Windows SharePoint Services 3.0:

Basic SharePoint

Student Manual

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Windows SharePoint Services 3.0: SharePoint for Users

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SharePoint for Users

Introduction

After reading this introduction, you will know how to:

A Use ILT Series manuals in general.

B Use course objectives to properly set your expectations for the course.

Topic A: About the manual

ILT Series philosophy

We believe strongly in the instructor-led class. During class, focus on your instructor. Our manuals are designed and written to facilitate your interaction with your instructor, and not to call attention to manuals themselves.

We believe in the basic approach of setting expectations, delivering instruction, and providing summary and review afterwards. For this reason, lessons begin with objectives and end with summaries. We also provide overall course objectives and a course summary to provide both an introduction to and closure on the entire course.

Manual components

The manuals contain these major components:

- Table of contents
- Introduction
- Units
- Appendices (optional)
- Course summary
- Quick reference (optional)
- Glossary (optional)
- Index

Topic B: Setting your expectations

Properly setting your expectations is essential to your success. This topic will help you do that by providing a list of the objectives for the course.

Course objectives

These overall course objectives will give you an idea about what to expect from the course. It is also possible that they will help you see that this course is not the right one for you. If you think you either lack the prerequisite knowledge or already know most of the subject matter to be covered, you should let your instructor know that you think you are misplaced in the class.

After completing this course, you will know how to:

- Identify components of the Windows SharePoint Services environment and the default team Web site.
- Use Web Part Pages
- Use the default components of a Windows SharePoint Services team Web site.
- Create and manage Wiki Page libraries.
- Create and manage discussion boards and surveys.

Unit 1

The SharePoint site – Review

Complete this unit and you'll know how to:

A Review components of a Windows SharePoint Services 3.0 Team Web site.

B Modify Team Web site components.

Topic A: SharePoint Component Review

Explanation

You can use Windows SharePoint Services to organize, manage, and share information. SharePoint stores information at a central location within a database. This information can be accessed by multiple users, regardless of their geographical location. You can access this information by using either a Web browser or desktop applications, such as Microsoft Office.

To view the information from a Web browser, you connect to a SharePoint Web site. There are various templates you can use to create a SharePoint Web site. The default template is the *Team site*. On a SharePoint Team site, some of the basic tasks you can perform include:

- Posting documents that you want to share with other users.
- Controlling the versions of the documents you create.
- Conducting discussions.
- Creating events and announcements to let other users know about team activities.
- Creating libraries to store documents, images, and forms.
- Creating tasks and assigning them to team members.

The Team Web site

The default Team Web site has a similar layout and contains many of the same components as the Central Administration Web site.

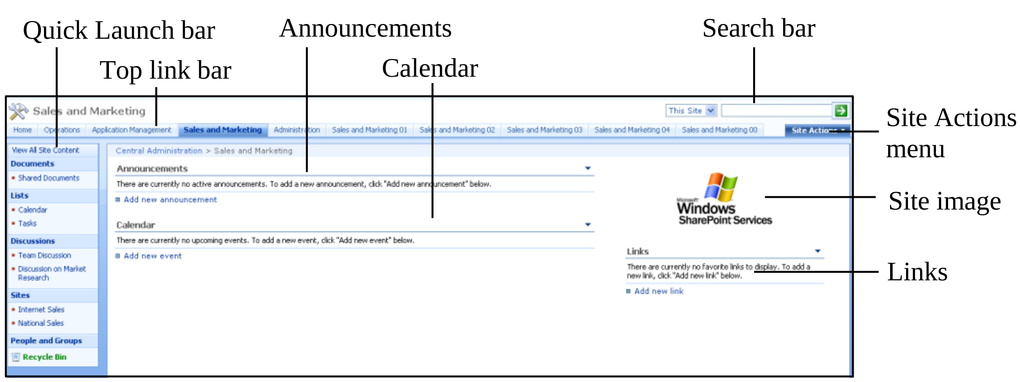


Exhibit 1-1: The Home page of a Team Web site

The *Quick Launch bar* contains links to other components of the Team Web site. You can use the links to navigate quickly to other pages of the Web site.

The *Top link bar* is customizable and can contain hyperlinked tabs to allow you to navigate between parent and child sites in your site collection—the site hierarchy. By default, child sites are listed on the top link bar of the parent site, and child sites inherit the top link bar of the parent site.

The *Announcements* section is where you can post messages on the home page of your Team Web site.

The *Calendar* section is a customizable list of upcoming meetings and events.

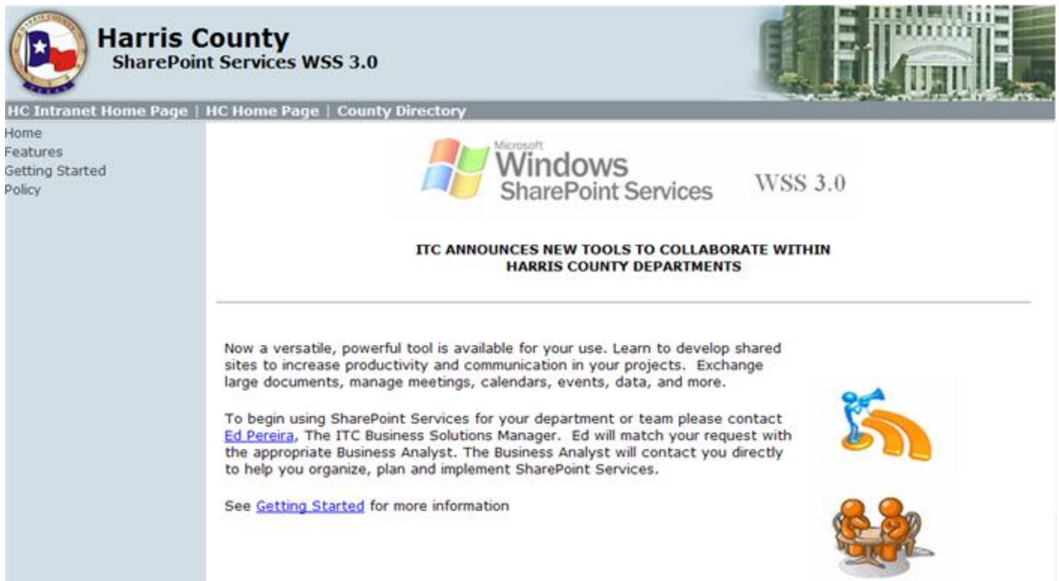
The *Links* section is empty by default but is customizable, allowing you to add URL links to resources both outside and within your organization.

The *Site Actions menu* gives you quick access to creation, editing, and other management tasks.

The *Search bar* allows you to search within a site, or if allowed, across multiple sites.

How to Begin

To request a SharePoint site, go to this web page for contacting the Business Solutions group: http://www.hcintranet.net/wss/



The site will provide you with information about SharePoint features, how to begin the process of implementing your site, and policies that apply. Ed Pereira is the contact for SharePoint. He will assign a Business Analyst to help you structure your SharePoint site.

For the Sharepoint policy, go to **Usage Policy**>
http://www.hctx.net/CmpDocuments/33/SharePoint/SharePoint%20Policies%20v1.0.pdf

The Quick Launch bar

The Quick Launch bar, as shown in Exhibit 1-2, contains links to Team Web site components, such as document libraries, lists, discussion groups, subsites, people and groups, and the Recycle Bin.

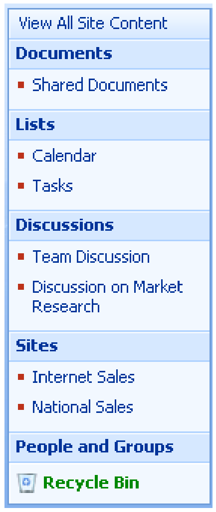


Exhibit 1-2: The Quick Launch bar

The following table describes the default links of a Team Web site's Quick Launch bar.

Link	Description
Documents	Displays a page that lists the shared documents on the Team Web site. You can use the links on this page to upload files to the site.
Lists	Displays lists where you can store various types of information, such as announcements, calendar items, links, and tasks.
Discussions	Displays the list of message boards on the Web site. The team members in an organization can use message boards to discuss various topics.
Sites	Displays a list of subsites and workspaces that have been created as part of the site. If you have appropriate rights, you can use the Create link on this page to create a subsite or workspace.
People and Groups	Displays the groups and users who are members of this Web site. If you have appropriate rights, you can use these pages to manage the permissions assigned to groups and users.
Recycle Bin	Similar to the Windows Recycle Bin, you can use this page to restore or permanently delete items that have been removed from the site. Items older than 30 days are automatically permanently deleted from the Recycle Bin.

The SharePoint Services hierarchy

Explanation

A SharePoint team site can have one or more subsites. These subsites can be organized further into subsites. A site that doesn't have a parent site is called a top-level site. The structure of a top-level site and its subsites is called a *site collection*. This structure is similar to the file and folder structure in Windows. Maintaining a hierarchical structure helps you organize information.

For example, the company, Outlander Spices, has a top-level Web site. The site has subsites for the divisions, such as Sales, Support, and Acquisition. Each of these sites is further organized into sites for the subdivisions, such as National Sales, Internet Sales, Technical Support, Spices, and Food. The hierarchy of sites and subsites is the site collection for Outlander Spices. This site collection example is shown in Exhibit 1-3.

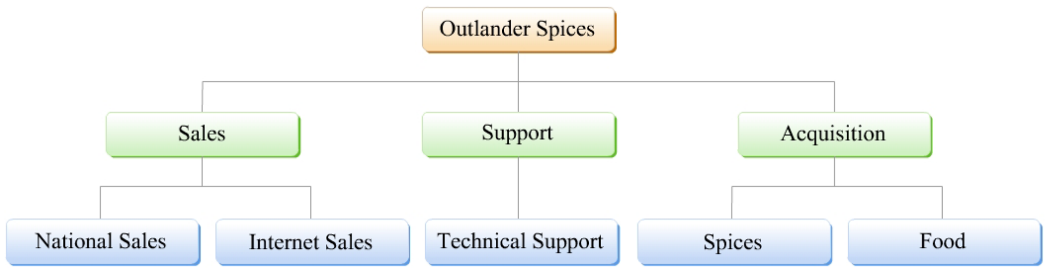


Exhibit 1-3: Example of a site collection

Contact List

Explanation

You can create a *Contacts list* to store personal information, such as addresses and phone numbers, of people with whom your team works—for example, customers, vendors, and external partners. You can use it as a one-point reference to communicate with them. As with the Issues list, Windows SharePoint Services doesn't create an empty Contacts list by default. You need to create the list and then add items to it. To create a Contacts list:

1 Click Site Actions and choose Create.

2 Under Communications, click Contacts. This action opens the dialog box. In the Name box, enter a name for your Contacts list.

4 If desired, in the Description box, enter a description of the list.

5 Specify whether or not the list should appear on the Quick Launch bar.

6 Click Create.

Explanation

You can export SharePoint Contacts list items into your Outlook Contacts list.

1 Click the down-arrow next to the Contacts list item that you want to export to Outlook.

2 Choose Export Contact.

3 Click Open. This action opens Outlook with the Contact information automatically filled in from SharePoint.

4 In Outlook, click Save & Close.

Topic B: Component modifications

Explanation

A Team Web site is made up of components called *Web parts*. You can use Web parts to add images, documents, and lists to the site. By default, there are four Web parts on the Team Web home page: Announcements, Calendar, site image, and Links. You can add additional Web parts to the home page, such as Tasks and Surveys.

Modifying the default Team Web site

The default team Web site has a title and a description, a Top link bar, a Quick Launch bar, tree view, and site theme applied. You can customize all of these items by using the Look and Feel category on the Site Settings page, shown in Exhibit 1-4.

Exhibit 1-4: The Site Settings page of a Team Web site

You can use the "Reset to site definition" link to remove all customizations from a single page or from all pages in the site.

Site title, description, and icon

When you create a Team Web site, you must enter a title for the site. There's also a space for an optional description. You can edit the title, and add or edit a description by using the "Title, description, and icon" link. This feature also lets you change the icon that appears next to the site title on your page. By default, it's a graphic of a hammer and wrench crossed like an X.

Do it!

B-1: Modifying the site description and icon

Here's how	Here's why
1 Click on the Sales and Marketing tab on the Top Link bar. Under **Pictures** on the **Quick Launch** bar; click the **icon** photo	A red pepper graphic is saved in a shared directory on the class server.
2 Under Preview, click the photo again	
3 In the Address box, select the address of the photo	
4 Press CTRL + C	To copy the URL for the photo to the Windows clipboard
5 Click the back arrow	
6 On the Top link bar, click **Sales ##**, where ## is your assigned student number	This Team Web site was created during class setup for you to work with.
7 On the Top link bar, click **Site Actions** and choose **Site Settings**	
8 Under Look and Feel, click **Title, description, and icon**	From this page, you can edit the title of your Team Web site, add a description, change the site icon, and edit the URL for your site.
9 In the description box, type **This Team Web site contains information pertaining to the Sales department of Outlander Spices division ##.**	Use your assigned student number for ##.
10 In the Logo URL and Description section, in the URL Place your cursor in the field, and press CTRL + V	To paste the URL for the photo in the Address box.
11 Click Click here to test	The URL is tested and the logo successfully opens in an Internet Explorer window.
12 Close the Internet Explorer window containing the graphic	
13 In the Enter a description box, type **Outlander Spices Logo**	
14 In the URL name box, type **sm##**	Use your assigned student number for ##. Users find short URLs easier to remember and use than longer ones.
15 Click **OK**	
16 On the Top link bar, click **Sales ##**	To return to your Team Web site's home page and view the changes. The new URL displays in the address box of Internet Explorer. The red pepper icon displays next to the site title instead of the default hammer and wrench graphic. The description you entered is shown at the top of the content area.

Tree view

Explanation

When you enable *tree view* on your Team Web site, a Site Structure section is added to the Quick Launch bar, as shown in Exhibit 1-5. Users can use these links to navigate quickly to other content on the Web site or its subsites.

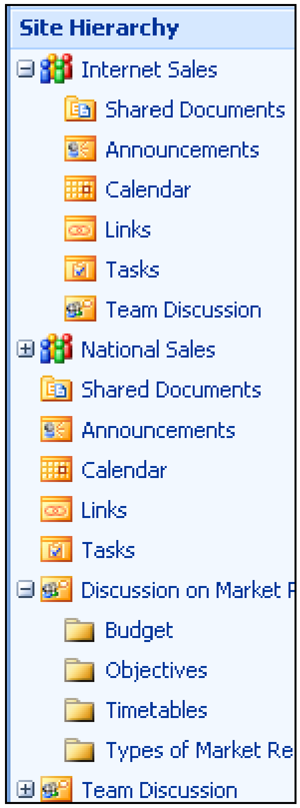
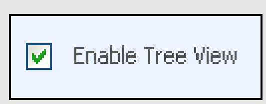
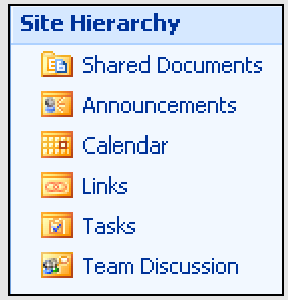


Exhibit 1-5: Tree view with some items expanded

Do it!

B-2: Enabling tree view

Here's how	Here's why
1 Access the Site Settings page of your Sales ## Team Web site	(From the Top link bar, click Site Actions and choose Site Settings.)
2 Under Look and Feel, click **Tree view**	
3 Check **Enable Tree View**	
4 Click **OK**	

5 Return to your Sales ## home page	(Click Sales ##.)  The graphical Site Hierarchy is added to your Quick Launch bar.

Top link bar

Explanation

When you create a Web site, you choose whether or not it inherits the Top link bar of its parent site. The default setting is for sites to inherit the Top link bar of their parent site. You can disable this setting at any time by using the "Top link bar" link in Site Settings.

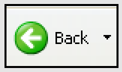
If the Team Web site isn't inheriting its Top link bar from its parent site, you can customize it with links to site content on any other internal or external URL, making it easier for users to access frequently used resources. Using the Top link bar, users can navigate from any page of the Team Web site to these links.

Do it!

