

THE EXPERT'S VOICE® IN SHAREPOINT

# SharePoint 2007 User's Guide

Learning Microsoft's Collaboration  
and Productivity Platform

*A comprehensive guidebook for users  
of Microsoft SharePoint 2007*

Seth Bates and Tony Smith

apress®

# SharePoint 2007 User's Guide

Learning Microsoft's Collaboration  
and Productivity Platform



Seth Bates and Tony Smith

## **SharePoint 2007 User's Guide: Learning Microsoft's Collaboration and Productivity Platform**

**Copyright © 2007 by Seth Bates and Tony Smith**

All rights reserved. No part of this work may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage or retrieval system, without the prior written permission of the copyright owner and the publisher.

ISBN-13 (pbk): 978-1-59059-829-0

ISBN-10 (pbk): 1-59059-829-6

Printed and bound in the United States of America 9 8 7 6 5 4 3 2 1

Trademarked names may appear in this book. Rather than use a trademark symbol with every occurrence of a trademarked name, we use the names only in an editorial fashion and to the benefit of the trademark owner, with no intention of infringement of the trademark.

Lead Editor: Jonathan Hassell

Technical Reviewer: Aaron Bates

Editorial Board: Steve Anglin, Ewan Buckingham, Gary Cornell, Jason Gilmore, Jonathan Gennick, Jonathan Hassell, James Huddleston, Chris Mills, Matthew Moodie, Dominic Shakeshaft, Jim Sumser, Matt Wade

Project Manager: Kylie Johnston

Copy Edit Manager: Nicole Flores

Copy Editor: Heather Lang

Assistant Production Director: Kari Brooks-Copony

Production Editor: Katie Stence

Compositor: Lynn L'Heureux

Proofreader: Lori Bring

Indexer: Becky Hornyak

Cover Designer: Kurt Krames

Manufacturing Director: Tom Debolski

Distributed to the book trade worldwide by Springer-Verlag New York, Inc., 233 Spring Street, 6th Floor, New York, NY 10013. Phone 1-800-SPRINGER, fax 201-348-4505, e-mail [orders-ny@springer-sbm.com](mailto:orders-ny@springer-sbm.com), or visit <http://www.springeronline.com>.

For information on translations, please contact Apress directly at 2560 Ninth Street, Suite 219, Berkeley, CA 94710. Phone 510-549-5930, fax 510-549-5939, e-mail [info@apress.com](mailto:info@apress.com), or visit <http://www.apress.com>.

The information in this book is distributed on an "as is" basis, without warranty. Although every precaution has been taken in the preparation of this work, neither the author(s) nor Apress shall have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused directly or indirectly by the information contained in this work.

# Contents at a Glance

About the Authors . . . . .	xiii
Acknowledgments . . . . .	xv
Introduction . . . . .	xvii
<b>CHAPTER 1</b> Introduction to SharePoint Technologies . . . . .	1
<b>CHAPTER 2</b> Sites . . . . .	5
<b>CHAPTER 3</b> SharePoint Server 2007 . . . . .	59
<b>CHAPTER 4</b> List Concepts . . . . .	117
<b>CHAPTER 5</b> Lists . . . . .	169
<b>CHAPTER 6</b> Libraries . . . . .	211
<b>CHAPTER 7</b> Workflow and Information Management Policies . . . . .	271
<b>CHAPTER 8</b> Pages and Web Parts . . . . .	297
<b>CHAPTER 9</b> Personalization Features . . . . .	323
<b>CHAPTER 10</b> Document Management Solutions . . . . .	349
<b>CHAPTER 11</b> Project Collaboration Solutions . . . . .	373
<b>INDEX</b> . . . . .	389



# Contents

About the Authors . . . . .	xiii
Acknowledgments . . . . .	xv
Introduction . . . . .	xvii

