About SharePoint Server 2007

SharePoint Server 2007 is an integrated suite of server applications that helps people and teams work together. At Microsoft, these sites are most commonly used for team collaboration. This Overview focuses on the team collaboration capabilities of SharePoint Server 2007.

What Is SharePoint Server 2007?

SharePoint Server 2007 is a collection of Web-based tools that make it easy to work on projects with other people. These tools consist mostly of pre-designed Web sites that teams or individuals use to store information and collaborate with others. These sites come with content authoring tools for site owners and members.

These sites use Web conventions—access through a browser, linked information, images as well as text—to create a fast and easy method of collaborating. These sites create a single point from which information can be shared.

SharePoint Server 2007 Sites

Use customizable templates for the creation of Web sites. A variety of templates are available—Team Site, Document Workspace, Meeting Workspace, Blog, Wiki Site—and each template is designed for a different purpose.

Each site comes with a predetermined number of Web Parts. Web Parts are content "containers" used to display information on a site. Site members can use Web Parts to arrange text, related links, calendars, images, document libraries, other Web pages, and more.

Each site has a Web Parts Gallery from which additional Web Parts may be added.

Web Part	Purpose
Announcements	Post messages on the home page.
Tasks	Keep track of project work details.
Calendar	Stay informed on team events.
Links	Post links of interest for site members.
Document Library	Share documents with site members.
Contact List	Post names and contact information of site members.
Image	Display pictures and photographs.

The Team Site template is one of the most frequently used templates. The following illustration shows a sample Team Site home page.

Sample Team Site Home Page

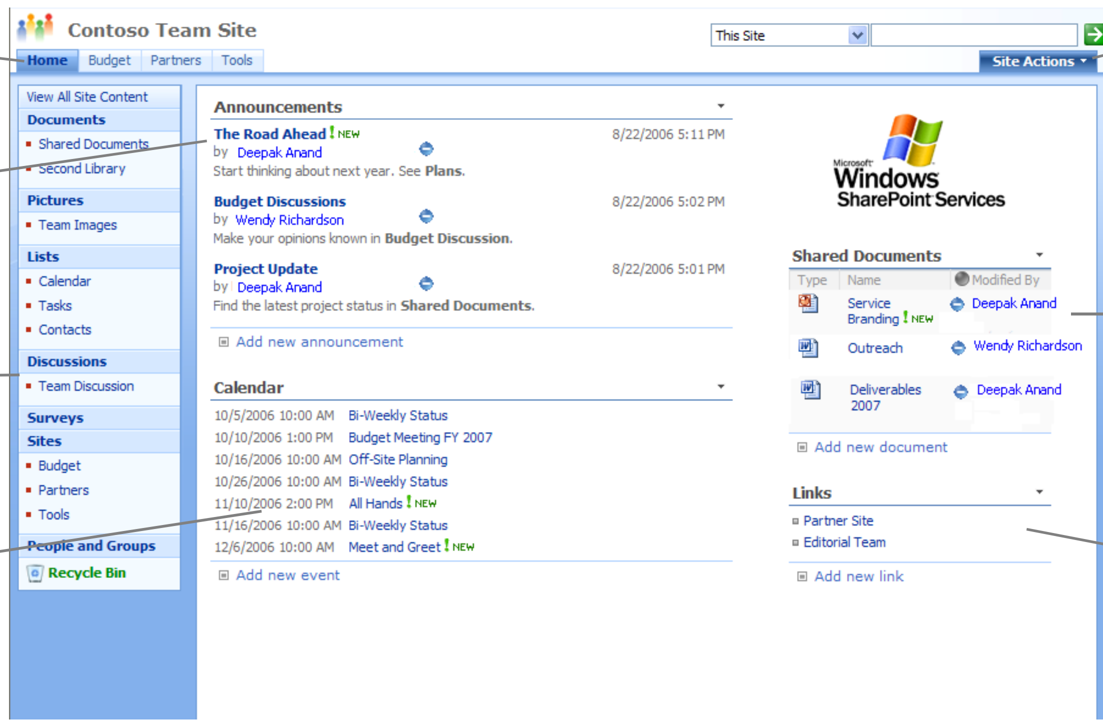
This sample site was built from a Team Site template.

Tabs
Display subsites and link to them.

Announcements
Post messages on the home page of the site.

Quick Launch
List key site pages on this navigation menu.

Calendar
Display important dates and events.



Site Actions
Show common commands for the site.

Document Library
Contain and display team documents.

Links
Post links of interest to site members.

Use Web Parts as building blocks for your site.

Conventions

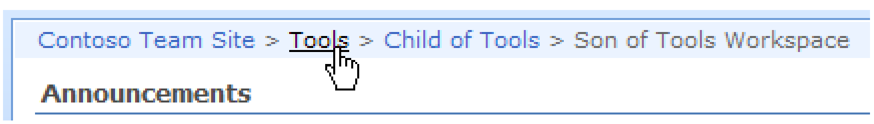
To get the most from your site, familiarize yourself with its conventions. These include navigation, file manipulation, and site permissions.

Navigation

There are three ways to navigate: the left navigation menu (Quick Launch), tabs, and a "bread crumb" trail.

- The left navigation menu is customizable, so its appearance may vary from site to site. However, in most cases, the pages on a site will be listed on its left navigation menu.
- Tabs across the top of the main window can also be used for navigation. A **Home** tab always appears. As subsites are created, new tabs generally appear for them, though this appearance is optional.

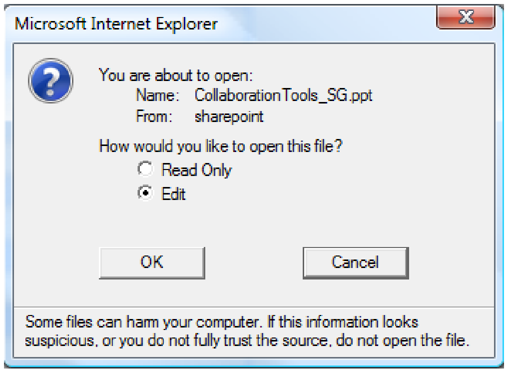
- A "bread crumb" trail is a series of links indicating your location on a site. In addition to showing location, bread crumbs offer links to locations between you and the parent site. Bread crumbs appear below the tabs, in the upper-left portion of the main window.



Note: Subsites live within an existing SharePoint Server 2007 site. The existing site is known as the top level site. Subsites may be created to appear completely independent of the top level site, but are rooted in the top level site

Editing Files

To edit a file, click the document name. In the Windows® Explorer window, click the **Edit** option, and then click **OK**.



Moving Files

Do not delete files in one location and upload them to another in order to move them. Instead, use Windows Explorer view to drag files from one location to another.

In a Document Library, on the **Actions** menu, click **Open with Windows Explorer**. Open a similar window in a different Document Library. Now resize the windows so you can see both, and drag files from one location to the other. Click your browser's **Back** button to return to the default view.

Restoring Files

The Recycle Bin is a temporary location where files await permanent deletion. You can restore files from the Recycle Bin, but you must restore them before automatic permanent deletion takes place. The default waiting period is 30 days, but this period can be customized. Ask a site administrator for details.

Permissions and Access

All sites come with permission options. The default setting prevents anyone from accessing the site. A site owner (typically the site creator) must give specific users and specific groups access to the site.

Site owners either add users to existing permission groups, or give specific permissions to specific users.

By default, there are three groups used for allowing access to a site: Visitor, Member, and Owner. When you add a user to one of these groups, the user is given the permission level associated with the group. The following table describes the three groups.

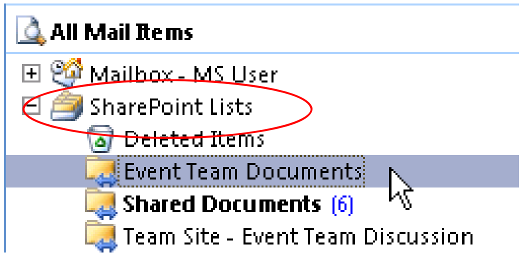
This group	Provides this permission level
Visitor	Read: user can view site content.
Member	Contribute: user can view and edit site content.
Owner	Full Control: user can view and edit site content, and modify site settings.

By default, permission levels applied to the Home page of a site automatically apply to all pages within the site. Site owners may also apply different permission levels to different pages and subsites.

Integration Features in SharePoint Server 2007

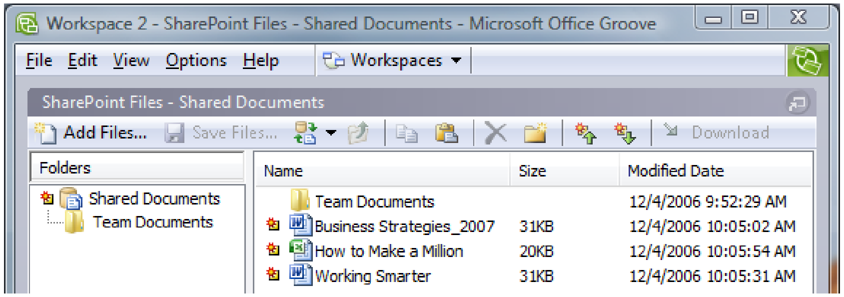
Integration with Microsoft® Office Outlook 2007

Create SharePoint Server 2007 resources for team collaboration and connect them to Outlook 2007. Team members can then use Outlook 2007 to collaborate with the SharePoint Server 2007 resources. In Outlook 2007, the SharePoint Server 2007 resources appear in the **SharePoint Lists** folder. You access them the same way you access your e-mail messages.



Integration with Microsoft® Office Groove® 2007

Collaborate with other team members by adding the files to a Groove 2007 workspace. Workspace members access the files, edit them, and then synchronize the changes with SharePoint Server 2007.



Groove 2007 workspace

Integration with RSS (Really Simple Syndication)

Distribute content on a site through RSS, using Outlook 2007 as an RSS reader. This way, site members receive the most current content as it becomes available.

You can also display RSS content using the RSS Viewer Web Part.

About SharePoint Server 2007 Sites and Workspaces

SharePoint Server 2007 helps you store and collaborate on information using Web sites and workspaces hosted on the corporate network. No specialized knowledge is needed to create a site or workspace. Use this guide to determine which sites or workspaces are best for your needs.

	Sites (long-term use)		Workspaces (short-term use)	
	My Site	**Team Site**	**Document Workspace**	**Meeting Workspace**
Purpose	Individuals share public information; organize daily activities; store private files.	Teams store and display information; coordinate activities; collaborate on projects.	Groups collaborate on documents related to a specific project or purpose.	Groups manage meeting agenda items, materials, and follow-up actions.
Best Uses	• Share business-related information about yourself with your coworkers. • Store private files or collaborate on shared files.	• Centralize and coordinate team activities. • Store, organize, and display team files.	• Collaborate on documents without using e-mail. • Store multiple documents. • Display information related to document review.	• Post meeting agendas. • Track action items. • Store documents and other files associated with a meeting.
Key Features	• Stores private and shared documents. • Enables control of private information versus public information. • Allows for site customization and supports multi-purpose use.	• Enables collaboration on Microsoft Office system files. • Includes document check in/check out and version control . • Allows site customization and supports multi-purpose team use.	• Enables use of SharePoint Server 2007 features directly from Microsoft Office system applications. • Includes document check in/check out and version control. • Connects to a Team Site or My Site.	• Enables workspace creation in Outlook 2007 when sending a meeting invitation. • Supports one-time or recurring meetings. • Connects to a Team Site or My Site.
Challenges	• Public section is viewable to all users with corporate network access.	• Keeping content current and useable may require a site manager.	• Review and editing of documents requires corporate network access.	• Meeting participants must be aware of the site and its location.

