Business Users Guide to SharePoint Server 2007

SBU 201

V3.0

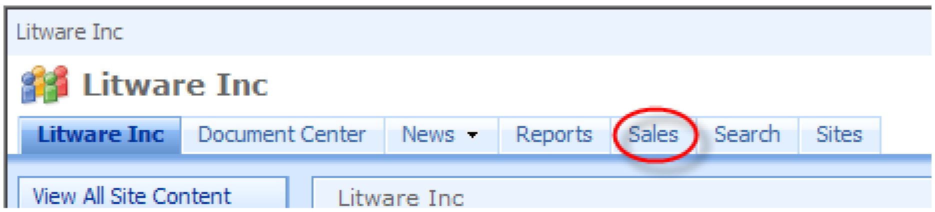
Contents

Lab Overview: In Exercise 1, to organize the information that needs to be tracked on the Sales team site, you will be using custom lists and views of the data. In Exercise 2, to present the data in a useful manner to the visitors of the site, you will be utilizing web parts to organize and present the data.

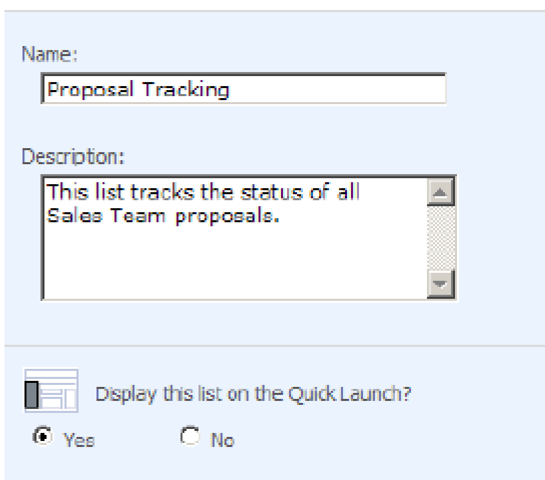
Exercise 1:

Litware's sales team has decided to create a list to track projects they have been requested to bid on. It will be your task to set-up a list that will keep track of their bidding information and present it to the users.

1) You need to first create the proposal list under the Sales site.
   A) Open Internet Explorer and go to **http://portal/pages/default.aspx**
   B) Next navigate to the Sale tab from the Litware Inc. Homepage.



   C) Click on the **Site Actions** menu (Far right of top tool bar) and then click on **Create**.
   D) You should notice that we are on the **Create** page. This page allows us to choose from the readily available library, list, page, and site templates.
   E) Under the **Custom Lists** section, click on the link for **Custom List**. (This will take you to the **New** page.)
      i) *Under the **Name and Description section,** name your new list **Proposal Tracking** and enter a brief description for what this new list is going to do.*
      ii) *For the **Navigation** section, make sure that **Yes** has been selected for the option **Display this list on the Quick Launch?***

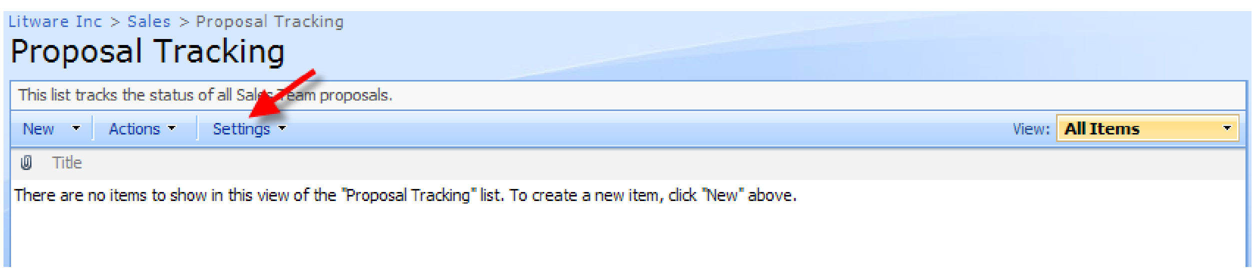


      iii) *Click **Create**. When your screen reloads, you should be viewing the new list, **Proposal Tracking**.*

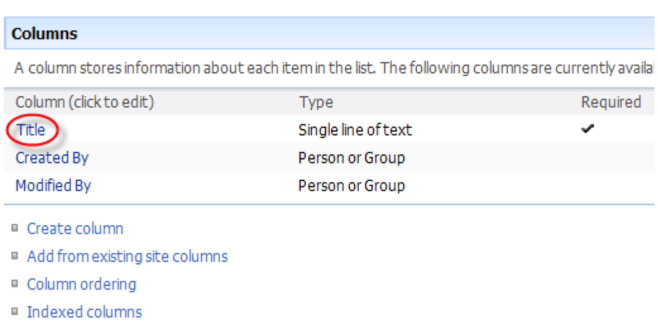
1) In order to give the **Proposal Tracking** list more functionality, we will customize the list to incorporate some new columns that will serve to track specific information from each proposal. Below is a table that contains all the information needed to complete this customization.

Column Name	**Type: other options listed**	**Description**
Company Name	Single Line of text	Please use the legal company name
# of Hours Requested	Number	
Amount Proposed	Currency	
Date RFP Due	Date; Date only	
Region	Choice: East, West; remove the default value	
Status	Choice: In Progress, Submitted, Accepted, Rejected; remove the default value	

A) To add these new columns, click on the **Settings** drop-down menu (**Note**: This is not the **Site Actions** drop-down menu) and click on **List Settings**. You should now be on the **Customize Proposal Tracking** page.