B-3: Customizing the Top link bar

Here's how	Here's why
1 Go to the Site Settings page	
2 Under Look and Feel, click **Top link bar**	This Web site is inheriting its top link bar from its parent site—Central Administration.
3 Click **Stop Inheriting Links**	 Your Sales ## Team Web site now has a single link on its Top link bar. This link takes you to the home page of the Sales ## Team Web site.
4 Click 	You'll create a Top link to the Team calendar page.
5 In the "Type the Web address" box, type **http://hcsharepointt1:34763/sm##/lists/calendar**	
6 In the "Type the description" box, type **Team Calendar**	
7 Click **OK**	A new link is added to the Top link bar. It reads "Team Calendar."
8 On the Top link bar, click **Team Calendar**	To navigate quickly to the Calendar page of the Team Web site.

9	Return to the Site Settings page Click **Top link bar**	
10	Add a new link to **http://support.microsoft.com** Use **Microsoft Support** for the description	
		This is the URL to Microsoft's Help and Support Center.
11	Test the link	(Click Microsoft Support in the Top link bar.) This takes you away from your Team Web site and to Microsoft's site.

12	Click 	To return to the Sales ## Web site.
13	Click 	
14	Change the Team Calendar link order to **3** Click **OK**	 The Microsoft Support link displays before the Team Calendar link on the Top link bar.
15	Next to Microsoft Support, click 	To open the Edit Link page.
16	Click **Delete** Click **OK**	To remove this link from the Top link bar.

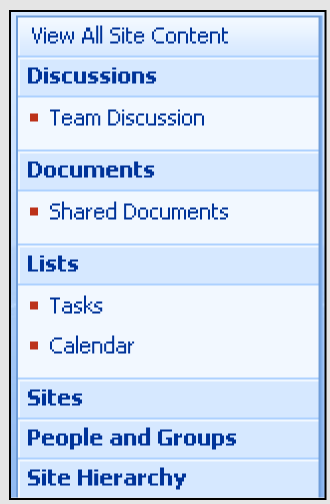
Quick Launch bar

Explanation

By default, the Quick launch bar on a Team Web site contains links to the following Web site components: Documents, Lists, Discussions, Sites, People and Groups, and Recycle Bin. Using the Quick Launch link under Look and Feel in Site Settings, you can add or remove links from the Quick Launch bar, create a new heading, and change the order in which the links appear on the Quick Launch bar.

Do it!

B-4: Modifying the Quick Launch bar

Here's how	Here's why
1 Go to the Site Settings page	
2 Under Look and Feel, click **Quick Launch**	You can use this page to change the links and headings that are displayed on the Quick Launch bar.
3 Click **Change Order**	
4 Next to Discussions, change the number to **1**	To place Discussions first in the list on the Quick Launch bar.
5 Next to Tasks, change the number to **1**	To put Tasks before Calendar in the list under Lists.
6 Click **OK**	
7 Return to your home page	(Click Home on the Top link bar or click Sales ## above the Quick Launch page title.)
8 Observe the Quick Launch bar	 "Discussions" is displayed first on the bar, and Tasks is displayed before Calendar under Lists.
9 Go to the Site Settings page	
Click **Quick Launch**	

10 Next to People and Groups, click 

11 In the "Type the description" box, type **Team Members**

Click **OK**

12 Return to your home page

The People and Groups link now reads Team Members.

13 Choose **Tools**, **Internet Options…**

You'll be setting your Sales Team site's home page as your Internet Explorer home page to make navigating to this page easier.

Click **Use Current**

Click **OK**

You can now click the Internet Explorer Home button to get to your Sales ## site.

14 Close Internet Explorer

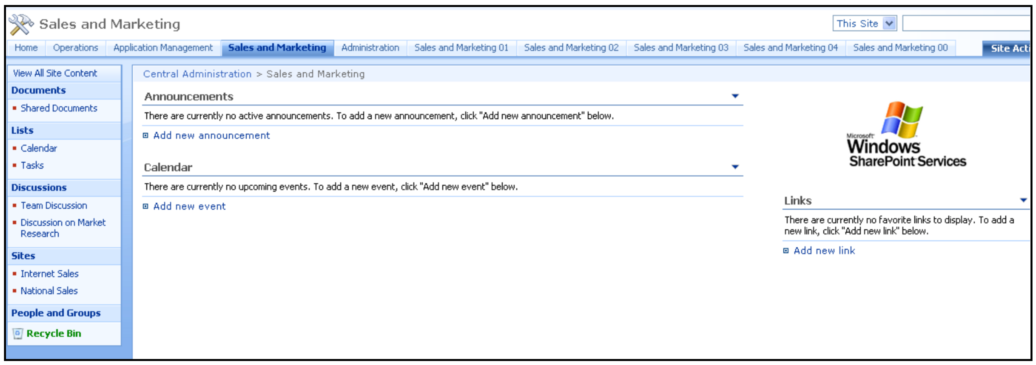
Unit summary: The SharePoint site – Review

Topic A In this topic, you learned how to navigate within the Windows SharePoint Services 3.0 environment and the Windows SharePoint Services 3.0 hierarchy.

Topic B In this topic, you learned how to modify the default information on a Windows SharePoint Services 3.0 Team Web site.

Review questions

1 In the following graphic, identify the components of the Windows SharePoint Team Web site.



2 What are some of the basic tasks you can use a Windows SharePoint Team Web site to do?

3True or False? By default, child sites are listed on the top link bar of the parent site.

4 True or False? By default, child sites inherit the top link bar of the parent site.

5 Which menu do you use to complete page creation, editing, and management tasks?

6 True or False? Once deleted, a Windows SharePoint Services item can’t be restored

7 The structure of a top-level site and its subsites is called what?

Independent practice activity

In this activity, you’ll be practicing the skills necessary to navigate with a SharePoint services 3.0 Team Web site, as well as identifying the components of a Team Web site.

1 Access the Administration Team Web site at http://outlander/administration.

2 How can you determine if this Web site has any subsites?

3 Does this site have any subsites? If so, what are they?

4 How can you access the discussion boards on the site?

5 Are there any discussion boards on this site?

Unit 2

Team Web Part Pages components

Complete this unit and you'll know how to:

A Create and use Web Part Pages.

Topic A: Web Part Pages

Explanation

A *Web Part Page* is a custom page that can hold Web Parts, such as announcements, tasks, and events. A Web Part Page is divided into sections called *zones*. You place the Web Parts into these zones.

An advantage of using a Web Part Page is that you can assemble various Web Parts that are relevant to the team in one place. For example, if you create a Web Part Page for the Media team in an organization, then the Web Part Page might contain only the Image Web Part and image libraries that the team has created for various projects.

Creating Web Part Pages

To create a Web Part Page, from the Site Actions menu, choose Create. The various types of pages you can create on your Team Web site are listed by category. The categories include:

- Libraries
- Communications
- Tracking
- Custom Lists
- Web Pages

Under Web Pages, click Web Part Page to open the "New Web Part Page" page, as shown in Exhibit 2-1.

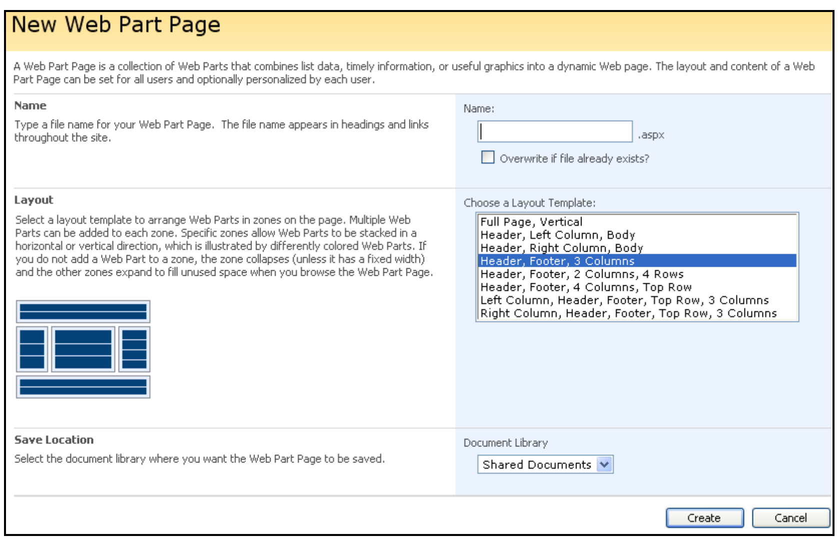


Exhibit 2-1: The New Web Part Page page

When you create a Web Part Page, you:

- Specify a name for the page.
- Specify if you want to overwrite the Web Part Page each time you create a Web Part Page with the same name.
- Select a layout template for the page. The layout you select determines how the zones are arranged on the Web Part Page.
- Specify the location where you want to save the Web Part Page. By default, a Web Part Page is saved in Shared Documents.

Do it!

A-1: Creating a Web Part Page

Here's how	Here's why
1 Click **Site Actions** and choose **Create**	
2 Under Web Pages, click **Web Part Page**	To open the "New Web Part Page" page.
3 In the Name box, type **Marketing**	
4 Check **Overwrite if file already exists?**	If you don't check this option, you get an error message if another Web Part Page with the same name exists.
5 Verify that under "Choose a Layout Template," "Header, Footer, 3 Columns" is selected	You'll use this layout template for the Web Part Page. This layout has a header, footer, and three zones: left, right, and middle.
6 Verify that under Save Location, Shared Documents is selected	This indicates that the shared Web Part Page will be saved in Shared Documents. You can access this Web Part Page by clicking Shared Documents on the Quick Launch bar.
7 Click **Create**	To create the Web Part Page. You can add Web Parts to this page by using the Add a Web Part link in one of the zones.

Adding Web Parts

Explanation

After you create a Web Part Page, as shown in Exhibit 2-2, you can add Web Parts to it. A new Web Part Page has a title bar and zones. The empty sections on the Web Part Page are zones. Each zone has a name, such as Header, Footer, Left Column, and Right Column. The number and placement of the zones vary, depending on the layout template you selected when you created the Web Part Page.

To add Web Parts to the Web Part Page, you click the "Add a Web Part" link in the desired zone. Check the Web Part or Web Parts you want to add to the zone and click Add.

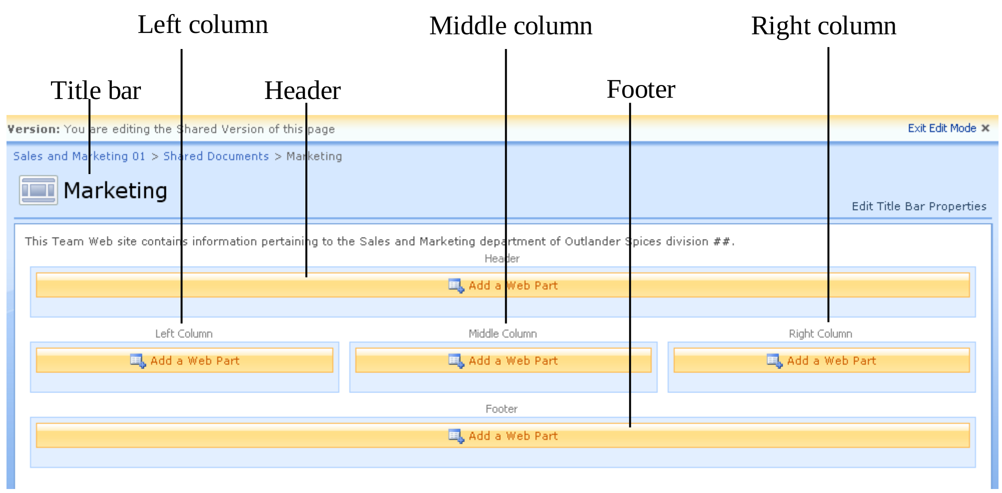


Exhibit 2-2: The new Web Part Page, Marketing

Do it!

A-2: Adding Web Parts to a Web Part Page

Here's how	Here's why
1 In the Header zone, click **Add a Web Part**	You'll add the Announcements Web Part to the Header zone.
2 Under Lists and Libraries, check **Announcements**	
3 Click **Add**	
4 In the Left Column zone, click **Add a Web Part**	You'll add the Calendar Web Part to the Left Column zone.
5 Under Lists and Libraries, check **Calendar**	
6 Click **Add**	
7 In the Middle Column zone, click **Add a Web Part**	You'll add the Links Web Part to the Middle Column zone.
8 Under Lists and Libraries, check **Links**	
9 Click **Add**	
10 In the Title Bar, click **Edit Title Bar Properties**	
11 In the Image Link box, type **(See instructions on pg. 1-8; 1-10)**	
	The pepper icon resides in a shared directory on the classroom server.
12 Click **OK**	
13 Exit Edit Mode	

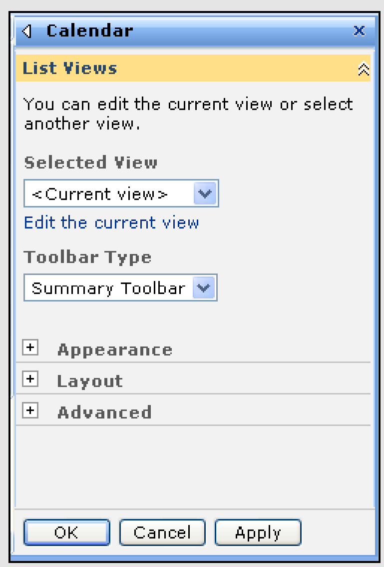
Modifying Web Parts

Explanation

After you add Web Parts to a page, you can modify them at any time. For example, if you chose, initially, to add announcements, calendar, and a title bar image to the Web Parts page but later decide you want to change the title of a particular Web Part or swap one Web Part with another one, you can do that by entering Edit Mode. You access Edit Mode by choosing Edit Page from the Site Actions menu for the Web Part Page you want to modify.

Do it!

A-3: Modifying a Web Part Page

Here's how	Here's why
1 Go to your Home Site	
2 On the Quick Launch bar, click **Shared Documents**	
3 In the Shared Documents list, click **Marketing**	
4 Click **Site Actions** and choose **Edit Page**	You use Edit Mode to add, remove, or update Web Parts on this page.
5 Next to Calendar, click **edit** and choose **Modify Shared Web Part**	
6 Observe the task pane at the right side of the page	 The task pane displays options, such as Appearance, Layout, and Advanced, that you can use to modify the Web Part. The options on the task pane change, depending on the Web Part you choose to modify.

7	From the Selected View list, choose **Calendar**	
	Click **OK**	To acknowledge that this change might disable Web Part connections you established in this zone.
8	Click **Apply**	To view your change on the page.
9	In the task pane, expand **Appearance**	
10	Edit the title to read **Marketing Master Calendar**	
11	Click **OK**	
12	Click **Exit Edit Mode**	The Calendar is now shown in Calendar view, instead of in List view, and the title of the Calendar zone now reads “Marketing Master Calendar.”

Moving Web Parts

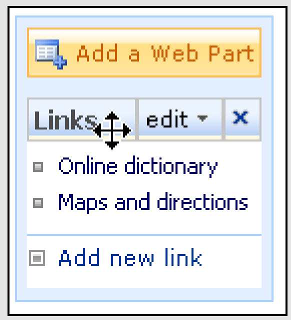
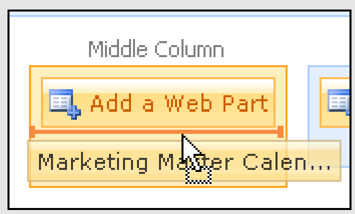
Explanation

You might need to change the layout of a Web Part Page. For example, you might have Announcements in the header zone, Calendar in the right zone, and Links Web Part in the middle zone. Later, you might want to move Announcements to the middle zone or Links Web Part to the right zone. You can do this when the Web Part Page is in Edit Mode.

You access Edit Mode by choosing Edit Page from the Site Actions menu for the Web Part Page you want to modify.

Do it!

A-4: Moving a Web Part

Here's how	Here's why
1 Click **Site Actions** and choose **Edit Page**	
2 Place your mouse pointer over the Links Web Part	
3 Drag this Web Part to the Left Column	To move the Links Web Part to the Left Column.
4 Drag the Marketing Master Calendar to the Middle Column	
5 Click **Exit Edit Mode**	Links is now on the left side of the page and the Calendar on the right.