Site and Workspace Comparison	My Site	Team Site	Document Workspace	Meeting Workspace
Your Own Work Web Site	•			
Best for Team Collaboration		•		
Best for Document Collaboration			•	
Best for Managing Meetings				•
Supports Search Function	•	•	•	•
Multi-purpose, Longer-term Use	•	•		
Single-purpose, Shorter-term Use			•	•
Provides Public and Private Sections	•			
Use Directly from Office 2003 Applications			•	
Create Using Outlook 2003			•	•
Control User Access and Privileges	•	•	•	•
Requires Corporate Network Access	•	•	•	•

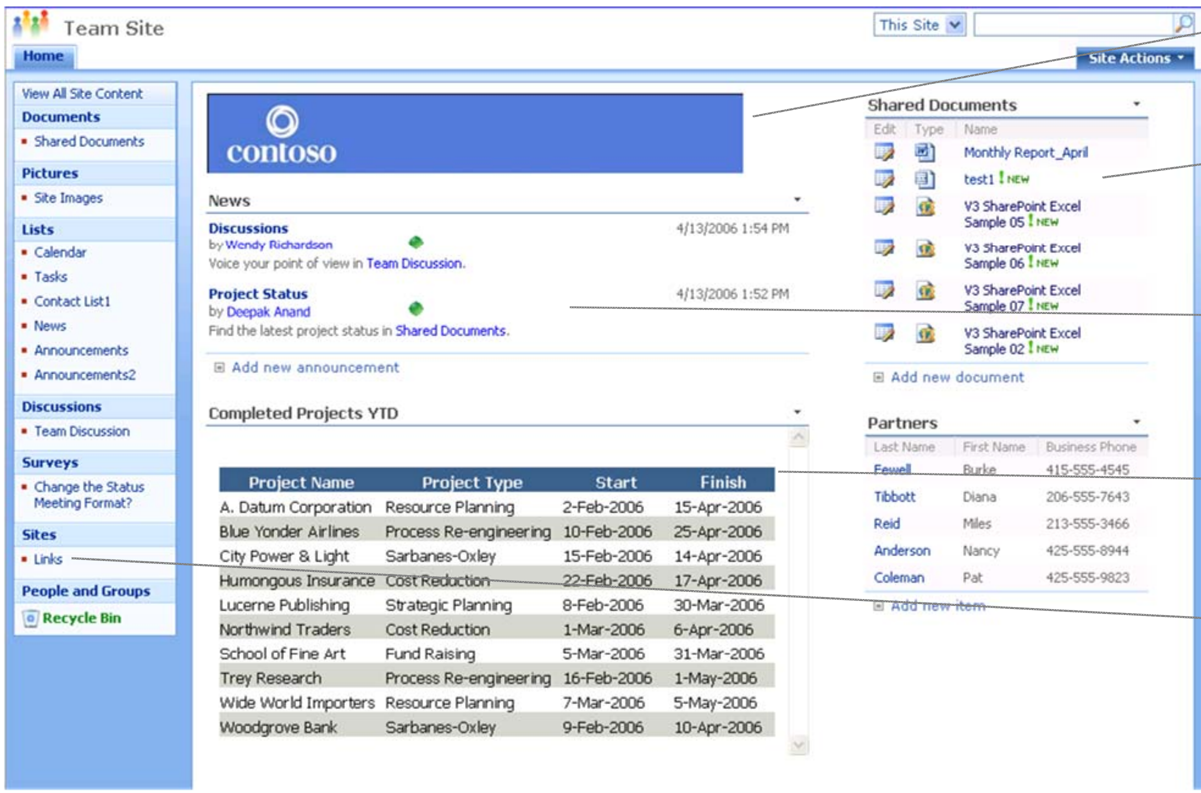
Extranet Sites—Collaborate with External Partners and Customers

Want to use a SharePoint Server 2007 site to collaborate with external business partners, vendors, or customers? Create a SharePoint Extranet Team site. Because Extranet sites are accessed through the Internet, external users can access the content and collaboration features.

Note To determine if SharePoint Server 2007 Extranet Sites are available in your enterprise, check with your Site Administrator.

About Customizing a SharePoint Server 2007 Site

Modify the structure and appearance of your SharePoint Server 2007 site to best suit the needs of your group. Use the tools and methods described in this guide to customize your site. **Note** This guide assumes you already have a site created. For illustration purposes, a Team Site is used as an example.



Create a Unique Look for Your Site with an Image Web Part.

Display Other Content on Your Site including shared documents, partner names, alerts, RSS feeds, and more to aid collaboration with others.

Customize Announcements on Your Site to create a better experience for your readers.

Display a Microsoft® Office document on Your Site to immediately share information with users.

Customize Your Left Navigation Menu by adding or removing site links.

Create a Unique Look for Your Site

Change the look of your site with a theme. Themes combine color schemes and design elements to give your site a cohesive look and feel. Then place a banner, team logo, or other image on your home page using an Image Web Part. For example, see the "Contoso" banner on page 1 of this guide.

Tip Though bold colors are striking, they can also make text hard to read. If you use a theme to change the look of your site, always keep your audience in mind.

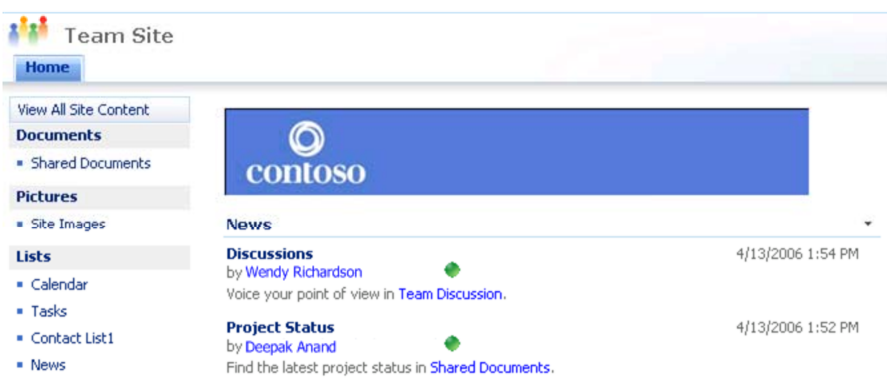
Change the Look and Feel of Your Site with a Theme

1 On the **Site Actions** menu, click **Site Settings**.

2 Under **Look and Feel**, click **Site theme**.

3 Select a theme from the list, and then click **Apply**.

The image below shows the Simple theme. Compare this to the Default theme featured on page 1 of this guide.



Add a Banner or Picture to Your Site

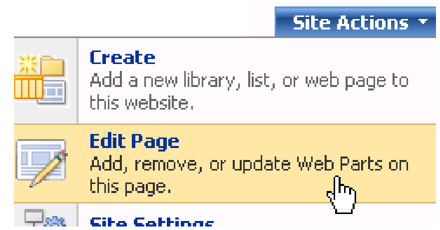
1 Go to a Picture Library, and then click **Upload.**

Note To see all your picture libraries, click **View All Site Content** at the top of the left navigation menu (Quick Launch).

2 Browse to the picture, click **Open**, and then click **OK**. If desired, update the picture properties, and then click **OK**.

3 With the picture in **All Pictures** view, click the picture. Right-click the preview picture, and then select **Copy Shortcut**. This gives you the image address.

4 From your SharePoint Home page, on the **Site Actions** menu, click **Edit Page**.



5 At the top of the column where you want to add the picture, click **Add a Web Part**. In the **Add Web Parts to [column]** list, select the **Image Web Part** check box, and then click **Add**.

6 In the **Image Web Part**, click **open the tool pane**.

7 In the tool pane, under **Image Link**, enter the image address you copied in step 3. Test the location by clicking **Test Link**. If the link works, click **OK**.

8 When you have finished, on the **Site Actions** menu, click **Exit Edit Mode** to return to normal view.

Notes

- Use the tool pane to adjust picture alignment, appearance, and layout. To open the tool pane, click the arrow to the right of the Image Web Part title, and then click **Modify Shared Web Part**.

- Never use a copyrighted image in your site without obtaining permission from the copyright holder.

Display Other Content on Your Site

Use Web Parts to customize your site. Web Parts are content "containers" used to display information. Use Web Parts to arrange text, related links, calendars, images, document libraries, other Web pages, and more.

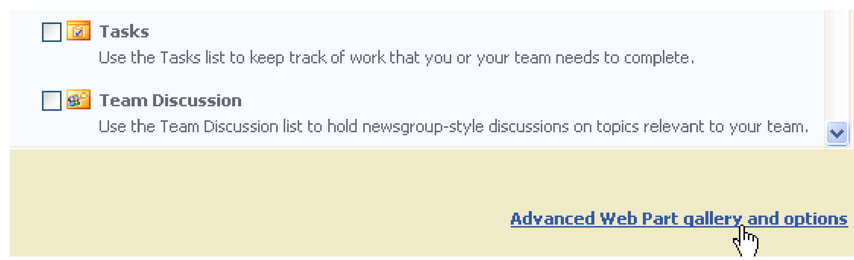
There are Web Parts for almost every kind of content. With a little creativity, you can use existing Web Parts for almost any new content need. In the table below are some examples of existing Web Parts:

To Display This Content	Use This Web Part
Messages to site users	Announcements
A list of site users	Site Users
An Office document or a Web page	Page Viewer Web Part
A list of high priority tasks for site users	Tasks

1 From your Home page, on the **Site Actions** menu, click **Edit Page**.

2 At the top of the column where you want to add the Web Part, click **Add a Web Part**. In the **Add Web Parts to [column]** list, select the check box of the Web Part that you want, and then click **Add**.

Note If you don't find the Web Part you're looking for in the **Add Web Parts to [column]** list, click **Advanced Web Part gallery and options**.



3 To arrange Web Parts on the page, click a title bar and drag the Web Part to the position you want, keeping within the column markings.

4 When you have finished, click **Exit Edit Mode** to return to normal view.

Display a Microsoft® Office Document on Your Site

Display any Microsoft Office document or Web page by using the **Page Viewer** Web Part. Displaying a document in this way makes it simple to share information. See the Completed Projects YTD spreadsheet on page 1 of this guide for an example of how such a document looks.

Note To ensure access to the document by all visitors, you must store it on your site. For best viewing, it should be saved as a Web page before uploading it to the site. (**File**>**Save as Web Page**.)

1 Go to a Document Library, and then click **Upload**.

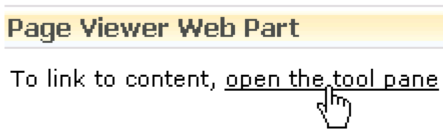
Note Click **Documents** at the top of your site to see all your Document Libraries.

2 Browse to the document, click **Open**, and then click **OK**. After the document has been uploaded, right-click the document icon (view the file in **All Documents** view), and then click **Copy Shortcut**. This gives you the document address that you will use in step 6.

3 From your Home page, on the **Site Actions** menu, click **Edit Page**.

4 At the top of the column where you want to add the Web Part, click **Add a Web Part**. In the **Add Web Parts to [columns]** list, select the **Page Viewer Web Part** check box, and then click **Add**.

5 In the **Page Viewer Web Part**, click **open the tool pane**.



6 In the **Tool Pane**, click **Web Page**. Under **Link**, paste the document address you copied in step 2. Test the location by clicking **Test Link**. If the link works, click **OK**.

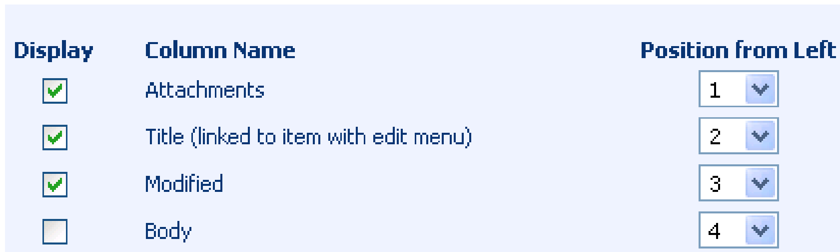
Customize Announcements on Your Site

By default, sites include an Announcements Web Part on the Home page. With this Web Part, you can post news and updates to your site. By becoming familiar with this tool, you can customize how news and updates are displayed. Take a look at the News section on page 1 of this guide to see how the Announcements Web Part might be customized.

1 Click **Announcements** in the title bar of the Web Part.

2 Click **All items**, and then click **Modify this View**.

3 On the **Edit View** page, in the **Columns** section, use the **Display** check boxes to determine which columns will appear in the Announcements Web Part. Use the **Position from Left** boxes to determine their order of appearance.



Display	Column Name	Position from Left
☑	Attachments	1
☑	Title (linked to item with edit menu)	2
☑	Modified	3
☐	Body	4

4 Use the remaining sections of the **Edit View** page to:

- **Sort** items to appear in a different order.
- **Filter** content to prevent some items from appearing.
- **Group** columns.
- Display **Totals** if you are using columns with numbers.
- Apply a **Style** to the Announcement content.

  Note See the shaded style and the changed title in the picture on page 1 of this guide for an example.
- Group items inside **Folders** rather than viewing the items in one long list.
- Set the **Item Limit** to determine how many items will display.
- Adjust **Mobile** settings for the view.

5 When you have finished, click **OK**, and then return to the Home page.

6 At the end of the **Announcements** title bar, click the arrow, and then click **Modify Shared Web Part**.

7 In the Tool Pane, in the **Selected View** box, select **All Items**. In the warning box, click **OK**.

8 At the bottom of the Tool Pane, click **OK**.

Customize Your Left Navigation Menu

The left navigation menu (Quick Launch) is the list of site links found on the left side of your Home page. By default, new links are automatically added when lists and libraries are added to the site. In addition, you can customize the left navigation menu by manually adding or removing site links and headings.

Add a Site Link or Heading in the Left Navigation Menu

1 On the left navigation menu, click **View All Site Content**.

2 Right-click the site link or heading that you want to add, and then select **Copy Shortcut**. This gives you the site address that you will use in step 4.

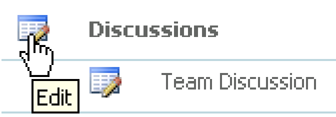
3 On the **Site Actions** menu, click **Site Settings**. Under **Look and Feel**, click **Quick Launch**.

4 Click **New Link** or **New Heading**, and then paste the site address you copied in step 2. Type the description of the new link or heading (if it's a new link, also select a **Heading** to put it under), and then click **OK**. The new link or heading appears on the left navigation menu.

Remove a Site Link or Heading from the Left Navigation Menu

1 On the **Site Actions** menu, click **Site Settings**. Under **Look and Feel**, click **Quick Launch**.

2 Click the edit icon next to the link or heading you want to remove, and then click **Delete.**



About Site Access and Storage

Manage access and storage on your SharePoint Server 2007 sites.

Manage Access
Limit access to sensitive business information. Topics in this section:

- Give Users Access to Your Site
- Manage Access to a Document Library
- Approve Requests for Access to Your Site
- Change the Administrator Who Receives Requests for Access

Manage Storage
To avoid outdated content and to maximize your space, delete old documents, workspaces, meeting spaces, and lists. Topics in this section include:

- Locate and Delete Unused Workspaces and Sites
- View Traffic to Your Site
- View Detailed Storage Space Information
- View All Sites Created Under Your Main Site

Before You Begin

Some procedures in this guide require site collection administration permissions. If you are unable to access pages or links mentioned in the procedures, contact the site creator or a site collection administrator to request the appropriate permissions.

