

COLLABORATION WITH SHAREPOINT 3.0

GINI COURTER, PARTNER, TRIAD CONSULTING

Every day, more organizations are using Microsoft SharePoint to help departments, projects, and ad hoc teams manage their workload and work more closely. Whether your organization is already using SharePoint or simply talking about using SharePoint, whether you're just a user or in charge of administering one or more SharePoint sites, this half-day session is for you. Starting from scratch, we'll use Windows SharePoint Services 3.0 to create and provision a SharePoint site for a team, including:

- Using a SharePoint site
- Figuring out the requirements for your site
- Creating a new site or subsite
- Creating custom lists
- Understanding how document libraries are supposed to work, which is different than Windows folders
- Creating custom views in document libraries
- Creating contacts and calendars
- Synchronizing SharePoint and Outlook
- Adding content to your site
- Publishing content from Excel

If time allows, we'll also take a look at wiki and web part pages in SharePoint. Come find out what we learned while designing and building over a hundred SharePoint sites for teams large and small.

NOTES: While this session will be taught using SharePoint 3.0, much of the content also applies to SharePoint 2.0. Consider also attending the InfoPath session; the form created in that session will be published in the SharePoint site created in this session.

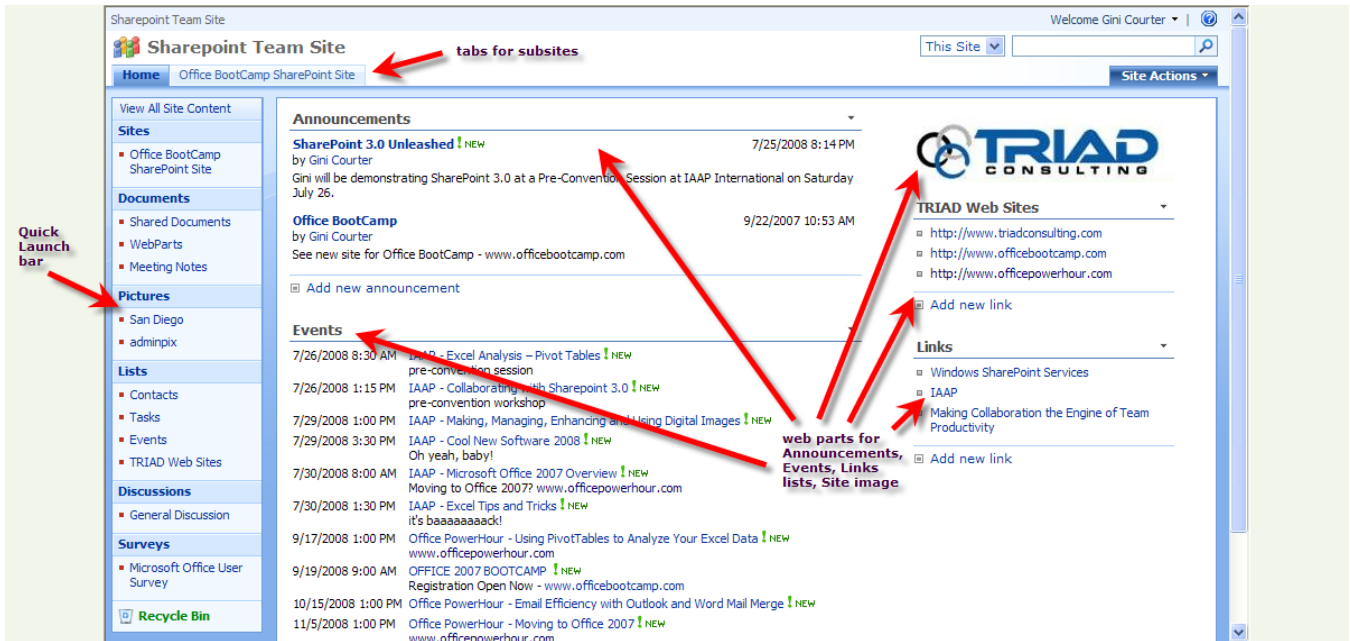
SHAREPOINT SITE TOUR

We'll start with a tour of a SharePoint 3.0 site. A page on a SharePoint site is composed of **web parts**. Web parts can be used to display images, text, rich text, contents from other web sites....but most importantly, web parts can display live data from your SharePoint site.

The web parts on the next page show:

- announcements
- the site image (TRIAD Consulting's logo),
- events
- two link lists: TRIAD sites and a general links list

Of these four lists, only the site image is static. All the other web parts retrieve data from lists in the SharePoint site.