<b>CHAPTER 1</b>	<b>Introduction to SharePoint Technologies . . . . .</b>	<b>1</b>
	What Is Microsoft SharePoint 2007? . . . . .	2
	Evolution of SharePoint . . . . .	2
	Why Is It Valuable? . . . . .	3
	What Are the Building Blocks? . . . . .	3
<b>CHAPTER 2</b>	<b>Sites . . . . .</b>	<b>5</b>
	Sites Overview . . . . .	6
	Site Layouts . . . . .	7
	Team Sites, Document Workspaces, and Wiki Sites . . . . .	7
	Meeting Workspaces . . . . .	13
	Blog Sites . . . . .	19
	Site Navigation . . . . .	21
	Navigation Through Sites . . . . .	21
	Navigating Within Team Sites, Document Workspaces, and Wiki Sites . . . . .	22
	Navigating Within Meeting Workspaces . . . . .	23
	Navigating Within Blog Sites . . . . .	24
	Navigating Through Sites Using Mobile Devices . . . . .	25
	Creating Sites . . . . .	26
	Creating Subsites in MOSS Sites . . . . .	26
	Creating Subsites in WSS Sites . . . . .	27
	Create a New Document Workspace from a Document in a Site . . . . .	29
	Advanced Site Creation Using Office . . . . .	29
	Managing Site Security . . . . .	32
	Managing SharePoint Groups . . . . .	32
	Changing Permission Inheritance for a Site . . . . .	35
	Managing Permission Levels . . . . .	36
	Managing Site Collection Administrators . . . . .	40

Changing Site Details .....	40
Updating the Site Title, Description, URL, and Logo .....	40
Customizing Navigation Options .....	41
Updating Site Themes .....	46
Resetting Site Definitions .....	46
Configuring Regional Settings for a Site .....	46
Deleting Sites .....	47
Managing Site Templates .....	48
Creating Site Templates .....	48
Editing Site Templates .....	49
Deleting Site Templates .....	50
WSS Site Search .....	50
Working with Search Results .....	50
Managing Site Search Visibility .....	51
Using Site Statistics .....	51
Site Usage Reports .....	51
Using Site Collection Usage Statistics .....	53
Viewing Site Hierarchy .....	54
Managing Site and Site Collection Features .....	55
Recycle Bin .....	56
Viewing Items in the Recycle Bin .....	56
Restoring Items from the Recycle Bin .....	57
Deleting Items from the Recycle Bin .....	57

<b>■ CHAPTER 3    SharePoint Server 2007 .....</b>	<b>59</b>
MOSS Portals .....	59
Collaboration Portal .....	59
Publishing Portal .....	68
MOSS Navigation Enhancements .....	71
Navigation Bar .....	71
Site Actions Menu .....	71
Quick Launch .....	73
Navigation Management .....	74

MOSS Search .....	75
Performing Simple Searches .....	75
Performing Advanced Searches .....	75
Working with Search Results .....	77
Search Scopes .....	77
Search Keywords and Best Bets .....	79
Searchable Columns .....	80
Search Settings .....	81
Managing Site Look and Feel .....	81
Defining the Welcome Page .....	81
Page Layouts and Site Templates .....	82
Master Pages and Style Sheets .....	83
MOSS Site Templates .....	83
Document Center Template .....	84
Records Center Template .....	84
Personalization Site Template .....	86
Site Directory Template .....	88
Report Center Template .....	90
Search Center Template .....	91
Search Center with Tabs Template .....	92
Publishing Site Template .....	93
Publishing Site with Workflow Template .....	95
News Site Template .....	95
Site Creation .....	96
Site Content and Structure Management .....	97
Usage Reports and Auditing .....	99
Site Usage Reports .....	100
Site Collection Usage Reports .....	107
Site Collection Auditing .....	110
Site and Site Collection Features .....	112
Content Variations .....	113
Variation Labels .....	114
Translatable Columns .....	115
Variation Logs .....	115



<b>CHAPTER 4</b>	<b>List Concepts</b>	117
	Creating Lists	117
	Working with Lists	118
	Adding, Editing, and Deleting Items	118
	Filtering and Sorting the List	120
	Using Views	121
	Faster Data Manipulation Using the Datasheet	122
	Folders	123
	Versions	124
	Managing Lists	125
	General Settings	126
	Content Approval	128
	Security	129
	Managing Columns	131
	Managing Views	142
	Creating a List Template	150
	Deleting the List	152
	Advanced List Concepts	152
	Site Columns	152
	Content Types	156
	RSS Feed Settings	161
	Advanced Office Integration	163
	Exporting SharePoint Lists to Excel	163
	Creating Custom Lists Using Excel	165
	Advanced Datasheet Features	167
<b>CHAPTER 5</b>	<b>Lists</b>	169
	Communications	169
	Announcements	170
	Contacts	172
	Discussion Board	175
	Tracking	177
	Links	177
	Calendar	179
	Tasks	187
	Project Tasks	188
	Issue Tracking	190
	Survey	192
	Agenda	195

