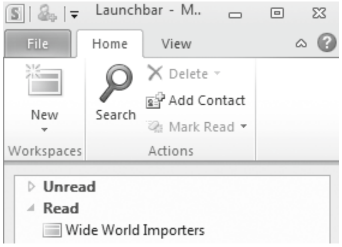
Practice Files You will use the practice file WideWorldInvoice.docx, located in the Documents\Microsoft Press\SBS_SPF\Chapter05 folder.

SET UP Open the SharePoint site that you want to synchronize to SharePoint Workspace. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient permissions to add a document to a library. If in doubt, see the Appendix at the back of this book

1. Open SharePoint Workspace by clicking the **Start** button on your computer, and then selecting **All Programs\Microsoft Office\Microsoft SharePoint Workspace 2010**.

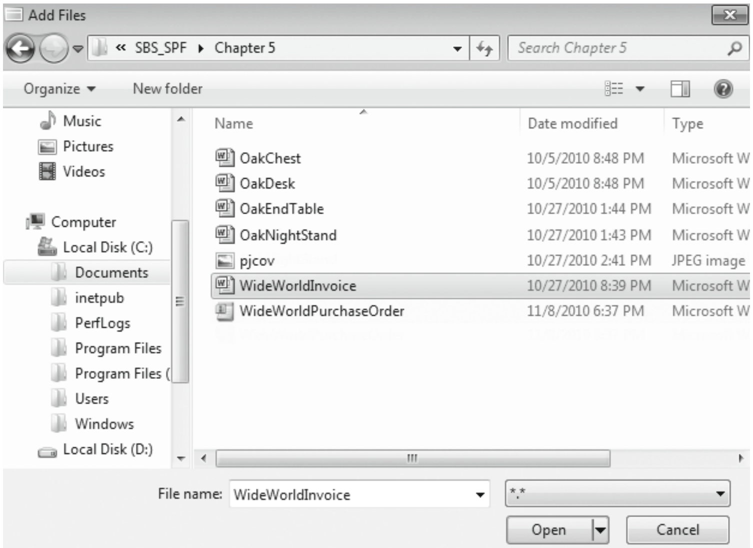
2. The **Wide World Importers** site that you synchronized in the previous exercise is shown under **Read**.


Launchbar - M..
File
Home
View
New
Search
Delete
Add Contact
Mark Read
Workspaces
Actions
Unread
Read
Wide World Importers

3. Double-click **Wide World Importers** to open the content from this site that has been taken offline. The Oak Furniture library opens. Oak Furniture is currently the only library on the Wide World Importers site that you have synchronized to SharePoint Workplace, so it is the only library shown.

Add Documents

4. Click the **Home** tab, and then click **Add Documents** on the Ribbon to add a new document to the Oak Furniture library in the SharePoint Workspace.
5. In the **Add Files** dialog, navigate to the location **C:\Documents\Microsoft_Press \SBS_SPF\Chapter05**.

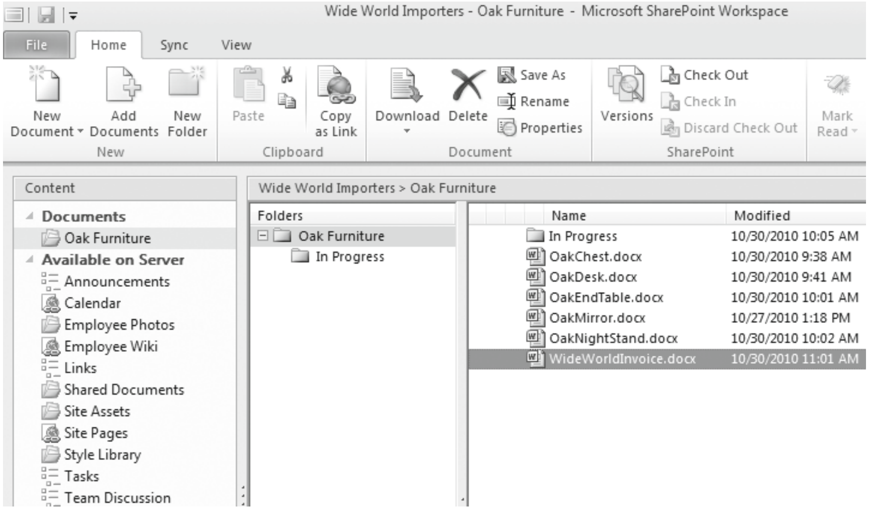

Add Files
« SBS_SPF ▸ Chapter 5
Search Chapter 5
Organize
New folder
Music
Pictures
Videos
Computer
Local Disk (C:)
Documents
inetpub
PerfLogs
Program Files
Program Files (
Users
Windows
Local Disk (D:)
Open
Cancel

Name	Date modified	Type
OakChest	10/5/2010 8:48 PM	Microsoft W
OakDesk	10/5/2010 8:48 PM	Microsoft W
OakEndTable	10/27/2010 1:44 PM	Microsoft W
OakNightStand	10/27/2010 1:43 PM	Microsoft W
pjcov	10/27/2010 2:41 PM	JPEG image
WideWorldInvoice	10/27/2010 8:39 PM	Microsoft W
WideWorldPurchaseOrder	11/8/2010 6:37 PM	Microsoft W

File name: WideWorldInvoice

.

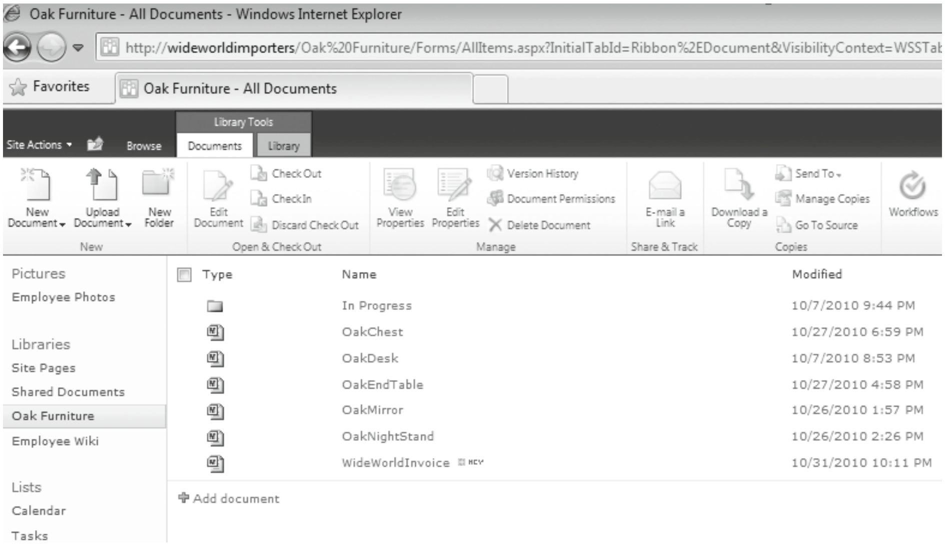
6. Select the document titled **WideWorldInvoice.docx**, and click **Open**. The document has been added to the Oak Furniture library in the SharePoint Workspace.


Wide World Importers - Oak Furniture - Microsoft SharePoint Workspace
File
Home
Sync
View
New Document
Add Documents
New Folder
New
Paste
Copy as Link
Clipboard
Download
Delete
Save As
Rename
Properties
Document
Versions
Check Out
Check In
Discard Check Out
SharePoint
Mark Read
Content
Documents
Oak Furniture
Available on Server
Announcements
Calendar
Employee Photos
Employee Wiki
Links
Shared Documents
Site Assets
Site Pages
Style Library
Tasks
Team Discussion
Wide World Importers > Oak Furniture
Folders
Oak Furniture
In Progress

Name	Modified
In Progress	10/30/2010 10:05 AM
OakChest.docx	10/30/2010 9:38 AM
OakDesk.docx	10/30/2010 9:41 AM
OakEndTable.docx	10/30/2010 10:01 AM
OakMirror.docx	10/27/2010 1:18 PM
OakNightStand.docx	10/30/2010 10:02 AM
WideWorldInvoice.docx	10/30/2010 11:01 AM

7. You will now synchronize the SharePoint Workspace with the SharePoint site. In the SharePoint Workspace, click the **Sync** tab on the Ribbon and then click **Sync Workspace**. The offline changes you made in the Oak Furniture library are synchronized with the live site.

8. In the browser, navigate to the **Oak Furniture** library and verify that the new file, **WideWorldInvoice.docx**, has been uploaded to the library on the SharePoint server.


Oak Furniture - All Documents - Windows Internet Explorer
http://wideworldimporters/Oak%20Furniture/Forms/AllItems.aspx?InitialTabId=Ribbon%2EDocument&VisibilityContext=WSSTab
Favorites
Oak Furniture - All Documents
Library Tools
Site Actions
Browse
Documents
Library
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
Share & Track
Download a Copy
Send To
Manage Copies
Go To Source
Copies
Workflows
Pictures
Employee Photos
Libraries
Site Pages
Shared Documents
Oak Furniture
Employee Wiki
Lists
Calendar
Tasks
Add document

Type	Name	Modified
	In Progress	10/7/2010 9:44 PM
	OakChest	10/27/2010 6:59 PM
	OakDesk	10/7/2010 8:53 PM
	OakEndTable	10/27/2010 4:58 PM
	OakMirror	10/26/2010 1:57 PM
	OakNightStand	10/26/2010 2:26 PM
	WideWorldInvoice NEW	10/31/2010 10:11 PM

CLEAN UP Close the browser, and then close SharePoint Workspace.

Working Offline with Outlook

Another method of taking your documents offline is by using an Outlook client. The documents are emailed to you as attachments and placed into the SharePoint list in Outlook.

SET UP Open the SharePoint site where you'd like to copy documents offline. If prompted, type your user name and password, and then click OK.

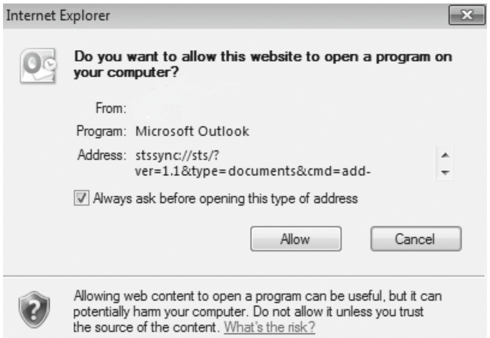
BE SURE TO verify that you have sufficient permissions to the document library to check out, modify, and check in documents. If in doubt, see the Appendix at the back of this book.

In the following exercise, you will take documents offline by using Outlook.

1. On the Quick Launch, click the **Oak Furniture** library.

Connect to Outlook

2. On the **Library** tab on the Ribbon, click **Connect to Outlook**.
3. A message box appears, asking whether you want to allow this website to open a program on your computer (Microsoft Outlook). Click **Allow**.



Do you want to allow this website to open a program on your computer?