Removing Web Parts

Explanation

If you no longer require a Web Part on your Web site, you can delete it. To delete a Web Part, open the page in Edit Mode. Click edit next to the title of the Web Part and choose Delete.

Do it!

A-5: Removing a Web Part

Here's how	Here's why
1 Open the Marketing page in Edit Mode	
2 Next to Links, click **edit**	
3 Choose **Delete**	
4 Click **OK**	To verify the deletion.
5 Exit Edit Mode	
6 Return to the Home page	

Team Web site image

Explanation

By default, the Microsoft Windows SharePoint Services graphic displays on the Home page of Team Web sites. You can replace that graphic with one of your own by modifying the Home page.

1. From the Team Web site home page, click Site Actions.
2. Choose Edit Page.
3. In the Site Image box, choose Edit, Modify Shared Web Part.
4. In the Image Link box, enter the URL or path to your image file.
5. Click Test Link to verify the URL or path is correct.
6. Click OK.

Do it!

A-6: Changing the Team Web site image

Here's how	Here's why
1 Observe the site image	By default, the site image is Microsoft's Windows SharePoint Services logo. You can replace this image with one of your own.
2 Click **Site Actions** and choose **Edit Page**	You can edit the default Team Web site pages, just as you can edit ones you create.
3 Next to Site Image, click **edit** and choose **Modify Shared Web Part**	
4 **See instructions on pg. 1-8; 1-10** to Copy Logo 01	
5 Click **Test Link**	
6 Close the Internet Explorer window containing the image test	
7 Click **OK**	
8 Click **Exit Edit Mode**	The Outlander Spices logo is displayed on the Home page in place of the Microsoft logo.
9 Close Internet Explorer	

Unit summary: Team Web Part Pages components

Topic A

In this topic, you learned how to create **Web Part Pages**. You also learned how to add, modify, and remove the **Web Parts** in a Web Part Page.

Review questions

1 What's a Web Part Page?

2 How's a Web Part Page divided?

3 What's the advantage of using Web Part Pages?

4 The various types of pages you can create on your Team Web site are listed by zones. What are the zones?

Independent practice activity

1 Create a Web Part Page called **Spices ##**, using the Header, Footer, 2 Columns, 4 Rows template. Place the new Web part in the Shared Documents library.

2 Add Calendar, Announcements, Tasks, and Links to the Web Part Page.

3 Change the title of the Announcements section to **Important Announcements**.

4 Add the image, icon.jpg, to the Title Bar. Icon.jpg is in the Images share in the Sales and Marketing Picture Library.

5 Remove the Calendar Web Part from the Web Parts Page.

Unit 3

Libraries

Complete this unit and you'll know how to:

A Create and manage document libraries.

B. Create and manage Wiki libraries.

Topic A: Document libraries

Explanation

A *library* is a central repository that you can use to store and share files, images, and forms. A Windows SharePoint Services Team Web site has four types of libraries:

- Document library—Used for sharing a collection of documents or other files.
- Form library—Used for managing XML-based business forms.
- Picture library—Used to share image files.
- Wiki Page library—Used to manage interconnected Wiki pages. A *wiki* is software that allows users to create, edit, and link web pages using a Web browser.

Libraries are similar to lists, but they have additional features depending on the library type, such as thumbnails and slide show views for picture libraries. Libraries also have a version control feature.

Creating document libraries

A *document library* is a collection of files, such as Word, Excel, and PowerPoint. Using document libraries, you can perform tasks, such as:

- Creating subfolders in which to group files within a document library
- Controlling the versions of files
- Checking in and checking out files

When you create a SharePoint Team Web site, a document library called *Shared Documents* is created by default. The name of the library doesn't convey anything about the documents in it. Therefore, you should create a library with a descriptive name and store documents in it. For example, you can create a library, Sales Report Templates, to store templates for all types of reports related to sales. This helps team members identify the documents that a library contains.

To create a document library:

1 Choose Site Action and click Create.

2. Under Libraries, click Document Library. The new Document Library page appears, as shown in Exhibit 3-1.

3. Enter the desired information for your new document library.

4. Click Create.

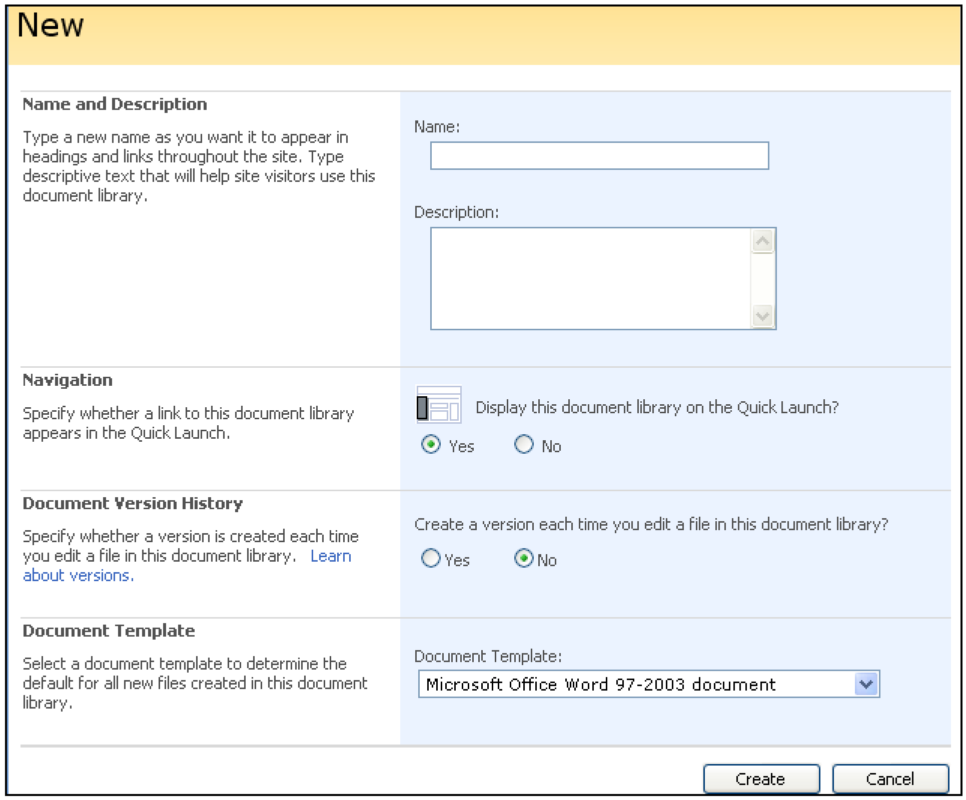


Exhibit 3-1: The New Document Library page

The following table describes the sections in the New Document Library page.

Section	Description
Name and Description	Specify a title and a description for the library.
Navigation	Specifies whether or not this library should appear as a link on the Quick Launch bar.
Document Versions	Specifies whether or not you want to create versions of the documents in the library.
Document Template	Specifies an application that SharePoint uses for creating a new file in the library. For example, if you specify Microsoft Office Word Document as the document template, then the default blank file is a Word document.

Do it!

A-1: Creating a document library

Here's how	Here's why
1 Open Internet Explorer	The home page is set to your Sales ## Team Web site home page.
2 Click **Site Actions** and choose **Create**	
3 Under Libraries, click **Document Library**	
4 In the Name box, type **Business Documents**	
5 In the Description box, type **This document library contains sample business documents and templates.**	
6 Under Navigation, verify that Yes is selected	To place a link to this document library on the Quick Launch bar.
7 Under Document Version History, verify that No is selected	This choice specifies that you don't want to create a new version of the file in the library each time you make a change.
8 Under Document Template, verify that "Microsoft Office Word 97-2003 document" is selected	To use Microsoft Word as the default document type for all new files created in this library.
9 Click **Create**	

Default document template

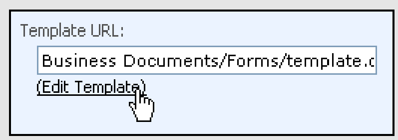
Explanation

A document library has a default template, which is used to create new documents when users choose New, New Document in the library. The default template is a blank document in the application you selected when you created the library. However, you can edit the contents of this template, if you want to set a different format for new library documents. To change the library's default document template:

1. Click Settings and choose Document Library Settings.
2. Click Advanced Settings.
3. In the Document Template section, click Edit Template.
4. Make the desired changes to the template.
5. Save the template, overwriting the existing file.
6. Close the editing application.
7. Click OK on the Document Library Advanced Settings page.

Do it!

A-2: Editing a document library's default template

Here's how	Here's why
1 Click **Settings** and choose **Document Library Settings**	
2 Under General Settings, click **Advanced Settings**	
3 In the Document Template section, under Template URL, click **(Edit Template)**	
Click **OK**	To open the blank template in Word.
4 Click 	
Choose **Open**	
5 Browse to the Student Data folder for this unit	
Select **Proposal.dotx**	
6 Click **Open**	
7 Copy the contents of Proposal.dotx to the template.doc	(In Proposal.dotx, press Ctrl+A, then Ctrl+C. Switch to Template.doc and press Ctrl+V.)
8 In template.doc, click 	
9 Close both Word files	

10	On the Document Library Advanced Settings page, click **OK**	
11	Above Customize Shared Documents, click **Business Documents**	 To return to the Business Documents document library.
12	Click **New** and choose **New Document**	
	Click **OK**	To confirm that you trust the source file and want to open it. The new blank document is no longer a blank Word document. It's now the Proposal template.
13	Close Word	

File uploads

Explanation

In addition to creating new documents in the library, you can upload existing documents to share. To upload an existing file to the library:

1. Click Upload and choose Upload Document to upload a single document.
2. Click Browse and navigate to the folder where the file is located
3. Select the file.
4. Click Open.
5. Check or clear the check box for overwriting existing files.
6. Click OK.

To upload multiple files to the library:

1. Click Upload and choose Upload Multiple Documents. A page with an interface similar to that of the Windows Explorer appears on the Upload Document: <document library> page, as shown in Exhibit 3-2.
2. Use the left pane to navigate to the location of the files.
3. In the right pane, check the files in this folder that you want to upload.
4. Repeat steps 2 and 3 for files in other folders.
5. Click OK.

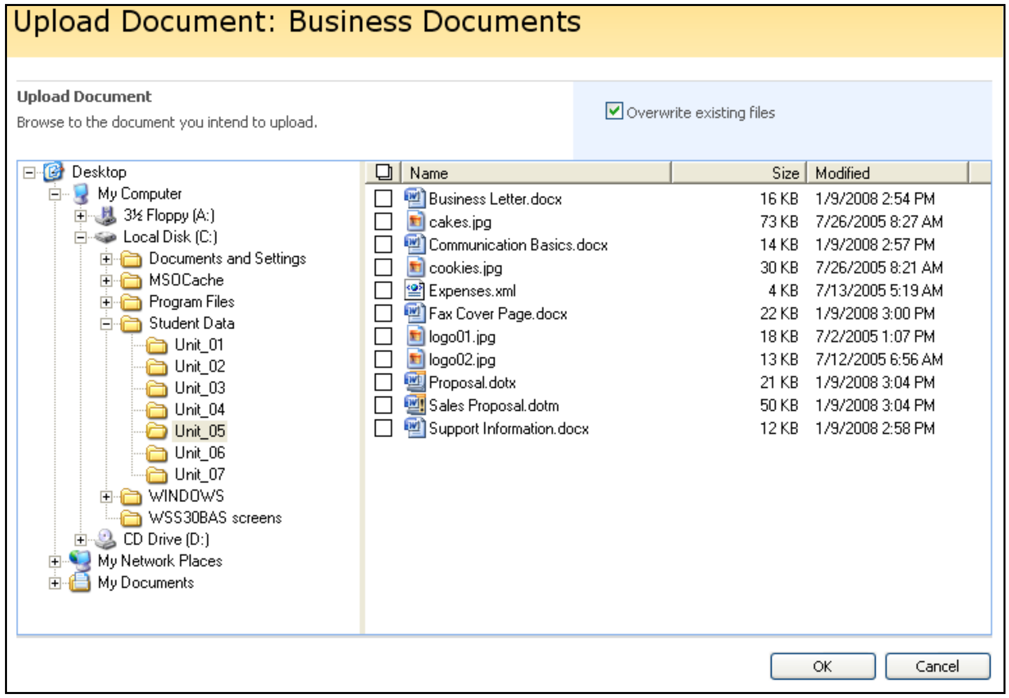


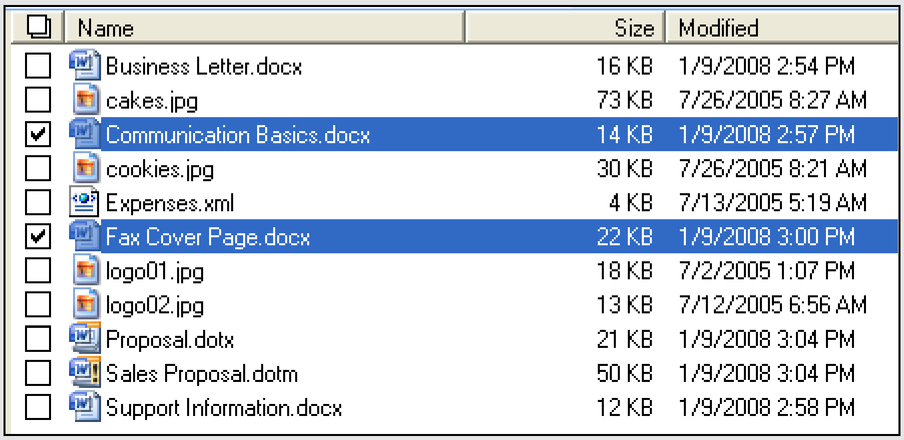
Exhibit 3-2: The interface for uploading multiple files

To navigate the interface for uploading multiple files, you browse through the folders using the left pane. When you select a folder in the left pane, a list of files stored in that folder displays in the right pane.

Do it!

A-3: Uploading existing documents to a document library

Here's how	Here's why
1 Click the down-arrow next to Upload and choose **Upload Multiple Documents**	
2 In the left pane, navigate to the Unit 5 data folder on your desktop as your instructor directs	
3 In the right pane, check **Communication Basics.docx** and **Fax Cover Page.docx**	



	Name	Size	Modified
☐	Business Letter.docx	16 KB	1/9/2008 2:54 PM
☐	cakes.jpg	73 KB	7/26/2005 8:27 AM
☑	Communication Basics.docx	14 KB	1/9/2008 2:57 PM
☐	cookies.jpg	30 KB	7/26/2005 8:21 AM
☐	Expenses.xml	4 KB	7/13/2005 5:19 AM
☑	Fax Cover Page.docx	22 KB	1/9/2008 3:00 PM
☐	logo01.jpg	18 KB	7/2/2005 1:07 PM
☐	logo02.jpg	13 KB	7/12/2005 6:56 AM
☐	Proposal.dotx	21 KB	1/9/2008 3:04 PM
☐	Sales Proposal.dotm	50 KB	1/9/2008 3:04 PM
☐	Support Information.docx	12 KB	1/9/2008 2:58 PM

4 Click **OK**	To upload these two documents.
5 Click **Yes**	To verify that you want to upload these two files to Outlander.

Deleting document libraries

Explanation

You delete a document library on a Windows SharePoint Services Team Web site in the same manner you delete a list.

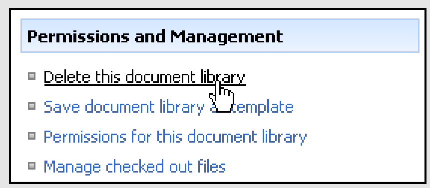
1. Access the document library you want to delete.
2. Click Settings and choose Document Library Settings.
3. Under Permissions and Management, click “Delete this document library.”
4. Click OK to delete the list and move it to the SharePoint Recycle Bin.

If necessary, you can restore the document library from the Recycle Bin.

Note: You can delete all other types of libraries in the same way. In the steps above, substitute the type of library for Document Library.

Do it!

A-4: Deleting a document library

Here’s how	Here’s why
1 On the Business Documents page, click **Settings** and choose **Document Library Settings**	
2 Under Permissions and Management, click **Delete this document library**	
3 Click **OK**	The Business Documents document library is deleted. It no longer appears on the Quick Launch bar under Documents, nor does it appear on the All Site Content page under Document Libraries.