Custom Lists .....	196
Decisions .....	196
Objectives .....	197
Text Box .....	197
Things to Bring .....	198
Additional Meeting Workspace List Concepts .....	199
Lists for Meetings in Series .....	199
Attendees .....	199
Additional Lists with SharePoint Server 2007 .....	201
KPI List .....	201
Languages and Translators .....	206
Advanced Office Integration .....	207
Exporting SharePoint Lists to Excel .....	207
Advanced Datasheet Features .....	208

<b>CHAPTER 6</b>	<b>Libraries .....</b>	<b>211</b>
	Document Library .....	212
	Creating Document Libraries .....	212
	Working with Document Libraries .....	213
	Managing Document Libraries .....	223
	Form Library .....	232
	Creating Form Libraries .....	232
	Working with Form Libraries .....	232
	Managing Form Libraries .....	236
	Picture Library .....	237
	Creating Picture Libraries .....	238
	Working with Picture Libraries .....	238
	Managing Picture Libraries .....	246
	Wiki Page Library .....	249
	Creating Wiki Page Libraries .....	249
	Working with Wiki Page Libraries .....	249
	Managing Wiki Page Libraries .....	253
	Translation Management Library .....	254
	Working with Translation Management Libraries .....	254
	Report Library .....	255
	Data Connection Library .....	255

Slide Library .....	256
Creating Slide Libraries .....	256
Working with Slide Libraries .....	256
Managing Slide Libraries .....	260
Advanced Library Concepts .....	261
Advanced Office Integration .....	261
Open and Save As Integration .....	262
Shared Workspace and Document Management Task Panes .....	263
Accessing Offline Documents by Connecting Libraries with Outlook ...	265
Creating Form Libraries Through InfoPath Form Publishing .....	266
Exporting Library Metadata to Excel .....	268
Advanced Datasheet Features .....	269

## ■ CHAPTER 7      **Workflow and Information Management Policies** ..... 271

Workflow .....	271
Managing Workflows .....	278
SharePoint Server 2007 Workflows .....	282
Workflow with SharePoint Designer 2007 .....	285
Information Management Policies .....	286
Policy Features .....	287
Site Collection Policy .....	290
Site Content Type Policy .....	292
List and Library Policies .....	293
Policy Columns in Views .....	296

## ■ CHAPTER 8      **Pages and Web Parts** ..... 297

Pages .....	297
Basic Pages .....	297
Web Part Pages .....	300
Publishing Pages .....	305
Web Parts .....	310
Adding Web Parts to Pages .....	310
Managing Web Part Pages .....	312
Exporting and Importing Web Parts .....	316
Standard Galleries and Web Parts .....	318
Further Customization .....	321

<b>CHAPTER 9</b>	<b>Personalization Features</b>	323
	Alerts	323
	Subscribing to an Alert	324
	Receiving an Alert	330
	Managing Your Alerts	330
	Removing Alerts for Other Users	332
	My Site	332
	The My Home Page	334
	The My Profile Page	335
	My Links	339
	Adding My Links	340
	Editing My Links	340
	Deleting My Links	341
	Personalization Sites	341
	Personalizing Content	341
	Integration with My Site	344
	Personalizing Pages	344
	Logon Management	346
	Signing Out of the Portal	346
	Signing In As a Different User	346
<b>CHAPTER 10</b>	<b>Document Management Solutions</b>	349
	Document Management Overview	349
	Document Creation	350
	Document Creation Resources	350
	Document Consumption	351
	Challenges of Document Management	351
	Needs for Document Management	353
	SharePoint Document Management Solutions	354
	RFP Response Requirements	354
	SharePoint Solution Components	355
	RFP Response Process Definition	355
	SharePoint Environment Layout	356
	RFP Response Process Walk-Through	364
	Benefits of SharePoint Document Management Solutions	370
	Tips for Creating Effective Document Management Solutions	371