From:

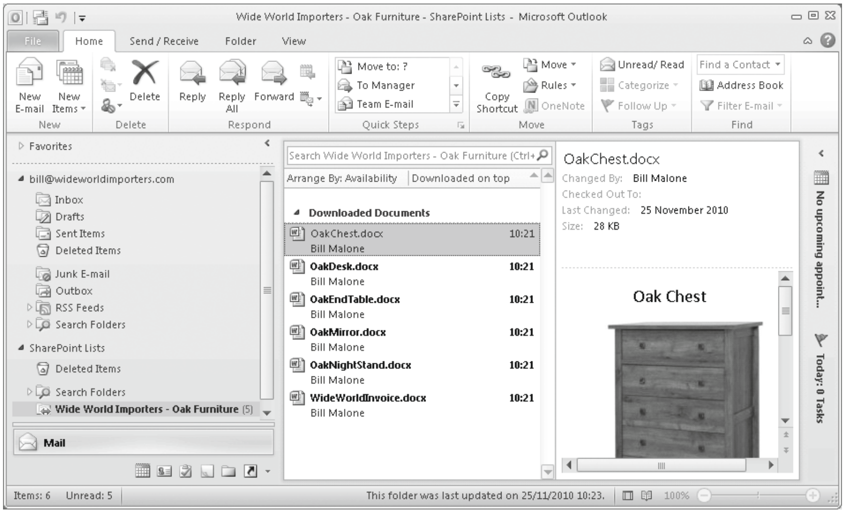
Program: Microsoft Outlook

Address: stssync://sts/?ver=1.1&type=documents&cmd=add-

☑ Always ask before opening this type of address

Allowing web content to open a program can be useful, but it can potentially harm your computer. Do not allow it unless you trust the source of the content.

4. Outlook opens, and a SharePoint list is created in Outlook. The documents in the library are downloaded automatically into this new list as attachments to emails.


Wide World Importers - Oak Furniture - SharePoint Lists - Microsoft Outlook
File
Home
Send / Receive
Folder
View
New E-mail
New Items
Delete
Reply
Reply All
Forward
Move to: ?
To Manager
Team E-mail
Copy Shortcut
Move
Rules
OneNote
Unread/ Read
Categorize
Follow Up
Find a Contact
Address Book
Filter E-mail
New
Delete
Respond
Quick Steps
Move
Tags
Find
Favorites
bill@wideworldimporters.com
Inbox
Drafts
Sent Items
Deleted Items
Junk E-mail
Outbox
RSS Feeds
Search Folders
SharePoint Lists
Deleted Items
Search Folders
Wide World Importers - Oak Furniture (5)
Mail
Search Wide World Importers - Oak Furniture (Ctrl+
Arrange By: Availability
Downloaded on top
Oak Chest
No upcoming appoint...
Today: 0 Tasks
100%

Downloaded Documents

OakChest.docx Bill Malone	10:21
OakDesk.docx Bill Malone	10:21
OakEndTable.docx Bill Malone	10:21
OakMirror.docx Bill Malone	10:21
OakNightStand.docx Bill Malone	10:21
WideWorldInvoice.docx Bill Malone	10:21

OakChest.docx
Changed By: Bill Malone
Checked Out To:
Last Changed: 25 November 2010
Size: 28 KB

Items: 6 Unread: 5
This folder was last updated on 25/11/2010 10:23.

See Also For more information on SharePoint Foundation integration with Outlook, refer to Chapter 13, "Using SharePoint Foundation with Outlook 2010."

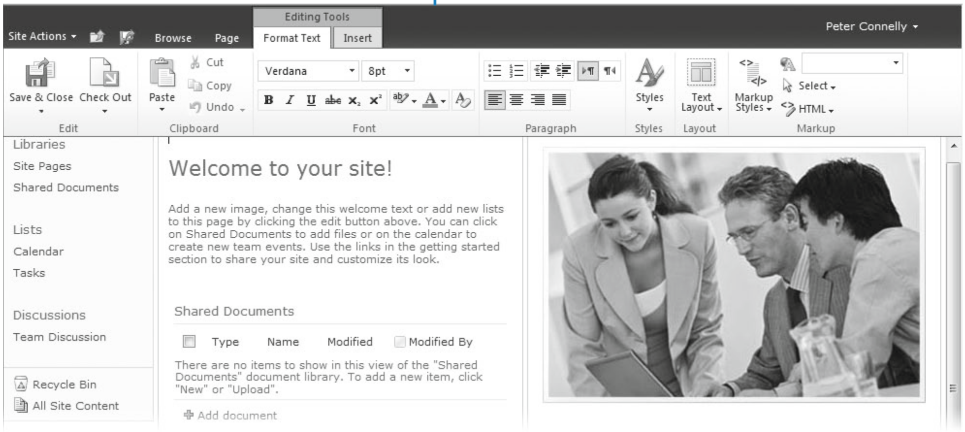
CLEAN UP Close the browser, and then close Outlook.

Key Points

- Libraries provide a central location to store documents, forms, and pictures so that they can be shared easily.
- You can create document libraries for specific topics and give them descriptive names.
- You can add existing documents to a document library in many ways, including by using the browser, using Windows Explorer, and using SharePoint Workspace.
- Remember to check out a document before you edit it.
- You can check in and check out documents by using Office suite applications.
- You can use versioning to manage the history of your documents in SharePoint.
- Set up alerts on documents when you want to know that a document has been changed or deleted.
- Deleted documents can be restored from the site Recycle Bin.
- You can take the documents in the SharePoint library offline in several ways, including using SharePoint Workspace and also Outlook.

Chapter at a Glance

Edit a page, page 156

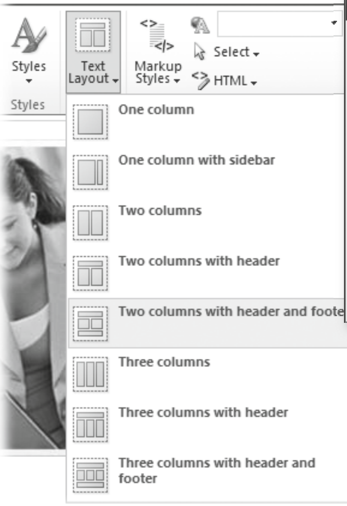


Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Peter Connelly
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Text Layout
Layout
Markup Styles
Select
HTML
Markup
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Discussions
Team Discussion
Recycle Bin
All Site Content
Shared Documents
Type
Name
Modified
Modified By
Add document

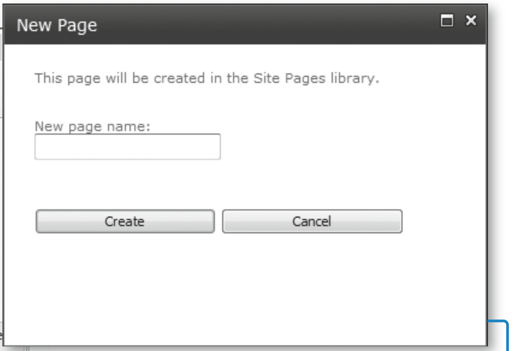
Welcome to your site!

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

There are no items to show in this view of the "Shared Documents" document library. To add a new item, click "New" or "Upload".



Styles
Text Layout
Markup Styles
Select
HTML
One column
One column with sidebar
Two columns
Two columns with header
Two columns with header and foote
Three columns
Three columns with header
Three columns with header and footer

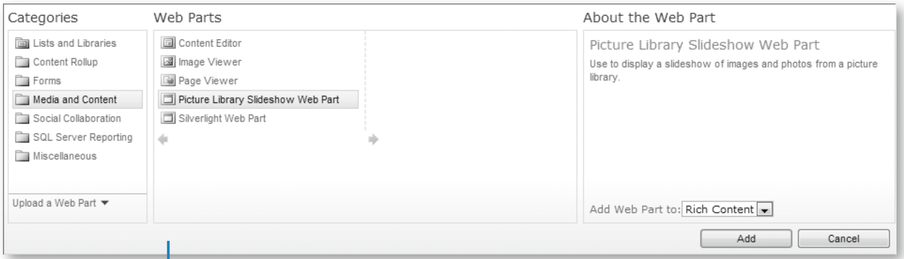


New Page
New page name:
Create
Cancel

This page will be created in the Site Pages library.

Create a new page, page 160

Change the layout of a page, page 159



Categories
Lists and Libraries
Content Rollup
Forms
Media and Content
Social Collaboration
SQL Server Reporting
Miscellaneous
Upload a Web Part
Web Parts
Content Editor
Image Viewer
Page Viewer
Picture Library Slideshow Web Part
Silverlight Web Part
About the Web Part
Picture Library Slideshow Web Part
Add Web Part to: Rich Content
Add
Cancel

Use to display a slideshow of images and photos from a picture library.

Add a Web Part from the Web Part pane, page 168

6

Working with Web Pages

In this chapter, you will learn how to

- ✔ Edit a page.
- ✔ Change the layout of a page.
- ✔ Create a new page.
- ✔ Add links.
- ✔ Work with page history and versions.
- ✔ Use alerts.
- ✔ Add a Web Part from the Web Part pane.
- ✔ Remove a Web Part.
- ✔ Customize a Web Part by using the Web Part tool pane.
- ✔ Edit Web Part pages.
- ✔ Move Web Parts.

In Microsoft SharePoint Foundation 2010, a website is a collection of web pages. You will find this approach more natural than in Microsoft Windows SharePoint Services 3.0, where a site was seen as a container for list and library data and web pages were used to display data held in the lists and libraries. In Windows SharePoint Services 3.0, the addition of static text and images was possible only by adding the Content Editor Web Part.

In SharePoint Foundation, when you create a Team site, SharePoint creates a wiki page library, named Site Pages, where the web pages are stored and where the new pages can be created from the Site Actions menu. There are two types of web pages—wiki pages and Web Part pages. Wiki pages are the default pages at sites created from the Team, Blank, or Document Workspace site template. Both ***wiki pages*** and ***Web Part pages*** can contain Web Parts. ***Web Parts*** are reusable components that can contain any type of web-based information, including analytical, collaborative, and database information. Wiki pages consist of a mix of free-format static text and images in addition to Web Parts, whereas Web Part pages can contain only Web Parts. To include free-format static text or images on a Web Part page, you must use the Content Editor Web Part or the Image Web Part.

Both types of pages are flexible and highly customizable using three types of tools:

- A browser
- A SharePoint Foundation–compatible web page editing tool, such as Microsoft SharePoint Designer 2010
- A professional development tool such as Microsoft Visual Studio 2010

No one tool can do everything, and therefore it is likely that in any deployment of SharePoint Foundation, all three tools will be used at some point.

This chapter introduces the basic concepts of wiki pages, Web Part pages, and Web Parts. Using the browser, you will learn how to view wiki pages and Web Part pages in different ways, as well as how to change the appearance of these pages by adding and removing static text and images and adding and removing Web Parts.

Practice Files Before you can complete the exercises in this chapter, you need to download the Chapter 6 practice files from the book's catalog page to the following folder on your computer: Documents\Microsoft Press\SBS_SPF\Chapter06. See "Using the Practice Files" at the beginning of this book for more information.

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

Editing a Page

On a Team site, blank site, or Document Workspace, the default web pages are wiki pages. They are stored in a SharePoint Foundation–based wiki library, named Site Pages.