Topic B: Wiki Page libraries

Explanation

A *Wiki* is a piece of software that allows users to create, edit, and link web pages easily. *Wiki Page libraries* on a SharePoint Services Team Web site support rich text, pictures, tables, and hyperlinks. No external application is necessary to create a page with all these elements.

Creating a Wiki Page library

Just like all other libraries in Windows SharePoint Services, you create a blank Wiki Page library first, then you add content to it. Because Wiki Pages are new to Windows SharePoint Services 3.0, when you create a Wiki Page, an introduction page with a link to Help displays, as shown in Exhibit 3-3.

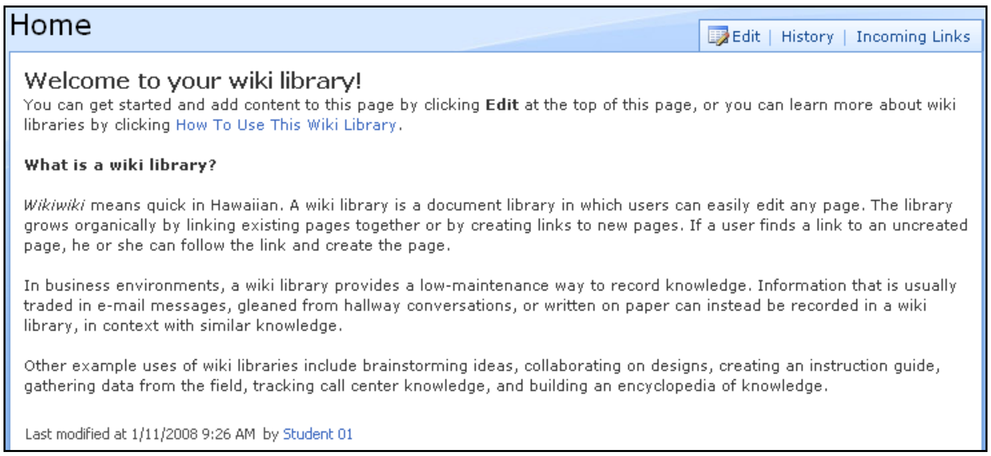


Exhibit 3-3: A new Wiki Page library

Do it!

A-1: Creating a Wiki Page library

Here's how	Here's why
1 Click **Site Actions** and choose **Create**	
2 Under Libraries, click **Wiki Page Library**	
3 In the Name box, type **Newsletters ##**	
Click **Create**	
4 Click **How To Use This Wiki Library**	This help page has basic information on Editing wiki pages, Creating links to pages, Creating pages, Managing your wiki library, Restoring a page, and Viewing incoming links.
5 Above How To Use This Wiki Library, click **Newsletters ##**	To return to your Wiki page.

Wiki pages

Explanation

Once you've created a Wiki Page library, you can add Wiki pages to it. You can add many types of components to a Wiki page, such as text and text formatting, images, links to other pages, and tables, without needing an external program, such as Microsoft Office. All the editing is done right in the browser window. The advantage of a Wiki page is that it's not limited to the original author. Others can contribute content to the page.

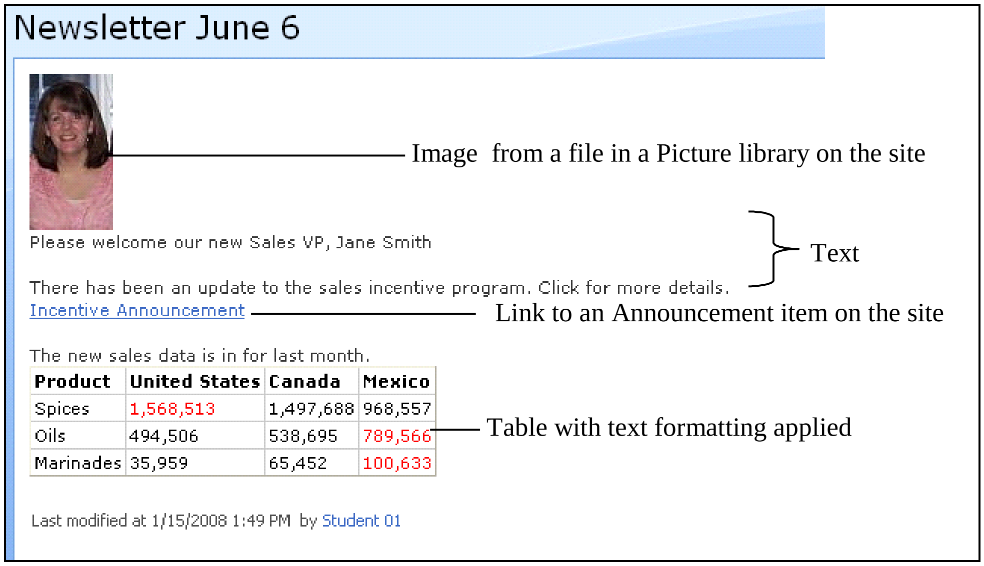
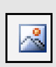


Exhibit 3-4: An example of a Wiki page

Do it!

A-2: Creating a Wiki page

Here's how	Here's why
1 Click **New** and choose **New Wiki Page**	You'll create a new Wiki page in your library. Leaving the default Home and Help pages for users to read.
2 In the Name box, enter **Newsletter *{today's date}***	
3 Click in the Wiki Content box	
Observe the toolbar	 You use the toolbar to add items to the Wiki page.
4 Open a new IE window	Sometimes, it's easier to copy and paste URL addresses when creating a Wiki page. You'll use this second window to copy URLs to the Windows clipboard.
5 In the new IE window, on the Quick Launch bar, under Pictures, click **Employee Photos**	
Click the NewEmployee photo	You'll be putting this photo on your Wiki page.
Under Preview, click the photo again	
6 In the Address box, select the address of the photo	
Press CTRL + C	To copy the URL for the photo to the Windows clipboard
7 Switch back to the IE window with the Wiki page	
8 Click 	To insert an image on the Wiki page.
9 In the Alternative text box, type **New Sales VP**	
Place your cursor in the Address box, and press CTRL + V	To paste the URL for the photo in the Address box.
Click **OK**	

10 Press ↵ ENTER and type **Please welcome our new Sales VP Jane Smith**	
11 Press ↵ ENTER twice	
12 Type **There has been an update to the sales incentive program. Click for more details**	
Press ↵ ENTER	
13 Switch to the second IE window	
Click **Back**	
14 Click **Sales##**	
15 Under Announcements, click **Change to the incentive structure**	
16 Select the contents of the Address box and press CTRL + C	To copy the URL for this announcement.
17 Switch back to the IE window with the Wiki page	
Click 	You'll insert a link to the announcement item about the incentive plan change.
18 In the Text to display box, type **Incentive Announcement**	
Place your cursor in the Address box, and press CTRL + V	To paste the URL of the announcement item on the Team Web site.
19 Click **OK**	
20 Press ↵ ENTER twice	
21 Type **The new sales data is in for last month.**	
Press ↵ ENTER	
22 Click 	To insert a table.

23	In the Number of columns box, type **4** In the Number of rows box, type **4** Click **OK**	
24	Click in the top, left cell Type **Product**	
25	Click in the second cell, top row Type **United States**	To move to the next cell to the right.
26	Click in the third cell, top row Type **Canada**	
27	Click in the fourth cell, top row Type **Mexico**	
28	Complete the table as shown:	(see table below)
29	Select the top row and click **B**	To apply bold to the top row text.
30	Select **1,568,513** and click **A** Select Red	
31	Apply the Red color to 789,566 and 100,633	
32	Click **Create**	To save and close the new Wiki page.
33	Click **Incentive Announcement**	The link in the newsletter takes you right to the Announcement item on the Team Web site.

The new sales data is in for last month.

Product	United States	Canada	Mexico
Spices	1,568,513	1,497,688	968,557
Oils	494,506	538,695	789,566
Marinades	35,959	65,452	100,633

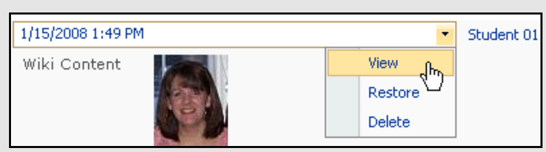
Wiki page history

Explanation

Wiki Page libraries automatically track the changes users make to the content of a Wiki page. The History feature shows you the changes that were recently made to the page and indicates which user made the changes. You can also manage the various versions of the Wiki page by clicking Version History on the Page History page.

Do it!

A-3: Viewing the history of a Wiki page

Here's how	Here's why
1 Access your partner's Newsletter ## Wiki page	You have permissions on your partner's Team Web site as a member of their Test users ## group.
2 Click **Edit**	You'll make a change to your partner's Wiki page.
3 At the bottom of the page, add **Watch for details of our annual sales meeting.** Make the text bold and increase the font size to 4	
4 Click **OK**	
5 Go back to your Newsletter ## Wiki page	
6 Click **History**	The top of the page shows you that the page was last modified by your partner's Student ## account. "Watch for details of our annual sales meeting." Is highlighted in yellow, indicating that it was added.
7 Click **Version History**	The two versions of the Wiki page are listed.
8 Click the down-arrow next to the 1.0 version and choose **View**	 You can restore this version by choosing Restore (or Restore this version) or move the version to the Recycle Bin by choosing Delete (or Delete this version).
9 Close all open windows	

Unit summary: Libraries

Topic A

In this topic, you learned how to create **Wiki libraries**. Wiki libraries allow you to create an interconnected collection of Wiki pages. You learned how to add many types of components to a Wiki page, such as text and text formatting, images, links to other pages, and tables, without needing an external program, such as Microsoft Office. You did all of your editing right in the browser window.

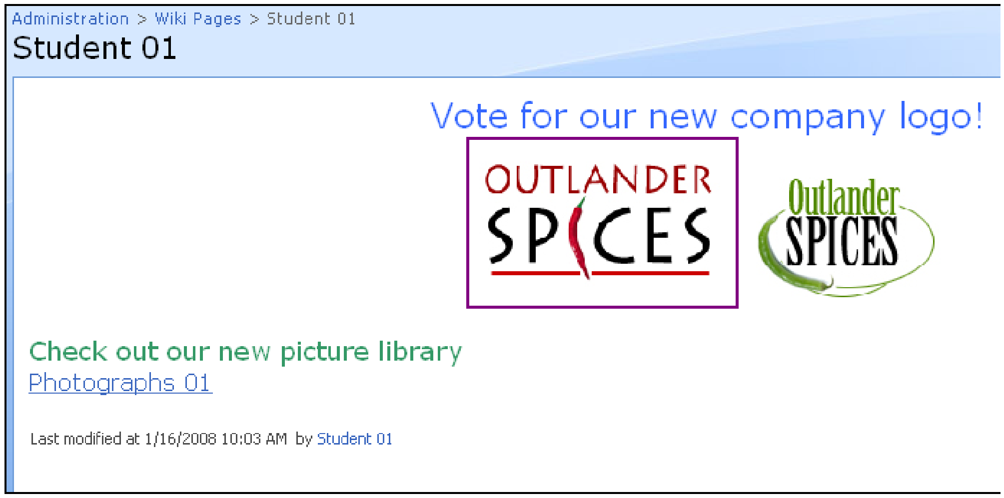
Review questions

1. If the blank default template for your document library doesn’t meet your needs, what two things can you do to change it?

2. What type of content does a Wiki page in SharePoint Services support?

3. What are some advantages of a Wiki page?

Create a Wiki page similar to the one in the following graphic in the Wiki Pages library. Name the page Student ##.



Delete the Wiki page.

Unit 4

List management

Complete this unit and you’ll know how to:

A Create and manage Tasks and Project Tasks lists.

B Create and manage Issue Tracking lists.

Topic A: Tasks lists

Explanation

A list stores information as items. You can use a list to arrange and publish information on a site. For example, you can use a list to store a set of tasks or to store events that are relevant to your team. Windows SharePoint Services has six built-in lists:

- Announcements
- Calendar
- Contacts
- Issue Tracking
- Links
- Project Tasks
- Tasks

We will explore Tasks Lists.

Default Tasks list

By default, Windows SharePoint Services creates empty Calendar and Tasks lists when you create a team Web site. You can use the default *Tasks list* to create task items for your team. To open the default task list, click Tasks on the Quick Launch bar. This opens the Tasks: New Item page, as shown in Exhibit 4-1.

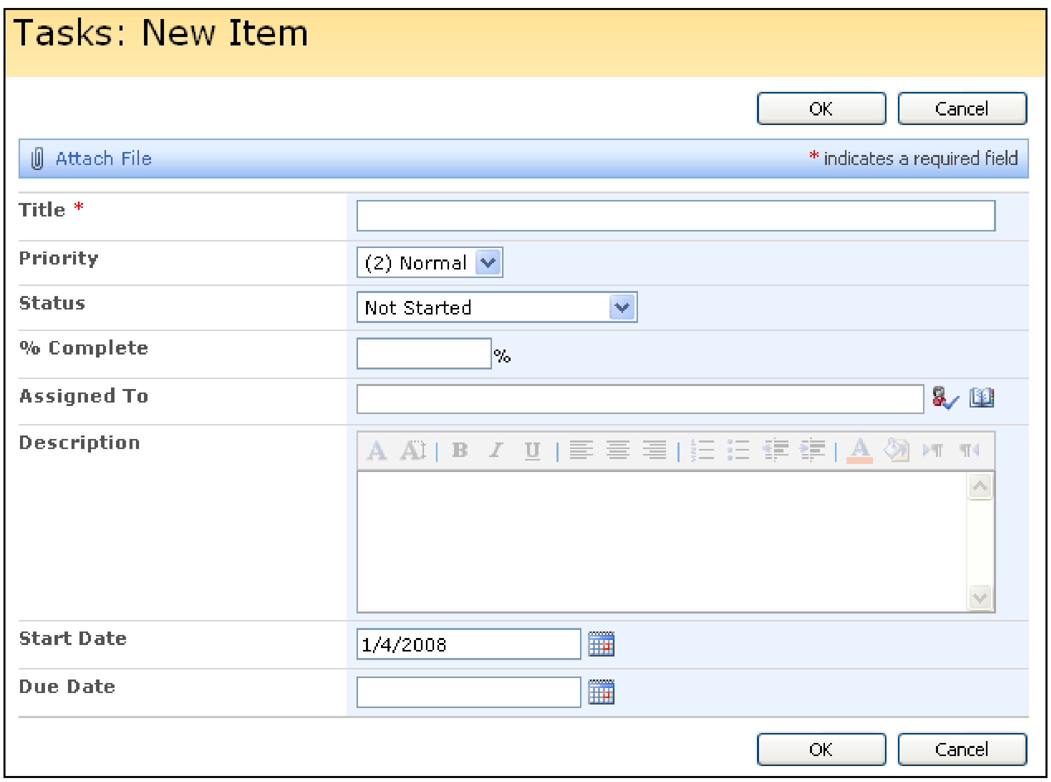


Exhibit 4-1: The Tasks: New Item page

Default Tasks list items help you and your team keep track of information about tasks you need to get done. The fields in a Tasks list item are:

- Title: Specifies the name of the Tasks item. This field is mandatory.
- Priority: Indicates how important the task is. You can set the priority to (1) High, (2) Normal, or (3) Low.
- Status: Indicates whether or not the task has been started and its progress. The default values are Not Started, In Progress, Completed, Deferred, and Waiting on someone else.
- % Complete: Indicates what percentage of the task is complete so far.
- Assigned To: Indicates the person the task is assigned to.
- Description: A short explanation of the task. You can apply formatting to the text you enter in this field.
- Start Date: Indicates when the task is scheduled to begin.
- Due Date: Indicates when the task is due for completion.

This page also gives you the option of attaching a file to the Tasks item. Use the Attach File link at the top of the page to add file attachments one at a time.

Do it!

A-1: Using the default Tasks list

Here's how	Here's why
1 Open Internet Explorer	The home page is set to your **Sales ##** Team Web site home page.
2 On the Quick Launch bar, under Lists, click **Tasks**	
3 Click **New** and choose **New Item**	The Title field is the only required field for a new Task item.
4 In the Title box, type **Quarterly sales report**	
5 In the Priority list, select **(1) High**	
6 In the Status list, select **In Progress**	
7 In the % Complete box, type **10**	
8 In the Assigned To box, type **train##** Click 	Where ## is your assigned training number.
9 In the Description box, type **Quarterly sales report is needed for sales meeting next week.** Apply bold and red color to the font of the words, "next week"	
10 In the Start Date box, select yesterday's date	
11 In the Due Date box, select the date a week from today	
12 Click **OK**	
13 Observe the Tasks list	This view displays columns for the Task item title, to whom it's assigned, its status and priority, the due date, and the % complete.