B) Scroll down to the **Columns** section. You will notice that three columns have already been created: **Title**, **Created By**, and **Modified By**. These are the default columns that are added by default whenever a custom list is created. We will now add the first column (see the table above). The first column is **Company Name**. This will now serve as our "**Title**" column, so rather than clicking on the link **Create column,** we will instead click on the **Title** column link.



i) *In the **Name and Type** section, rename the column **Company Name**.*

ii) *In the same section, you will see that **the type of information in this column is: Single line of text**, so you will not have to change anything here.*

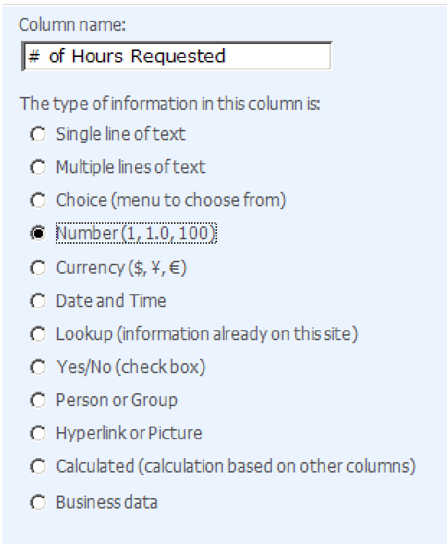
iii) *Make sure that in the **Additional Column Settings**, make sure that **Require that this column contains information** has been marked **Yes**.*

iv) *Click **OK**. Once the screen refreshes, you should be back at the **Customize Proposal Tracking** page.*

C) For the next column, you will need to go back to the **Columns** section and click on **Create column**.

i) *Using the information from the table above, enter **# of Hours Requested** for the **Column name**.*

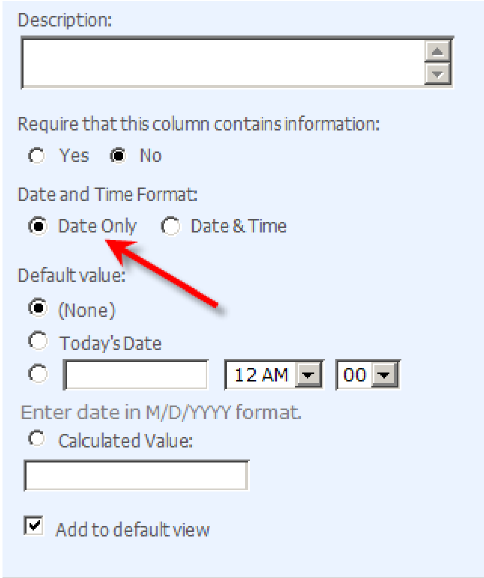
ii) *For **The type of information in this column is** select **Number**.*



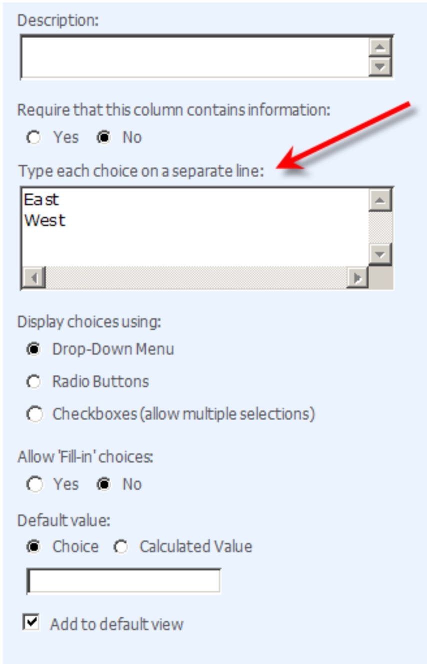
iii) *Click **OK**.*

D) Use the table and steps above to help you create the rest of the columns: **Amount Requested, Date RFP Due, Region, and Status. Note**: Look at the last three columns you are to create. When you create them, you will notice that you have been given additional information to add during the creation process.

i) *For the **Date RFP Due**, in addition to the name and type, you will also need to make sure that in the **Additional Column Settings** the **Date and Time Format** is set to **Date Only**.*

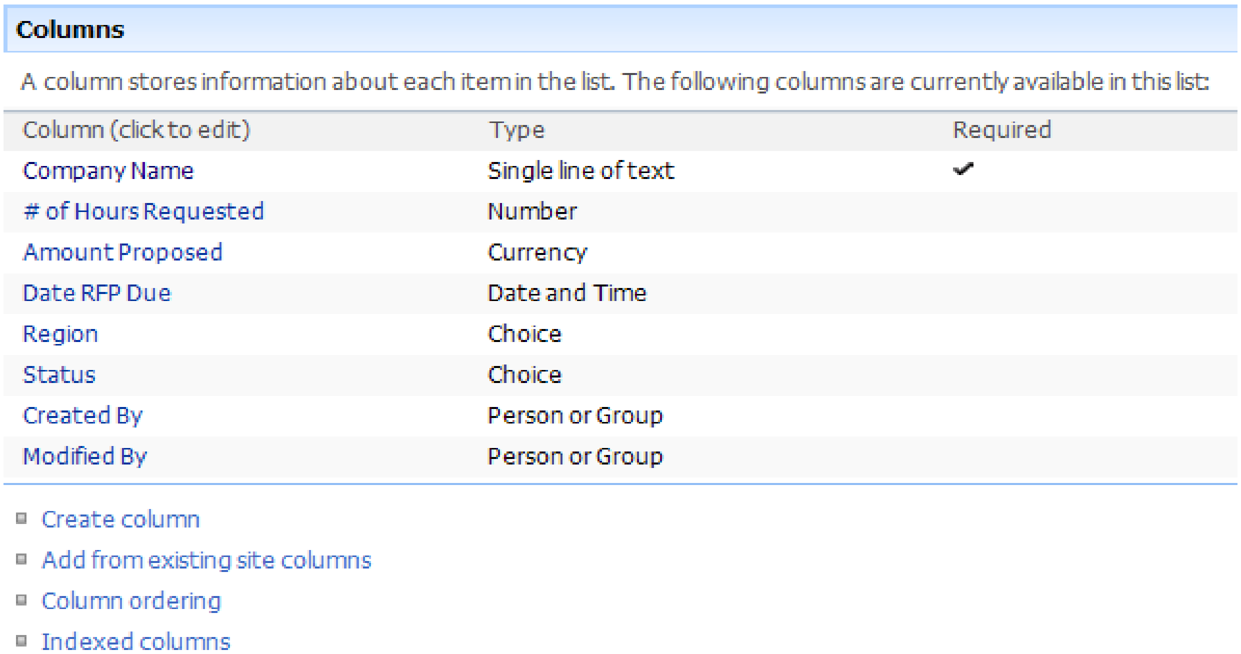


ii) *For the last two columns, **Region** and **Status**, after you select **Choice** as the column type, a new information box appears in the **Additional Column Settings** section. In the area **Type each choice on a separate line:** delete the default choices and enter the choices designated in the table (**East** and **West** for **Region**; **In Process**, **Submitted, Accepted,** and **Rejected** for **Status**).*