The wiki library, Site Pages, inherits its permissions from the site. Therefore, anyone who is mapped to the Contribute permission level at the site level—that is, anyone who is a member of the site's Members SharePoint group—is allowed to change any wiki page or create new pages, which is known as "open editing." If a page is found to be incomplete or poorly organized, any member of the site can edit it as he or she sees fit. Therefore, as users share their information, knowledge, experience, ideas, and views, the content evolves. Site members can work together to change or update information without the need to send emails or attend meetings or conference calls. All users are allowed to control and check the content, because open editing relies on the assumption that most members of a collaboration site have good intentions.

When you edit a page, you should always check it out before you modify the content. This is to prevent other users in your team from editing the page at the same time.

Tip Wiki pages stored in a SharePoint Foundation–based wiki library can include static text, images, and Web Parts, without the need for Web Part zones.

In this exercise, you will edit the home page of a site.

Practice Files You will use the practice file pjcov.jpg, located in the Documents\Microsoft Press\SBS_SPF\Chapter06 folder.

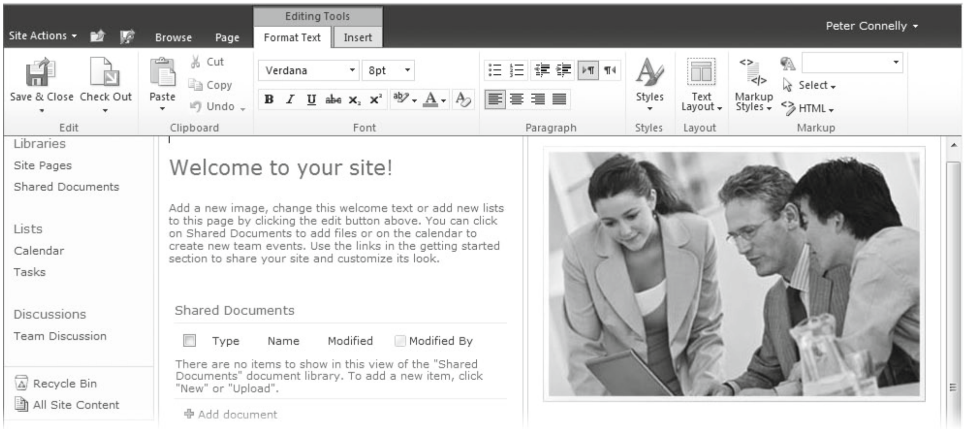
SET UP Open the SharePoint Team site where you would like to edit the home page. The exercise will use the *http://wideworldimporters* site, but you can use whatever site you want. If prompted, type your user name and password, and then click OK.

BE SURE TO verify that you have sufficient rights to edit the home page of this site. If in doubt, see the Appendix at the back of this book.

Edit

1. Click the **Edit** icon that is displayed to the left of the **Browse** tab.

   The Editing Tools ribbon tabs—Format Text and Insert—are displayed on the right side of the Page tab, and the Ribbon is displayed above the two wiki page content areas. The Edit icon that was displayed to the left of the Browse tab is replaced with the Save & Close icon.


Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Peter Connelly
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Styles
Text Layout
Layout
Markup Styles
Select
HTML
Markup
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Discussions
Team Discussion
Recycle Bin
All Site Content
Shared Documents
Type
Name
Modified
Modified By
Add document

Welcome to your site!

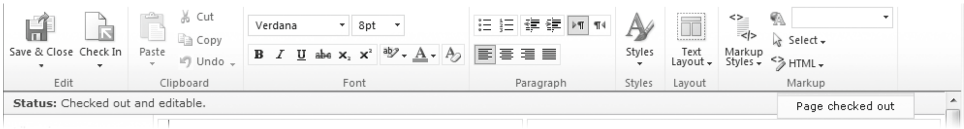
Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

There are no items to show in this view of the "Shared Documents" document library. To add a new item, click "New" or "Upload".

Check Out

2. On the **Format Text** tab, click **Check Out** in the **Edit** group.

   A notification message briefly appears below the Ribbon and to the right, displaying the text "Page Checked Out," and a yellow status bar appears below the Ribbon stating that the page is checked out and editable. On the Format Text tab, the Check Out command in the Edit group is replaced with the Check In command.


Save & Close
Check In
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Styles
Text Layout
Layout
Markup Styles
Select
HTML
Markup

Status: Checked out and editable.

Page checked out

Tip The Status bar and notification area are new to SharePoint 2010. Both give you contextual information. The Status bar displays persistent information and uses four predefined background colors to identify the level of importance of the information. Very important information has a red background, important information has a yellow background, success information has a green background, and all other information has a blue background.

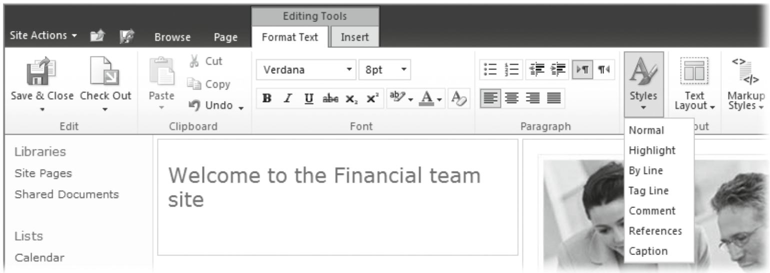
3. Place the cursor to the left of the **Welcome** title. Press **CTRL+A** to select all the content in the left content area of the page, and then press **DELETE**.

   The contents in the left area of the wiki page are deleted.

   Tip Other keyboard shortcuts can be found by placing the cursor above the commands on the Ribbon.

4. In the left content area, type **Welcome to the Financial team site**, and then press **ENTER** to move the cursor to a new line.

5. On the **Format Text** tab, click **Styles**, and then click **Normal**.


Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Text Layout
Markup Styles
Normal
Highlight
By Line
Tag Line
Comment
References
Caption
Libraries
Site Pages
Shared Documents
Lists
Calendar

Welcome to the Financial team site

6. Type **This web site is used by members of the Wide World Importers Financial team and allows us to share content** and then press **ENTER**.

   Tip Start the home page of a Team site with an introduction that states its purpose. The first page in the Site Pages wiki library is labeled Home and should contain the context or any assumptions that will apply to all pages, as well as list or library content that is stored in the site. If you edit an existing wiki page, you should not place new content before the introduction, nor should the content necessarily be added to the bottom of the page. You should emphasize the flow of ideas, be concise, write factual information, and stay on topic for the page. Check for spelling and grammatical errors that can detract from the content. You might consider entering the text in Microsoft Word first, check it for spelling and grammar using the Spelling & Grammar feature of Word, and then paste it into the wiki content area.

7. Click the **Insert** tab, and then click **Picture** in the **Media** group.

   The Select Picture dialog opens.

Picture

8. Click **Browse**, and then navigate to the **Chapter06** practice file folder. Click **pjcov.jpg** and then click **Open**.
9. Leave the default library where the image will be uploaded to **Site Assets**, and then click **OK**.

   The Site Assets – pjcov.jpg dialog opens.
10. Click **Save** to upload the image and display the image on the page. The Design tab is displayed.

11. On the **Format Text** tab, click **Check In** in the **Edit** group.

    The Check In dialog is displayed.
12. In the **Comments** box, type **Welcome message added to the page**, and then click **Continue**.

    The page is saved, the Editing Tools ribbon tabs disappear, and the Save & Close icon to the left of the Browse tab is replaced with the Edit icon. The Browse tab becomes the active tab.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Changing the Layout of a Page

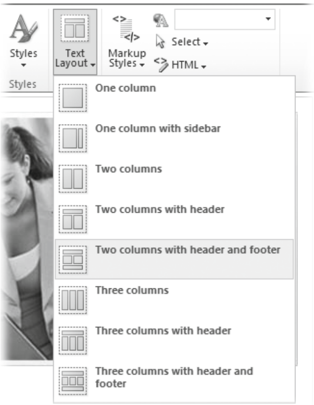
The home page of a Team site contains two content areas. You can change the number of content areas that a wiki page contains using the Format Text contextual ribbon and clicking the Text Layout command in the Layout group.

In this exercise, you will change the layout of your page.

SET UP Open the SharePoint site that you used in the previous exercise, if it is not already open.

BE SURE TO verify that you have sufficient rights to edit the home page of this site. If in doubt, see the Appendix at the back of this book.

1. Click **Site Actions**, and then click **Edit Page**.
2. On the **Format Text** tab, click **Text Layout** in the **Layout** group, and then click **Two columns with header and footer**.


Styles
Text Layout
Markup Styles
Select
HTML
Styles
One column
One column with sidebar
Two columns
Two columns with header
Two columns with header and footer
Three columns
Three columns with header
Three columns with header and footer

The page redisplays and now contains four content areas.

3. Select **Welcome to the Financial team site**, and then, on the **Format Text** tab, click **Cut**.
4. Place the cursor in the top content area, and then, on the **Format Text** tab, click the down arrow on the **Paste** command and click **Paste plaintext**.
5. On the **Format Text** tab, click **Save & Close** in the **Edit** group.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Creating a New Page

Typically, pages are limited to no more than two or three screens of information. This enables the information on the page to be in an easily accessible and modifiable format. There are four methods that you can use to create a new page in a wiki page library:

- Create a forward link and then click it to create a page. This is the recommended method, because it is easier for people to find a page when another page is linked to it.
- The New Page command on the Site Actions menu.
- The All Pages view of the Site Pages library.
- The More Options command on the Site Actions menu.

In this exercise, you will create a wiki page by using these four methods.

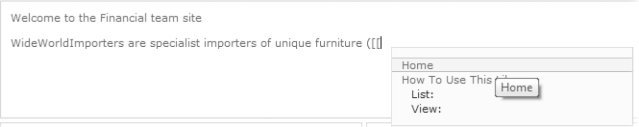
SET UP Open the SharePoint site that you used in the previous exercise, if it is not already open.

BE SURE TO verify that you have sufficient rights to create a page in this site. If in doubt, see the Appendix at the back of this book.

Edit

1. Click the **Edit** icon that is displayed to the left of the **Browse** tab.
2. In the top content area, place the cursor on a new line under **Welcome** and type **WideWorldImporters are specialist importers of unique furniture ([[**

   A list of pages that exist in the Site Pages wiki library is displayed.

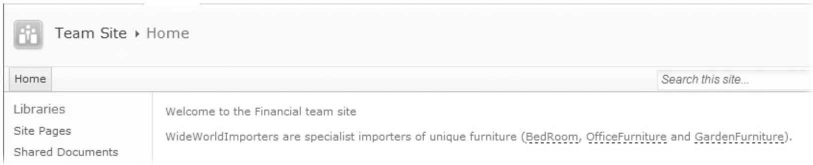
   Welcome to the Financial team site

   WideWorldImporters are specialist importers of unique furniture ([[

3. Type **B**.

   A message appears that the Item does not exist—that is, there is no page in the Site Pages library with a name starting with the letter *B*.
4. Type **edRoom]], [[OfficeFurniture]] and [[GardenFurniture]])** and then press **ENTER**.
5. Click **Save & Close**.