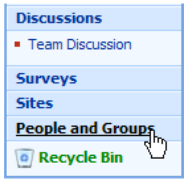
Give Users Access to Your Site

Using groups is the most efficient way to manage site access.

By default, there are three groups with associated permission levels: Visitor, Member, and Owner. When you add a user to a group, the user is given the permission level associated with that group.

To grant this permission level	Add users to this group
Read: User can view site content.	**Visitor**
Contribute: User can view and edit site content.	**Member**
Full Control: User can view and edit site content, and modify site settings.	**Owner**

1 From within the site, on the left navigation menu (Quick Launch), click **People and Groups**.



2 On the **People and Groups** page, at the top of the left navigation menu under **Groups**, click the group with the permissions you want to grant to your users.

3 On the **New** menu, click **Add Users**. On the **Add Users** page, in the **Users** text box, type the alias of the user you want to add. To add more than one user, separate each alias with a semicolon.

4 Click **Add users to a SharePoint group**. The group you previously specified is selected.

5 Select the **Send welcome e-mail to the new users** check box to send an e-mail alerting users they have been added to your site. You may also add a personalized message. Click **OK**.

Note You can also add users individually and assign them individual permission levels. To assign specific permission, on the **Add Users** page, click **Give users permission directly**, and then select the check box for the appropriate permission.

Manage Access to a Document Library

In addition to managing access to your entire site, you can also set access levels for a Document Library or list.

1 From within the site, on the left navigation menu, click **Documents**.

2 On the **All Site Content** page, under **Document Libraries**, click the Document Library for which you want to manage access.

3 On the Document Library page, on the **Settings** menu, click **Document Library Settings**.

4 On the **Customize [library]** page, under **Permissions and Policies**, click **Permissions for this document library**.

5 On the **Actions** menu, click **Edit Permissions**, and then click **OK**.

6 On the **Permissions** page, select the check boxes of the users or groups whose permissions to this document library you want to change.

7 On the **Actions** menu, click **Edit User Permissions**, select the check boxes for the permissions you want to apply, and then click **OK**.

Note This procedure also applies to lists and other content.

Approve Requests for Access to Your Site

If you are a site administrator, you may receive requests for access to a site via e-mail. To approve these access requests:

1 In the **Access request for a site** e-mail, click **Grant [User] access to the site**.

2 On the **Add Users** page, under **Give Permission,** do one of the following:

Click **Add users to a SharePoint group**, and then on the list click a permissions group.

-OR-

Click Give users permission directly, and then select the check box for the appropriate permission.

3 Select the **Send welcome e-mail to the new users** check box to send an e-mail alerting users they have been added to your site. You may also add a personalized message. Click **OK**.

Change the Administrator Who Receives Requests for Access

1 On the **Site Actions** menu on the upper right, click **Site Settings**.

2 On the **Site Settings** page, under **Users and Permissions**, click **Advanced permissions**.

3 On the **Permissions** page, on the **Settings** menu, click **Access Requests**.

4 On the **Manage Access Requests** page, select the **Allow requests for access** check box. Type the e-mail address of the person who will receive the access requests. This person must be an Administrator. Click **OK**.

5 In the **Send all requests for access to the following e-mail address** box, type the e-mail address of the person who will receive the access requests, and then click **OK**. This person must be an Administrator.

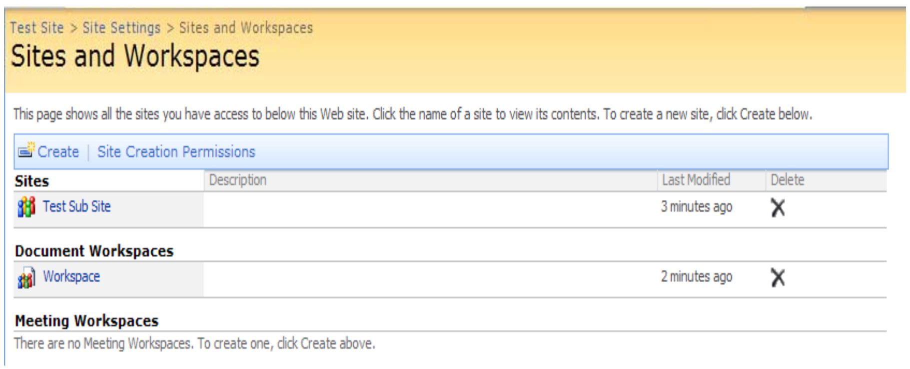
Note Site collection administrators can see who the administrators are for their sites by going to the **Site Actions** menu. Click **Site Settings**, and then under **Users and Permissions** click **Site collection administrators**.

Locate and Delete Unused Workspaces and Sites

1 On the parent site home page, on the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Administration**, click **Sites and workspaces**.

3 On the **Sites and Workspaces** page, find the site or workspace you want to delete, and then in the **Delete** column, click .

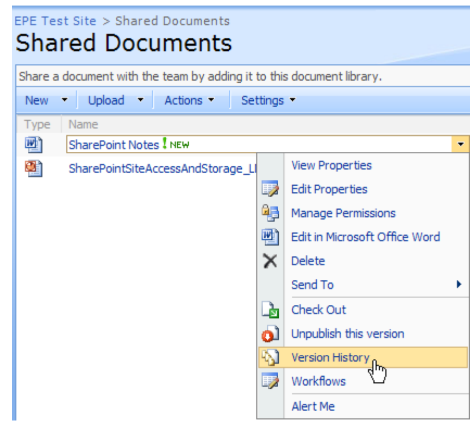


Delete Outdated Document Versions

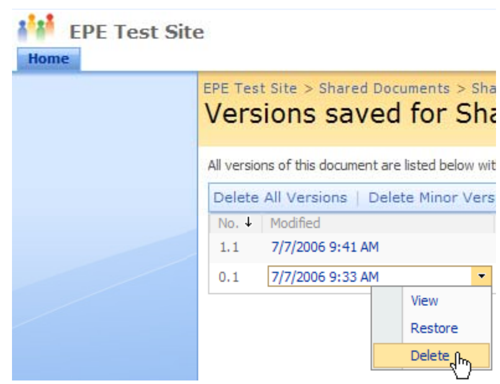
With Version Control activated, you can keep a history of changes to a file. Version Control can be helpful, but keeping multiple copies of a document takes up space and counts against your site’s storage limit. If you do not need multiple versions of a file, consider deleting them.

1 In the document library, click the arrow to the right of the document, and then click **Version History**.

Note If Version Control is not activated, you will not see this option. By default, Version Control is not activated.



2 To delete a version of the document, click the arrow to the right of the document version, and then click **Delete**.



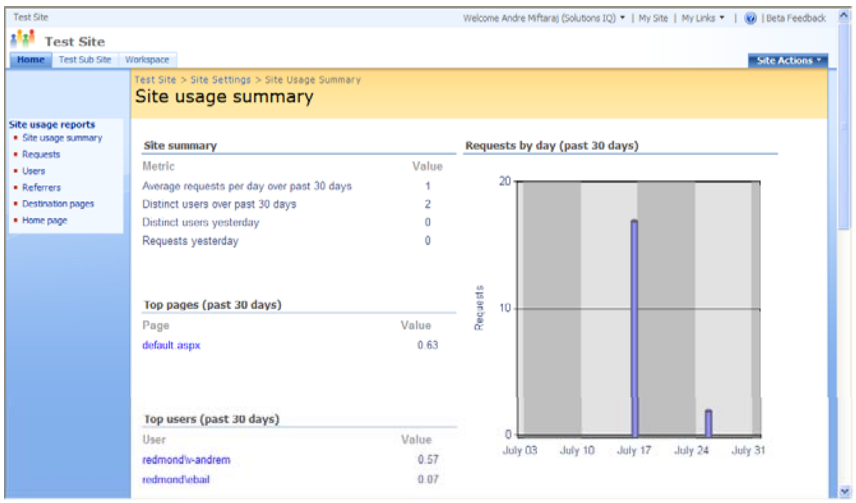
View Traffic to Your Site

The Site Usage Report provides information about how many page requests your site has received and also lists details on users and browser type.

1 On the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Administration**, click **Site usage data**.

3 On the **Site usage summary** page, to view a particular report, click the report from the **Site usage reports** list in the navigation menu on the left side of the page.



Use Recycle Bins

SharePoint Server 2007 has two recycle bins: the end user recycle bin and the site collection recycle bin. The recycle bins give you two levels of protection against accidentally deleting parts of your site or important data. Deleted items can be restored from either recycle bin.

You can delete documents, libraries, lists—almost anything, except an entire site. Deleted material is initially placed in the end user recycle bin. When you delete the contents of the end user recycle bin, they are placed in the site collection recycle bin.

Important

- After you empty the site collection recycle bin, the deleted material cannot be recovered.
- The recycle bins are automatically emptied every 30 days. Until that time, you can safely restore a deleted item.

Restore Deleted Items from the User Recycle Bin

1 On the left navigation menu, click **Recycle Bin**.

2 Select the check boxes of the items to be restored, click **Restore Selection**, and then click **OK**. The restored items are returned to the location from which they were deleted.

Note If you restore an item that originally resided in a folder that has since been deleted, the folder is recreated in its original location, and the restored item is placed in the folder.

Important The remaining procedures in this guide require that you have site collection administration permissions. If you do not have these permissions, you will not have access to the necessary controls and links to perform these tasks. To get site collection administrator permissions, contact the site creator or a site collection administrator.

Restore Deleted Items from the Site Collection Recycle Bin

1 On the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Collection Administration**, click **Site collection recycle bin**.

3 On the **Site Collection Recycle Bin** page, on the left pane under **Select a View**, click **Deleted from end user Recycle Bin**. The list now shows you items that were first deleted by users and then deleted from the end user recycle bin.

4 Select the check boxes of the items to be restored, click **Restore Selection**, and then click **OK**.

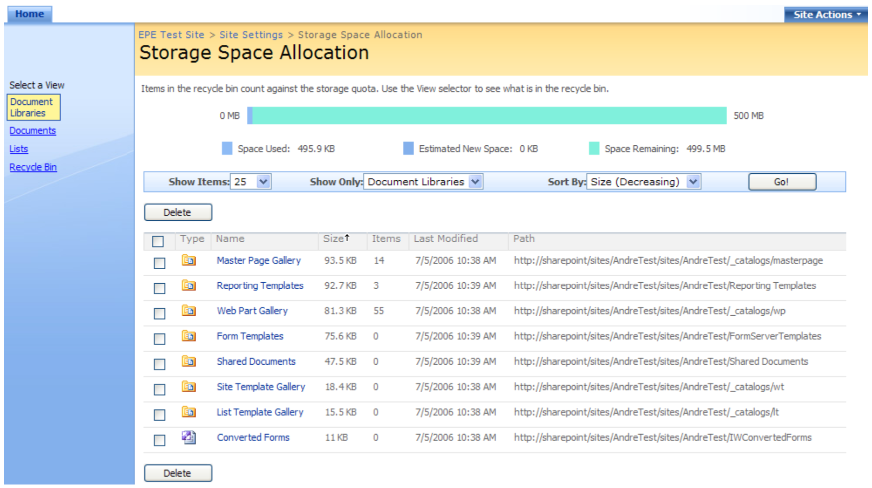
View Detailed Storage Space Information

The Storage Space Allocation view displays the sizes and locations of Document Libraries, documents, and lists.

1 On the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Collection Administration**, click **Storage space allocation**.

3 In the left navigation menu, click the view you prefer—**Document Libraries**, **Documents**, or **Lists**.



4 To filter your view, click the options you want from the **Show Items**, **Show Only**, and **Sort by** lists, and then click **Go**.

Note To delete documents, document libraries, and lists from the **Storage Space Allocation** view, select the check box next to the documents, Document Libraries, or lists. Click **Delete**.

View All Sites Created Under Your Main Site

The **View Site Hierarchy** page displays workspaces and other sites created on your main site.

1. On the **Site Actions** menu, click **Site Settings**.

2. On the **Site Settings** page, under **Site Collection Administration**, click **Site hierarchy**.

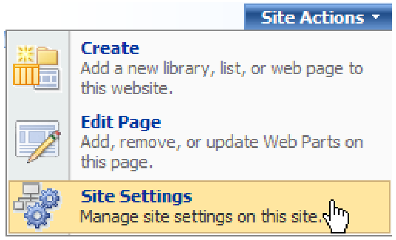
On the **View Site Hierarchy** page, a list of all sites under your main site appears. To go to the **Site Administration** page of a particular site, click **Manage**.

View Available Storage Space

Use the site collection usage summary page to view the space currently being used on your site and the remaining available space. To see details on how much space a particular Document Library, document, or List occupies, see “View Detailed Storage Space Information” earlier in this guide.

1. On the **Site Actions** menu, click **Site Settings**.

2. On the **Site Settings** page, under **Site Collection Administration**, click **Storage space allocation**.



About Team Sites

SharePoint Server 2007 Team Sites are Web sites created from a template and designed for team collaboration. They are hosted on the corporate network. Team Sites are a great way to coordinate team activities with document collaboration and storage.