CHAPTER 11	Project Collaboration Solutions	373
	Project Collaboration Overview	373
	Challenges of Project Collaboration	374
	Needs for Project Collaboration	375
	SharePoint Project Collaboration Solutions	376
	Service Plan Project Requirements	376
	Service Plan Project Process Definition	376
	SharePoint Environment Layout	377
	Service Plan Project Process Walk-Through	384
	Benefits of SharePoint Project Collaboration Solutions	387
	Tips for Creating Effective Project Collaboration Solutions	388
INDEX		389

# About the Authors



■ **SETH BATES** is a solutions architect and senior consultant for DataLan Corporation, a 2005 Microsoft Eastern Region Partner of the Year located in White Plains, New York. Bates coauthored the *SharePoint 2003 User's Guide* and performed the technical editing for *Microsoft SharePoint: Building Office 2003 Solutions* and *Advanced SharePoint Services Solutions*. He also published an article titled "SharePoint Web Part Development" in the April 2005 edition of *Dr. Dobbs' Journal*. Bates has over nine years' experience engineering business solutions, primarily using Microsoft technologies. With experience in all phases of the software engineering life cycle, he brings a broad mix of analysis, design, and implementation expertise to his work.



■ **TONY SMITH** is a product manager for DataLan Corporation, a Microsoft Gold Certified partner located in White Plains, New York. Tony coauthored the *SharePoint 2003 User's Guide* and has been working with SharePoint 2007 since its first beta release. He also has experience designing and deploying SharePoint solutions in a wide range of organizations, including Fortune 500 and Fortune 50 companies. With a background that includes business analysis, network engineering, and application development, Tony has over 15 years' experience engineering business solutions and regularly presents to engineers, analysts, and business decision makers. You can find additional information about Tony and topics discussed in this book at [www.sharepointextras.com](http://www.sharepointextras.com).



# Acknowledgments

**W**riting this book has been yet another positive experience working with Apress. The people at Apress have been great to work with, and we would like to specifically thank several of them. We would like to thank Kylie Johnston for managing this effort and coordinating all of the tasks that went into creating this book. We would also like to thank Heather Lang for copy editing, Katie Stence for production editing, and editor Jonathan Hassel: all were instrumental in ensuring the quality of this book. We are also appreciative to everyone else at Apress involved in this process that we were not fortunate enough to work with directly.

Along with the coordination and help provided by Apress, we would also like to thank the technical editor, Aaron Bates, who did a great job reviewing this book. His thoroughness and content suggestions helped to ensure that this book would be technically accurate and beneficial for readers. We also would like to thank our colleagues at DataLan who work to successfully market, sell, and deliver information worker solutions. Our real-world experiences there have contributed to our ability to organize and create this book.

—Seth Bates and Tony Smith

I would like to thank Tony, who convinced me that the effort needed to write another book would be worthwhile.

And I would like to convey my love and appreciation for my wife Jennifer, my son Dylan, and my daughter Kyra. You provided the loving support I needed to complete this book.

—Seth Bates

I would also like to thank Seth. This book has been yet another effort we have jointly worked on that has been a positive experience.

Finally, I would like to thank my wife Lynn, who has provided encouragement and support throughout this process.

—Tony Smith





# Introduction

**S**harePoint 2007 is the centerpiece of the Microsoft Office system and the next stage in the evolution of the SharePoint technology platform. SharePoint 2007 significantly expands on previously existing SharePoint capabilities providing a comprehensive set of tools that can be used as the foundation to create business solutions. We have seen many situations where SharePoint is introduced and individuals struggle to leverage these resources without a good enough understanding of the capabilities to gain the most value possible. This book was an outcome of this need and can serve as a reference for people working within a SharePoint environment.

The goal of this book is to deliver a tool to all levels of SharePoint users. Beginners will be provided with the information they need to most effectively use the capabilities provided. Intermediate users will be given the information they need to manage their SharePoint resources. Advanced users will be provided the foundation needed for building business solutions using SharePoint's capabilities. We have incorporated our experiences working with a variety of organizations and knowledge of the product into an easily understood format for learning about SharePoint 2007, which we hope will enable you to gain the in-depth knowledge you need to effectively use and manage these tools.

Further reading about the topics provided in this book can be found at <http://www.sharepointextras.com> where we provide additional information around SharePoint including references to other resources.

## Who This Book Is For

The goal of this book is to provide the knowledge necessary for anyone to effectively use Microsoft's SharePoint 2007 platform. Whether you have not yet used SharePoint, have used previous versions, just started using the basic features, or have been using it for a long of time, this book provides the skills you need to work efficiently with the capabilities SharePoint 2007 provides.