Do it!

A-2: Adding additional Tasks items

Here's how

1 Create a new task using the following variables:

Title:	Sales meeting food orders
Priority:	(2) Normal
Assigned to:	instructor
Description:	Coordinate breakfast, lunch and dinner for sales meeting.
Start Date:	A week from today
Due Date:	Two weeks from today

2 Create a new task using the following variables:

Title:	Sales meeting agenda
Priority:	(3) Low
Assigned to:	train## (where ## is your partner's student number)
Description:	Print out sales meeting agendas.
Start Date:	Two days prior to two weeks from today
Due Date:	One day prior to two weeks from today

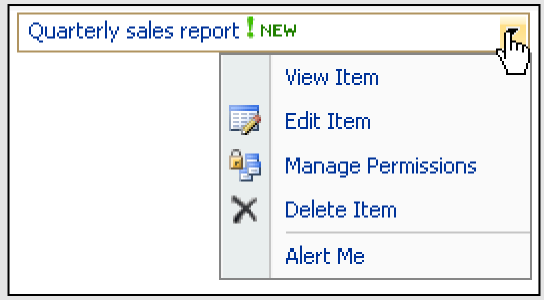
Editing a Tasks item

Explanation

Like other list items, such as Announcements and Events, if you have the appropriate permissions assigned to you, you can edit Task items. Open the Tasks list, click the down-arrow next to the item you want to edit and choose Edit Item. Make the desired changes to the fields and click OK to save your changes.

Do it!

A-3: Editing a Tasks item

Here's how	Here's why
1 Click the down-arrow next to Quarterly sales report	
2 Choose **Edit Item**	
3 In the Description, change the words "next week" to **in two weeks**	
4 Change the Due Date to the date two weeks from today	
5 Click **OK**	To save your changes.

Sort and filter lists

Explanation

You can sort and filter items in a SharePoint list. Each column heading in a list has a down-arrow that opens a menu. An example of this menu from the Tasks list is shown in Exhibit 4-2.You use the menu choices to sort or apply a filter to the items in the list.

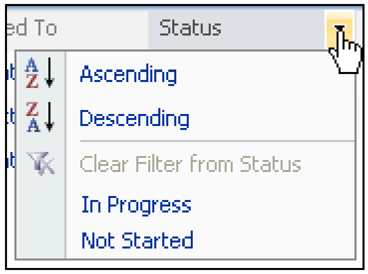


Exhibit 4-2: The Status column menu

Do it!

A-4: Sorting and filtering the Tasks list

Here's how	Here's why
1 Click the arrow next to Due Date and choose **Ascending**	To sort the list with the earliest due dates first.
2 Click the arrow next to Status and choose **Not Started**	To filter the list to show only those tasks which haven't been started yet.
3 Sort the filtered list to show the highest priority items at the top of the list	(Hint: Choose Ascending from the Priority menu.)
4 Click the arrow next to Status and choose **Clear Filter from Status**	To display all Task items in the list again.

Default views

Explanation

Each SharePoint list has *views* which you can apply to change how the list displays. The View menu is customized for each list type. Some of the views apply a filter to the list; others sort the list. The View menu for the Tasks list is shown in Exhibit 4-3.

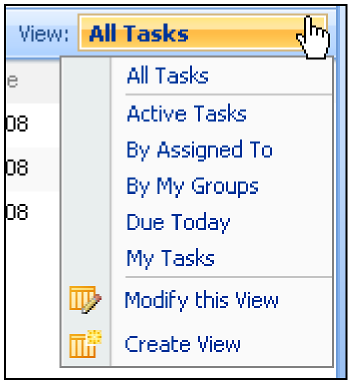


Exhibit 4-3: The Tasks list View menu

Do it!

A-5: Changing the Tasks list view

Here's how	Here's why
1 From the View menu, choose **By Assigned To**	This particular view sorts the Tasks list items by the Assigned To column in alphabetical order.
2 From the View menu, choose **Due Today**	This view filters the Tasks list to show only those items that have a due date of today.
3 From the View menu, choose **My Tasks**	This view filters the Tasks list to show only those items assigned to the user who's logged in.
4 From the View menu, choose **All Tasks**	To return the Tasks list to the default view.

Topic B: Issue Tracking lists

Explanation

You can use an Issue Tracking list to record problems. For example, a problem could include being unable to work with a utility or being unable to find required templates. A problem could also be a technical problem that you've encountered. You can enter these problems in an Issue Tracking list and assign the problem to a team member or the team leader to resolve. Unlike Announcements, Calendar, and Tasks lists, Windows SharePoint Services doesn't create an empty Issues Tracking list by default. You need to create the list and then add items to it.

Creating an Issue Tracking list

To create an Issue Tracking list:

1. On the Quick Launch bar, click Lists. There isn't a default Issue Tracking list.
2. Click Create.
3. Under Tracking, click Issue Tracking.
4. Enter a name and optional description for your list.
5. Select whether or not to display the list on the Quick Launch bar.
6. Select whether or not to send an e-mail when an owner is assigned to the list or when an item is edited.
7. Click Create

Do it!

B-1: Creating an Issue Tracking list

Here's how	Here's why
1 On the Quick Launch bar, click **Lists**	
2 Click **Create**	
3 Under Tracking, click **Issue Tracking**	
4 In the Name box, type **Sales Issues ##**	Where ## is your assigned student number.
5 Click **Create**	To accept all other Issue Tracking list defaults.
6 Observe the default columns	Issue ID, Title, Assigned To, Issue Status, Priority, and Due Date display as column headings.

Issue categories

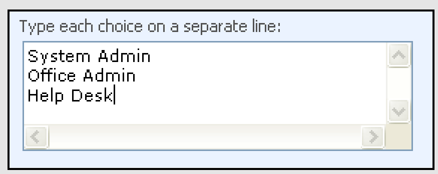
Explanation

Issues can be categorized based on the type of problem. By default, an Issue Tracking list has three categories: Category 1, Category 2, and Category 3. You can modify these category names to make them meaningful for your organization. You can edit the existing choices and add additional choices if you need more than three categories. For example, computer-related issues might be grouped into a category called Technical Problems. To modify the category names:

1. Display the Issue Tracking list page.
2. Click Settings and choose List Settings.
3. Under Columns, click Category.
4. In the “Type each choice on a separate line” box, edit the category names to something meaningful.
5. Click OK.

Do it!

B-2: Specifying categories

Here’s how	Here’s why
1 Click **Settings** and choose **List Settings**	
2 Under Columns, click **Category**	
3 In the “Type each choice on a separate line” box, type the following: **System Admin** **Office Admin** **Help Desk**	
4 Click **OK**	This step changes the choices for the Category field from the generic defaults to something more descriptive.
5 Above Customize Sales Issues ##, click **Sales Issues ##**	To return to the Sales Issues ## page.

Issue Tracking list items

Explanation

After you create an Issue Tracking list, you can add items to it, just like any other Windows SharePoint list. To add an issue item, click New and choose New Item. The New Item page displays, as shown in Exhibit 4-4.

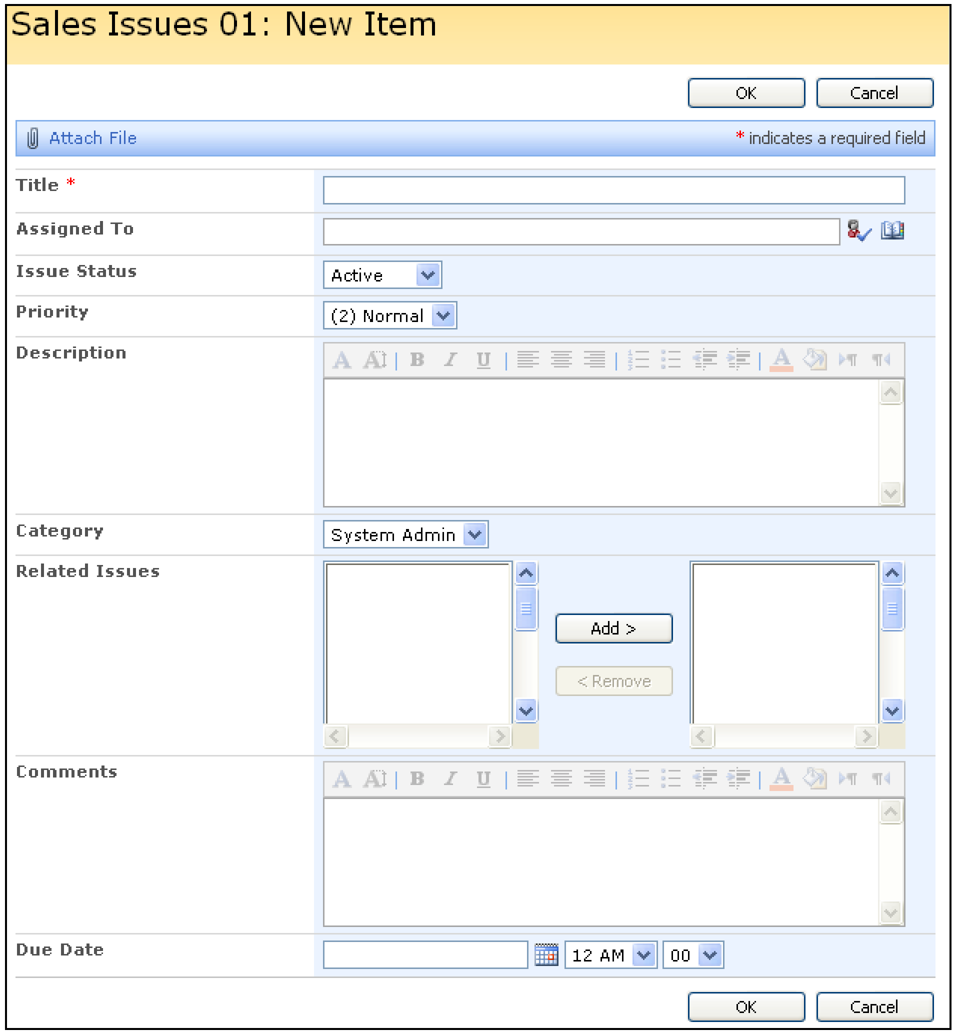


Exhibit 4-4: An example of a new Issue Tracking item

The following table describes the fields on the *issue_tracking*: New Item page.

Field	Description
Title	The name for the issue tracking item. This field is mandatory.
Assigned To	The user to whom you want the issue tracking item assigned to.
Issue Status	Indicates whether the issue is active, resolved, or closed. Similar to the issue Category field, you can edit these choices or additional ones.
Priority	Shows how important the issue is. The default choices are High, Normal, and Low. Again, you can edit these choices or add additional ones.
Description	A description or notes about the issue.
Category	The group to which the issue belongs. The default categories are generic—Category 1, Category 2, and Category 3. You can edit these choices to make them more meaningful to your organization or add additional ones.
Related Issues	You can link a new item to existing items in your Issues Tracking list. Use the Add and Remove buttons to move items between the lists.
Comments	This field can be used by the person resolving the issue to make notes.
Due Date	The date when you expect the issue to be resolved.

Do it!

B-3: Adding an item to an Issue Tracking list

Here's how	Here's why
1 Click **New** and choose **New Item**	
2 In the Title box, type **Unable to access external Web sites**	
3 In the Assigned To box, type **train##**	Where ## is your partner's assigned student number.
4 From the Priority list, select **(1) High**	
5 In the Description box, type **I'm unable to access Web sites outside our company from my laptop computer.**	
6 In the Due Date field, enter the date a week from today at noon	
7 Click **OK**	

Editing Issue Tracking items

Explanation

After you add an issue, it might need to be updated because of a change in its status, due date, user assignment, or other component. You edit Issue Tracking items just as you do any other list item:

1. Click the down-arrow next to the Issue Tracking item you want to edit.
2. Choose Edit Item.
3. Make the desired changes.
4. Click OK.

Do it!

B-4: Editing an Issue Tracking item

Here's how	Here's why
1 Click the down-arrow next to "Unable to access external Web sites" and choose **Edit Item**	
2 From the Issue Status list, select **Resolved**	
3 Click **OK**	

Topic C: Content Approval

Explanation

If you're concerned about inaccurate or inappropriate content being posted to lists or libraries on your Team Web site, you can enable a feature called *content approval*. This feature holds items submitted by users until they're approved by a user with Manage Lists permissions. The Manage Lists permission is included in the Full Control and Design permissions levels. By default, the *site* Owners group has Manage Lists permission. Posts by members of the Owners group aren't held for approval.

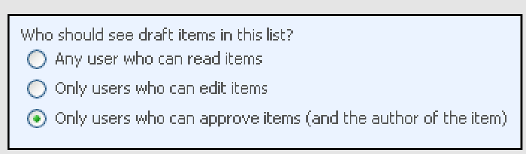
To enable content approval on an individual list or library:

1 Display the desired list or library's page.
2 Click Settings and choose List Settings or *type* Library Settings.
3 Under General Settings, click Versioning settings.
4 Under "Require content approval for submitted items?," click Yes.
5 Under "Who should see draft items in this list?," select the desired option:
   - Any user who can read items
   - Only users who can edit items
   - Only users who can approve items (and the author of the item)
6 Click OK.

If you enable the content approval feature on a list or library that already contains content, that content is automatically approved. You can change that status on individual items if necessary.

Do it!

B-1: Enabling content approval

Here's how	Here's why
1 From the Products list page, click **Settings** and choose **List Settings**	
2 Under General Settings, click **Versioning settings**	
3 Under "Require content approval for submitted items?," click **Yes**	
4 Observe the Draft Item Security section	 By default, users won't be able to see new items in the list until they're approved.
5 Click **OK**	To enable content approval for the Products list.

Approving or rejecting content

Explanation

Once a user submits an item, it appears in the list or library with an approval status of "pending." By default, the person who created the item can see it in his or her list or library view, as can anyone with Manage Lists permissions.

The Approve/Reject page is shown in Exhibit 4-5. To approve or reject an item:

1 Click the down-arrow next to the item.

2 Choose Approve/reject.

3 Select the desired approval status:

- Approved
- Rejected
- Pending

Note: You can change an item's status from any one of the three values to either of the other two. For example, you can change an approved item to rejected or back to pending.

4 If desired, enter a comment.

5 Click OK.

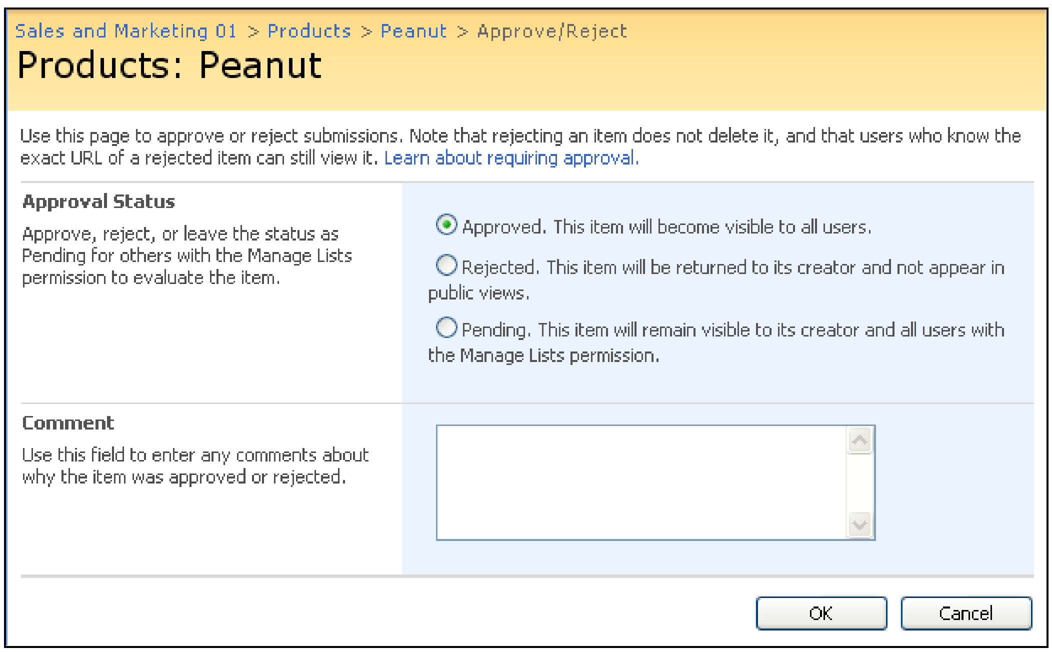


Exhibit 4-5: An example of the content approval page

Do it!