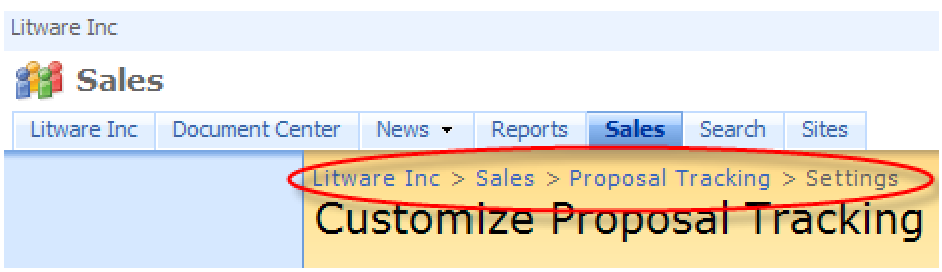


*For the last two columns, also make sure that the **Default value:** in the **Additional Column Settings** section is blank.*

iii) Your **Customize Proposal Tracking** page should now have all the new columns.



2) It's time to start adding items to our new list. Using the breadcrumb, click on **Proposal Tracking**.



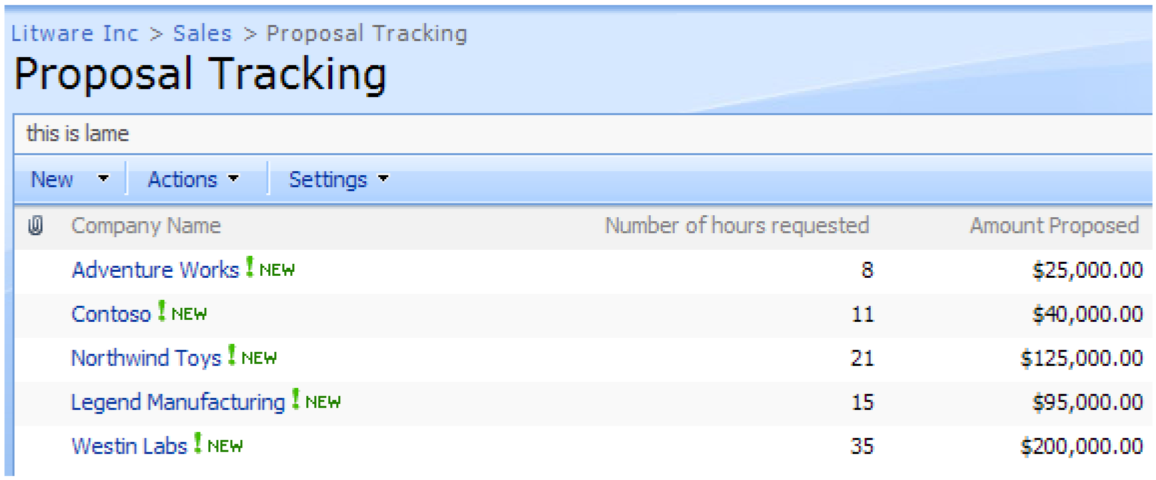
A) Below is a table that has all the information for our new items.

Company Name	# of Hours Requested	Amount Proposed	Date RFP Due	Region	Status
Adventure Works	8	$25,000	2/1/08	East	Accepted
Contoso	11	$40,000	3/1/08	East	Submitted
Northwind Toys	21	$125,000	6/5/08	West	In Progress
Legend Manufacturing	15	$95,000	4/22/08	East	Accepted
Westin Labs	35	$200,000	3/1/08	West	Rejected

B) On the **Proposal Tracking** page, click on the **New** drop-down menu**.**

C) Click on **New Item**.

D) Using the table above, fill out the **New Item** information for each document. Be sure to click **OK** when you are done entering the information for each item. When you are finished, verify that all the documents have loaded properly.



3) Now that we have some proposals in our list, we will need to create a variety of views so that Litware's Sales team can view a filtered view of the information, so they don't have to sort through the data themselves.

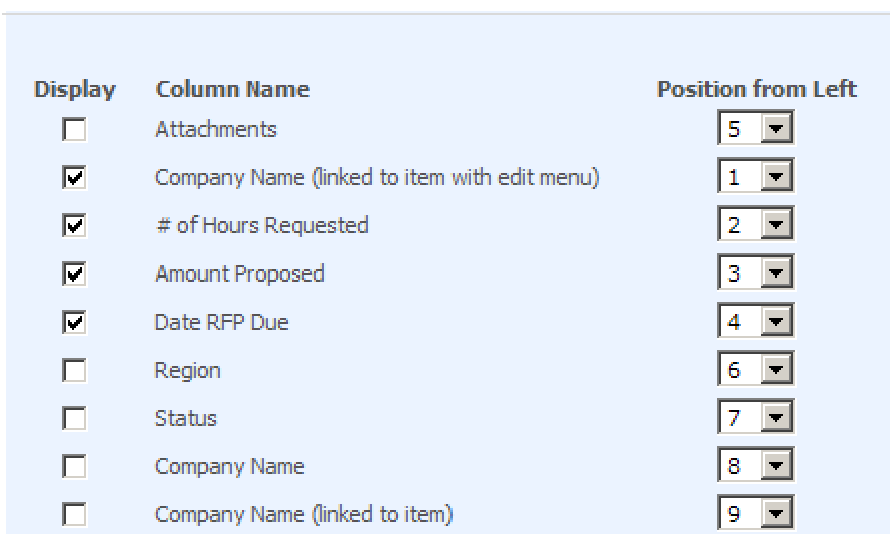
A) The first view we are going to create is the **East View of Accepted Proposals**.

B) On the **Proposal Tracking** list page, click on the **Settings** drop-down menu and click on **Create View**.