   The home page is displayed with the words “BedRoom,” “OfficeFurniture,” and “GardenFurniture” shown as hyperlinks and underlined with a dotted line. By using double brackets on the edit form, you have created three linked pages. Linked pages do not have to exist, and such nonexistent pages are denoted by a dotted underline, as is the case with “BedRoom,” “OfficeFurniture,” and “GardenFurniture.”

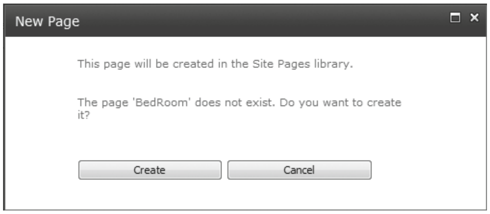
   

   Welcome to the Financial team site

   WideWorldImporters are specialist importers of unique furniture (BedRoom, OfficeFurniture and GardenFurniture).

Tip The naming convention for wiki pages, known as *WikiWords* or *WikiNames*, is to concatenate two or more words. Each word is composed of two or more letters, with no spaces between words. The first letter of each word is capitalized, and the remaining letters are lowercase. This formatting is known as *Camel case*. The wiki page name is used to form part of the Uniform Resource Locator (URL).

6. Click **BedRoom**. The New Page dialog is displayed.



New Page

This page will be created in the Site Pages library.

The page 'BedRoom' does not exist. Do you want to create it?

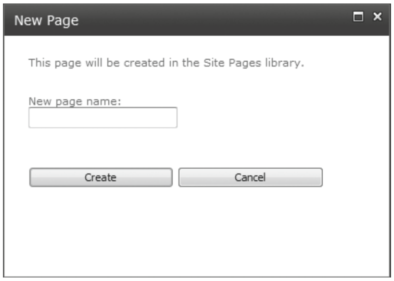
Create
Cancel

7. Click **Create**.

   The BedRoom page is displayed, and BedRoom appears in the list of Recently Modified pages in the left navigation pane.

8. Click **Site Actions**, and then click **New Page**.

   The New Page dialog is displayed.



New Page

This page will be created in the Site Pages library.

New page name:

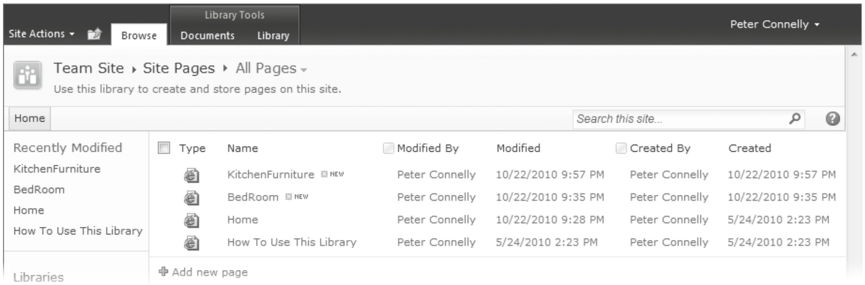
Create
Cancel

9. In the **New page name** box, type **KitchenFurniture** and then click **Create**.

   The KitchenFurniture page is displayed, and KitchenFurniture appears in the list of Recently Modified pages in the left navigation pane.

View All Pages

10. Click the **Page** tab, and then click **View All Pages** in the **Page Library** group. The Site Pages library is displayed in the All Pages view.



Library Tools
Site Actions
Browse
Documents
Library
Peter Connelly
Home
Search this site...
Recently Modified
KitchenFurniture
BedRoom
Home
How To Use This Library
Libraries
Add new page

Team Site › Site Pages › All Pages

Use this library to create and store pages on this site.

Type	Name	Modified By	Modified	Created By	Created
	KitchenFurniture NEW	Peter Connelly	10/22/2010 9:57 PM	Peter Connelly	10/22/2010 9:57 PM
	BedRoom NEW	Peter Connelly	10/22/2010 9:35 PM	Peter Connelly	10/22/2010 9:35 PM
	Home	Peter Connelly	10/22/2010 9:28 PM	Peter Connelly	5/24/2010 2:23 PM
	How To Use This Library	Peter Connelly	5/24/2010 2:23 PM	Peter Connelly	5/24/2010 2:23 PM

11. Click **Add new page**. The New Page dialog is displayed.

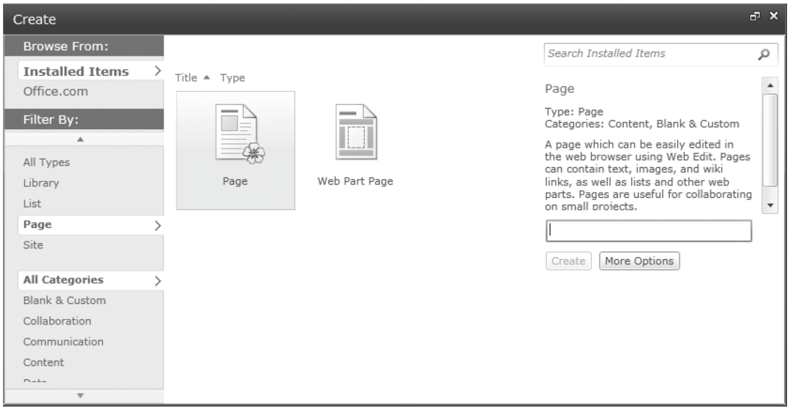
12. In the **New page name** box, type **Seating**, and then click **Create**.

The Seating page is displayed, and Seating appears under Recently Modified in the left navigation pane.

13. Click **Site Actions**, and then click **More Options**.

    The Create dialog is displayed.

14. Under **Filter By**, click **Page**.


Create
Browse From:
Installed Items
Office.com
Filter By:
All Types
Library
List
Page
Site
All Categories
Blank & Custom
Collaboration
Communication
Content
Title
Type
Page
Web Part Page
Search Installed Items
Page
Create
More Options

Type: Page
Categories: Content, Blank & Custom

A page which can be easily edited in the web browser using Web Edit. Pages can contain text, images, and wiki links, as well as lists and other web parts. Pages are useful for collaborating on small projects.

In the middle pane, the types of pages are shown—Page and Web Part Page, with Page selected.

15. Under **Page** in the right pane, type **FloorCoverings**, and then click **Create**.

    The FloorCovering page is displayed, and FloorCoverings appears under Recently Modified in the left navigation pane.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Adding Links

In the previous section, you created a forward link to a page yet to be created by enclosing the name of the page in double square brackets on the edit form. In the following exercise, you will create a link to a page and have the link display text that is different from the page name. You will then use the Incoming Links feature to identify those pages that link to a wiki page before you delete the page.

Tip When you add content to a wiki page and suggest a topic that other contributors to the Team site may know the answer to, try to enter text on the page in the form of a forward link; that is, place text between double square brackets. Other contributors to the page can enter information by clicking the forward link and creating new pages.

In this exercise, you will add a forward link.

SET UP Open the SharePoint site that you used in the previous exercise, if it is not already open. Be sure to complete the previous exercises in this chapter before beginning this exercise.

BE SURE TO verify that you have sufficient rights to edit the home page in this site. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, under **Libraries**, click **Site Page**, and then, in the **Name** column, click **Home**. The home page of the Team site appears.

Edit

2. Click the **Edit** icon that is displayed to the left of the **Browse** tab.
3. Place the cursor on a new line below **WideWorldImporters**. Type **[[s**, and then press **TAB** to select **Seating**, and then type **| Seating Furniture]]**.

   Tip To display double open or closed square brackets without making a link, type a backslash before the two brackets, such as *\[[* or *\]]*.

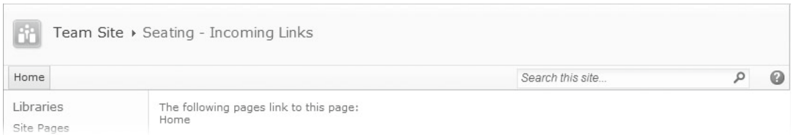
4. Click **Close & Save**.

   The words "Seating Furniture" are not underlined with dashes; therefore, this forward link points to the existing Seating page that you created in the previous exercise.

5. Click **Seating Furniture**. The Seating page is displayed.

Incoming
Links

6. Click the **Page** tab, and then click **Incoming Links** in the **Page Actions** group. The pages that link to the Seating page are listed; the home page is the only one listed here.

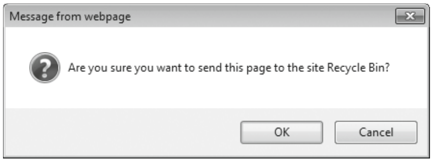


The following pages link to this page:
Home

7. Click **Home**, and then click the **Edit** icon that is displayed to the left of the **Browse** tab.
8. In the content area, select **[[Seating|Seating Furniture]]**, press **DELETE**, and then click **Save & Close**.
9. On the Quick Launch, under **Libraries**, click **Site Pages**, and then click **Seating**.

Delete Page

10. Click the **Page** tab, and then click **Delete Page** in the **Manage** group.



Are you sure you want to send this page to the site Recycle Bin?

11. Click **OK** to send the page to the Recycle Bin.

    Important If you do not delete the forward links to a page before you delete the page, the forward links are displayed with a dashed underline, identifying them as forward links to a nonexistent page—that is, a page that has yet to be created.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Working with Page History and Versions

A SharePoint Foundation–based wiki library has all the features of a document library, such as history and version management. Therefore, no amendments are lost. Major versioning is turned on by default when you create a wiki page library. You can also use content approval and workflow, as well as restrict the rights as to who can publish and edit pages.

In the following exercise, you will view the history of a page, observe the changes to the page, and then revert to the previous copy of the page.

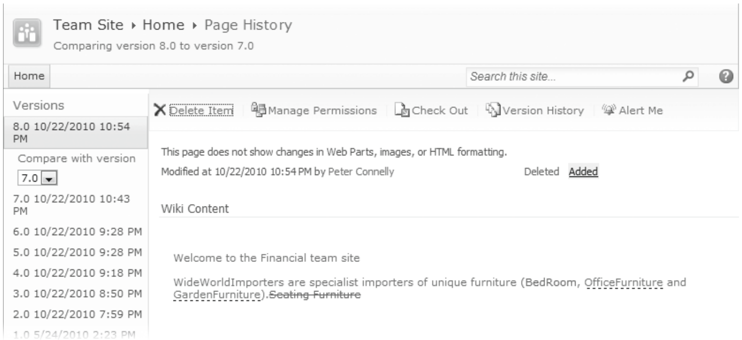
SET UP Open the SharePoint site that you used in the previous exercise, if it is not already open. Be sure to complete the previous exercises in this chapter before beginning this exercise.

BE SURE TO verify that you have sufficient rights to manage pages in this site. If in doubt, see the Appendix at the back of this book.

Page History

1. Click the **Page** tab, and then click **Page History** in the **Manage** group.

   You are taken to the History page of the home page. In the content area, deletions have a strikethrough red font, and additions have a green background color. In the left navigation pane, each version of the page is listed with the date and time that the version was created.