B-2: Approving and rejecting list items

Here's how	Here's why
1 Grant the Contribute permission level to your partner's Sales ## Owners group	(You don't need to send a Welcome e-mail.)
2 Access the Products list on your partner's Sales Web site.	
3 Add two new Products items to your partner's Products list using the following variables:	As you create the new item, observe the content approval warning at the top of the New Item page.

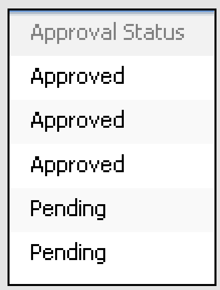
Title: **Peanut**

Product type: **Oil**

Title: **Sesame**

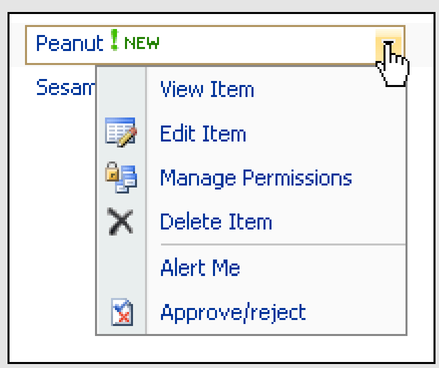
Product type: **Oil**

Here's how	Here's why
4 Observe the Approval Status column	



Your two new items appear as pending.

Here's how	Here's why
5 Go back to your own Products list page	
6 Click the down-arrow next to Peanut	



You now have an Approve/reject menu choice.

7 Choose **Approve/reject**	
8 In the Approval Status section, select **Approved. This item will become visible to all users**	
Click **OK**	To approve the item.
9 Click the down-arrow next to Sesame and choose **Approve/reject**	
10 In the Approval Status section, select **Rejected. This item will be returned to its creator and not appear in public views.**	
11 In the Comment box, type **We had to temporarily discontinue this item due to quality issues.**	
Click **OK**	
12 After your partner finishes rejecting his or her Sesame Products item, go back to the Products page	The Sesame item has an approval status of “Rejected.”
13 Click **Sesame**	To view details of the rejected item.
14 Observe the Approval Status field	

Rejected
We had to temporarily discontinue this item due to quality issues.

	The comment displays what your partner entered when rejecting the item.
15 Click **Close**	
Return to your Home page	

List deletion

Explanation

All lists, regardless of type, are deleted in the same manner. To delete a list on a SharePoint Team Web site:

1. Display the list you want to delete.
2. Click Settings
3. Under Permissions and Management, click Delete this list.
4. Click OK to confirm the deletion and move the list to the Recycle Bin.

If you need to, you can restore the list from the Recycle Bin.

Do it!

B-3: Deleting a list

Here's how	Here's why
1 On the Quick Launch bar, click **Sales Issues ##**	
2 Click **Settings** and choose **List Settings**	
3 Under Permissions and Management, click **Delete this list**	
4 Click **OK**	To confirm that you want to delete the list. The list moves to the Recycle Bin. You can restore it from there, if you need to do so.
5 Close Internet Explorer	

Unit summary: List management

Topic A

In this topic, you learned how to apply **permissions** to a list or library, which restricts or allows users to complete certain tasks. You also learned how to use the **content approval** feature, so that posted items must be approved for appropriate content before they can be seen by the Web site's users. You learned how to delete a list from your SharePoint Services Team Web site.

Review questions

1. In a Tasks list item, what are the required fields?

2. True or False? You can attach files to a Tasks list item.

3. To display list items that meet certain criteria, what do you do?

4. What feature should you enable if you're concerned about inaccurate or inappropriate content being posted to lists or libraries on your Team Web site?

5. Who can see pending and rejected items in a SharePoint list or library?

6. How do you let a user know why you rejected a particular list or library item?

7. True or False? Once you delete a list, you can't get it back.

Independent practice activity

In this activity, you'll practice creating and managing Task items. You'll also create and manage a custom list. Use your assigned student number for ##.

1 Open Internet Explorer.

2 Create a new Tasks item using the following variables:

   Title: Presales ##

   Assigned To: Train##

   Description: Send the proposal to AVP, Sales.

   Start Date: Tomorrow

4 Edit your Presales ## task so that the Due Date, instead of the Start Date, is tomorrow.

5 Create an Issue Tracking list called Sales Processes Related Issues ##. Don't display the list on the Quick Launch bar.

6 Add an Issue Tracking list item called "Proposal Template," a High priority, and a description of "I'm unable to find the proposal template."

Unit 5

Discussions and surveys

Complete this unit, and you'll know how to:

A Create and manage discussion boards.

B Create and manage surveys.

Topic A: Discussion boards

Explanation

A *discussion board* is a forum where the members of a team can discuss topics relevant to them. Discussion boards are threaded, which means the original message and all of its replies are linked together. The benefit of a threaded discussion is that it's easier to follow a conversation. If you're familiar with newsgroups, the style of a SharePoint Services discussion board is similar. To create a discussion board:

1. Click Site Actions and choose Create.
2. Under Communications, click Discussion Board. The New Discussion Board page displays, as shown in Exhibit 5-1.
3. Enter a name for the discussion board. This is the topic of discussion. It appears as the title on the discussion board page.
4. If desired, enter a description for the discussion board. This explains the purpose of the discussion board and appears underneath the title on the discussion board page.
5. Specify whether or not the discussion board should have a link on the Quick Launch bar.
6. Click Create.

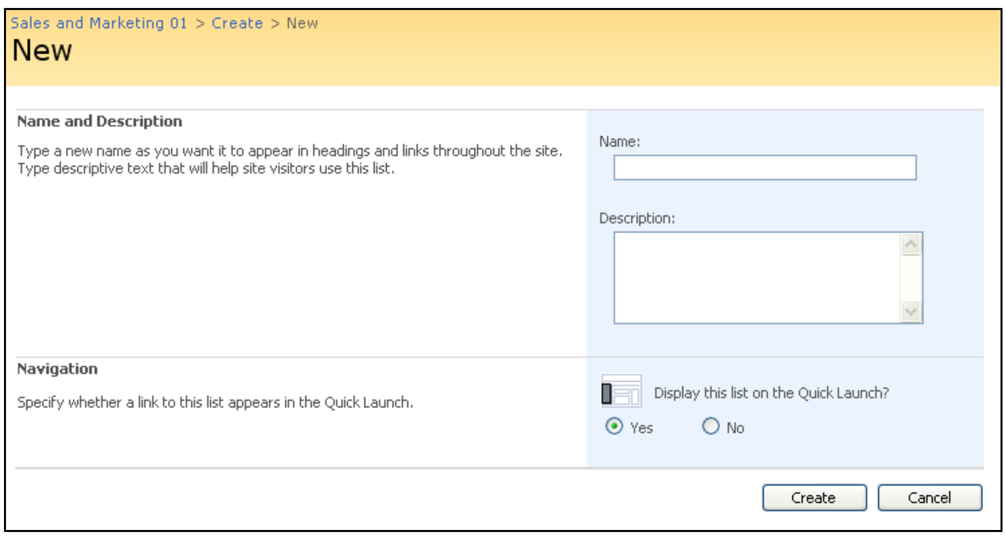
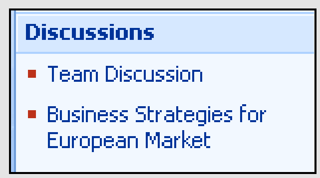


Exhibit 5-1: The New page for creating a discussion board

Do it!

A-1: Creating a discussion board

Here's how	Here's why
1 Open Internet Explorer	The home page is set to your Sales ## Team Web site home page.
2 Click **Site Actions** and choose **Create**	
3 Under Communications, click **Discussion Board**	
4 In the Name box, type **Business Strategies for European Market**	This is the topic of the discussion. It appears as the title on the discussion board page.
In the Description box, type **Managers will present strategies to capture the European market.**	This description appears under the title on the discussion board page.
5 Click **Create**	 A link for the new discussion board is listed on the Quick Launch bar under Discussions.

Discussions

Explanation

After you create a discussion board, users can start a discussion. To start a discussion:

1. From the desired discussion board page, click New and choose Discussion. This action opens the New Item dialog box, as shown in Exhibit 5-2.
2. Enter a subject for the discussion.
3. If desired, enter any explanatory text in the Body box.
4. Click OK.

When you create the new discussion, it displays on the discussion board as a list item.

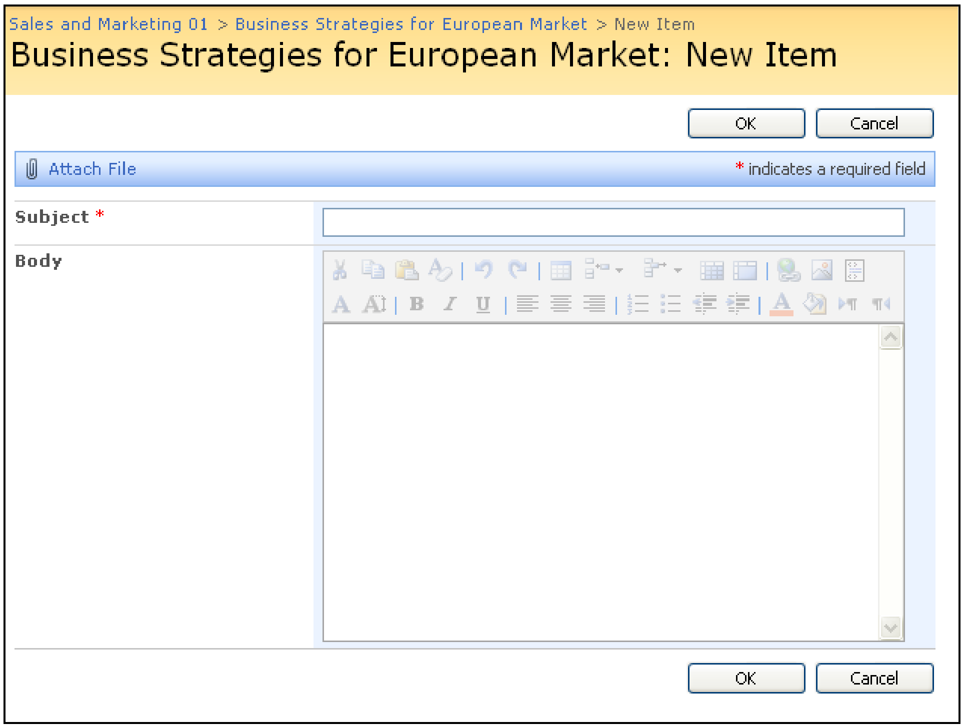


Exhibit 5-2: The New Item page for starting a discussion

Do it!

A-2: Starting a discussion

Here's how	Here's why
1 From the Business Strategies for European Market page, click **New** and choose **Discussion**	
2 In the Subject box, type **Strategy for the European market**	
In the Body box, type **Need social, economic, legal, and political analyses of Europe**	This is your starting comment for the discussion. Users who participate in the discussion reply to your comment.
3 Select the body text	You have the ability to use rich-text formatting in your discussion comments.
4 Click 	
Select **Blue**	
5 Click 	
Click **Turquoise**	
6 Observe the bar above the Subject area	You can attach files to your discussion comments.
7 Click **OK**	

Discussion item responses

Explanation

When a user responds to the first discussion comment, Windows SharePoint Services starts a discussion thread. A *discussion thread* is a series of discussion comments, with the first comment and its responses. By default, a discussion thread displays in a flat view, as shown in Exhibit 5-3. In Flat view, items are listed in the order they're added to the board.

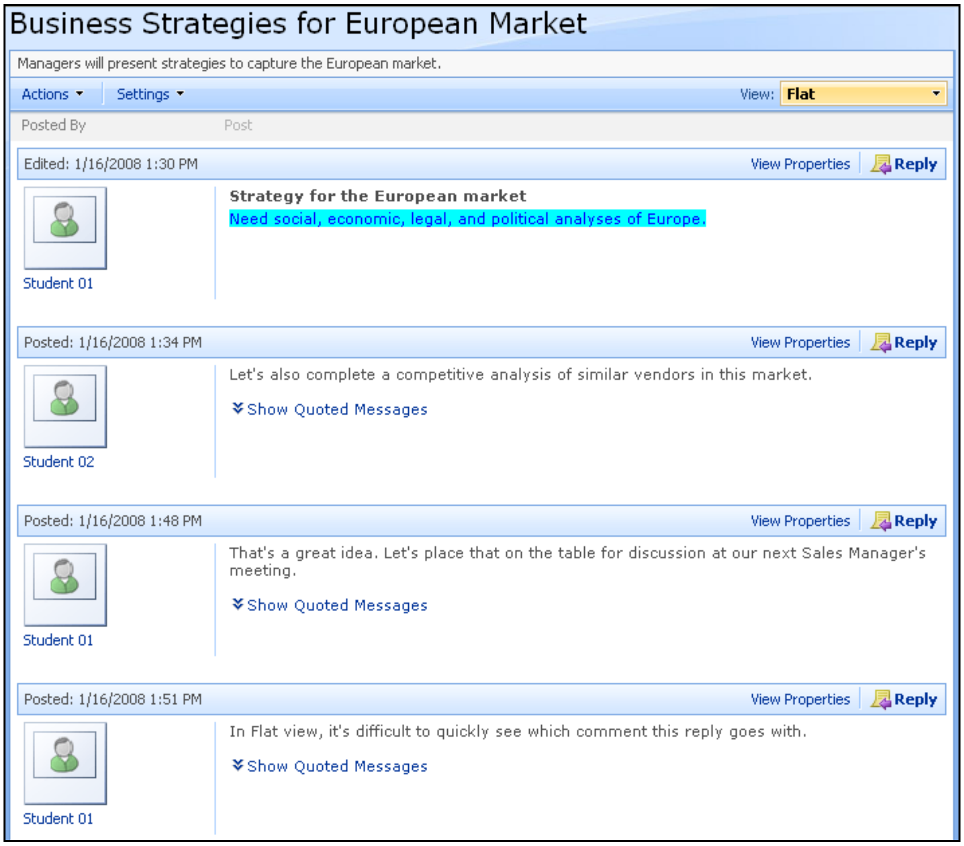


Exhibit 5-3: Discussion comments shown in Flat view

You can change the view to Threaded, which displays the replies to a comment indented underneath that comment, as shown in Exhibit 5-4. The Threaded view can make it easier to follow a discussion by identifying which replies go with which comments.