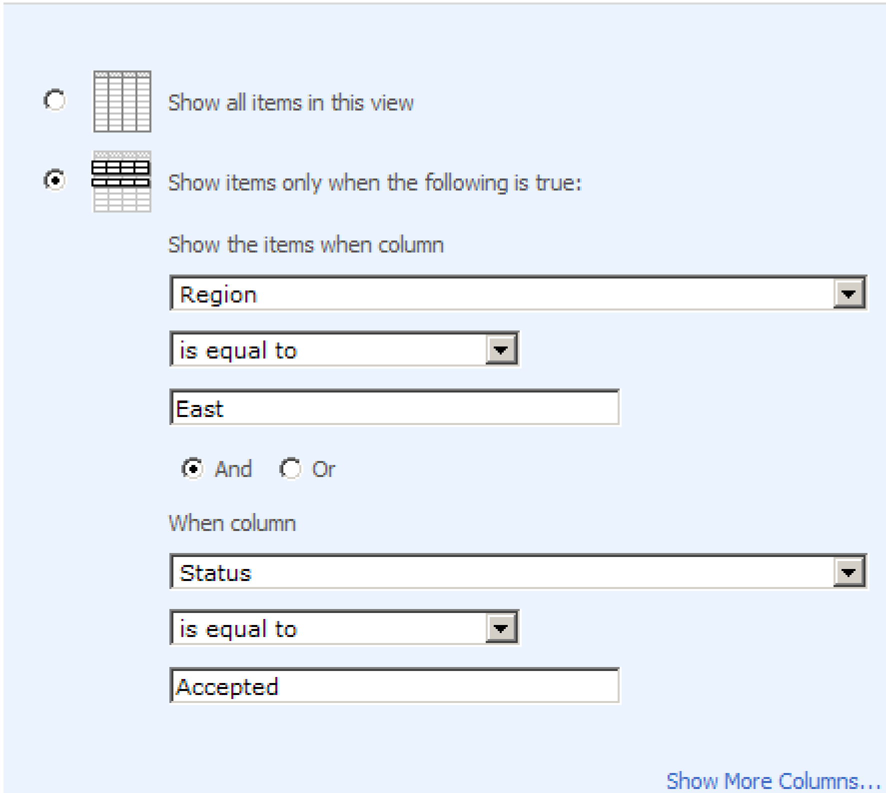
C) Under the **Choose a view format** section, click on the link for **Standard View**. This will take you to the **Create View: Proposal Tracking**

i) For the name, enter **East View of Accepted Proposals**.

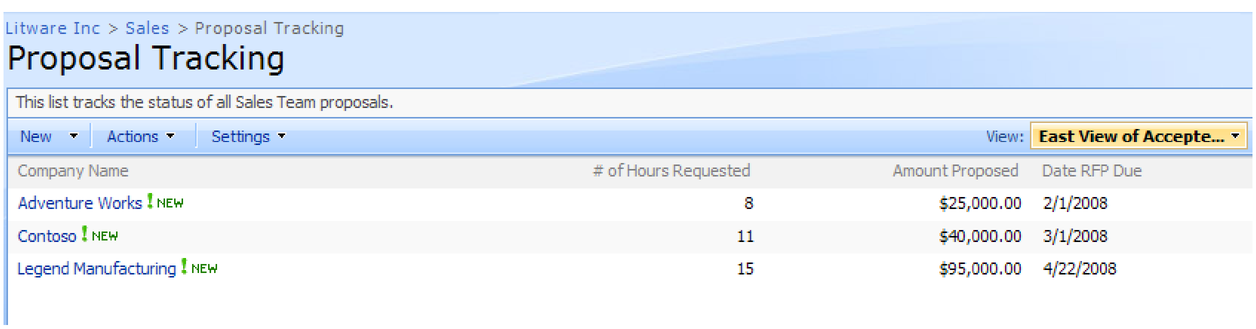
ii) Scroll down to the **Columns** section. Click on the **Display** check-boxes and reorder the columns using the **Position from Left** drop-down menus so that the section matches the one below:



iii) Next, scroll down to the **Filter** menu. Fill out this section so that it matches the one below:



iv) Click **OK**. When you are back at the **Proposal Tracking** page, notice that the only documents that are on the page are those that match the requirements you just entered. Also notice that on the right-hand side of the page, the **View** drop-down menu is showing that the current view is **East View of Accepted Proposals**. To switch this view, simply click on the drop-down menu and click on another view.

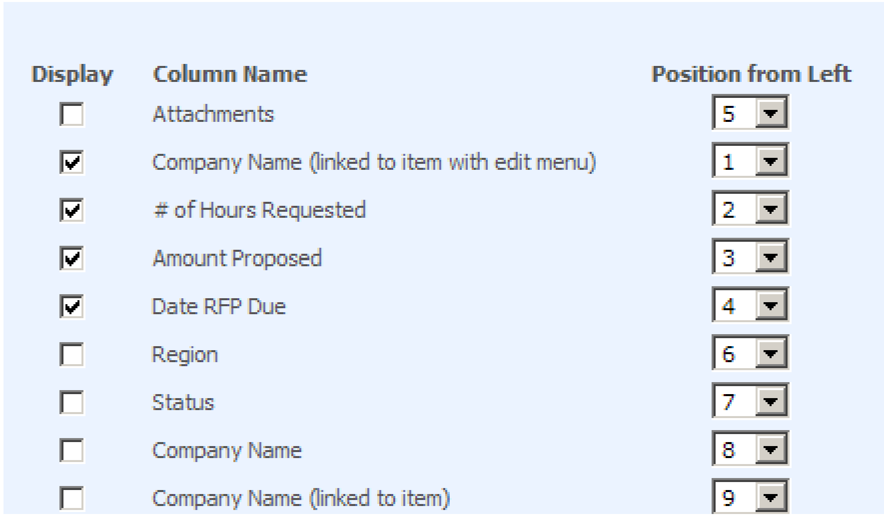


D) The next view we are going to create is the **East View of Submitted Proposals**. Again, click on the **Settings** drop-down menu, click on **Create View**.