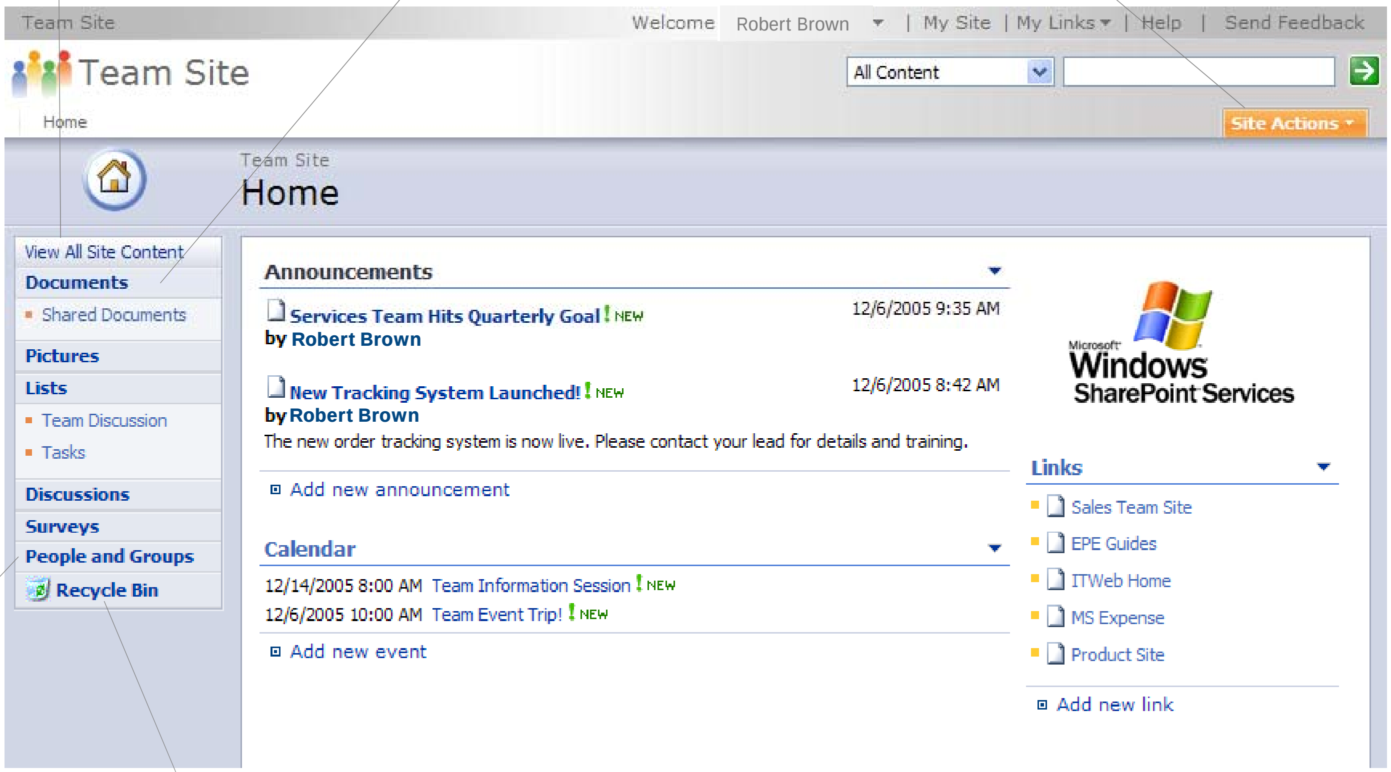
Topics in this guide include:

- Create a Team Site
- Add Content
- Upload Documents
- Edit Documents
- Create a New Document Library
- Allow Access to Your Site

Site Content
Gain quick access to all content on the site.

Document Libraries
Store team documents and collaborate on them.

Site Actions
Gain quick access to Team Site actions, including Create Content, Edit Page, and Site Settings.



People and Groups
Control who can access your site and what content they can view and edit.

Recycle Bin
Restore or permanently remove deleted items.

Create a Team Site

Create a new, stand-alone Team Site or create one within an existing site.

Create a a Stand-Alone Team Site

1 Go to *insert URL here*.

2 On the **SharePoint Site Request** page, click **Create a Team Site** for the region where most of your users are located.

3 On the **Local Search** page, read the information, scroll to the bottom, and then click the link.

4 On the **New SharePoint Site** page, complete the form, select the **Team Site** template, and then click **Create**.

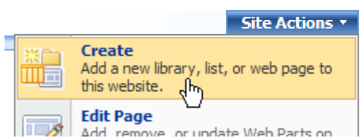
Note The URL you select cannot be changed after you create the site.

5 On the **Set Up Groups for this Site** page, add the Visitors, Members, and Owners of this site, and then click **OK**.

Create a Team Site Within an Existing Site

You must be the site owner, or have permissions from the site owner, to create a Team Site within an existing site.

1 Click **Site Actions**, and then click **Create**.



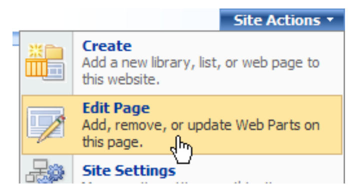
2 On **Create Page**, under **Web Pages**, click **Sites and Workspaces**.

3 On the **New SharePoint Site** page, complete the form. Next to **Template Selection**, be sure to click **Team Site**. Click **Create**.

Add Content

Add content to your site by using Web Parts. Web Parts are content "containers" used to display and arrange content on your site. Adding the correct Web Part to a page enables you to display text, related links, calendars, images, document libraries, other Web pages, and more.

1 Click **Site Actions**, and then click **Edit Page**. The page changes to Design Mode.



2 At the top of the column you want to add a Web Part to, click **Add a Web Part**.

3 In **Add Web Parts to [zone]** dialog box, select one or more Web Parts, and then click **Add**.

4 To add content to each Web Part, click **Add new *x*** at the bottom of the Web Part or follow the instructions in the Web Part.

5 When you have finished, in the upper-right section of the page, click **Exit Edit Mode**.

Lay Out Content

Arrange Web Parts on the page so that information is easy to find.

1 Click **Site Actions**, and then click **Edit Page**. The page changes to Design Mode.

2 Drag any Web Part by its title bar to a new location.

3 Click edit on the Web Part title bar to see additional options, including **Minimize**, **Delete**, and **Modify Shared Web Part**. Click × to close the Web Part.

4 When you have finished, click **Exit Edit Mode**.

Add New Pages

Organizing site content on separate pages helps team members find information. On these new pages, you can display document libraries, lists, discussion boards, and more.

1 Click **Site Actions**, and then click **Create**.

2 On **Create Page**, under **Web Pages**, click **Web Part Page**.

3 On **New Web Part Page**, type the name of your page, and then click a layout template.

4 Click a Document Library as a location to save the page, and then click **Create**.

5 To add Web Parts to the page, click **Add a Web Part**. In the **Add Web Parts to [zone]** dialog box, select the check box of the Web Part you want, and then click **Add**. When you have finished, click **Exit Edit Mode**.

Re-Order Navigation links

The left navigation menu (Quick Launch) has a default structure, and grows automatically as you add pages or other content to your site. Follow the procedure below to manually re-order the position of the links.

1 Click **Site Actions**, and then click **Site Settings**.

2 On the **Site Settings** page, under **Look and Feel**, click **Quick Launch.**

3 On the **Quick Launch** page, click **Change Order**.

4 On the **Top Link Bar** page, complete the form to specify the order of the Quick Launch links.

5 When you have finished, click **OK**.

Upload Documents

The first step in collaboration is to upload documents to the site.

1 Navigate to the appropriate Document Library, and then click **Upload**. (The name of the default Document Library is "Shared Documents.")

2 On the **Upload Document** page, click **Browse.**

3 Select the file in the **Choose file** window, click **Open**, and then click **OK**.

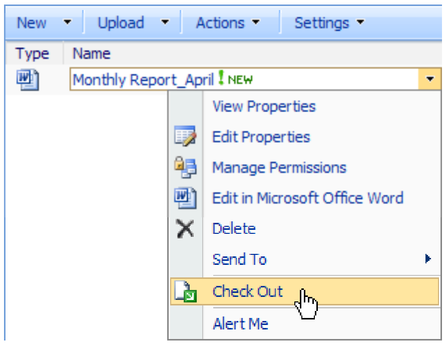
Edit Documents

Before making changes to a document, use the Check Out feature to prevents others from editing the document while you are working on it.

1 Navigate to the Document Library where the file is stored.

Tip If you have trouble finding the right library, go to the Quick Launch, and then click **Documents** to view all document libraries.

2 Point to the document, click the arrow next to it, click **Check Out**, and then click **OK**.



A dialog box asks if you want to work with a local copy of the file. This is the default behavior.

The Word icon changes to indicate that the file is checked out.

3 Click the file name of the document, and then click **OK**.

4 When you have finished editing the document, save it and close the file, and then click **Yes**.

5 In the **Check In** dialog box, enter any comments, and then click **OK**.

Notes

- After you check out and edit a document, be sure to check it back in.
- If you edit a local copy of a file, you must check it in before others can see your changes.

Save Versions of Documents

To save a copy of the document each time a change is made, activate Version Control. This way, you can review changes made in each version and return to a prior version if necessary.

Note Version Control is turned off by default.

1 Navigate to the document library, click **Settings**, and then click **Document Library Settings**.

2 Under **General Settings**, click **Versioning settings**.

3 On the **Document Library Versioning Settings: [document library]** page, under **Document Version History**, click **Create major versions**, and then click **OK**.

Notes

- Saving multiple versions of a document uses more space on your site.
- To view previous versions of your documents, click the arrow next to the file name, and then click **Version History**.

Delete Prior Versions of Documents

If you have Version Control activated, a new copy of your document is saved every time it is changed. Because multiple copies take up more space on the site, it is good practice to delete versions you no longer need.

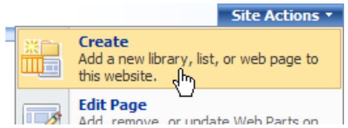
1 Navigate to the Document Library, point to the file name, click the arrow, and then click **Version History**.

2 On the **Version Saved for [file name]** page, click **Delete All Versions**. All prior versions of the document are deleted. The most recent version is retained.

Create a New Document Library

Creating additional document libraries is a good way to consolidate a set of documents related to a specific topic or project.

1 Click **Site Actions**, and then click **Create**.



2 On **Create Page**, under **Libraries**, click **Document Library**.

3 On the **New** page, complete the form, and then click **Create**.

Create an Alert for a Document Library

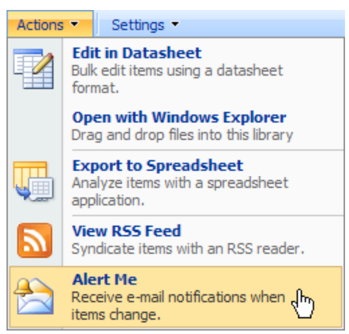
Have messages sent to you when changes are made to library documents.

1 Navigate to the Document Library you want to receive alerts about.

Tip To find the right library, go to the left navigation menu, and then click **Documents** to view all document libraries.

2 On the **[library name]** page, click **Actions**, and then click **Alert Me**.

3 On the **New Alert** page, complete the form, and then click **OK**.



Give Access to Your Site

By default, there are three groups used for allowing access to a site: Visitor, Member, and Owner. When you add a user to a group, the user is given the permission level associated with the group.

To grant this permission level	Add to this group
Read: User can view site content.	**Visitor**
Contribute: User can view and edit site content.	**Member**
Full Control: User can view and edit site content, and modify site settings.	**Owner**

1 From within the site, on the left navigation menu, click **People and Groups**.

2 On the **People and Groups** page, at the top of the left navigation menu under **Groups**, click the group with the permissions you want to grant to your users.

3 On the **New** menu, click **Add Users**. On the **Add Users** page, in the **Users** text box, type the alias of the user you want to add. To add more than one user, separate each alias with a semicolon.

4 Click **Add users to a SharePoint group**. The group you previously specified is selected.

5 Select the **Send welcome e-mail to the new users** check box to send an e-mail alerting users they have been granted access to the site. You may also add a personalized message. Click **OK**.

Note To assign specific permissions instead of the permissions associated with a group, on the **Add Users** page, click **Give users permission directly**, and then select the check box for the appropriate permission.

Restore Deleted Items

Items in the Recycle Bin are permanently deleted after 30 days. Until that time, you can safely restore a deleted item.

1 On the left navigation menu (Quick Launch), click **Recycle Bin**.

2 Select the check box for one or more items, and then click **Restore Selection**. The restored items return to the section of the site from which they were deleted.

About Meeting Workspaces

A Meeting Workspace is a SharePoint Server 2007 Web site for creating and storing agendas, minutes, documents, and other information about your meetings. You create a Meeting Workspace at the same time you create an Microsoft® Office Outlook® 2007 meeting request.

Topics in this guide:

- Create a Meeting Workspace
- Link a Meeting Request to an Existing Workspace
- Change Workspace Permissions
- View an Existing Workspace
- Apply Agenda Items Across All Meetings
- Delete a Workspace

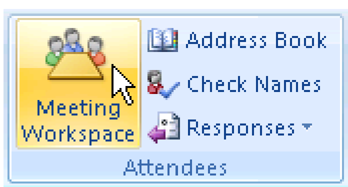
Create a Meeting Workspace

When you create a Meeting Workspace from within an Outlook 2007 meeting request, SharePoint Server 2007 gives your attendees access to the workspace.

Note To create a workspace from a meeting request, you must have Site Owner permissions (Full Control) to the site where you create the workspace. The default location for your workspace is your My Site.