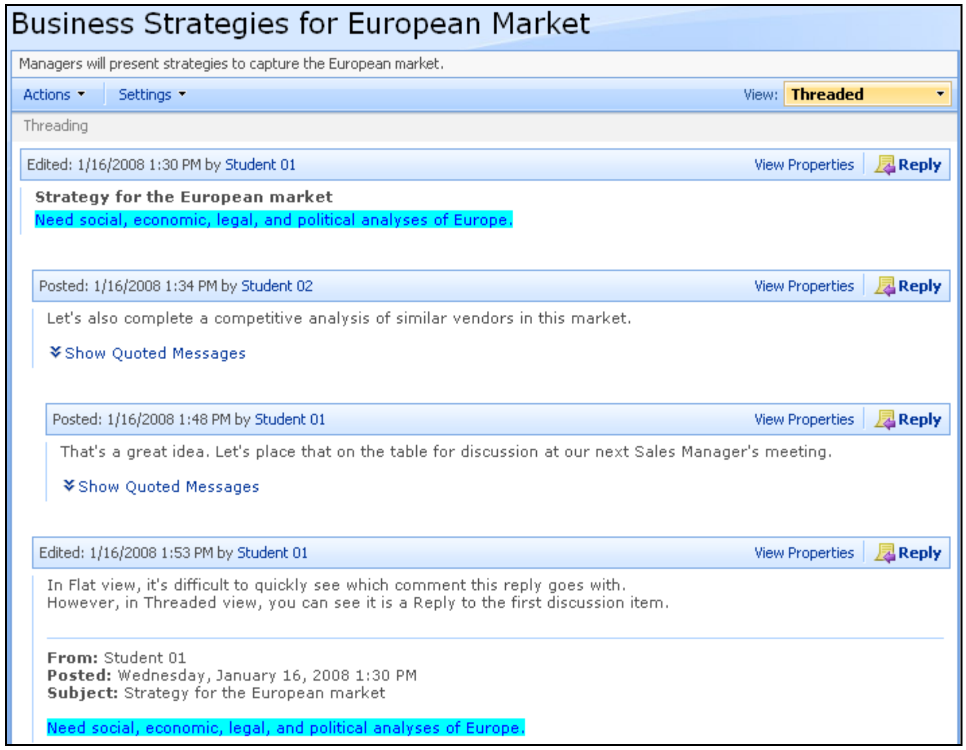


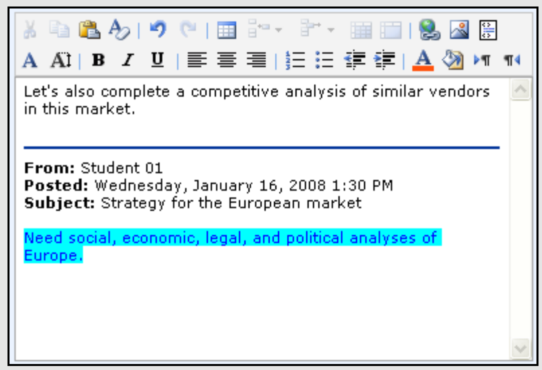
Exhibit 5-4: Discussion comments shown in Threaded view

To respond to a discussion comment,

1. Open the comment to which you want to reply.
2. Click Reply.
3. Enter your comments in the Body text above the original comment text.
4. If desired, apply rich-text formatting.
5. Click OK.

Do it!

A-3: Responding to a discussion comment

Here's how	Here's why
1 Access your partner's Sales ## Team Web site	You have permissions on your partner's Team Web site as a member of their Test users ## group.
2 On the Quick Launch bar, under Discussions, click **Business Strategies for European Market**	You'll respond to your partner's original discussion comment.
3 Click **Strategy for the European market**	
4 Click **Reply**	The text of the comment you're responding to appears in the Body box for reference.
5 In the Body box, type **Let's also complete a competitive analysis of similar vendors in this market.**	
6 Click **OK**	The reply appears on the discussion page as a second item.
7 From the View menu, choose **Threaded**	This displays the comment and its reply in a hierarchical structure, so you can follow the discussion a bit easier.

Editing discussion comments

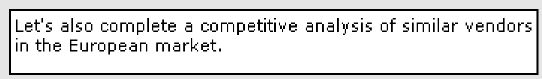
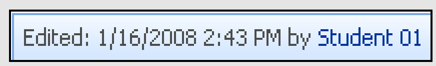
Explanation

After you create a discussion comment or response, you might want to add text to it, modify the existing text, or delete a part of the text. To edit a discussion comment or reply:

1. Access the discussion thread where your comment or reply is located.
2. Next to the comment or reply you want to edit, click View Properties.
3. Click Edit Item.
4. Make the desired changes to the comment or reply.
5. Click OK.

Do it!

A-4: Editing a discussion comment

Here's how	Here's why
1 Return to the discussion board on your own team site, and next to the reply to Strategy for the European market, click **View Properties**	You'll edit the reply your partner posted to your discussion comment.
2 Click **Edit Item**	
3 Change the word "this" to **the European**	
4 Click **OK**	To save your changes.
5 Observe the title area of the reply	 It shows that you edited the reply.

Deleting discussion comments

Explanation

You can delete a discussion comment, if it's no longer relevant or is inappropriate to the discussion. When you delete a discussion comment, the responses to that comment are also deleted. To delete a discussion reply:

1. Access the discussion thread where the reply you want to delete is located.
2. Next to the comment or reply you want to delete, click View Properties.
3. Click Delete Item.
4. Click OK.

To delete an entire thread:

1. Access the discussion board where the thread you want to delete is located.
2. Next to the top-level comment you want to delete, click the down-arrow and choose Delete Item.
3. Click OK.

Note: You can delete an entire thread by Viewing Properties of the top-level comment, but you'll get an error message, as shown in Exhibit 5-5. This occurs because you've deleted the discussion page that you were previously viewing. SharePoint can't display the page anymore, because it doesn't exist. You can click "Go back to site" to return to the site's Home page.

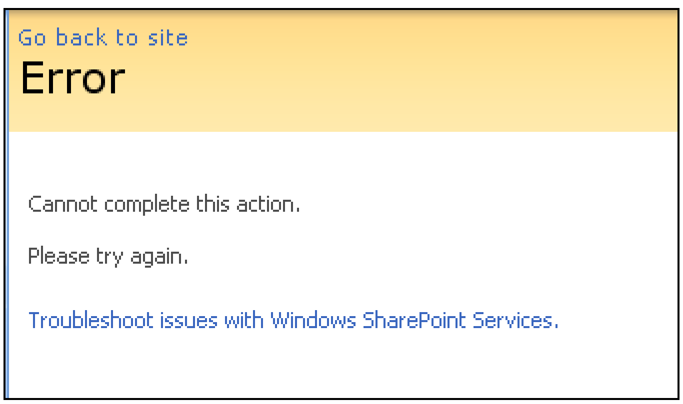


Exhibit 5-5: Error message when you delete the discussion page

As with list and library items, you can restore deleted discussion threads and comment replies from the Recycle Bin.

Do it!

A-5: Deleting a discussion comment

Here's how	Here's why
1 Next to the reply to Strategy for the European market, click **View Properties**	
2 Click **Delete Item**	
3 Click **OK**	To verify the deletion.
4 Click **Business Strategies for European Market**	To return to the main page of the discussion board.

5 Click the down-arrow next to Strategy for the European market and choose **Delete Item**	This method allows you to delete an entire discussion thread without receiving an error message.
6 Click **OK**	To confirm the deletion.

Deleting discussion boards

Explanation

You delete a discussion board just as you delete a list or a library—using the Discussion Board's Settings menu.

1. Display the discussion board you want to delete.
2. Click Settings and choose Discussion Board Settings.
3. Under Permissions and Management, click "Delete this discussion board."
4. Click OK.

As with lists and libraries, you can restore deleted discussion boards from the Recycle Bin.

Do it!

A-6: Deleting a discussion board

Here's how	Here's why
1 On the Business Strategies for European Market page, click **Settings** and choose **Discussion Board Settings**	
2 Under Permissions and Management, click **Delete this discussion board**	
3 Click **OK**	

Topic B: Surveys

Explanation

A *survey* is a questionnaire that you can use to collect information in a preset form from a group of people. In Windows SharePoint Services, you can create and publish a survey to identify the views and opinions of your team on a specific subject. After your team members respond to the survey, you can view the results and export them to a Microsoft Excel spreadsheet for further analysis. To create a survey:

1 Click Site Actions and choose Create.

2 Under Tracking, click Survey.

3 Specify the page settings for the survey, as shown in Exhibit 5-6.

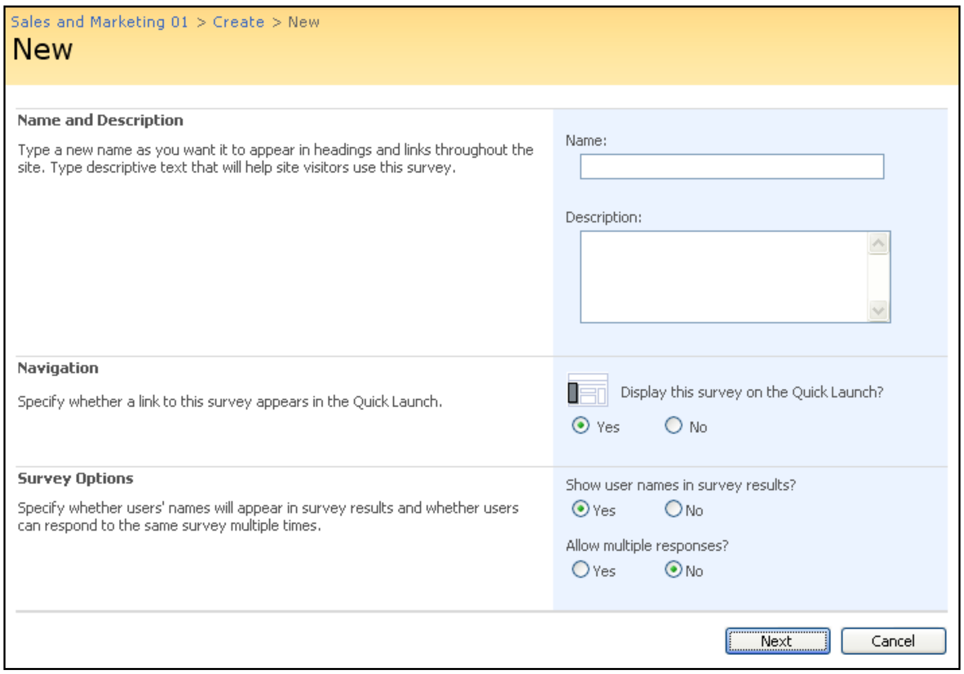


Exhibit 5-6: The New page for a Survey

4 Click Next to proceed to add questions to the survey.

Unlike with lists and libraries, where you create an empty list or library and then add items to it; when you create a new survey, the creation page moves right into the page to add a question to your survey.

5 In the Question box, shown in Exhibit 5-7, type your Question and select the type of answer you want users to give. Your choices include:

Survey response	Use
Single line of text	When you want team members to respond question in just a few words.
Multiple lines of text	When you want the team members to give more details.
Choice (menu to choose from)	When you want team members to select from a list of preset options.
Rating Scale (a matrix to choices or a Likert scale)	When you want team members to choose a response from a numeric scale. For example, you can ask the team members to choose a response from a scale of 1 to 10.
Number (1, 1.0, 100)	When you want team members to specify a numerical value.
Currency ($, ¥, £)	When you want team members to specify a monetary value.
Date and Time	When you want team members to specify a date or time value.
Lookup (information already on this site)	When you want the team members to choose responses from information that already exists on the Team Web site.
Yes/No (check box)	When you want the team members to specify whether their response to the question is Yes or No.
Person or Group	When you want the team members' response to be a person or group that exists on the Team Web site.
Page Separator (inserts a page break into your survey)	When you want to divide questions onto separate pages.

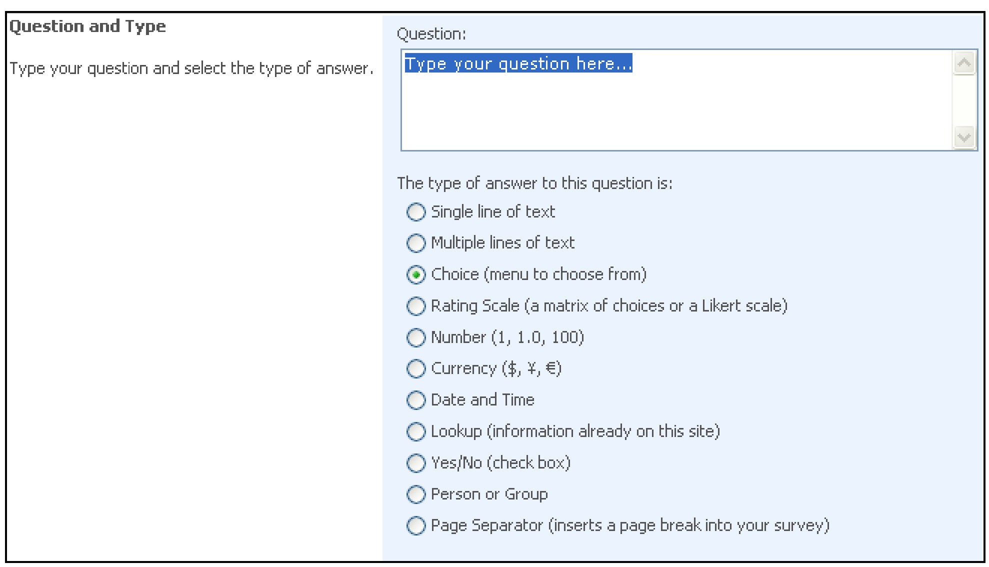


Exhibit 5-7: The Question and Type box

6 In the Additional Question Settings box, select whether or not to require a response to this question.

7 In the Additional Question Settings box, set the other values. The additional settings available in this box change, depending on the type of answer you selected for the question.

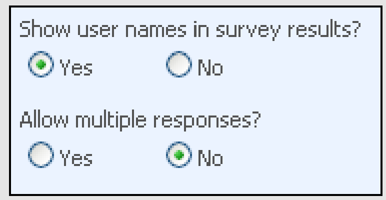
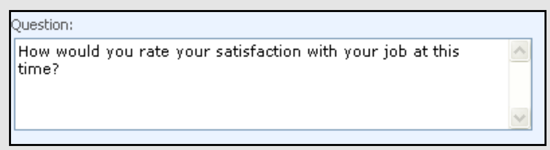
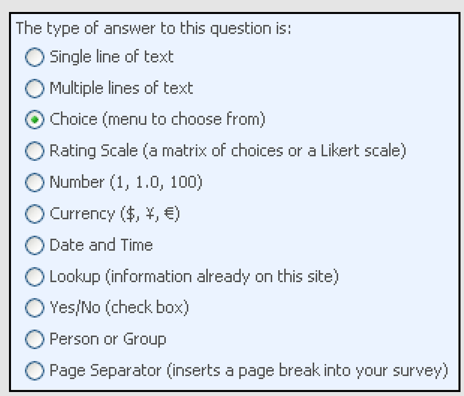
8 Click Next Question to enter another question in the survey.
Click Finish if you're done entering questions.

Branching logic

A new survey feature of Windows SharePoint Services 3.0 is branching logic. Using this feature, you can change the survey questions presented to a user based on their responses to specific questions. In a survey that branches, questions appear only if they apply to someone's situation, which is determined by their answer to a previous question. If those questions don't apply to the user, they're presented with another set of questions or that set of questions is skipped entirely. Once you configure all the questions for your survey, you use Survey Settings to set up branching for the desired questions.

Do it!

B-1: Creating a survey

Here's how	Here's why
1 Click **Site Actions** and choose **Create**	
2 Under Tracking, click **Survey**	
3 In the Name box, type **Employee Satisfaction Survey**	
In the Description box, type **This survey is designed to collect your feedback on the working environment of Outlander Spices.**	
4 Observe the Survey Options box	 You can specify whether responses should be anonymous and whether users can respond to the survey more than once.
5 Under "Show user names in the survey results?," select **No**	To set responses to anonymous. You'll keep the default value of one survey response per user.
Click **Next**	You're taken directly to the page where you can add a question to the survey.
6 In the Question box, type **How would you rate your satisfaction with your job at this time?**	
7 Under "The type of answer to this question is," verify that "Choice (menu to choose from)" is selected	

8 Under "Require a response to this question," select **Yes**

Selecting Yes forces the user to select an answer to this question.

9 In the "Type each choice on a separate line" box, type

Extremely satisfied

Very satisfied

Satisfied

Neither satisfied nor dissatisfied

Dissatisfied

Very dissatisfied

Extremely dissatisfied

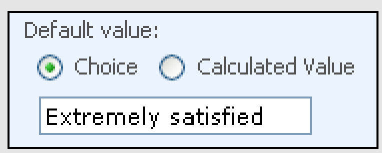
10 Under "Display choices using," select **Drop-Down menu**

To place your choices for this question in a dropdown menu on the survey.

11 Observe the "Allow 'Fill-in' choices" box

A value of Yes allows users to enter their own responses instead of choosing one of yours. A value of No forces them to choose one of your preset answers.

12 In the "Default value" box, type **Extremely satisfied**



To specify the default answer to this question to "Extremely satisfied."

13 Click **Next Question**

You'll enter a second question for the survey.