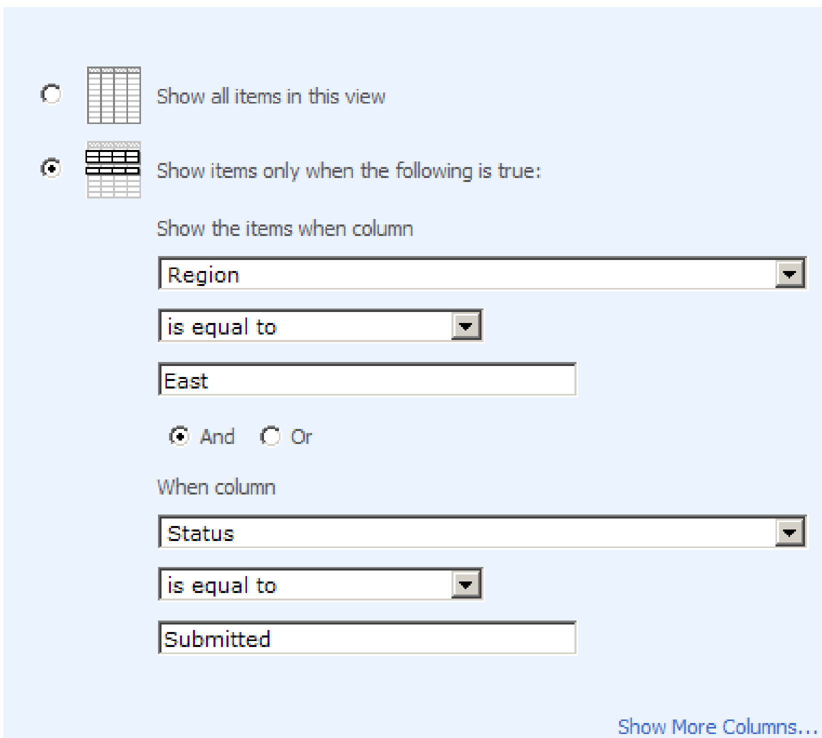
E) Under the **Choose a view format** section, click on the link for **Standard View**.

i) For the **View Name:** enter **East View of Submitted Proposals**.

ii) Scroll down to the **Columns** section and match the settings to the image below:



iii) Next, scroll down to the **Filter** section and match the settings to the image below:



iv) Click **OK**.

F) The third view we are going to create is the **Accepted Proposals** view.

G) Click on **Settings**, click on **Create View**.

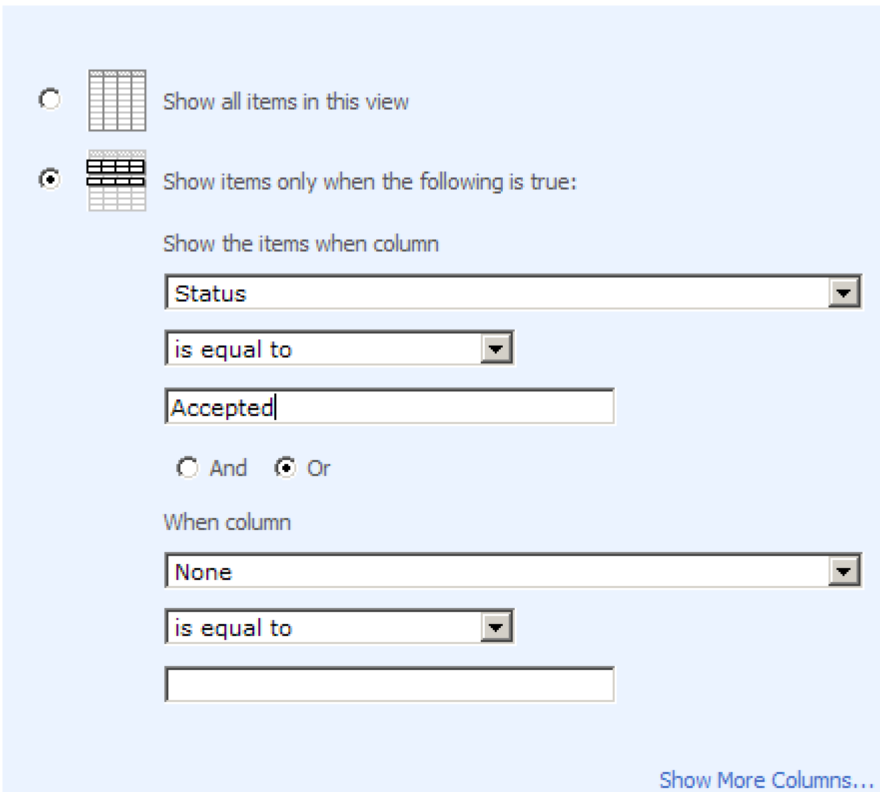
H) Under the **Choose a view format** section, click on the link for **Standard View**.

i) Enter **Accepted Proposals** as your **View Name:**

ii) Match the **Columns** section with the one below:

Display	Column Name	Position from Left
☐	Attachments	6
☑	Company Name (linked to item with edit menu)	1
☑	# of Hours Requested	2
☑	Amount Proposed	3
☑	Date RFP Due	4
☑	Region	5
☐	Status	7
☐	Company Name	8
☐	Company Name (linked to item)	9
☐	Content Type	10
☐	Created	11

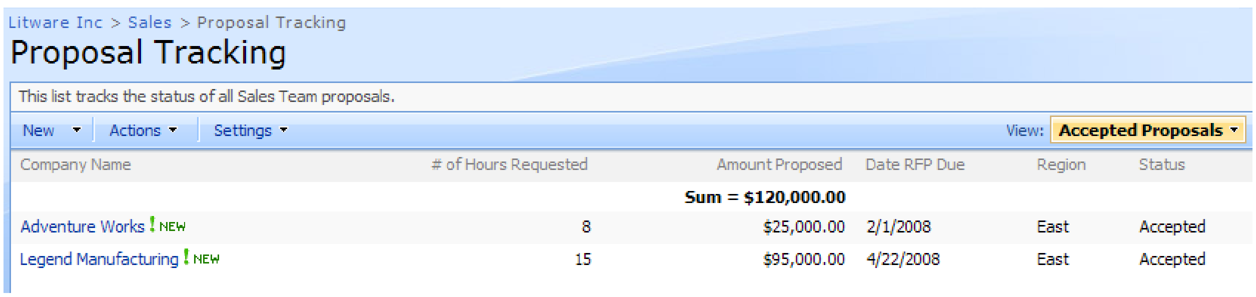
iii) Match the **Filter** section with the one below:



iv) A new feature we are going to add to this view is a **Total** for a selected column. Scroll down and expand the **Totals** icon.

v) Click on the **Amount Proposed Total** drop-down menu and click on **Sum**.

vi) Click **OK**. Notice that back on the **Proposal Tracking** list page that your new **Total** function is visible.