1 In Outlook 2007, create a meeting request.

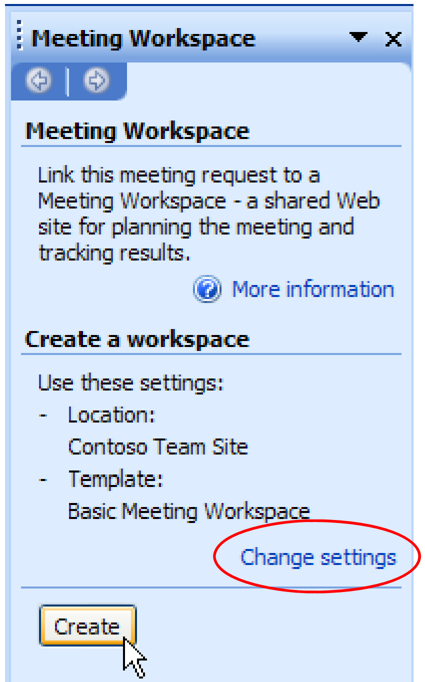
2 On the **Meeting** tab of the meeting request, in the **Attendees** group, click **Meeting Workspace**.



3 In the **Meeting Workspace** task pane, review the default settings for the new workspace. You'll see where the workspace will be located and what type of site template will be used.

- To accept the default settings, click **Create**.
- To change the default settings, click **Change settings**. In the **Select a location** list, click the site to put your Meeting Workspace on. If your meeting is a recurring team meeting, you may want to put the Meeting Workspace on your Team Workspace on your Team Site. If your Team Site is not listed, click **Other**, and then type the URL of your Team Site. **Note** Do not include .aspx.

In the **Select a template type** list, click the template you want. The Basic Meeting Workspace contains standard items to start with. Click **OK**, and then click **Create**.



4 In the meeting request, type a message if necessary, and then click **Send**. The meeting request is sent with a link to the Meeting Workspace.

5 To add content to the Meeting Workspace, go to it by right-clicking the meeting on your calendar, and then clicking **View Meeting Workspace**.

Link a Meeting Request to an Existing Workspace

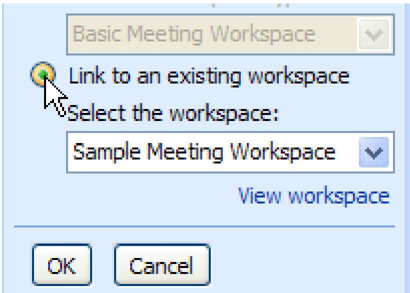
If you already have a Meeting Workspace, you can link it to an Outlook 2007 meeting request.

1 Open a new or existing meeting request. On the **Meeting** tab, in the **Attendees** group, click .

2 In the **Meeting Workspace** task pane, under **Create a Workspace**, click **Change settings**.

3 Under **Select a Location**, click a site.

4 Under **Select a workspace**, click **Link to an existing workspace**.



5 In the **Select the workspace** list, click a workspace, and then click **OK**.

6 Under **Link to a workspace**, click **Link**.

Notes

- To find a Meeting Workspace on a Team Site, go to the left navigation menu (Quick Launch), and look under **Sites**. Meeting Workspaces should be listed there. If your Workspace is not listed, at the top of the navigation pane, click **View All Site Content**. Meeting Workspaces are listed under **Sites and Workplaces**.
- To find a Meeting Workspace on a My Site, go to the left navigation menu and click **View All Site Content**. Meeting Workspaces are listed near the bottom of the page.

Change Workspace Permissions

Meeting organizers are automatically added to the Attendees list and they are assigned Full Control permissions to the Meeting Workspace. Other attendees are assigned Contribute permissions. Organizers may change attendee permissions at any time.

1. On the **Meeting Workspace** home page, under **Attendees**, click **Manage attendees**.
2. On the **Attendees** page, under **Settings**, click **List Settings**.
3. On the **Customize Attendees** page, under **Permissions and Policies**, click **Permissions for this list**.
4. On the **Permissions: Attendees** page, under **Actions**, click **Manage Permissions of Parent**.
5. On the **Permissions: *[workspace name]*** page, select the check boxes of the users or groups for whom you want to change permissions.
6. Under **Actions**, click **Edit User Permissions**.
7. On the **Edit Permissions: *[workspace name]*** page, assign new user or group permissions. When you have finished, click **OK**.

View an Existing Workspace

Access a Meeting Workspace from a meeting request, from a meeting reminder, from your Outlook calendar, or from a SharePoint site.

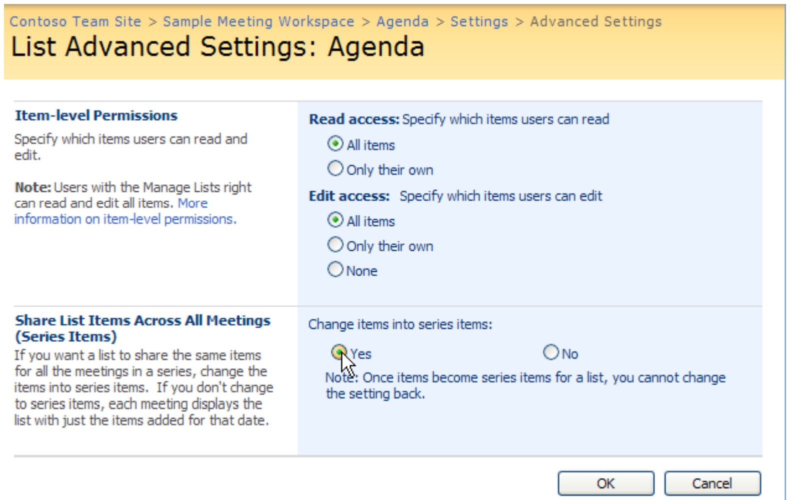
To access from	Do the following
A meeting request	Click the link to the Meeting Workspace.
A meeting reminder	On the **Meeting Services** list, click **View Meeting Workspace**.
An Outlook 2007 calendar	Right-click a meeting or appointment, and then click **View Meeting Workspace**.
A SharePoint Server 2007 site	In the left navigation menu (Quick Launch), click **View All Site Content**. On the **All Site Content** page, under **Sites and Workspaces**, click your Meeting Workspace.

Apply Agenda Items Across All Meetings

To have the same agenda items appear from meeting to meeting, change them into series items.

1. On the **Meeting Workspace** home page, on the **Agenda** title bar, click **Agenda**.
2. Under **Settings**, click **List Settings**.
3. On the **Customize Agenda** page, under **General Settings**, click **Advanced settings**.

4 On the **List Advanced Settings: Agenda** page, next to **Share List Items Across All Meetings**, click **Yes**, and then click **OK**.



Delete a Workspace

1 Under **Site Actions**, click **Site Settings**.

2 Under **Site Administration**, click **Delete this site**.

3 On the **Delete Web Site** page, click **Delete**.

Notes

- Deleting a Meeting Workspace deletes all information on the Meeting Workspace site. It does not delete meeting information contained in Outlook 2007. To do this, open the meeting request in Outlook 2007.
- Canceling or deleting a meeting in Outlook 2007 does not delete the Meeting Workspace associated with it.
- To recreate a deleted meeting request with a link to a Meeting Workspace, you must manually re-establish the link. See “Link a Meeting Request to an Existing Workspace” earlier in this guide for information on how to do this.
- Don't cancel a meeting request in order to send a new one with changed details. Instead, send an updated meeting request to attendees. This maintains the existing link between the meeting request and the Meeting Workspace.

About Document Collaboration

SharePoint Server 2007 sites help you to collaborate with others on the corporate network. The integration between SharePoint Server 2007 and the Microsoft Office® system brings together many powerful features for collaborating on documents. For example, using Microsoft Office® Word 2007, you can create a Document Workspace to collaborate with others on a document at a central location.

Topics in this guide:

- Create a Document Workspace
- Invite Others to Collaborate on a Document
- Collaborate on a Document
- Use Version Control
- Delete a Document Workspace

Create a Document Workspace

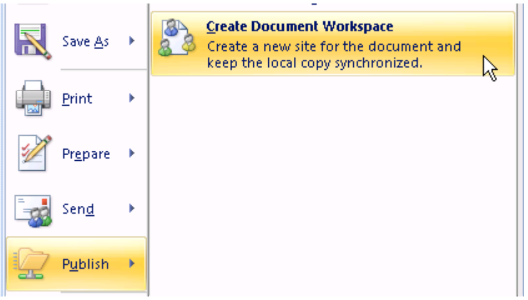
A Document Workspace is a document collaboration site created within an existing site. When you create a Document Workspace from within a Microsoft Office system application, the file is automatically uploaded to the workspace and is ready for collaboration.

1 Open a document you want to collaborate on.

Note Document Workspaces can be created within Word 2007, Microsoft® Office® Excel 2007, Microsoft® Office® PowerPoint 2007, and Microsoft® Office Visio® 2007 Visio.

2 Depending on the application you have open, do one of the following:

- In Microsoft Office Word, Excel, or PowerPoint, click the Microsoft Office button, click **Publish**, and then click **Create Document Workspace**.



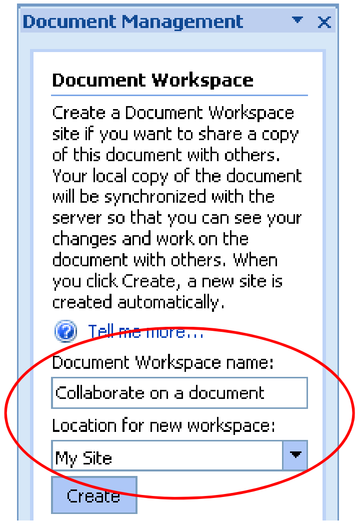
-OR-

- In Visio 2007, on the **Tools** menu, click **Document Management**.

3 In the **Document Management** pane, give your Document Workspace a name. **Note** The file name appears by default.

4 Choose a location for the new workspace. The location list shows you all the parent sites where your workspace may live. You can also type an address that goes directly to a SharePoint Server 2007 site, such as [http://sharepoint/sites/*sitename*](http://sharepoint/sites/sitename).
Tip List the root name for the site without any suffixes.

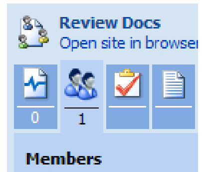
5 To create the workspace, click **Create**.



Invite Others to Collaborate on a Document

Now that you have a Workspace, you can invite others to collaborate.

1 Open the document. In the **Document Management** pane, click the **Members** tab. Near the bottom of the pane, click **Add new members**.



Note The **Document Management** pane should appear automatically when you open the document. If it does not:

- In Microsoft Office Word, Excel, or PowerPoint, click the Microsoft Office button, click **Server**, and then click **Document Management Information**.
- In Visio 2007, on the **Tools** menu, click **Document Management**.

2 In the **Add New Members** window, add e-mail addresses or user names of those you want to work on your file. Separate addresses or names with semicolons.

Note By default, your invitees are given Contributor permissions. This means they can edit and save documents in the workspace. SharePoint uses site groups to manage different permission levels for users. To assign different permissions, click a site group from the list.

3 Click **Next**, and then **Finish**.

4 In the **Add New Members** window, select the **Send an e-mail invitation to the new members** check box. You can see and edit the message before sending it..

5 Add any other information you would like to provide, and then click **Send**.

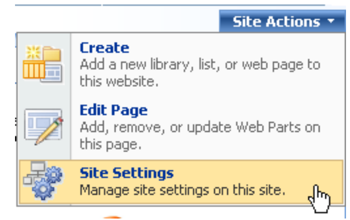
Add New Members From the Document Workspace

Note It is important to limit the availability of sensitive data posted on your site to only those you have given permission to access the data.

1 Open the document. In the **Document Management** pane, under the Document Workspace name, click **Open site in browser**.

2 In your Document Workspace, at the top of the page, click **Site Actions**, and then click **Site Settings**.

3 Under **Users and Permissions**, click **People and groups**, click **New**, and then click **Add Users**.

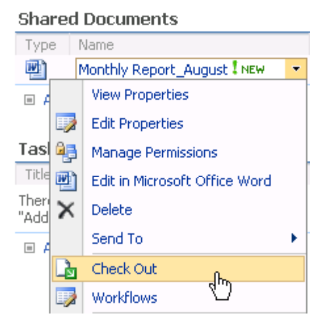


Collaborate on a Document

With your workspace created and your users given permission to the workspace, you can begin working on the document. Generally, a user goes to the workspace, checks out the document, edits it, and then checks it back in. This checkout procedure ensures that no one introduces changes to the document while someone else is working on it.

1 Go to the Document Workspace and move your pointer over the document you want to work on. When the arrow appears, click it, and then click **Check Out.**

2 When a message appears asking whether to use the local drafts folder, click **OK**.



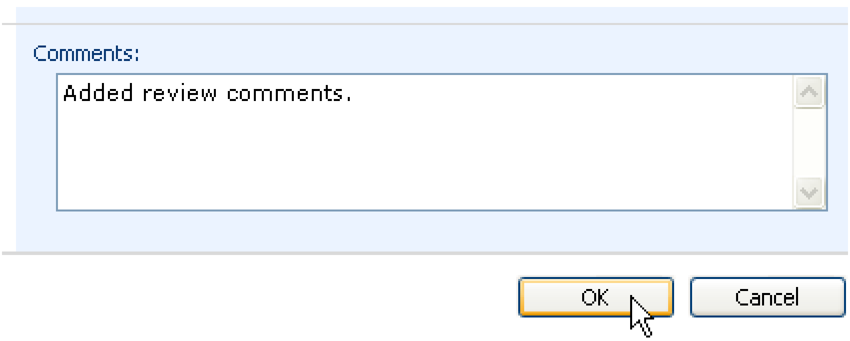
3 To work on the checked-out document, click again, and then click **Edit in [*application*]**.