Team Site ▸ Home ▸ Page History
Home
Search this site...
Versions
8.0 10/22/2010 10:54 PM
Compare with version
7.0
7.0 10/22/2010 10:43 PM
6.0 10/22/2010 9:28 PM
5.0 10/22/2010 9:28 PM
4.0 10/22/2010 9:18 PM
3.0 10/22/2010 8:50 PM
2.0 10/22/2010 7:59 PM
1.0 5/24/2010 2:23 PM
Delete Item
Manage Permissions
Check Out
Version History
Alert Me
Deleted
Added
Wiki Content

Comparing version 8.0 to version 7.0

This page does not show changes in Web Parts, images, or HTML formatting.

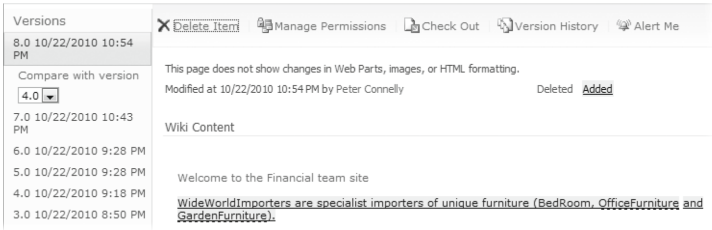
Modified at 10/22/2010 10:54 PM by Peter Connelly

Welcome to the Financial team site

WideWorldImporters are specialist importers of unique furniture (BedRoom, OfficeFurniture and GardenFurniture).~~Seating Furniture~~

2. In the left navigation pane, in the **Compare with version** list, select **4.0**.

   The current version of the page is compared with version 4.0 of the page.


Versions
8.0 10/22/2010 10:54 PM
Compare with version
4.0
7.0 10/22/2010 10:43 PM
6.0 10/22/2010 9:28 PM
5.0 10/22/2010 9:28 PM
4.0 10/22/2010 9:18 PM
3.0 10/22/2010 8:50 PM
Delete Item
Manage Permissions
Check Out
Version History
Alert Me
Deleted
Added
Wiki Content

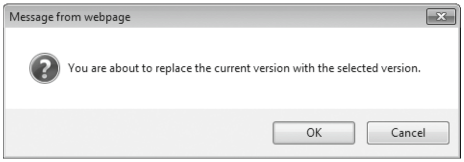
This page does not show changes in Web Parts, images, or HTML formatting.

Modified at 10/22/2010 10:54 PM by Peter Connelly

Welcome to the Financial team site

WideWorldImporters are specialist importers of unique furniture (BedRoom, OfficeFurniture and GardenFurniture).

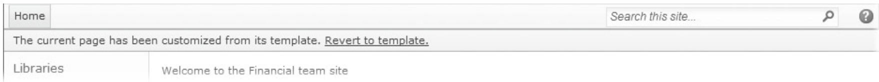
3. In the left navigation pane, under **Versions**, click **4.0**. The fourth version of the page is displayed.
4. Click **Restore this version**. A Message From Webpage dialog box appears.


Message from webpage
OK
Cancel

You are about to replace the current version with the selected version.

5. Click **OK** to replace the current version of the wiki page with the selected version. The home page is displayed. A yellow status bar appears, stating that the current page has been customized from its template. This can occur when you restore a previous version of a page using the browser or when using a program such as SharePoint Designer 2010.

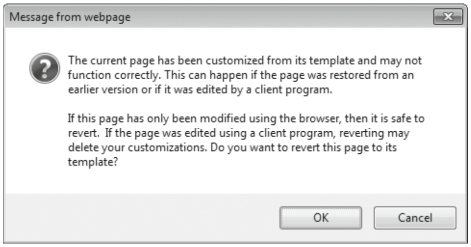
   See Also To learn more about customized pages, see Chapter 1, "Exploring SharePoint Designer 2010" in *Microsoft SharePoint Designer 2010 Step by Step* by Penelope Coventry (Microsoft Press, 2010).


Home
Search this site...
Libraries

The current page has been customized from its template. Revert to template.

Welcome to the Financial team site

6. On the status bar, click **Revert to template**. A Message From Webpage dialog box opens.


Message from webpage
OK
Cancel

The current page has been customized from its template and may not function correctly. This can happen if the page was restored from an earlier version or if it was edited by a client program.

If this page has only been modified using the browser, then it is safe to revert. If the page was edited using a client program, reverting may delete your customizations. Do you want to revert this page to its template?

7. Click **OK** to revert the page to its template.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Using Alerts

One of the most difficult obstacles encountered in the business world is knowing when information changes. SharePoint Foundation can help with this problem by enabling you to subscribe to an alert. When a web page to which you subscribe undergoes changes, you will receive an email message stating that the page has changed.

In the following exercise, you will set up an alert for a page and then receive an alert that it has been changed. You will then remove the alert.

SET UP Open the SharePoint site you used in the previous exercise, if it is not already open.

BE SURE TO verify that you have sufficient rights to create alerts and edit the home page in this site. If in doubt, see the Appendix at the back of this book.

1. Click the **Page** tab. Click **Alert Me** in the **Share & Track** group, and then, from the drop-down list, click **Set an alert on this page**.

   The Site Pages: Home.aspx – New Alert dialog appears. You are given several options on the frequency of alerts, as well as when to be alerted.

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

   Troubleshooting If your server is not configured to send an email message, an Error page will appear. If this page appears, you cannot complete the rest of the steps in this section. Check with your server administrator before you proceed.

   You are returned to the home page of your Team site.

3. Click the **Edit** icon that is displayed to the left of the **Browse** tab.
4. Place the cursor in the content area to the left of the **Welcome** pane, press **CTRL+A** to select all the content in the top area, and then press **DELETE**.

   The contents of the header area are deleted.

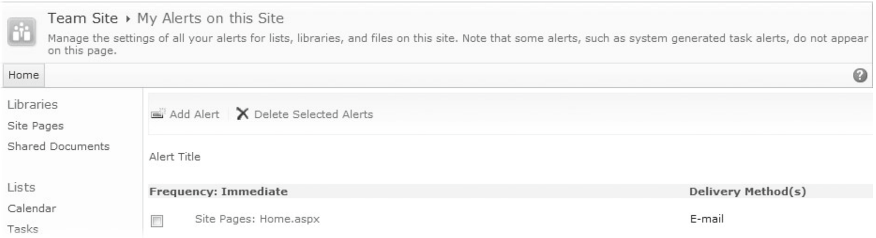
   Tip Other keyboard shortcuts can be found by placing the cursor over the Ribbon commands on the Format Text tab.

5. Click **Save & Close**.

   After a few minutes, you should receive two email messages. The first message indicates that an alert was successfully created. The second message indicates that home.aspx has been modified.

6. Click the **Page** tab. Click **Alert Me** in the **Share & Track** group, and then, from the drop-down list, click **Manage My Alerts**.

   The My Alerts On This Site page is displayed.



Team Site ▸ My Alerts on this Site

Manage the settings of all your alerts for lists, libraries, and files on this site. Note that some alerts, such as system generated task alerts, do not appear on this page.

Alert Title

Frequency: Immediate	Delivery Method(s)
☐ Site Pages: Home.aspx	E-mail

7. Click the check box to the left of **Site Pages: Home.aspx**, and then click **Delete Selected Alerts**.
8. Click **OK** to confirm the deletion of the selected alerts.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Adding a Web Part from the Web Part Pane

As you customize your site, you might decide to add information other than static text and images. This information may be stored in lists or libraries or in some other data source. You can do this by adding Web Parts. You can insert Web Parts on multiple pages and also insert a Web Part multiple times on the same web page. SharePoint Foundation provides built-in Web Parts for each website created. Two types of Web Parts are most commonly used via the browser:

- **XSLT List View (XLV) Web Parts** Web Parts that display the contents of lists and libraries. These Web Parts are displayed in the Lists and Libraries category. Each time that data in the list or library changes, the changes are reflected in the XLV Web Part. SharePoint Foundation introduced this new version of the List View Web Part (LVWP), which uses Extensible Stylesheet Language Transformation (XSLT) to define how to display the data from lists or libraries.

- **Built-in Web Parts** Web Parts that display other content. There are 13 built-in Web Parts displayed in five categories.

The 13 built-in Web Parts available on websites created from the Team site, Blank site, or Document Workspace template are summarized in the following table.

Category	Web Part	Description
Content Rollup	Relevant Documents	Use this Web Part to display documents that are relevant to the current user. This Web Part generates a personalized view of documents checked out by, created by, or last modified by the current user. You can configure the Web Part to use more than one criterion. To improve the performance of the Relevant Documents Web Part in a large-scale document management environment, use Column indexing on the Modified By, Created By, or Checked Out By columns. Make sure that the Show Items From The Entire Site Collection check box is not selected when configuring the Web Part.
	XML Viewer	Use this Web Part for Extensible Markup Language (XML) with Extensible Stylesheet Language (XSL) to define how the XML is displayed. You might use the XML Web Part to display structured data from database tables or queries as well as XML-based documents.
Forms	HTML Form Web Part	Use this Web Part if you want to send data to another Web Part via a Web Part connection. The content displayed in the other Web Part depends on the data that it receives.
Media and Content	Content Editor	Use this Web Part to add content to a Web Part page such as formatted text, tables, and images. This Web Part allows you to add content by using a Rich Text Editor or HyperText Markup Language (HTML) source editor. The HTML *<FORM>* element is not allowed in the Content Editor Web Part. If you need to add a Web Part that uses the *<FORM>* element, consider using the Page Viewer or Form Web Part.
	Image Viewer	Use this Web Part to display pictures and photos. This Web Part is included by default on the home Web Part page of many sites to display a logo.
	Page Viewer	Use this Web Part to display the content of a linked resource such as a website, web pages, files, or folders. In this way, you can display an entire web page within a Web Part. The linked content is isolated from other content on the web page, and hence the content is displayed asynchronously from the rest of the page. This means that you can view and use other content in other Web Parts on the page even if the link in this Web Part happens to take a long time to return its content. Also use this Web Part if you want to retrieve data from a server that requires authentication.

Category	Web Part	Description
	Picture Library Slideshow Web Part	Use this Web Part to display a slideshow of images and photos from a picture library. The images can be displayed in a random or sequential order, which you can configure using the Web Part tool pane.
	Silverlight Web Part	Use this Web Part to display a Silverlight application. Silverlight applications can be created using Visual Studio 2010 or Microsoft Expression Blend.
Social Collaboration	Site Users	Use this Web Part to view a list of the site users and their online status.
	User Tasks	Use this Web Part to display tasks that are assigned to the current user.
	What's New	Available on sites created from the Group Work Site template. Use this Web Part to show new information from specified lists and libraries, where the [Modified] column is configured as an Indexed column.
	Whereabouts	Available on sites created from the Group Work Site template. Use this Web Part to display Whereabouts information.
SQL Server Reporting	SQL Server Reporting Services Report Viewer	Use this Web Part to view Microsoft SQL Server Reporting Services reports.

Tip In addition to built-in Web Parts, you can create your own Web Parts by using tools, such as SharePoint Designer and Visual Studio 2010. You can also import custom Web Parts.