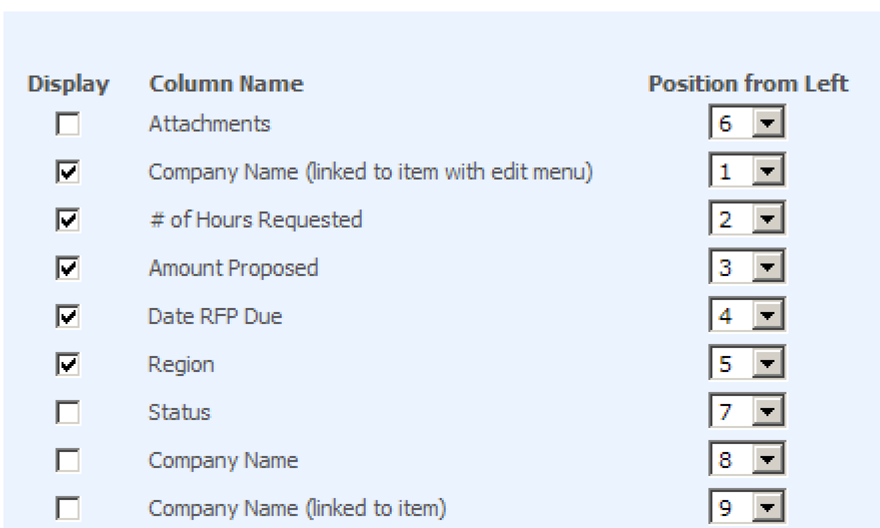


I) We have one last view to create. Click on the **Settings** drop-down menu, click on **Create View**.

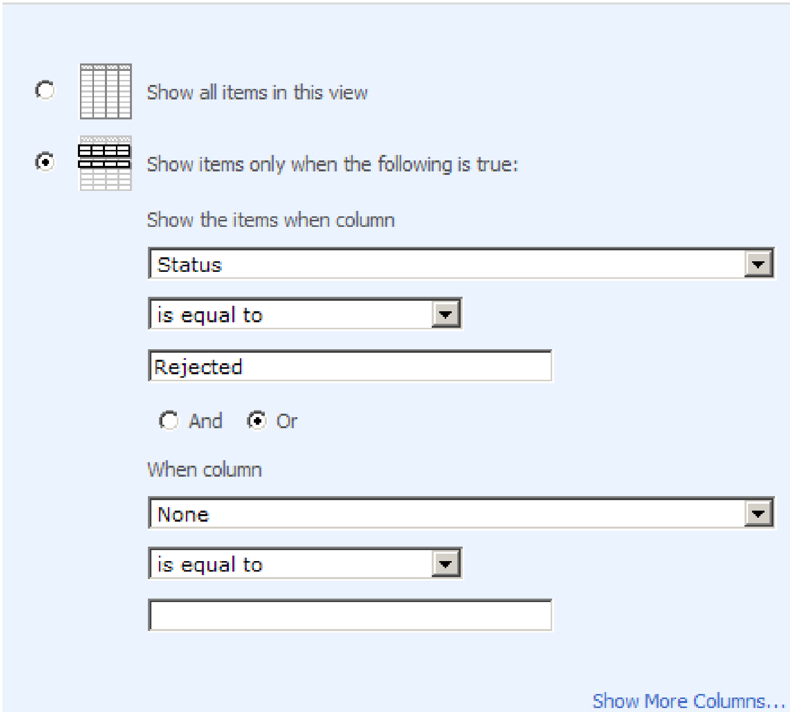
J) Click on the link for **Standard View**.

i) Enter **Rejected Proposals** for the **View Name.**

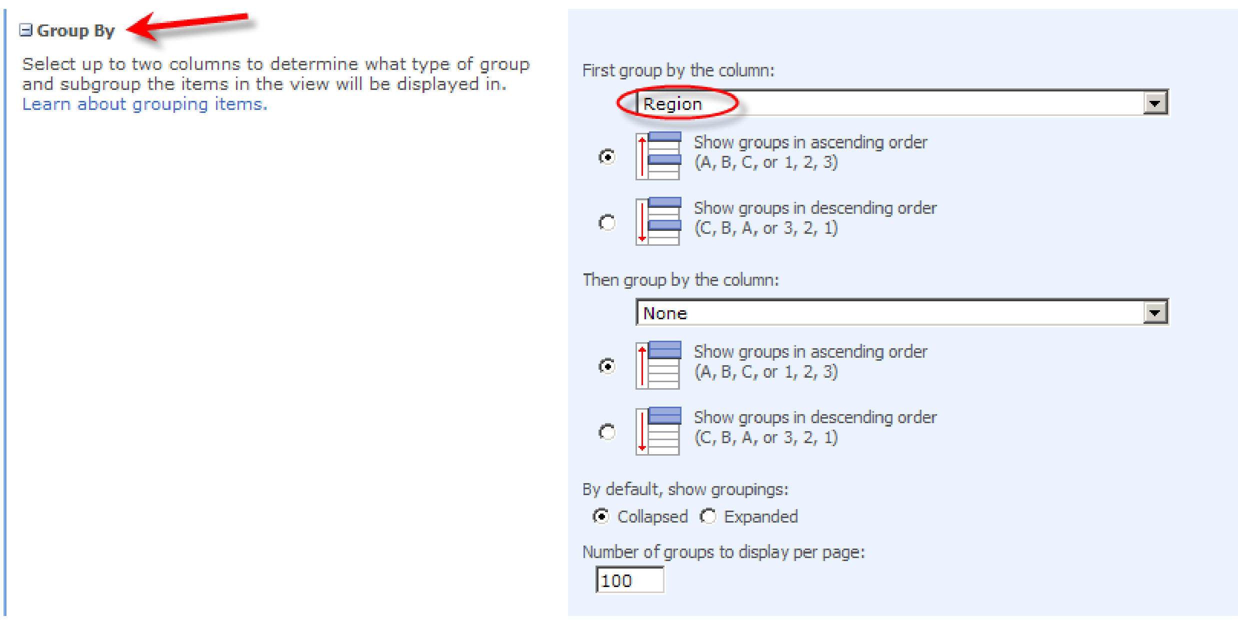
ii) Match the **Columns** section with the one below.