4 Make your changes, and then save and close the document.

5 In the **Check In** dialog box, click **Check in file**, and then click **OK**. (You can also click **Keep checked out**, which saves your changes to the document, but keeps the fie checked out to you.)

6 Click the type of version you want to check in. For more information, see the next procedure.

7 Enter comments in the **Check In Comments** box, and then click **OK.**



Tips

- To keep a record of all changes made to the document, activate version control. See "Use Version Control" later in this guide for more information.
- To receive a notice whenever a change is made to a document, click next to the document, click **Alert Me**, fill out the form, and click **OK**.

Use Information Rights Management to Protect Lists and Libraries

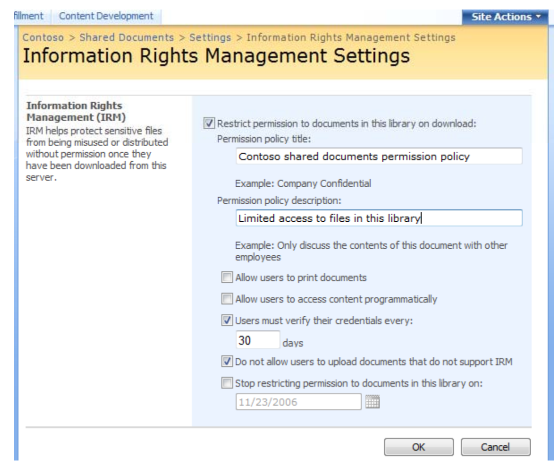
Use Information Rights Management (IRM) to limit the actions users can take on files they download from your SharePoint Server 2007 lists or libraries. When you set IRM permissions on a list or library, all files in that list or library automatically inherit those permissions.

Note You must have at least the Design permission level to apply IRM.

1 On the list or library page, on the **Settings** menu, click **List Settings** or **Document Library Settings**.

2 Under **Permissions and Management**, click **Information Rights Management**.

3 On the **Information Rights Management Settings** page, select the **Restrict permission to documents in this library on download** check box. Select the options you want, and then click **OK**.



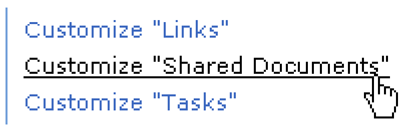
Use Version Control

You can save a version of your document each time it changes by using version control. Version control is useful for keeping a record of changes and for restoring a document to a previous version if necessary.

1 On your Document Workspace, at the top of the page, click **Site Actions**, and then click **Site Settings**.

2 Under **Site Administration**, click **Site libraries and lists**.

3 On the **Site Content** page, click **Customize "Shared Documents."**



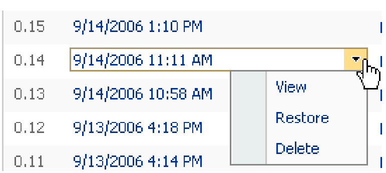
4 On the **Customize Shared Documents** page, under **General Settings**, click **Versioning settings**.

5 On the **Document Library Versioning Settings: Shared Documents** page, under **Create a version each time you edit a file in this document library**, do the following:

- To create major versions only, click **Create major versions**.
- To create major and minor versions, click **Create major and minor (draft) versions**.

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

7 To see the versions of your document, click next to the document, and then click **Version History**. To view, restore, or delete a version, click next to the version, and then click the appropriate option.



Delete a Document Workspace

When your document collaboration is complete and you have saved your work elsewhere, delete your workspace. This frees space on the servers for other users.

1 On your Document Workspace, at the top of the page, click **Site Actions**, and then click **Site Settings**.

2 Under **Site Administration**, click **Delete this site**.

3 On the **Delete This Site** page, click **Delete**.

Note To delete individual documents in the workspace, click next to the document name, and then click **Delete**.

About SharePoint Server 2007 My Sites

Use your My Site to store files and collaborate with your co-workers online. My Sites have public and private pages. Use your public page (called the "My Profile" page) to share files and information with coworkers, and use your private page (called the "My Home" page) to store files and information that only you can access.

Topics in this guide include:

- Access Your My Site
- Edit Your Profile
- Restrict Visitor Access to Information
- Customize the My Home Page
- Change the My Home Page Layout
- Upload a Document
- Create a Document Library
- Create A Document Workspace

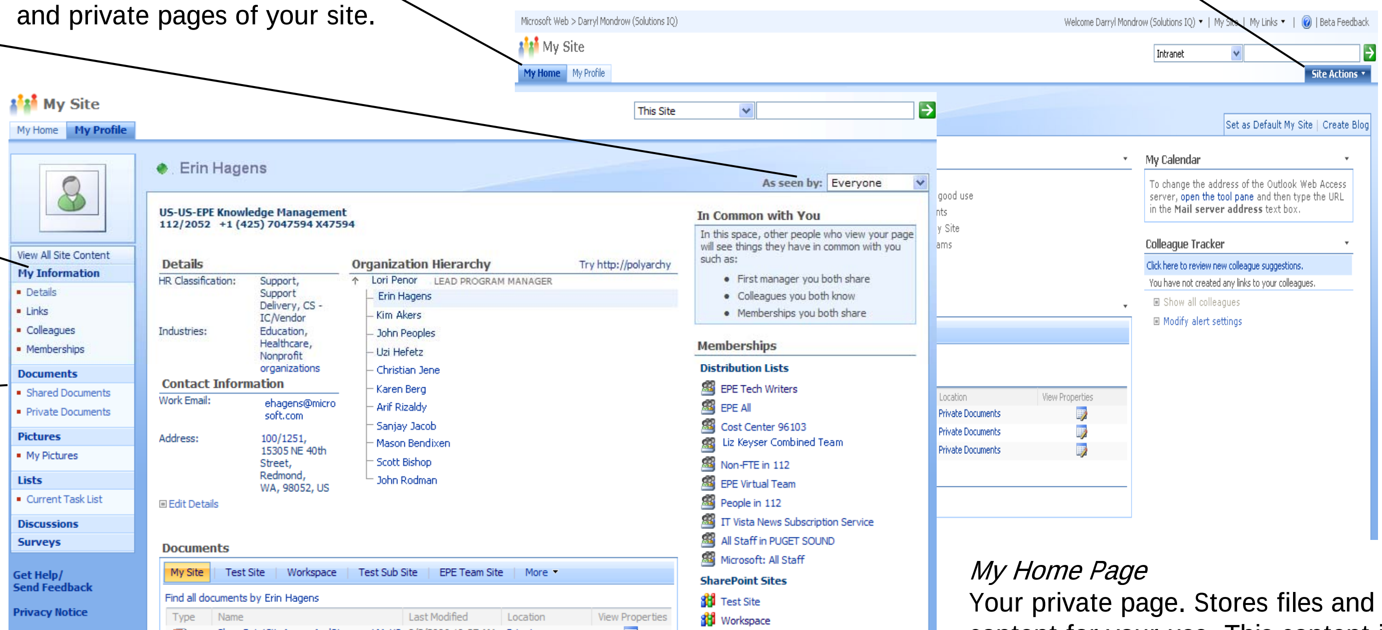
As Seen By List
Restrict what others can see, and then preview your My Profiles page as others see it.

Tabs
Click tabs to access the public and private pages of your site.

Site Actions Menu
Add content, edit page, or change site settings.

My Information
Edit your profile page.

Left Navigation Menu (Quick Launch)
Get quick access to your site content.



My Home Page
Your private page. Stores files and content for your use. This content is not publicly displayed.

My Profile Page
Your public page. Displays information about you and your work to your coworkers.

Access Your My Site

To access your my Site, contact the SharePoint Server 2007 Administrator for your organization.

Your My Site opens on your My Home page (your private page). To switch to your My Profile page (your public page), click the **My Profile** tab.

To switch to your My Profile page (your public page), click the **My Profile** tab.

Edit Your Profile

Your My Profile page is a way for others to learn about you and your expertise, projects, and colleague relationships. Although you can limit who views your shared information, the more you share with everyone, the easier it becomes for others to network with you.

1. On your My Home page, in the left navigation menu (Quick Launch), click **Profile**.

2. On the **Edit Profile** page, in the **About me** box, type descriptive text about yourself (for example**,** where you live, how long you've been with the company, your hobbies).

3. To add a photograph of yourself, click **Choose Picture**, and then in the **Upload Picture** dialog box, do one of the following:
   - To use your cardkey photo, click **Select your cardkey photo**, and then click **OK**.
   - To use another photo, click **Select a photo to upload**, browse to the photo and select it, click **Open**, and then click **OK**.

4. For each of the remaining text boxes on the Edit Profile page, do one of the following:
   - Type appropriate text in the text box.
   - If there is a **Browse** button to the right of the text box, click it. In the dialog box that opens, make your selections, and then click **OK**.

Tip After entering the appropriate values in each text box, if there is a Check Values or Check Names button to the right of the box, click it to verify the validity of the values entered in the box.

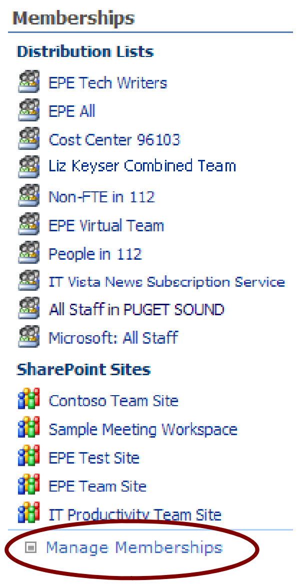
5. In the **Show To** column, select the audience who will be able to see the corresponding profile entries. (Only the selected audience can see the information on your My Site.) When you are finished, click **Save and Close**.

Restrict Visitor Access to Information

Use privacy categories on your My Profile page to restrict the information visitors can see. Among the parts of your site you can restrict are membership lists, links, and your colleagues list. The following illustrates how to edit the Memberships area.

Note You cannot change the layout of the My Profile page.

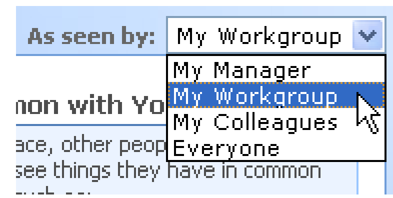
1. On your My Profile page, at the bottom of the **Memberships** area, click **Manage Membership**.
2. On the **My Memberships** page, select the check boxes of the list items you want to restrict, and then click **Edit Memberships**.
3. On the **Show these memberships to** list, click the category of site visitors you want to be able to view the memberships you specified in the previous step. The farther down the list, the more restrictive the group.
4. If you want the selected memberships to be grouped together for sorting purposes, click **New group**, and then enter a name for the group. Otherwise, accept the default **Existing group**, and then click **OK**.



View Your My Site As Others See It

Ensure that you're exposing only the information you wish to by viewing your My Profile page as others see it.

1. On your My Profile page, on the **As seen by** list in the upper-right corner, click one of the following privacy categories: **My Manager, My Workgroup, My Colleagues, Everyone.** The page then refreshes.



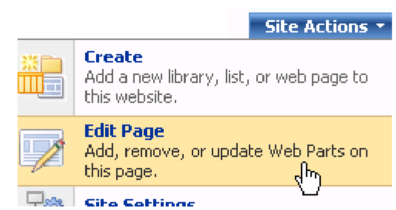
2. Notice that the refreshed page is the one that will be seen by the members of the particular privacy category that you selected.

Customize the My Home Page

The main area of the My Home page is customizable. You can display almost any type of content by adding new sections such as your files, tasks, calendar, news, and alerts—whatever best helps you organize your daily activities.

Customize the My Home page with Web Parts. Web Parts are content "containers" used to display information on your site. Use Web Parts to arrange text, related links, calendars, images, document libraries, other Web pages, and more.

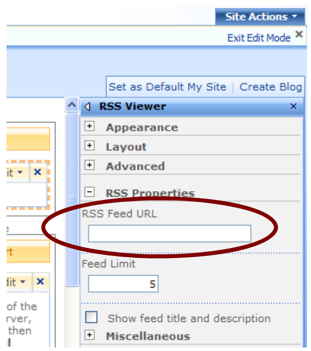
1. On the **My Home** page, on the **Site Actions** menu, click **Edit Page**.



2 At the top of the zone in which you want to add a Web Part, click **Add a Web Part**.

3 In the **Add Web Parts to [zone]** list, select the desired Web Part (for example, **RSS Viewer**), and then click **Add**. In the **RSS Viewer** Web Part, click **open the tool pane**.

4 In the tool pane, under **RSS Properties**, enter the URL of the desired RSS link, and then click **OK**.



5 When you have finished, below the **Site Actions** menu in the upper right, click **Exit Edit Mode** to return to the normal page.

Notes

- Use the tool pane to adjust appearance and layout. To open the tool pane, click to the right of the Web Part title, and then click **Modify Shared Web Part**.
- Never use a copyrighted image on your site without obtaining permission from the copyright holder.