SharePoint Designer allows you to add a Data Form Web Part (DFWP), also known as the Data View Web Part (DVWP). The DFWP is very similar to the XLV Web Part. Not only does it allow you to view data, but it can provide you with a form to enter data using XSLT. The DFWP can be used with a variety of data sources such as SQL Server databases, XML files, web and Representational State Transfer (REST) services, as well as data held in SharePoint lists and libraries. SharePoint Designer provides a "What You See Is What You Get" (WYSIWYG) XSLT editor to format the DFWP and XLV Web Parts. For example, you can create a DFWP or XLV Web Part that applies a style to a selected HTML tag or data values when the data meet specified criteria. If you use SharePoint Designer with the Furniture Sales list, you could highlight items when there are no units in stock.

In this exercise, you will customize the home page of a SharePoint site. You will add an XLV Web Part and restore a Web Part from the Web Part Page Gallery.

SET UP Open a SharePoint site that contains a list with data, for example, the Furniture Price list that is created in Chapter 14, "Using SharePoint Foundation with Excel 2010 and Access 2010." Alternatively, you can create a practice site for this chapter based on the Chapter06_Starter.wsp site template located in the Documents \Microsoft Press\SBS_SPF\Chapter06 folder. See "Using the Practice Files" at the beginning of this book for more information.

BE SURE TO verify that you have sufficient rights to edit the home page in this site. If in doubt, see the Appendix at the back of this book.

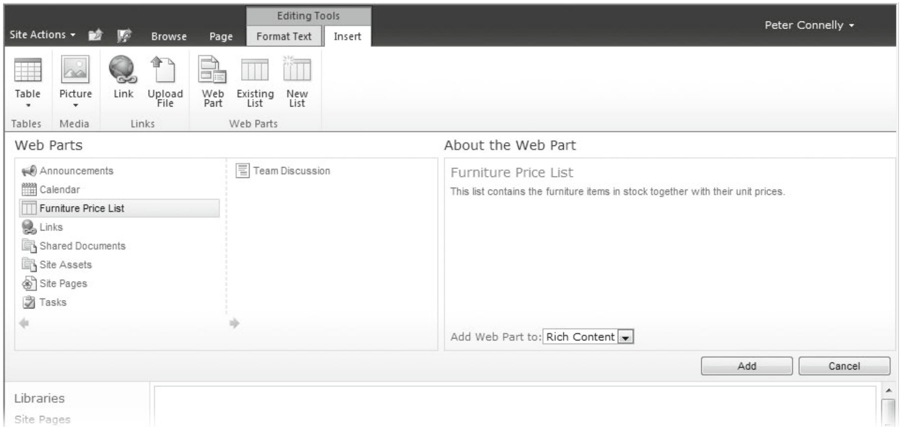
Edit

1. Click the **Edit** icon that is displayed to the left of the **Browse** tab.
2. Place the cursor in the top content area, if it is not already there, and then click the **Insert** tab.

Existing List

3. Click **Existing List** in the **Web Parts** group.

   The Web Parts pane is displayed at the top of the page below the Ribbon. A Web Part for each list or library created for this site is displayed.


Editing Tools
Site Actions
Browse
Page
Format Text
Insert
Peter Connelly
Table
Picture
Link
Upload File
Web Part
Existing List
New List
Tables
Media
Links
Web Parts
Add
Cancel
Libraries
Site Pages

Web Parts

- Announcements
- Calendar
- Furniture Price List
- Links
- Shared Documents
- Site Assets
- Site Pages
- Tasks
- Team Discussion

About the Web Part

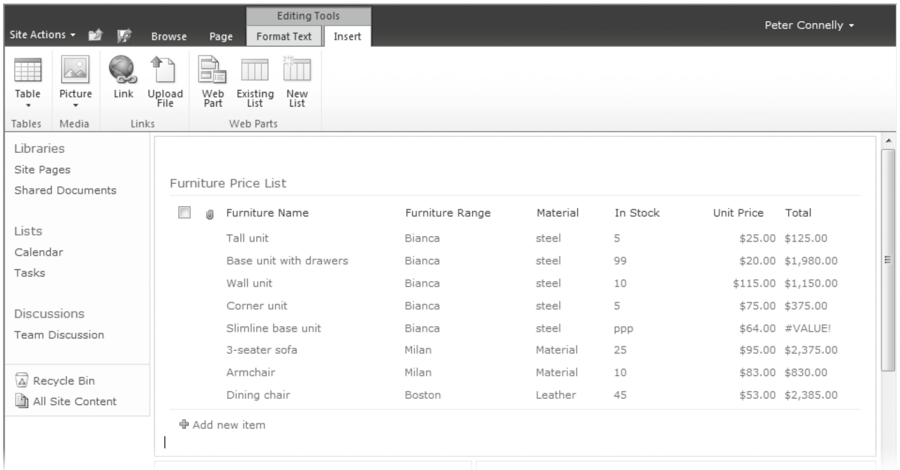
Furniture Price List

This list contains the furniture items in stock together with their unit prices.

Add Web Part to: Rich Content

4. In the **Web Parts** pane, click the list that contains data, such as **Furniture Price List**, and then click **Add**.

   A Loading dialog briefly appears, and then the Furniture Price List Web Part is added to the page.


Editing Tools
Site Actions
Browse
Page
Format Text
Insert
Peter Connelly
Table
Picture
Link
Upload File
Web Part
Existing List
New List
Tables
Media
Links
Web Parts
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Discussions
Team Discussion
Recycle Bin
All Site Content
Add new item

Furniture Price List

Furniture Name	Furniture Range	Material	In Stock	Unit Price	Total
Tall unit	Bianca	steel	5	$25.00	$125.00
Base unit with drawers	Bianca	steel	99	$20.00	$1,980.00
Wall unit	Bianca	steel	10	$115.00	$1,150.00
Corner unit	Bianca	steel	5	$75.00	$375.00
Slimline base unit	Bianca	steel	ppp	$64.00	#VALUE!
3-seater sofa	Milan	Material	25	$95.00	$2,375.00
Armchair	Milan	Material	10	$83.00	$830.00
Dining chair	Boston	Leather	45	$53.00	$2,385.00

New List

5. Place the cursor in the top content area in front of the **Furniture Price List** Web Part, if it is not already there, and then, on the **Insert** tab, click **New List**.

   The Create List dialog appears.

6. In the **List Title** box, type **Financial Links**. Under **Tracking**, click **Links**, and then click **OK**.

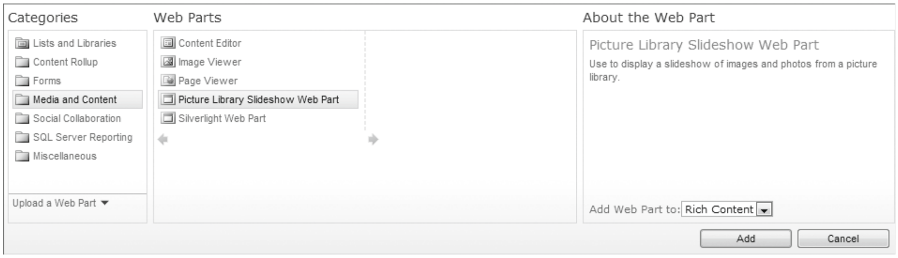
   The Financial Links list is created, and a Financial Links Web Part is displayed on the page.

Web Part

7. Place the cursor in the top content area, if it is not already there, and then, on the **Insert** tab, click **Web Part**.

   The Web Parts pane is displayed at the top of the page below the Ribbon.

8. Under **Categories**, click **Media and Content**, and then, under **Web Parts**, click **Picture Library Slideshow Web Part**.


Categories
Lists and Libraries
Content Rollup
Forms
Media and Content
Social Collaboration
SQL Server Reporting
Miscellaneous
Upload a Web Part
Web Parts
Content Editor
Image Viewer
Page Viewer
Picture Library Slideshow Web Part
Silverlight Web Part
About the Web Part
Add Web Part to:
Rich Content
Add
Cancel

Picture Library Slideshow Web Part

Use to display a slideshow of images and photos from a picture library.

9. Click **Add**.

   The Picture Library Slideshow Web Part is placed above the Furniture Price List Web Part.

10. On the **Page** tab, click **Save & Close**.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Removing a Web Part

When created, SharePoint sites can contain a number of libraries, lists, and one or more web pages that can contain one or more Web Parts. As you customize your site, you might decide that you do not need all the Web Parts on your pages and might want to remove them.

In this exercise, you will delete and close Web Parts to remove them from a website's home page. You will then restore a closed Web Part.

SET UP Open a SharePoint Team site.

BE SURE TO verify that you have sufficient rights to edit the home page in this site. If in doubt, see the Appendix at the back of this book.

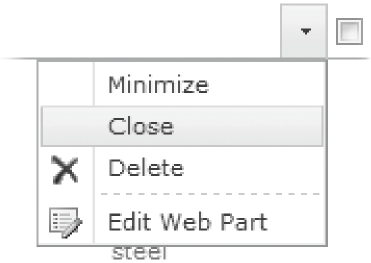
Edit

1. Click the **Edit** icon that is displayed to the left of the **Browse** tab.
2. In the top content area, hover the mouse over the title of the **Financial Links** Web Part and select the check box that appears.

   The List Tools and Web Part Tools contextual tab sets appear in the Ribbon.

Delete

3. Click the **Options** tab in the **Web Part Tools** contextual tab set, and then click the **Delete** command in the **State** group.
4. Click **OK** to confirm that you wish to delete the Web Part permanently.
5. In the top content area, hover the mouse over the title of the **Furniture Price List** Web Part, click the down arrow that appears, and then click **Close**, which temporarily removes the Web Part from the page.



   The browser redisplays the page with only one Web Part—the Picture Library Slideshow Web Part.

6. Click the **Insert** tab, and then click **Web Part** in the **Web Parts** group.

   The Web Parts pane now includes a category Closed Web Parts, which holds Web Parts that are temporarily removed from a web page by using the Close option. Currently, the Closed Web Parts category contains only one Web Part—the Furniture Price XLV Web Part that you removed in step 5.

7. Under **Categories**, click **Closed Web Parts**, and then, under **Web Parts**, click **Furniture Price List**.

   The Furniture Price List Web Part is displayed on the page.

8. Click the **Insert** tab, and then click **Web Part** in the **Web Parts** group.

   Note that the Closed Web Parts category is not displayed now. This category is displayed only when your page contains closed Web Parts.

Note You can liken the Closed Web Parts category to the Recycle Bin; however, Web Parts are placed here only when the Close option is used. When the Delete option is used, the Web Part is permanently deleted from the page. Web Parts placed in other categories act like templates. Web Parts from the other categories can be placed on a web page multiple times. Once a Web Part is placed on a page, it can be uniquely customized, but the template from which the Web Part is created remains in the category displayed in the Web Part pane.

9. Click **Save & Close**.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Tip Web Parts can be badly written. If they are not tested thoroughly, you might find that a web page does not display when you add a Web Part to it. In such situations, append *?Contents=1* to the URL of the Web Part page, such as *http://wideworldimporters/SitePages/home.aspx?contents=1*. The Web Part Page Maintenance page is displayed, which can be used to delete the offending Web Part. The Web Part Page Maintenance page can be very useful in determining if a page has any closed Web Parts and can be used to delete any closed Web Parts quickly. Having closed Web Parts on a page can cause the browser to take some time to display the page, which can be very annoying to users who frequently visit the page.