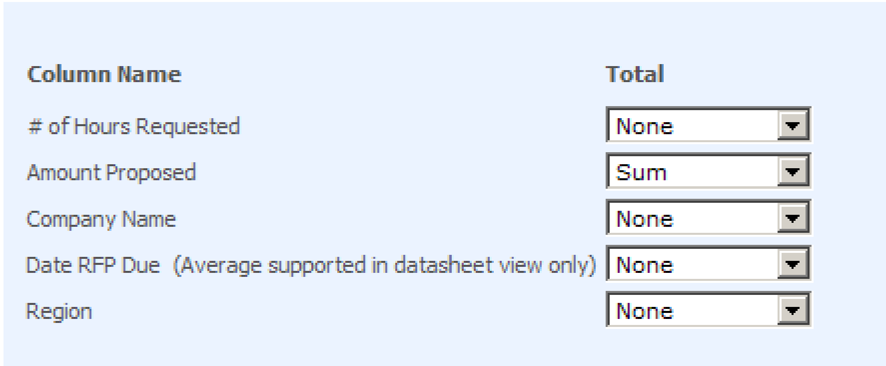
iii) Match the **Filter** section with the one below:



iv) We will add a new function to this view by expanding the **Group By** section and grouping the documents by region.

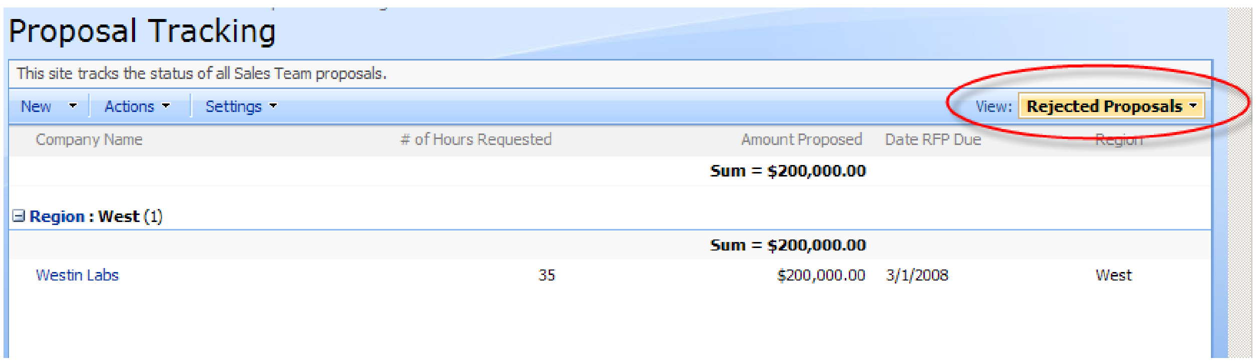


v) Expand the **Totals** section and set the **Amount Proposed Total** to **Sum**.



vi) Click **OK**.

K) Back at the **Proposal Tracking** page, notice that all the views you have created are now in the **View** drop-down menu. If you expand the region node, your proposal tracking list should look similar to the one below.



L) Go ahead and click on each view and notice how the information display varies. With a few clicks of your mouse you can customize a large amount of data to be stored and viewed in a variety of ways.

Exercise 2

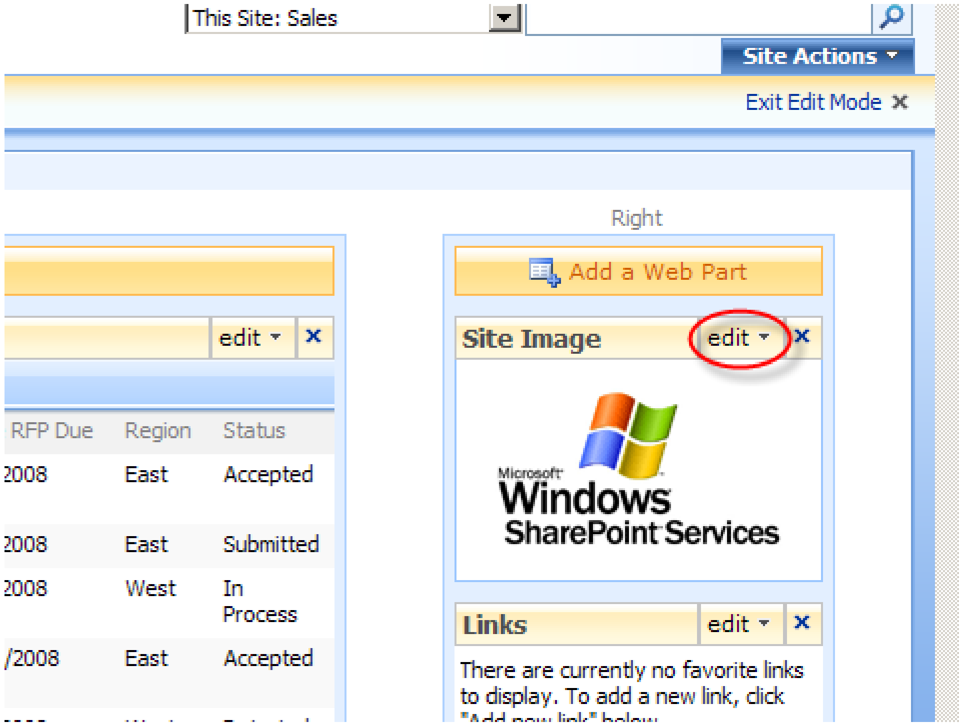
We are now going to customize the **Sales** homepage.

1) You will be adding the views of the Proposal Tracking list you created to the homepage and deleting some of the content currently on the page.

   A) Return to the **Sales** main page by clicking **sales** in the breadcrumb.

   B) Click on **Site Actions**, and then click on **Edit Page**.

C) In the right zone, on the **Site Image Web Part**, click on the **Edit** drop-down menu.



D) Click **Delete**. Click **OK** when a confirmation box pops up.