Change the My Home Page Layout

1 On your **My Home** page, on the **Site Actions** menu, click **Edit Page**.

2 Drag Web Parts by their title bars into other zones on the page.

3 For additional layout options, click to the right of a Web Part title, and then click **Modify Shared Web Part**.

4 To close a Web Part, click to the right of the Web Part title.

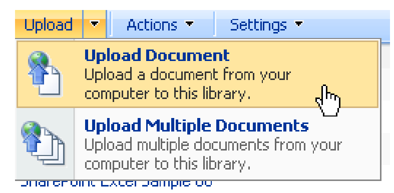
Note Closing a Web Part removes it from the page, but does not delete it.

5 When you have finished, click **Exit Edit Mode** to return to the normal page.

Upload a Document

Two default libraries, **Shared Documents** and **Private Documents**, are included with your My Site. You may also create your own, customized libraries.

1 Navigate to the Document Library in which you want to store your documents. On the **Upload** menu, click **Upload Document**.



2 On the **Upload Document: [document library]** page, click **Browse** to find a single document to upload.

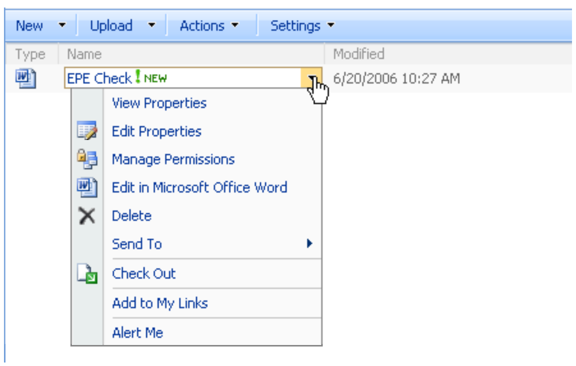
3 In the **Choose file** window, select the file, click **Open**, and then click **OK.**

4 Add descriptive information if desired, and then click **OK**.

Note Upload multiple documents from the same folder by clicking **Upload Multiple Documents**, navigating to the desired folder, and then selecting the check boxes of the files you want to upload.

Check Out and Edit a Document

1 In a Document Library, locate the document that you want to check out. Point to the document, click the arrow, and then click **Check Out**.



2 To edit your checked-out document, click the down arrow again, and then click **Edit in [Software Application]**.

Check In a Document

1 In a Document Library, locate the document that you want to check in. Point to the document, click the arrow, and then click **Check In**.

2 On the **Check in** page, under **Document Check In**, choose the appropriate option. Under **Comments**, enter optional comments, and then click **OK**.

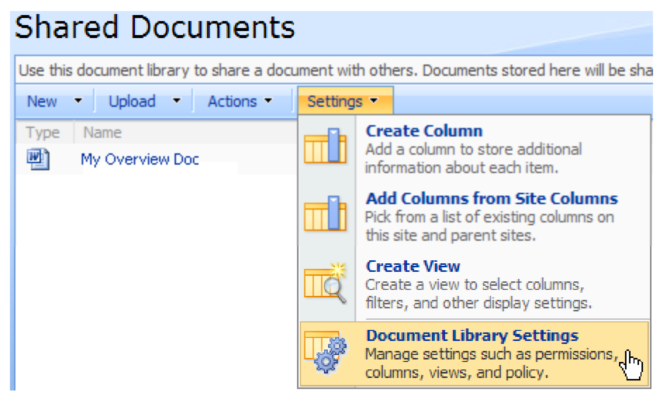
Control Access to a Document Library

To allow only specific users access to a Document Library, change the permission settings for that Document Library.

1 On the **My Home** page, on the left navigation menu, click **Documents**.

2 Under **Document Libraries**, click the library for which you want to create distinct permissions.

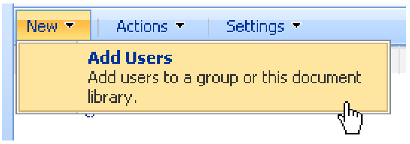
3 On the Document Library page, on the **Settings** menu, click **Document Library Settings**.



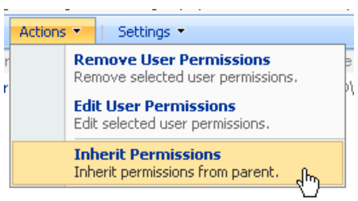
4 Under **Permissions and Policies**, click **Permissions for this document library**. On the **Actions** menu, click **Manage Permissions of Parent**.

5 Perform one of the following steps:

- Click one of the site groups and change permissions for that group.
- Click one or more specific users and change permissions for those users.
- On the **New** menu, click **Add Users**. Add new, specific users to the library, and apply distinct permissions during the Add Users process.



Note To automatically apply the general site permissions to a Document Library, at the top of the **Permissions** page for the library, on the **Actions** menu, click **Inherit Permissions**. This link does not appear if general permissions already apply to the library.



Create a Document Library

1 On the **My Home** page, on the left navigation menu, click **Documents**, and then click **Create**.

2 On the **Create Page**, under **Libraries**, click **Document Library**.

3 On the **New** page, give the Document Library a name and a description, and choose whether to display the library on the left navigation menu. You can also choose whether to create document versions, and whether to select a default document template.

4 When you have finished, click **Create**.

Create a Document Workspace

1 Go to your My Home page, click **Documents**, and then click **Create**.

2 In **Create Page**, under **Web Pages**, click **Sites and Workspaces**.

3 Complete the **New SharePoint Site** form. Under **Template Selection**, select **Document Workspace**.

4 When you have finished, click **Create**.

Note The default location of a Workspace is in the My Profile page. Only users with proper permissions can see the Workspaces.

About Surveys

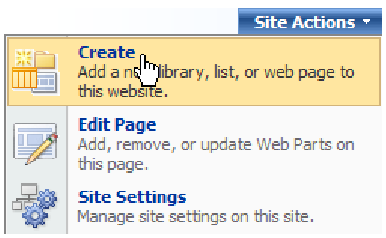
SharePoint Server 2007 surveys offer a quick and easy way to gather user opinions about products, features, designs, and ideas—and to measure user satisfaction concerning services, programs, and deployments. This guide explains how to create and distribute surveys.

Topics in this guide:

- Create a Survey
- Enable Branching
- Preview a Survey
- Send a Survey Link
- View Results

Create a Survey

1 Open your SharePoint Server 2007 site, and on the **Site Actions** menu, click **Create**.

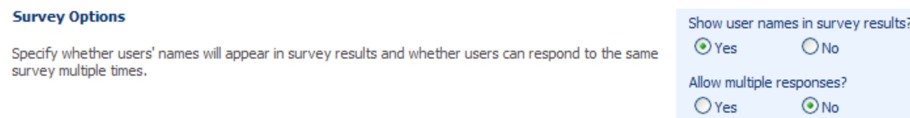


2 On the **Create** page, under **Tracking**, click **Survey**.

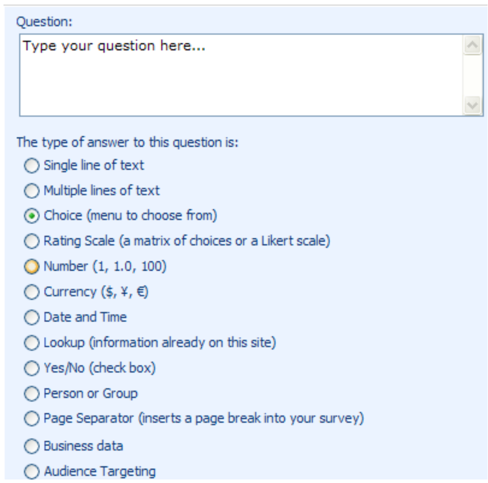
3 On the **New** page, type a name and description for your survey.

4 In the **Navigation** section, click an option to determine whether you want a link to the survey to appear in the left navigation menu (Quick Launch) of your home page.

5 In the **Survey Options** section**,** click an option to determine whether users' names will appear in survey results, and then whether users can respond to the same survey multiple times. Click **Next**.



6 On the <***Survey Name***>**: New Question** page, in the **Question** box, type the question you want to ask, and then select the type of answer you want.



Tip When choosing answer types, consider how you want to use the collected data. You can easily compare responses to multiple-choice, numerical-rating, and yes-or-no questions, while open-ended questions are more difficult to compare. However, open-ended questions might provide information you cannot get from other types of questions.

7 In the **Additional Question Settings** section, select the other options that you want for the answer. The available options depend on the type of answer you selected.

Note For information on enabling branching for a question, see the following procedure.

8 To add more questions to the survey, click **Next Question**.

9 After adding all the questions, click **Finish** to save the survey.

Enable Branching

Branching lets you simplify your surveys for your respondents by displaying only questions that are relevant to each respondent. Questions that are not relevant are not displayed. The relevance is determined by the respondent's answer to the preceding question.

For example, you might have the following questions in your survey:

1. Are you using Windows Vista™? (choices: Yes or No)
2. What version are you using? (choices: Beta or Released)
3. How much RAM does your computer have?

If a survey respondent's answer to question 1 is "No," question 2 becomes irrelevant. Using branching, only respondents who choose "Yes" for question 1 will be asked question 2. All others are taken directly to question 3.

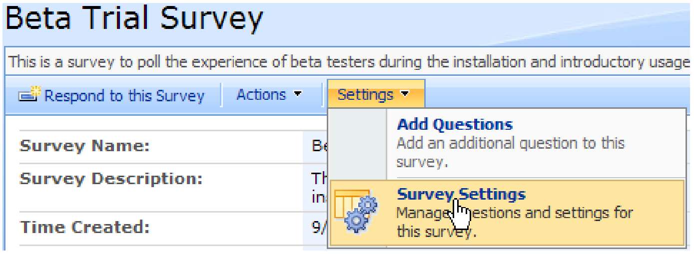
Set Branching Logic for a Question

Branching is set on the question whose answer determines the relevance of the subsequent questions. In the above example, branching would be set on question 1.

1 Create your survey. Then, on your site, on the left navigation menu, click **Surveys**.

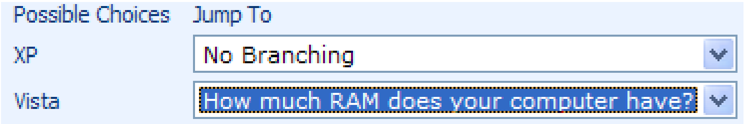
2 On the **All Site Content** page, under **Surveys**, click the survey name.

3 On the <***Survey Name***> page, on the **Settings** menu, click **Survey Settings**.



4 On the **Customize <*Survey Name*>** page, in the **Questions** section, click the question to set branching on.

5 On the **Edit Question: <*Survey Name*>** page, in the **Branching logic** section, on the **Jump To** list for the appropriate choice, click the question to jump to when this answer is chosen by the survey respondent.



6 When you have finished, click **OK**.

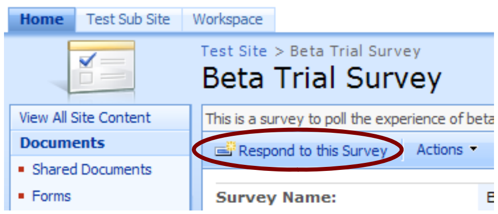
Preview a Survey

After creating a survey, it is a good idea to preview it to confirm it looks and operates as you intended.

1 On your site, on the left navigation menu, click **Surveys**.

2 On the **All Site Content** page, under **Surveys**, click the survey name.

3 On the <***Survey Name***> page, click **Respond to this Survey**.



4 Preview the survey.

5 When you have finished, click **Back**.

Send a Survey Link

After confirming that your survey operates as intended, send the survey. Rather than sending an e-mail message with a link to the home page of a team site, you can send a URL that takes survey recipients directly to the survey.

1 On your site, on the left navigation menu, click **Surveys**.

2 On the **All Site Content** page, under **Surveys**, click the survey name.

3 On the <***Survey Name***> page, click **Respond to this Survey**.

4 When the survey opens, copy the survey address in the browser Address Bar.

5 Create an e-mail message, and paste the survey address into the message. Your respondents will be able to click the link to go directly to the survey.

Tip When drafting the e-mail message to survey recipients, be sure to include the following: 1) a concise description of what data the survey will collect, 2) an explanation of how this data will be used, 3) how long the survey will take to complete, and 4) whether the survey is anonymous.

View Results

When users respond to your survey, your site stores their responses. You can then view individual survey responses or view a graphical summary showing all responses.

View an Individual Survey Response

1 On your site, on the left navigation menu, click **Surveys**.

2 On the **All Site Content** page, under **Surveys**, click the survey response you want to view.

3 On the <***Survey Name***> page, click **Show all responses**.

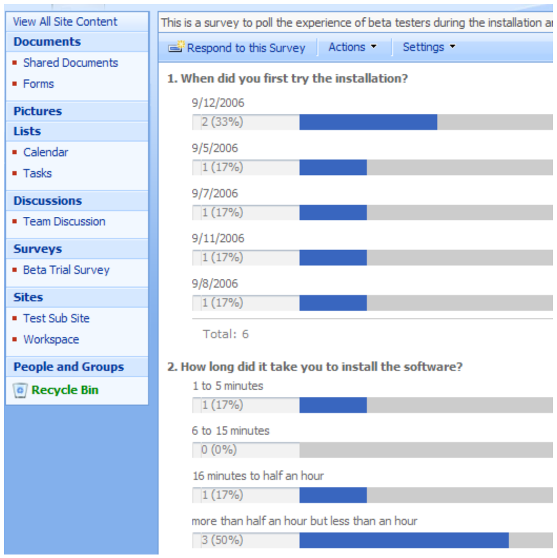
4 In the **View Response** column, click the response you want to view.