14 In the Question box, type **What is your overall opinion of Outlander Spices?**

15 Under "The type of answer to this question is," select **Multiple lines of text**

16 Under "Require a response to this question," select **Yes**

17 Under "Number of lines for editing," type **15**

18 Under "Specify the type of text to allow:," select **Rich text (Bold, italics, text alignment)**

19 Add another question with the following settings:

Question: **How comfortable are you with your physical work environment?**

Type of answer: **Choice**

Require a response: **Yes**

Choices:

Extremely satisfied

Very satisfied

Satisfied

Neither satisfied nor dissatisfied

Dissatisfied

Very dissatisfied

Extremely dissatisfied

Display choices: **Drop-Down Menu**

Allow 'Fill-in' choices: **No**

Default value:

Choice

Neither satisfied nor dissatisfied

20 Click **Finish**

You've created three questions for this survey.

Modifying a survey

Explanation

Once you complete your survey, you can use Survey Settings to:

- Edit existing questions and their settings
- Add additional questions
- Delete questions
- Change the order of questions
- Specify branching logic

Do it!

B-2: Modifying a survey

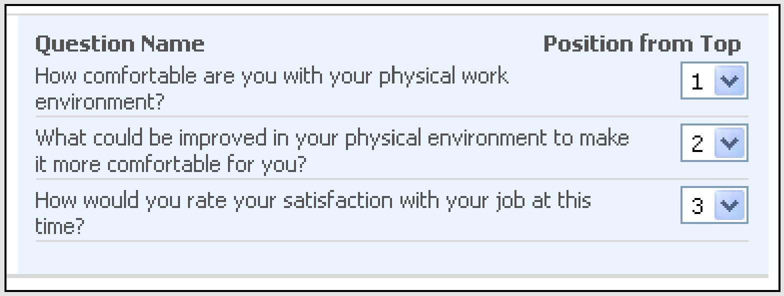
Here's how	Here's why
1 Under Questions, click **Add a question**	You'll add an additional question to your survey.
2 Add a question using the following information: Question: **What could be improved in your physical environment to make it more comfortable?** Type of answer: **Multiple lines of text** Require response: **Yes** Number of lines for editing: **10**	
3 Click **Finish**	
4 Under Questions, click **What is your overall opinion of Outlander Spices?**	You can edit the content and settings for this question from this page. You can also delete the question.
Click **Delete**	To delete the question.
Click **OK**	
5 Click **Change the order of the questions**	

6 Using the Position from Top boxes, place the questions in the following order:

How comfortable are you with your physical work environment? **1**

What could be improved in your physical environment to make it more comfortable for you? **2**

How would you rate your satisfaction with your job at this time? **3**



7 Click **OK**

8 Click **How comfortable are you with your physical work environment?**

You're going to add branching to this question. If users answer Dissatisfied, Very dissatisfied, or Extremely dissatisfied, they'll be directed to the question, "What could be improved in your physical environment to make it more comfortable for you?" If a user answers any of the Satisfied responses or Neither satisfied nor dissatisfied, the question will be skipped.

9 Observe the Branching Logic section

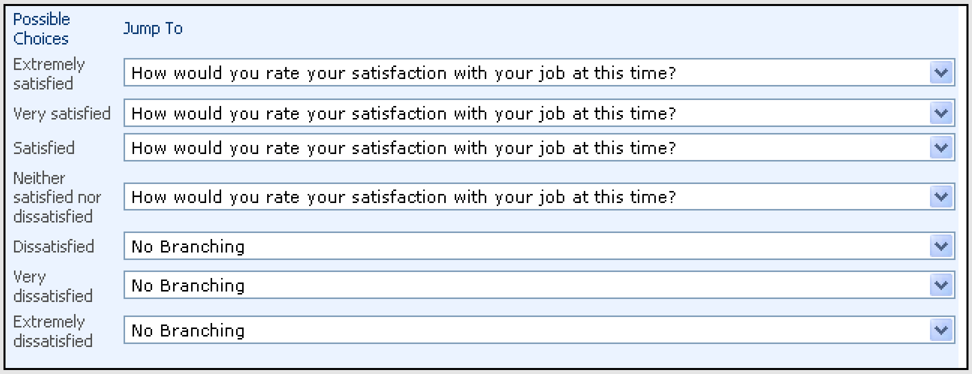
Here is where you'll specify which responses skip the second question, "What could be improved in your physical environment to make it more comfortable for you?"

10 From the Extremely satisfied dropdown list, select **How would you rate your satisfaction with your job at this time?**

From the Very satisfied dropdown list, select **How would you rate your satisfaction with your job at this time?**

From the Satisfied dropdown list, select **How would you rate your satisfaction with your job at this time?**

From the “Neither satisfied nor dissatisfied” dropdown list, select **How would you rate your satisfaction with your job at this time?**



11 Click **OK**

Responding to surveys

Explanation

To respond to a survey:

1 On the Quick Launch bar, under Surveys, click the link to the survey you want to respond to. If the survey isn't listed on the Quick Launch bar, click View All Site Content and click the link under Surveys.
2 Click "Respond to this Survey."
3 Answer the questions in the survey, using the Next button to move to the next question.
4 Click Finish.

You can use the Save button at any time during the survey to save your current responses and return later to finish the survey. You'll find your partially completed survey is in the All Responses view. It shows that it isn't yet completed. Click your survey to finish answering the questions.

Do it!

B-3: Responding to a survey

Here's how	Here's why
1 Above "Customize Employee Satisfaction Survey," click **Employee Satisfaction Survey**	To return to the survey page.
2 Click **Respond to this Survey**	
3 For the "How comfortable are you with your physical work environment?" question, select **Very Dissatisfied**	
4 Click **Next**	To move on to the next survey question. Save allows you to save your responses to this point and finish the survey at a later time.
5 Observe your next question	Because you responded using one of the branching answers, you're presented with the question, "What could be improved in your physical environment to make it more comfortable for you?"
In the answer box, type **My area is too cold, even with a sweater.**	
6 For the "How would you rate your satisfaction with your job at this time?" question, select **Very satisfied**	

7	Click **Finish**	You have one response so far.

Survey Name:	Employee Satisfaction Survey
Survey Description:	This survey is designed to collect your feedback on the working environment of Outlander Spices.
Time Created:	1/18/2008 8:49 AM
Number of Responses:	1

8	Access your partner's Employee Satisfaction Survey	You have permissions on your partner's Team Web site as a member of his or her Test users ## group.
9	Click **Respond to this Survey**	
10	For the "How comfortable are you with your physical work environment?" question, select **Very Satisfied**	
11	Click **Next**	To move on to the next survey question. Because you didn't respond with one of the branching answers, the question, "What could be improved in your physical environment to make it more comfortable for you?," is skipped.
12	Click **Finish**	To accept the default value for the final question.

Viewing survey responses

Explanation

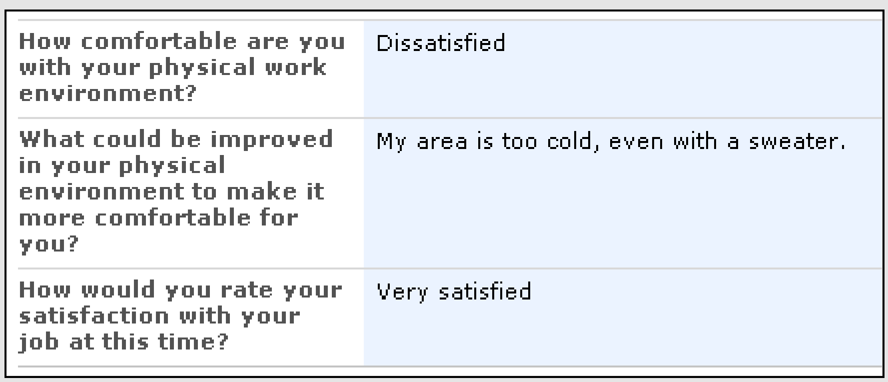
After the users have responded to your survey, you can view the results on the survey page. This page has three views:

- Overview—This is the default view. It shows the title and description of the survey, when it was created, and how many responses you have so far. There are links to the other two views.
- All Responses—This view displays a list of all responses. You can click each response in the list to view it.
- Graphical Summary—This view displays the answers to each question on a Gantt or bar chart.

Do it!

B-4: Viewing the responses to a survey

Here's how	Here's why
1 Return to your own Employee Satisfaction Survey page	You can change the view by using the View menu or by clicking one of the links on the Overview page.
2 Click **Show a graphical summary of responses**	To see the responses to each question as a Gantt or bar chart.
3 From the View menu, choose **All Responses**	This view lists each of the survey responses. The Completed column indicates whether or not the user finished the survey.
4 Click **View Response #1**	



The answer to each question displays.

Deleting surveys

Explanation

You delete survey responses and entire surveys in the same manner you delete lists, libraries, and discussion boards. To delete an individual survey response:

1. View the list of All Responses.
2. Click the down-arrow next to the response you want to delete. You can also open the response.
3. Choose Delete Response.
4. Click OK to verify the deletion.

To delete an entire survey:

1. Access the survey page.
2. Click Settings and choose Survey Settings.
3. Under Permissions and Management, click "Delete this survey."
4. Click OK to verify the deletion.

Similar to restoring lists, libraries, and discussions, you can restore individual survey responses from the Recycle Bin. You can also restore a deleted survey from the Recycle Bin.

Do it!

B-5: Deleting a survey response and a survey

Here's how	Here's why
1 On the All Responses view, click **View Response #1**	You can delete the response from the item menu without opening it. However, opening the response item helps you verify that it's the one you actually want to delete.
2 Click **Delete Response**	
3 Click **OK**	To verify the deletion.
4 Click **Settings** and choose **Survey Settings**	
5 Under Permissions and Management, click **Delete this survey**	
6 Click **OK**	
7 Close Internet Explorer	

Unit summary: Discussions and surveys

Topic A In this topic, you learned how to create a **discussion board** and start a discussion. You learned how to respond to a discussion **comment**, edit a discussion comment, and delete a discussion comment and a discussion board.

Topic B In this topic, you learned how to create and modify a **survey**, including how to apply **branching logic** to your questions. You learned how to respond to a survey and view **survey responses** graphically and in list form. In addition, you learned how to delete survey responses and surveys.

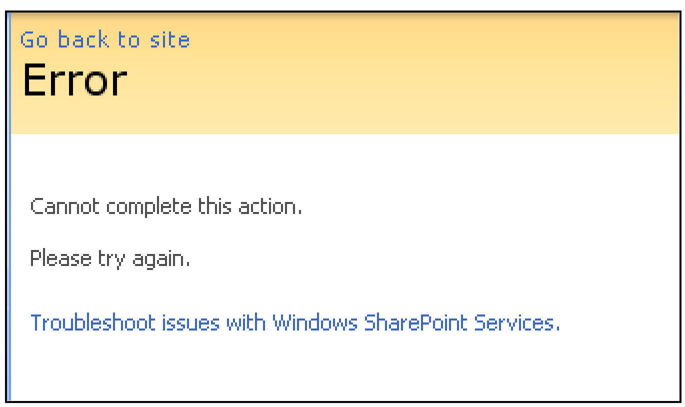
Review questions

1 What's unique about discussion boards compared to other SharePoint Services lists and libraries?

2 What happens when the first user responds to a discussion?

3 True or False? After a discussion comment or response has been posted, it can be modified.

4 When would you get the error shown in the following graphic? Why?



5 What's a SharePoint Services survey?

6 If you want users to choose a response from a numeric scale (for example, a scale of 1 to 10), what survey response type would you select?

7 If you want users to respond to a survey question with a simple Yes or No, what survey respond type would you select?

8 What's branching logic?

9 When would you want to implement branching logic?

10 How does branching logic work?

11 What are the three views you can use to view survey results?

Independent practice activity

In this activity, you'll practice creating, managing, and deleting Windows SharePoint Services discussion boards and surveys.

1. Go to http://outlander/administration.
2. Create a discussion board with the name: **Techniques of Market Segmentation ##**. Enter a description: **The discussion will focus on how to apply the techniques of marketing segmentation**. Don't create a link on the Quick Launch bar.
3. Start a discussion with the subject: **Consumer Market Segmentation**. To start the discussion, enter a comment: **Consumers are categorized based on geography, demography, and their psychology.**
4. On your partner's discussion board, respond to his or her discussion. Enter the response: **You can divide the market geographically, based on the urban and rural areas.**
5. Edit your response to include: **Consumers can be divided on the basis of geography, demography, their psychology, and their culture.**
6. On your own discussion board, delete your partner's response to your comment.
7. Delete your discussion board.
8. Create a survey called **Higher Prices ##,** with the question: **Should Outlander Spices quote a higher price for its products?** Select **Multiple lines of text** as the type of answer to this question. Don't place a link on the Quick Launch bar.
9. Respond to your partner's survey.
10. View the results of your survey.
11. Modify your survey to change the type of answer to choice. Set the answer options as **Yes**, **No opinion**, and **No**.
12. Delete your survey.
13. Close Internet Explorer.

Course summary

This summary contains information to help you bring the course to a successful conclusion. Using this information, you will be able to:

A Use the summary text to reinforce what you've learned in class.

Topic A: Course summary

Use the following summary text to reinforce what you've learned in class.

Unit summaries

Unit 1

In this unit, you learned how to identify and work with the default **components** of a Windows SharePoint Services **Team Web site**.

Unit 2

In this unit, you learned how to create and modify a **Web Part Page**.

Unit 3

You worked with **Wiki** page libraries.

Unit 4

In this unit, you learned how to create, manage, and delete **lists** on a Windows SharePoint Services Team Web site. The list you worked with is **Tasks**

Unit 5

In this unit, you learned how to create, manage, and delete **surveys** and **discussion boards**. You learned how to change the view to display surveys in a **graphical summary** form and discussion boards in a **threaded** format.

Glossary

Access view
Displays data using a form or report created on Microsoft Office Access.

announcement
Item type used in the Announcements Web section.

Announcements
Section where you can post messages on the home page of your Team Web site.

Calendar
Customizable list of upcoming meetings and events.

calendar view
Displays data in a daily, weekly, or monthly calendar format.

content approval
Allows an administrator to approve or reject user content before it's posted to the public.

custom permission level
Definable individual permissions and other settings.

datasheet view
Displays data in a spreadsheet format similar to that of Microsoft Excel.

discussion board
A forum for team members to discuss topics relevant to them.

discussion thread
A series of discussion comments, with the first comment and its responses.

document library
A central repository for sharing a collection of documents or other files.

events
Item types used in the Calendar Web part.

form library
A central repository for managing XML-based business forms.

Gantt chart
A bar chart that shows the start and finish dates of the individual tasks of the project, along with their progression, if you've entered a % Complete value.

Gantt view
Displays data in a Gantt (bar) chart, showing tasks over time.

library
A central repository that you can use to store and share files, images, and forms.

Links
A customizable list for URL links to resources, both outside and within your organization.

list
SharePoint Service Web section that stores information as items.

permission level
A predefined set of individual permissions and other settings.

picture library
A central repository for sharing image files.

Quick Launch bar
A left-side navigation tool containing links to navigate quickly to other pages of the Web site.

Recycle Bin
Similar to the Windows Recycle Bin, used to restore or permanently delete items that have been removed from the site.

search bar
Allows you to search within a site, or if allowed, across multiple sites.

Site Actions menu
Quick access to creation, editing, and other management tasks.

site collection
The structure of a top-level site and its subsites.

site group
Maintains security of SharePoint Web sites.

site themes
Applies fonts and a color scheme to your site.

standard view
Displays data on a Web page in a variety of layouts.

survey
A questionnaire to collect information in a preset form from a group of people.

team site
The default template to create a SharePoint Web site.

threaded
Referring to an original message and all of its replies.

Top link bar
Customizable and hyperlinked tabbed navigation tool that runs across the top of SharePoint Web sites.

tree view
A Site Structure section added to the Quick Launch bar to navigate the site and subsites.

view
Displays information in various layouts.

Web Part Page
A custom page that can hold web parts, such as announcements, tasks, and events.

web parts
Components that make up a Team Web site.

wiki
Software that allows users to create, edit, and link web pages using a Web browser.

Wiki Page library
A central repository for managing interconnected wiki pages.

zone
Sections of a Web Part Page.

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