Customizing a Web Part by Using the Web Part Tool Pane

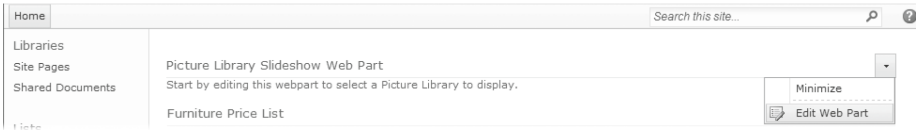
Once you add a Web Part to a web page, you might find that you have to customize it to display the content that you want visitors to your website to see. You might also have to tailor the Web Part's properties for it to take on the look and feel that you want.

In the following exercise, you will customize the Picture Library Slideshow Web Part and a SharePoint XLV Web Part.

SET UP Open the SharePoint site that you used in the previous exercise, if it is not already open. Be sure to complete the previous exercise in this chapter before beginning this exercise.

BE SURE TO verify that you have sufficient rights to edit the home page in this site. If in doubt, see the Appendix at the back of this book.

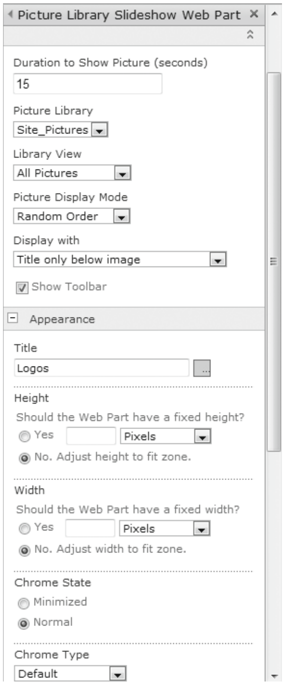
1. Hover the mouse over the title bar of the **Picture Library Slideshow Web Part**, click the down arrow that appears, and then click **Edit Web Part**.



Start by editing this webpart to select a Picture Library to display.

The Picture Library Slideshow Web Part tool pane is displayed to the right of the page.

2. From the **Picture Library** list, select the picture library whose images you wish to display in the Web Part, such as **Site_Pictures**, and then, under **Appearance** in the **Title** box, delete **Picture Library Slideshow Web Part** and type **Logos**.



Picture Library Slideshow Web Part

Duration to Show Picture (seconds)
15

Picture Library
Site_Pictures

Library View
All Pictures

Picture Display Mode
Random Order

Display with
Title only below image

☑ Show Toolbar

Appearance

Title
Logos

Height
Should the Web Part have a fixed height?
○ Yes Pixels
● No. Adjust height to fit zone.

Width
Should the Web Part have a fixed width?
○ Yes Pixels
● No. Adjust width to fit zone.

Chrome State
○ Minimized
● Normal

Chrome Type
Default

3. In the **Chrome Type** drop-down list, click **None**, and then scroll to the bottom of the Web Part tool pane and click **OK**.

   Images from the chosen picture library are displayed at the top of the page, and the tool pane disappears. The title of the Web Part is not displayed.

   Tip When a Web Part title is not displayed, to customize the properties of a Web Part, display the page in Edit mode. The Web Part title is then visible. You can either use the Web Part menu to edit the Web Part or select the check box on the Web Part title and, on the Options tab in the contextual Web Part Tools tab set, use the Web Part Properties command in the Properties group to open the Web Part tool pane.

4. Place the cursor over the title bar of the **Furniture Price List** Web Part, click the down arrow that appears, and click **Edit Web Part**.

   The Furniture Price List Web Part tool pane is displayed.

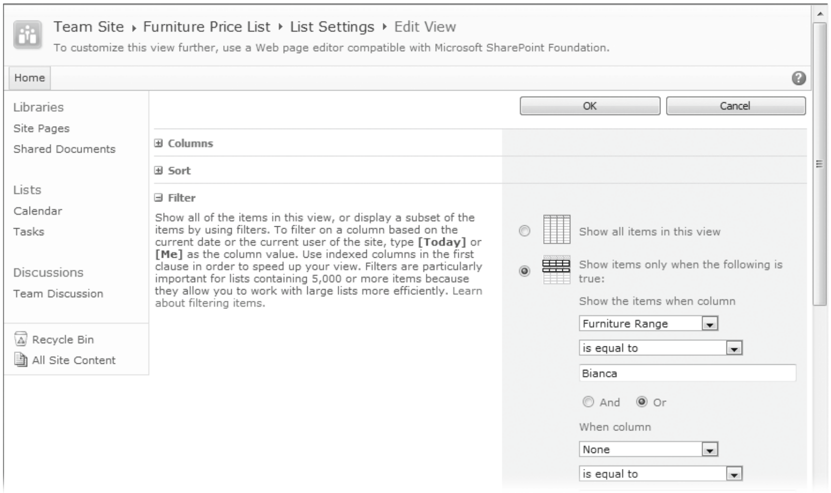
5. In the **Furniture Price List** tool pane, below the **Selected View** list, click the **Edit the current view** link. The Edit View of the Furniture Price List page is displayed.

6. In the **Columns** area, clear the **Attachments**, **In Stock**, **Unit Price**, and **Total** check boxes.

   Tip In this exercise, you will display only Bianca furniture; therefore, you will use the Furniture Range column to filter data. When the filter is applied, in the XLV Web Part, the Furniture Range column always contains the text "Bianca." Hence, you could choose not to display the Furniture Type column. However, when you first customize a view, it is good practice to leave the filter column, such as the Furniture Type column, in place so you can check that the filter is configured correctly.

7. Scroll down the page until the **Filter** area is visible. Select the **Show items only when the following is true** option.

8. On the **Show the items when column** list, click **Furniture Range**. In the **Value** box, type **Bianca**.



Team Site ▸ Furniture Price List ▸ List Settings ▸ Edit View

To customize this view further, use a Web page editor compatible with Microsoft SharePoint Foundation.

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. Learn about filtering items.

○ Show all items in this view

● Show items only when the following is true:

Show the items when column

Furniture Range

is equal to

Bianca

○ And ● Or

When column

None

is equal to

9. At the bottom of the page, click **OK**.

   Your web page is displayed. The Furniture Price List tool pane is no longer visible.

10. Place the cursor over the title bar of the **Furniture Price List** Web Part, click the down arrow that appears, and click **Edit Web Part**. The Furniture Price List tool pane is displayed.

11. Click the expand (+) icon to the left of **Appearance**, and then, in the **Title** text box, type **Sale – Bianca Furniture at half price**.

12. Click the expand (+) icon to the left of **Advanced** and clear the **Allow Minimize** check box.

13. At the bottom of the **Furniture Price List** tool pane, click **OK**.

14. Place the cursor over the title bar of the Sale – Bianca Furniture at half price Web Part, click the down arrow that appears, and notice that the **Minimize** option is no longer available.

CLEAN UP Leave the browser open if you are continuing to the next exercise.

Editing Web Part Pages

Web Part pages are the default type of page on sites such as group work sites, Meeting Workspaces, and blog sites. In addition, they are the type of pages used by lists and libraries to display their contents. Web Part pages consist only of Web Part zones. They do not contain wiki page content areas and, therefore, can contain only Web Parts. To add static text or images to a Web Part page, you must first add either the Content Editor Web Part or the Image Web Part, and then use the Web Part tool pane properties to add text or images.

Tip Using a tool such as SharePoint Designer, you can add Web Parts outside of Web Part zones on a Web Part page.

There are two versions of a Web Part page:

- **Shared Version** This version is the Web Part page that every user with the appropriate permissions on a site can view. To edit the Shared version of a Web Part page, place the page in Edit mode by using the Site Actions, Edit Page command.
- **Personal Version** This version of a Web Part page is available only to you and not to others. To edit the Personal version of a Web Part page, click the down arrow to the right of your name in the top corner of the page, and then click Personalize This Page. When you have a Personal view of a Web Part page, then it will be displayed by default when you first visit the page.

To customize the Shared version of any Web Part page for a list or library, you must have the following rights, all of which are included in the Design and Full Control permission levels by default:

- Manage Lists
- Add and Customize Pages
- Apply Themes and Borders
- Apply Style Sheets

A member of a website's Site Owners group has Full Control permissions and, therefore, is able to customize the Shared version of Web Part pages.

To customize the Personal view of any Web Part page, the Web Part page must be designed to be personalized. You must have the following rights, all of which are included in the Contribute, Design, and Full Control permission levels by default:

- Manage Personal Views
- Add/Remove Personal Web Parts
- Update Personal Web Parts

A member of a website's Members group has Contribute permissions and, therefore, is able to customize the Personal version of Web Part pages if they are designed to be personalized.

Tip When a Web Part page is designed to be personalized, editors of the page can disable the personalization of Web Parts on an individual basis by configuring the Web Part properties by using the Web Part tool pane.

Web Parts within Web Part zones can be connected to one another to provide interactive dashboards displaying related data from a number of data sources. A Ribbon command in SharePoint Foundation makes it easy to create a Web Part connection when two lists have a related column. For example, on a blog site, the Posts list has a lookup column to the Comments list. On a page where you are displaying the Posts XLV Web Part, on the Options tab in the Web Part Tools contextual tool set, you can click the Insert Related List command. This will add the Comments XLV Web Part to the page and connect the two Web Parts. Then, when users click a blog post in the Posts Web Part, the comments related to that post will be shown in the Comments Web Part. Using a tool such as SharePoint Designer, you can also connect Web Parts on one page with Web Parts on another page.

See Also For more information on connecting Web Parts, see Chapter 6, "Working with Data Sources," in *Microsoft SharePoint Designer 2010 Step by Step* by Penelope Coventry (Microsoft Press, 2010).

In the following exercise, you will familiarize yourself with editing a Web Part page.

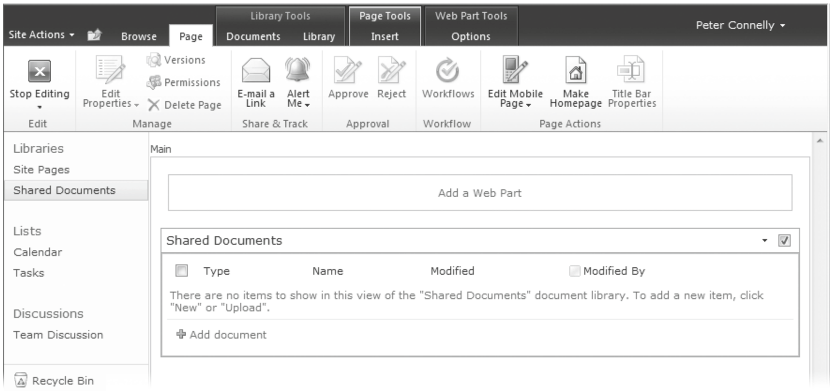
SET UP Open the SharePoint site that you used in the previous exercise, if it is not already open.