View a Graphical Summary of Survey Responses

1 On your site, on the left navigation menu, click **Surveys**.

2 On the **All Site Content** page, under **Surveys**, click the survey response you want to view.

3 On the <***Survey Name***> page, click **Show a graphical summary of responses**. An example of a graphical summary is shown below:



About SharePoint Server 2007 Web Parts

Web Parts are content "containers" used to display information on your site. Use Web Parts to arrange text, related links, calendars, images, Document Libraries, other Web pages, and more. This guide references SharePoint Server 2007.

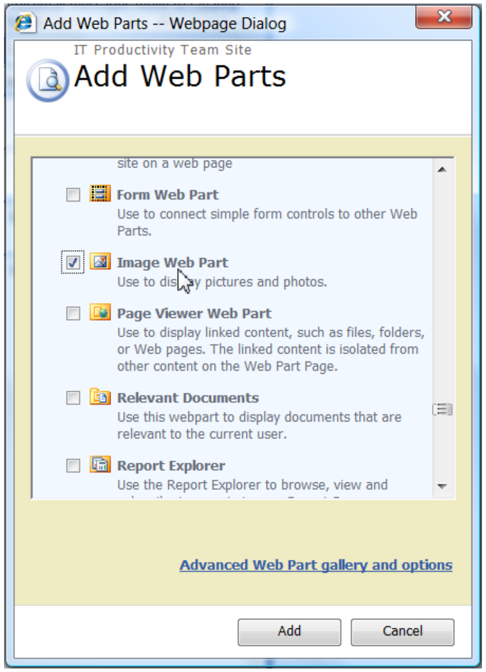
Topics in this guide include:

- Add a Web Part
- Delete a Web Part
- Display Content on Your Site
- Add Customized Content
- Modify the Appearance of Web Parts

Add a Web Part

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

2 At the top of the zone in which you want to add the Web Part, click **Add a Web Part**. In the **Add Web Parts to [*zone*]** dialog box, select the check box of the Web Part you want to add—this example uses the **Image Web Part—**and then click **Add**. The **Image Web Part** is displayed in the zone.



Tip Here's another way to view the Web Parts list: In the **Add Web Parts to [*zone*]** dialog box, click **Advanced Web Part Gallery and options**. In the tool pane, click the Web Part collection called **[your team site name] Gallery**. The Web Parts list is displayed alphabetically.

3 In the **edit** menu of the **Image Web Part**, click **Modify Shared Web Part**.

4 In the tool pane, under **Image Link**, enter the image URL or path, and then click **OK**.

5 When you have finished, click **Exit Edit Mode** to return to the default view.

Close a Web Part

When you close a Web Part, the Web Part is removed from the page. You can restore closed Web Parts later, as needed.

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

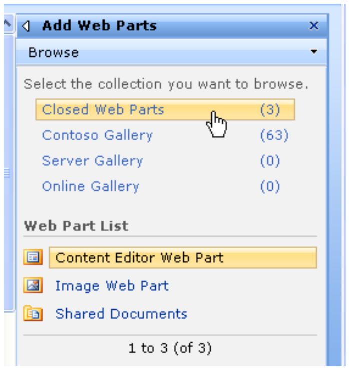
2 Click the  in the title bar of the Web Part you want to close. The Web Part is removed from the page.

3 When you have finished, click **Exit Edit Mode** to return to normal view.

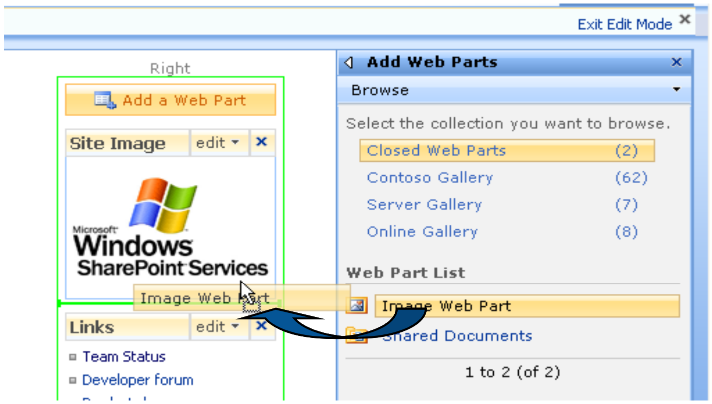
Restore a Closed Web Part

1 To restore a closed Web Part to the page, click **Site Actions**, and then click **Edit Page.**

2 In any zone, click **Add a Web Part**. In the **Add Web Parts to [*zone*]** dialog box, click **Advanced Web Part gallery and options**. The Web Part you closed appears in the **Closed Web Parts** collection.



3 Drag the Web Part title from the list to the desired zone location.



4 When you have finished, click **Exit Edit Mode** to return to normal view.

Delete a Web Part

When you delete a Web Part, the Web Part is permanently removed from the page.

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

2 In the **edit** menu of the Web Part you want to delete, click **Delete**, and then click **OK**.

3 When you have finished, click **Exit Edit Mode** to return to normal view.

Move a Web Part

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

2 Drag the Web Part heading to the desired zone location.

3 When you have finished, click **Exit Edit Mode** to return to normal view.

Display Content on Your Site

With Web Parts, among other actions, you can add images to the home page of your site, display data on a spreadsheet, and add content such as custom formatted text. Three commonly used Web Parts are:

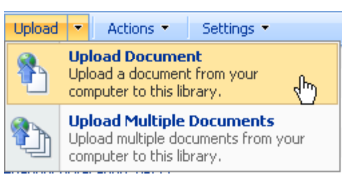
- **Image Web Part**: Displays an image such as a banner or logo on a Web page.
- **Content Editor Web Part**: Displays text content on your site.
- **Page Viewer Web Part**: Displays a linked file, folder, or Web page.

Note There are many more Web Parts available in SharePoint Server 2007.

Display a Banner or Logo

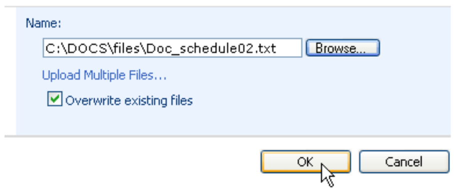
Use the Image Web Part to add a banner or logo to the home page of your site. You must first upload the image to a library.

1 Navigate to the document or picture library in which you want to store the image. On the **Upload** menu, click **Upload Document**.



2 On the **Upload Document: [Document Library]** page or the **Add Picture: [Picture Library]** page, click **Browse** to find the image to upload.

3 Select the file in the **Choose file** window, click **Open**, and then click **OK.**



4 In the left navigation menu (Quick Launch), click either **Documents** or **Pictures**, depending on where the image is stored.

5 If the image is in a Document Library:

- Copy the address of the image by right-clicking the file name, and then clicking **Copy Shortcut**. The shortcut is now copied to the clipboard.

-OR-

If the image is in a Picture Library:

- Click the image thumbnail to view the full image. Copy the address of the image by right-clicking the picture name, and then clicking **Copy Shortcut**. The shortcut is now copied to the clipboard.

Note You will use the image address in step 9.

6 Go to the **Home** page, click **Site Actions**, and then click **Edit Page**.

7 At the top of the zone in which you want the Image Web Part, click **Add a Web Part**. In the **Add Web Parts to [*zone*]** dialog box, scroll down to the **Miscellaneous** section, select **Image Web Part**, and then click **Add**.

8 In the Image Web Part, click **open the tool pane**.

9 In the **Image** area on the right, paste the address of the image, and then click **OK**.

The image is displayed within the Image Web Part.

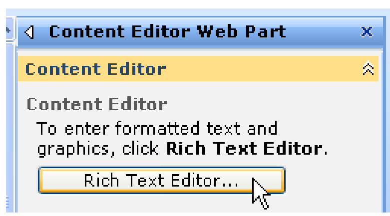
Add Customized Content

Use the Content Editor Web Part to display text content on your site. The Content Editor also enables you to add images, links, or tables.

1 Go to the **Home** page, click **Site Actions**, and then click **Edit Page**.

2 At the top of the zone in which you want to display text, click **Add a Web Part**. In the **Add Web Parts to [*zone*]** dialog box, scroll to the **Miscellaneous** section, select the **Content Editor Web Part** check box, and then click **Add**.

3 In the **Content Editor Web Part**, click **open the tool pane**. In the tool pane, click **Rich Text Editor**.



4 Compose a message and apply text formatting, or insert a picture or table. When you have finished, click **OK**.

5 In the tool pane, click **OK**. The text message is displayed within the Content Editor Web Part.

6 When you have finished, click **Exit Edit Mode** to return to normal view.

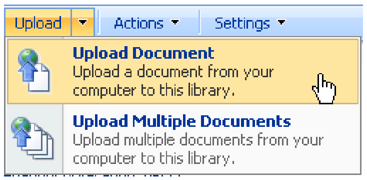
Display a Document or Spreadsheet

When you've uploaded your Microsoft© Office Word 2007 document, Microsoft© Office Excel© 2007 spreadsheet, or Web page, use the Page Viewer Web Part to display it. This Web Part can also be used to view a Web site.

1 Open the document or spreadsheet and save it as a Web page.

2 On your site, click **Documents**, and then click the folder in your Document Library where you will store the Web page you just created.

3 Click **Upload** and then click **Upload Document**. Click **Browse**, and find your document. Click your document, click **Open**, and then click **OK**.



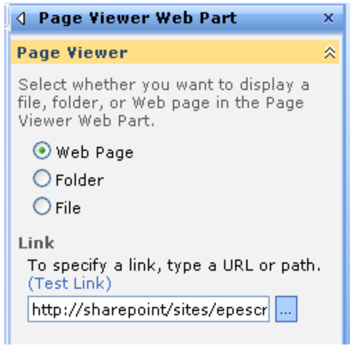
4 Copy the address of the file you uploaded by right-clicking the file name, and then clicking **Copy Shortcut**. You will need this address in step 9.

5 Go to the **Home** page, click **Site Actions**, and then click **Edit Page**.

6 At the top of the zone in which you want the Page Viewer Web Part, click **Add a Web Part**. In the **Add Web Parts to [*zone*]** dialog box, scroll to the **Miscellaneous** section, select the **Page Viewer Web Part** check box, and then click **Add**.

7 In the **Page Viewer Web Part**, click **open the tool pane**.

8 In the **Page Viewer** area on the right, click **Web Page**. Paste the address of the document or spreadsheet, and then click **OK**. The document or spreadsheet is displayed within the Page Viewer Web Part.



9 When you have finished, click **Exit Edit Mode** to return to normal view.

Tip To move a Web Part to a different location on the page, drag the Web Part title to that location.

Modify the Appearance of Web Parts

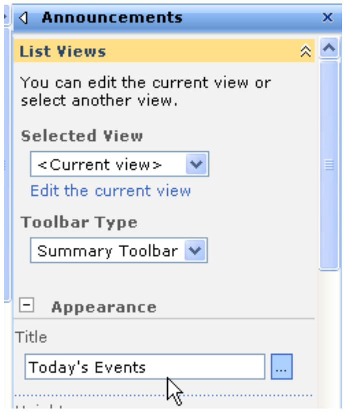
You can modify a Web Part title and size, as well as the view (changing the displayed style, for example).

Modify a Web Part Title

1 Click the arrow to the right of the Web Part title, and then click **Modify Shared Web Part**.

2 In the tool pane, click **Appearance**.

3 In the **Title** box, enter the new title you want displayed on the Web Part, and then click **OK**.



Delete a Web Part Title

A Web Part title is not required; in some cases, it may be beneficial to have no title at all.

1 Click the arrow to the right of the Web Part title, and then click **Modify Shared Web Part**.

2 In the tool pane, click **Appearance**.

3 In the **Chrome Type** menu, click **None**, and then click **OK**.

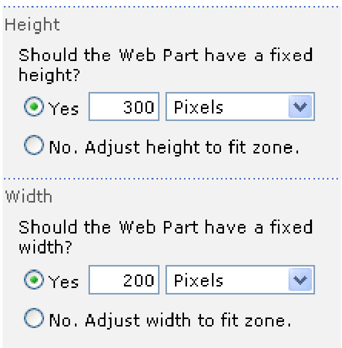
Modify a Web Part Size

1 Click the arrow to the right of the Web Part title, and then click **Modify Shared Web Part**.

2 In the tool pane, click **Appearance**.

3 In the **Height** section, choose **Yes**, and then enter the height you want. To change the unit of measure, click the unit you prefer from the list.

4 In the **Width** section, choose **Yes**, and then enter the width you want. To change the unit of measure, click the unit you prefer from the list.



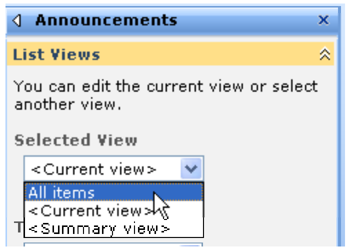
5 To set the Web Part to this new size, click **OK**.

Apply a Web Part View

Use Views to modify the way the information contained in Web Parts is displayed to site users. For example, you can add or delete columns from a view or change the style.

1 On the **Announcements** Web Part, click the arrow to the right of the Web Part title, and then click **Modify Shared Web Part**.

2 In the **Selected View** list, click the view you want, and then click **OK**.



Edit the Current Web Part View

1 On the **Announcements** Web Part, click the arrow to the right of the Web Part title, and then click **Modify Shared Web Part**.

2 Click **Edit the current view**.

3 On the **Edit View: Announcements** page, in the **Columns** section, select the columns you want to display. Click the position from the left in which you want the column to appear.

4 In the **Style** section, select the style you want to display, and then click **OK**.