If you want to learn about these capabilities in a detailed yet understandable format, this book is for you. Being a user guide, this book does not require you to have any programming knowledge. It does assume the reader has a basic understanding of navigating web sites. Some of the more advanced topics require prior working knowledge of Microsoft Office applications like Word and Excel.

## How This Book Is Structured

The chapters in this book are organized into two groups. Chapters 1 through 9 offer the fundamental knowledge of SharePoint 2007 that users need to successfully utilize the capabilities provided by the technology. This group can be used as an end-to-end reference guide, allowing you to easily look up specific SharePoint topics, and it includes step-by-step instructions, figures, tables, and examples. The capabilities described in these chapters are important and act as the building blocks for the solutions described in the second group of chapters.

The second group, Chapters 10 and 11, presents business solutions commonly deployed through SharePoint. Each of these chapters contains an example scenario that will help you understand the potential challenges of the situation along with the benefits that SharePoint provides. The scenarios also include the necessary steps for creating these solutions within a SharePoint environment.

## Chapter 1: Introduction to SharePoint Technologies

This chapter introduces you to the world of Microsoft SharePoint. It contains an explanation of the technology, its uses, and related terminology.

## Chapter 2: Sites

This chapter contains the details you need to understand the capabilities of sites and workspaces. We will focus on those capabilities making up the core of Windows SharePoint Services 3.0, which is the foundation of all SharePoint 2007 solutions. Security, content, structure, personalization, and search capabilities are all covered using detailed examples.

## Chapter 3: SharePoint Server 2007

This chapter focuses on additional core components and capabilities introduced into sites as part of SharePoint Server 2007. It contains the details you need to understand how to use these additional capabilities and describes how they are incorporated into the SharePoint environment. Here we will discuss the additional templates introduced with SharePoint Server 2007, enterprise searching, layout and navigation management, and reporting and auditing.

## Chapter 4: List Concepts

This chapter provides the knowledge needed to work with lists within SharePoint. The use and management of custom lists is described in detail. You will also learn about the advanced integration with Office applications that SharePoint's custom lists provide.

## Chapter 5: Lists

This chapter contains a detailed look at the lists that are provided by SharePoint for you to use as templates when creating your own lists. The use and management of each list is provided in detail, along with any advanced integration with Office applications that they provide.

## Chapter 6: Libraries

This chapter teaches the use and management of libraries within SharePoint. Capable of managing a variety of files from Office documents and forms to images and presentation slides, these SharePoint libraries provide many collaborative features, which are also covered in this chapter. Advanced integration between these libraries and Office applications, which can enhance your experience with SharePoint, is also discussed.

## Chapter 7: Workflow and Information Management Policies

The new capabilities found in the 2007 version of SharePoint include workflow processing and information management policies. The steps needed to define and execute business processes using workflows within the SharePoint environment are detailed in this chapter. This chapter also describes how to configure auditing, expiration, and other policies on the documents and information contained in your SharePoint sites.

## Chapter 8: Pages and Web Parts

Pages and web parts allow for the customization of sites. This chapter uses detailed steps to show you how to customize SharePoint using the various types of pages and the functional components known as web parts.

## Chapter 9: Personalization Features

In this chapter, we discuss the personalization features provided by SharePoint. We will discuss alerts, My Site, My Links, content filters, and targeting content, as well as how to use these capabilities to provide personalized user experiences.

## Chapter 10: Document Management Solutions

One of the most common uses for SharePoint is to create document management solutions. This chapter describes the challenges SharePoint document management solutions can address, the benefits you can receive by creating these solutions, and tips to be mindful of when creating these solutions. We will construct a sample document management solution and describe how the solution would be used.

## Chapter 11: Project Collaboration Solutions

Project collaboration is another common use for SharePoint. In this chapter, we will describe how to create project collaboration solutions through SharePoint. We will construct a sample solution and describe the benefits that can be received by creating these solutions.

## Contacting the Authors

Additional information about the authors can be found at [www.sharepointextras.com](http://www.sharepointextras.com). Seth Bates can be contacted by e-mail at [sbates@datalan.com](mailto:sbates@datalan.com), and Tony Smith can be contacted by e-mail at [tsmith@datalan.com](mailto:tsmith@datalan.com).