UNDER THE HOOD

To access site settings, choose Site Actions > Site Settings to open the Site Settings page:

Sharepoint Team Site > Site Settings

Site Settings

Site Information

Site URL: <http://boardworks.sharepointsite.net/>
Mobile Site URL: <http://boardworks.sharepointsite.net/m/>
Version: 12.0.0.6300

Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<input type="checkbox"/> People and groups	<input type="checkbox"/> Title, description, and icon	<input type="checkbox"/> Master pages	<input type="checkbox"/> Regional settings	<input type="checkbox"/> Recycle bin
<input type="checkbox"/> Site collection administrators	<input type="checkbox"/> Tree view	<input type="checkbox"/> Site content types	<input type="checkbox"/> Site libraries and lists	<input type="checkbox"/> Usage summary
<input type="checkbox"/> Advanced permissions	<input type="checkbox"/> Site theme	<input type="checkbox"/> Site columns	<input type="checkbox"/> Site usage report	<input type="checkbox"/> Storage space allocation
	<input type="checkbox"/> Top link bar	<input type="checkbox"/> Site templates	<input type="checkbox"/> User alerts	<input type="checkbox"/> Site collection features
	<input type="checkbox"/> Quick Launch	<input type="checkbox"/> List templates	<input type="checkbox"/> RSS	<input type="checkbox"/> Site hierarchy
	<input type="checkbox"/> Save site as template	<input type="checkbox"/> Web Parts	<input type="checkbox"/> Search visibility	<input type="checkbox"/> Portal site connection
	<input type="checkbox"/> Reset to site definition	<input type="checkbox"/> Workflows	<input type="checkbox"/> Sites and workspaces	
			<input type="checkbox"/> Site features	
			<input type="checkbox"/> Delete this site	

This page is one stop shopping for a site administrator. If you create or maintain a site, you'll spend lots of time on this page:

- Setting permissions and adding users
- Setting the look and feel of the site
- Saving the site as a template so you can use it again

UNDERSTANDING LIBRARIES

SharePoint libraries are like shared network folders, but better. Windows has many limitations that we've learned to live with. One major limitation is the inability to easily store and retrieve metadata: data about our files. In Windows, you can store a filename, creation date, data modified, author, and a few other pieces of data. In SharePoint, you can store whatever metadata you require.

For example, the document library shown on the next page has four custom fields that describe the documents contained in the library:

- App (Excel, Word, etc)
- Office (version: 2003, 2007, both)
- DocType (how the document is used), and
- Active (a yes/no field that indicates whether this document is current).

Share a document with the team by adding it to this document library.

New Upload Actions Settings View: All Documents

Type	Name	Modified	Modified By	App	Office	DocType	Active
	adversity	3/5/2008 11:19 AM	Gini Courter	Office	2003	Article	
	Books	2/9/2008 7:57 PM	Gini Courter	Excel	2007	Sample file	Yes
	Fearless	2/9/2008 5:44 PM	Gini Courter	Word	2007	Sample file	Yes
	Fearless	2/9/2008 5:44 PM	Gini Courter	Excel	2007	Sample file	Yes
	Intro to Office 2007 User Interface	2/9/2008 5:44 PM	Gini Courter	Office	2007	Overview	
	Nested field sample	2/9/2008 5:44 PM	Gini Courter	Office	2003; 2007	Sample file	Yes
	Office Bootcamp Presentation - Friday	2/9/2008 5:45 PM	Gini Courter	Office	2007	Overview	
	Office BootCamp Sample Word Doc	2/9/2008 5:45 PM	Gini Courter	Word	2007	Sample file	Yes
	OfficeBootCampFooter	2/9/2008 5:46 PM	Gini Courter	Office	2003; 2007	Other	
	Pacific Sales Transactions	2/9/2008 5:46 PM	Gini Courter	Excel	2007	Sample file	Yes
	Pacific Sales	2/9/2008 5:46 PM	Gini Courter	Excel	2007	Sample file	Yes
	Regional Sales	2/9/2008 5:46 PM	Gini Courter	Excel	2007	Sample file	Yes
	San Diego Trip Excel XML	2/9/2008 5:46 PM	Gini Courter	InfoPath	2007	Demo file	Yes
	The Art of Governance	2/9/2008 5:46 PM	Gini Courter	PowerPoint	2007	Sample file	Yes
	Travel Request	2/9/2008 5:46 PM	Gini Courter	InfoPath	2007	Demo file	

four fields of metadata about the files

In Windows, most users would create nesting folders to organize these files:

- Office 2003
 - Excel
 - Articles
 - Demo files
 - Overviews
 - Sample files
 - InfoPath
 - Articles
 - Demo files
 - Overviews
 - Sample files
 - Office...
 - PowerPoint...
 - Word...
- Office 2007....
 - Excel...
 - InfoPath
 - Office
 - PowerPoint
 - Word

In SharePoint, you never need to create folders to organize files.

SYNCHRONIZING WITH OUTLOOK

SharePoint includes three lists that synchronize with Outlook: Calendar, Contacts, and Tasks for use offline. The synchronization is read-only: the SharePoint Calendar, Contacts, and Tasks can only be edited in SharePoint. To add a SharePoint Calendar, Contacts, or Tasks list to your Outlook, display the list then choose Actions > Connect to Outlook.

UNDERSTANDING PERMISSIONS

With SharePoint 3.0 you can set permissions for the entire site, specific lists and libraries, and specific documents in the libraries. Here are the default permission types:

Permission Level	Description
<input type="checkbox"/> Full Control	Full control of the scope.
<input type="checkbox"/> Design	Can create lists and document libraries and edit pages in the Web site.
<input type="checkbox"/> Contribute	Can create and edit items in existing lists and document libraries.
<input type="checkbox"/> Read	Read-only access to the Web site.