BE SURE TO verify that you have sufficient rights to edit views in the Shared Documents library. If in doubt, see the Appendix at the back of this book.

1. On the Quick Launch, under **Libraries**, click **Shared Documents**. The All Documents view of the library, Shared Documents, is displayed.
2. Click **Site Actions**, and then click **Edit Page**.

Tip Web Part pages do not display the Edit icon or the Save & Close icon to the left of the Browse tab.

The browser redisplays the Web Part page in Edit mode. The Web Part page displays one Web Part zone denoted by a blue border labeled Main. At the top of each Web Part page zone is a white rectangle surrounded by a blue line containing the text “Add a Web Part”.

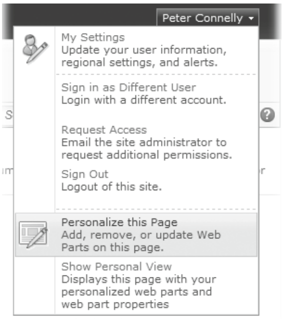

Site Actions
Browse
Page
Library Tools
Documents
Library
Page Tools
Insert
Web Part Tools
Options
Peter Connelly
Stop Editing
Edit
Edit Properties
Versions
Permissions
Delete Page
Manage
E-mail a Link
Alert Me
Share & Track
Approve
Reject
Approval
Workflows
Workflow
Edit Mobile Page
Make Homepage
Title Bar Properties
Page Actions
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Discussions
Team Discussion
Recycle Bin
Main
Add a Web Part
Shared Documents
Type
Name
Modified
Modified By
Add document

There are no items to show in this view of the "Shared Documents" document library. To add a new item, click "New" or "Upload".

Tip Other Web Part pages might be comprised of more than one Web Part zone, depending on the Web Part page template used when creating the page. You can also add or remove zones from a Web Part page by using a tool such as SharePoint Designer.

Stop Editing

3. On the **Page** tab, click **Stop Editing**.
4. In the top right corner of the page, click the arrow next to ***<your name>*** and click **Personalize this Page**.


Peter Connelly
My Settings
Update your user information, regional settings, and alerts.
Sign in as Different User
Login with a different account.
Request Access
Email the site administrator to request additional permissions.
Sign Out
Logout of this site.
Personalize this Page
Add, remove, or update Web Parts on this page.
Show Personal View
Displays this page with your personalized web parts and web part properties

The browser redisplays the Web Part page in Edit mode. A yellow status bar states that this is the Personal version of the page. Any changes that you make to the Web Part page affect only your view of this web page.

Tip When a Web Part page is not in Edit mode, there is no visible indication as to whether the page shows the Shared version or the Personal version. If the Show Personal View option is displayed on the <*your name*> drop-down menu, you are viewing the Shared version of the page. If the Show Shared View option appears, you are viewing the Personal version of the page. You can remove the Personal version of the page by clicking Reset Page Content on the <*your name*> drop-down menu. The Shared version of the page, then, is your default version. As an Administrator or web designer, you cannot customize the Personal views of specific users; you can customize only the Shared view and your own Personal view.

5. On the **Page** tab, click **Stop Editing**.

CLEAN UP Close the browser.

Moving Web Parts

As you customize your web page by adding and removing Web Parts, you might find that the Web Parts are not located where you would like them to be. In this situation, you can move the Web Parts around on the page to obtain the layout that you want.

In this exercise, you will move Web Parts on the home page of a SharePoint site.

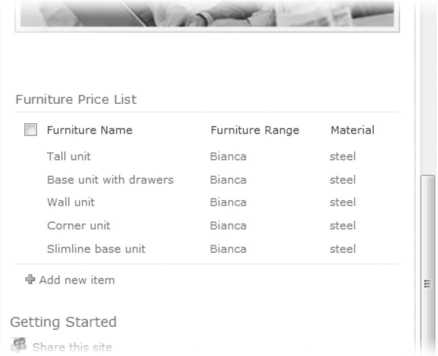
SET UP Open the SharePoint site that you used in the previous exercise, if it is not already open.

BE SURE TO verify that you have sufficient rights to edit the home page of this site. If in doubt, see the Appendix at the back of this book.

1. Click **Site Actions**, and then click **Edit Page**.

The browser displays the home page of your site in Edit mode.

2. Move the mouse over the title bar of the Sale – Bianca Furniture at half price Web Part so that the pointer changes to a hand. While holding down the mouse button, drag the Web Part to the content area to the left of **Getting Started**.



Furniture Price List

☐ Furniture Name	Furniture Range	Material
Tall unit	Bianca	steel
Base unit with drawers	Bianca	steel
Wall unit	Bianca	steel
Corner unit	Bianca	steel
Slimline base unit	Bianca	steel

3. Click **Save & Close**.

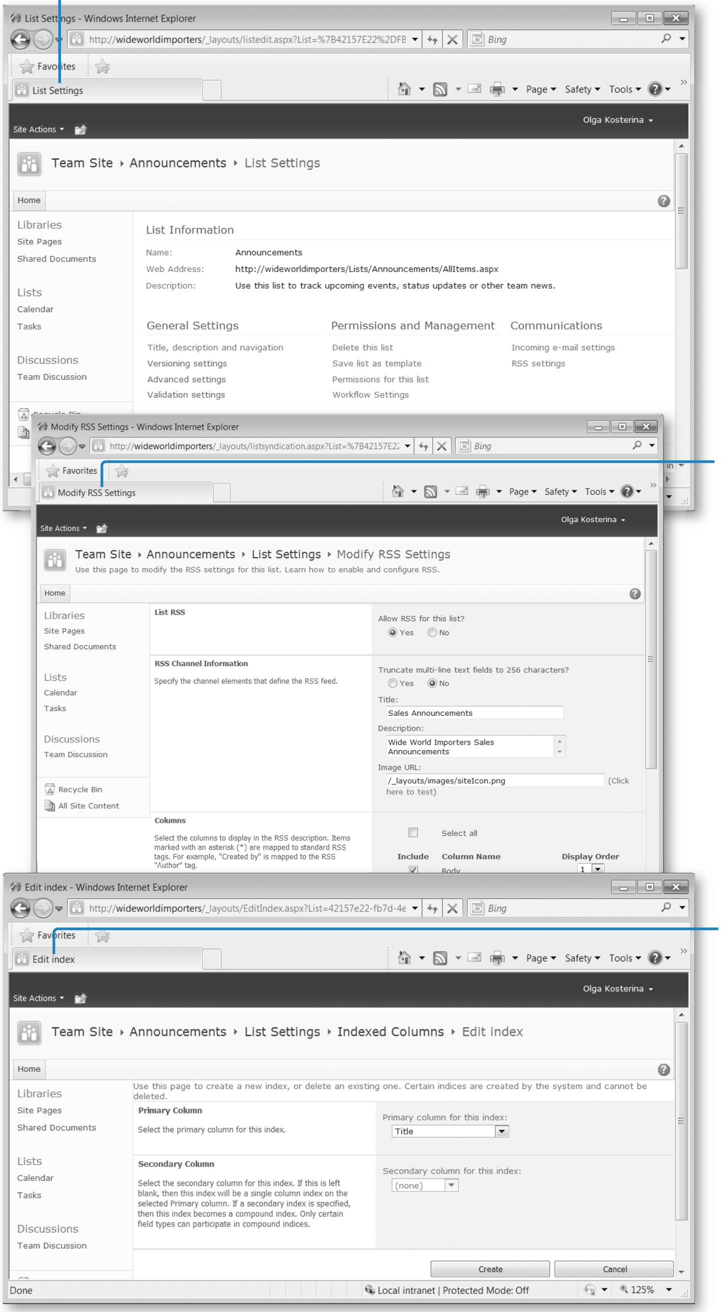
CLEAN UP Close the browser.

Key Points

- In SharePoint Foundation 2010, a website is a collection of web pages.
- There are two types of web pages—wiki pages and Web Part pages. On a Team site, blank site, or Document Workspace, the default web pages are wiki pages that are stored in a SharePoint Foundation–based wiki library named Site Pages.
- Both wiki pages and Web Part pages can contain Web Parts.
- A page can contain static and dynamic content, which is typically limited to no more than two or three screens of information.
- Create forward links to pages by using double square brackets around a WikiWord. For example, type **[[BedRoom]]** to create a link to the page named BedRoom. The page does not have to exist when the forward link is created.
- The easiest way to create a new wiki page is to create a forward link to a nonexistent page.
- Major versioning is enabled on wiki page libraries, and therefore no amendments are lost.
- Web Parts are reusable components that can contain any type of web-based content. They can display the contents of lists and libraries, as well as other content, such as the results of database queries, websites, web pages, files, and folders.
- Web Parts are organized by categories.
- The Lists and Libraries category contains an XLV Web Part for each list or library created in the site.
- The Closed Web Parts category is a temporary storage space for Web Parts that have been removed from a web page by using the Close button.
- A Web Part page can have two versions: a Shared version and a Personal version. All users can see changes made to the Shared version. Changes made to the Personal version are visible only to the user who altered his or her Personal version of the Web Part page. A user can reset the Personal view to the Shared view setting if desired.

Chapter at a Glance

Configure a SharePoint list, page 185



Team Site ▸ Announcements ▸ List Settings

List Information

Name: Announcements

Web Address: http://wideworldimporters/Lists/Announcements/AllItems.aspx

Description: Use this list to track upcoming events, status updates or other team news.

General Settings

- Title, description and navigation
- Versioning settings
- Advanced settings
- Validation settings

Permissions and Management

- Delete this list
- Save list as template
- Permissions for this list
- Workflow Settings

Communications

- Incoming e-mail settings
- RSS settings

Team Site ▸ Announcements ▸ List Settings ▸ Modify RSS Settings

Use this page to modify the RSS settings for this list. Learn how to enable and configure RSS.

List RSS

Allow RSS for this list? ● Yes ○ No

RSS Channel Information

Specify the channel elements that define the RSS feed.

Truncate multi-line text fields to 256 characters? ○ Yes ● No

Title: Sales Announcements

Description: Wide World Importers Sales Announcements

Image URL: /_layouts/images/siteIcon.png (Click here to test)

Columns

Select the columns to display in the RSS description. Items marked with an asterisk (*) are mapped to standard RSS tags. For example, "Created by" is mapped to the RSS "Author" tag.

Team Site ▸ Announcements ▸ List Settings ▸ Indexed Columns ▸ Edit index

Use this page to create a new index, or delete an existing one. Certain indices are created by the system and cannot be deleted.

Primary Column

Select the primary column for this index.

Primary column for this index: Title

Secondary Column

Select the secondary column for this index. If this is left blank, then this index will be a single column index on the selected Primary column. If a secondary index is specified, then this index becomes a compound index. Only certain field types can participate in compound indices.

Secondary column for this index: (none)

List Settings - Windows Internet Explorer
Modify RSS Settings - Windows Internet Explorer
Edit index - Windows Internet Explorer
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Olga Kosterina
Home
Libraries
Site Pages
Shared Documents
Lists
Calendar
Tasks
Discussions
Team Discussion
Recycle Bin
All Site Content
Create
Cancel
Local intranet | Protected Mode: Off
125%

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