DESIGNING SHAREPOINT SITES

Before you begin creating a SharePoint site, spend some time capturing and validating the requirements for the site. Requirements are the what, who, when, where, and why of your SharePoint site.

DOCUMENTING SITE GROUPS AND USERS

You assign permissions to groups then add individuals to the groups. Avoid assigning permissions to individuals – they make your site harder to maintain. Groups are created from the Site Settings page. You can easily create three groups:

- Visitors – read only access to site
- Members – site contributors
- Site Owners – full rights to site

Whoever creates the site is the default site owner, but you can grant full permissions to other users.

You may need more complex permissions. For example, in one organization a site is shared by Engineers and Sales People. Each group is responsible for updating part of the site, but needs read-only permission to the rest of the site. This is solved by creating two groups: Engineers and Sales. If you need to create additional site groups, capture the requirements for the permissions in a table like this:

Group	Users like....	Read only	Contribute	No permission
Engineers	Alicia, John...	All sales	All engineering	Management
Managers	Carol, D'Shaun	All sales All engineering	Management	
Sales	Brandon, Joan	All engineering	All sales	Management

Create another table to document the users. Here's a sample user table:

Last	First	Email	Groups	Notes
Courter	Gini	gcourter@triadconsulting.com	Owner	
Jones	Brandon	Bjones@somewhere.com	Sales	

CREATING LISTS AND LIBRARIES

Content for your site is stored in lists (think Excel lists and Outlook folders) and libraries (think Windows folders).

LISTS

Before you create a list in SharePoint, see if a similar list is already included in SharePoint. Here are some of the lists you can use or modify:

- Events – synchronizes with Outlook Calendar
- Contacts – synchronizes with Outlook Contacts
- Tasks – synchronizes with Outlook Tasks
- Issue Tracking
- Project Tasks
- Survey

If you need to create a custom list, lay the list out in Excel; what works in Excel works in SharePoint. Most lists have two views: the standard view (as shown) and a datasheet view used for bulk editing. To switch to datasheet view, display the list then choose Actions > Edit in Datasheet.

PUBLISHING A LIST FROM EXCEL

You can import data from Excel to SharePoint or publish an Excel list directly to SharePoint. If the Excel data is in a range, first choose Data > List > Create List from the Excel menu to create the list. On the List toolbar, click the List menu drop down and choose Publish to launch the wizard.

LIBRARIES

If you're moving data from an existing shared folder structure, analyze the folders to determine what custom columns you'll need to create in your library. Whether the library is for new or existing data, interview key users to determine how they'll want to view and retrieve data.

Choose Site Actions > Create to create a new list, library, or web part:

Libraries	Communications	Tracking	Custom Lists	Web Pages
<ul style="list-style-type: none">Document LibraryForm LibraryWiki Page LibraryPicture Library	<ul style="list-style-type: none">AnnouncementsContactsDiscussion Board	<ul style="list-style-type: none">LinksCalendarTasksProject TasksIssue TrackingSurvey	<ul style="list-style-type: none">Custom ListCustom List in Datasheet ViewImport Spreadsheet	<ul style="list-style-type: none">Basic PageWeb Part PageSites and Workspaces

To create a custom column in your library, select the library in the Quick Launch then choose Settings > Document Library Settings. The Settings page for a document library is shown on the next page of the handout.

CREATING VIEWS

When you create a new library, two views are created by default: All Documents and Explorer View (like Windows Explorer). You can create new views that better meet the needs of the sites users. Views can include custom sorting, grouping, and filtering. You create a new view (and set the default view) on the Settings page for


the document library. Choose a new view from the Views list in the upper right corner.

General Settings	Permissions and Management	Communications
<ul style="list-style-type: none">Title, description and navigationVersioning settingsAdvanced settings	<ul style="list-style-type: none">Delete this document librarySave document library as templatePermissions for this document libraryManage checked out files	<ul style="list-style-type: none">RSS settings

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:


Column (click to edit)	Type	Required
Title	Single line of text	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

- Create column  **Add a new column**
- Add from existing site columns
- Column ordering
- Indexed columns

Views

A view of a document library allows you to see a particular selection of items or to see the items sorted in a particular order. Views currently configured for this document library:

View (click to edit)	Default View
All Documents	✓
Explorer View	

- Create view  **create a custom view**

ADDING WEB PARTS, MODIFYING THE SITE

To modify a page in the SharePoint site, navigate to the page then choose Site Actions > Edit Page.

- To remove a web part from the page, simply click the X to close the web part. (Note: the web part still exists, it just isn't displayed on the page.)
- To delete a web part, click the drop down menu on the web part and choose Delete.
- To add a web part, click the Add a Web Part link at the top of the zone. Choose the web part you want to add then click Add. Position the web part.
- To modify a web part, click the drop down menu and choose Modify Web Part. Change the web part's settings in the task pane. Click Apply to see your changes. Click OK to save and exit editing mode.