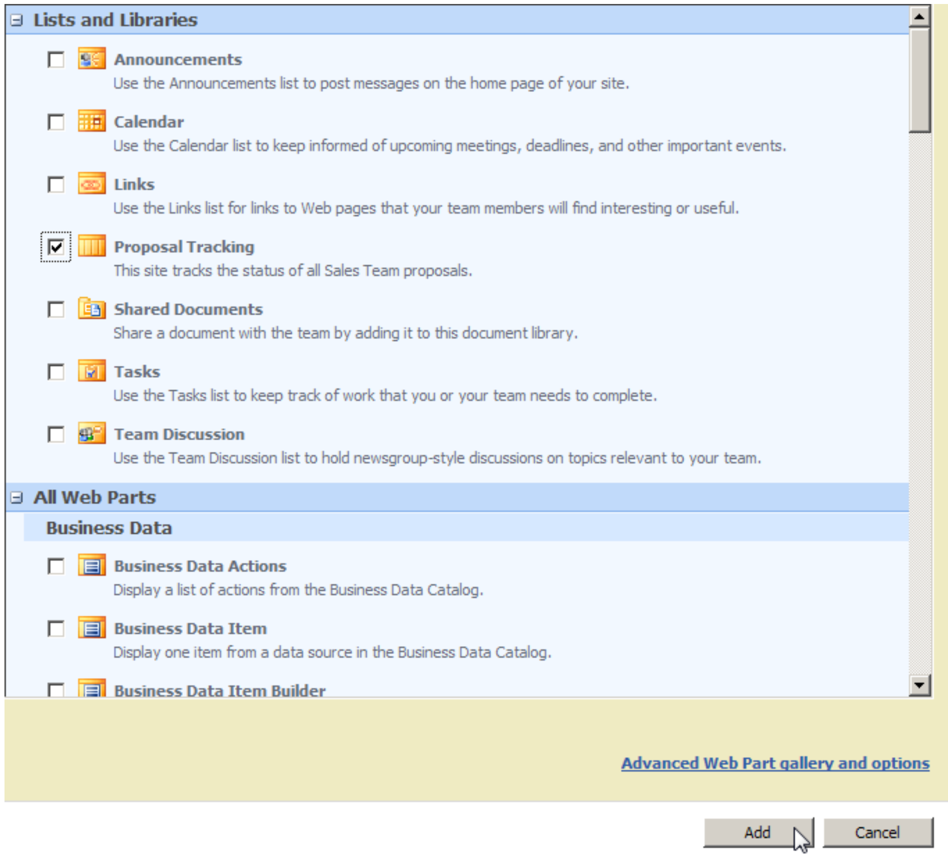
E) You should be back in edit mode for the **Sales** page. Verity that the **Site Image Web Part** has been deleted. Stay on this page for the next step.

2) Create a web part and filter it to one of the views you created in the first exercise.

A) On the left zone, click on the **Add a Web Part** link.

B) Under the **Lists and Libraries** section, select the box for **Proposal Tracking**.

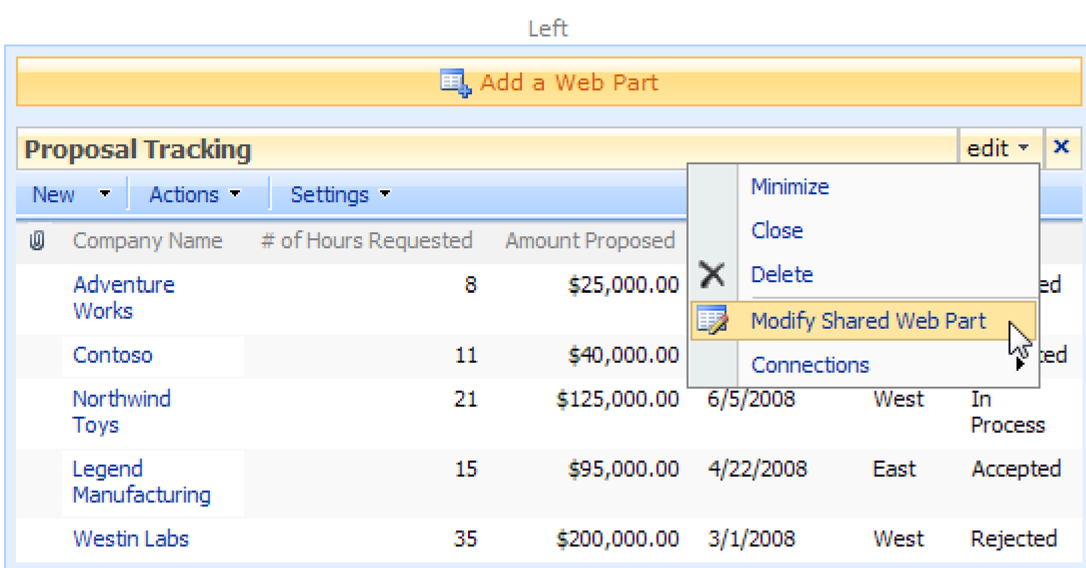
C) Click **Add**.



D) Back in edit mode on the **Sales** page you should see your new web part.

E) Click on the **Edit** drop-down menu.

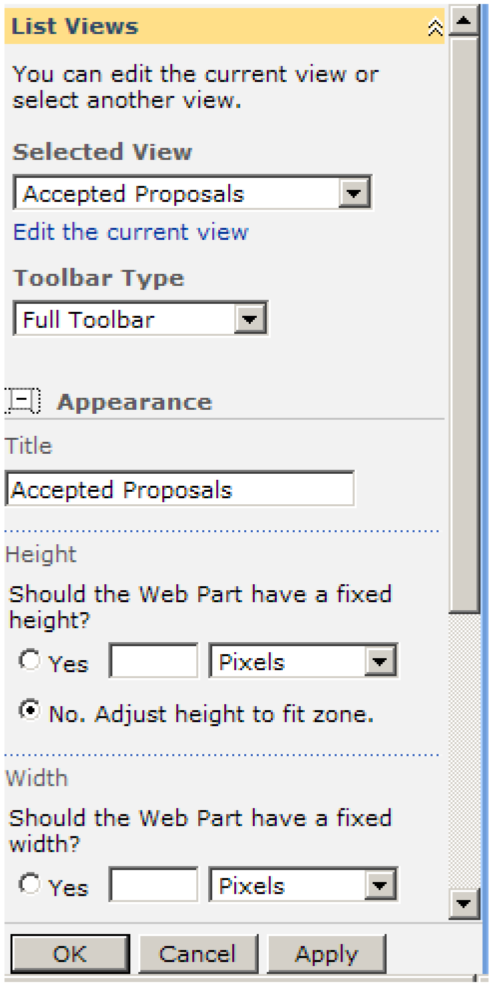
F) Click on **Modify Shared Web Part**.



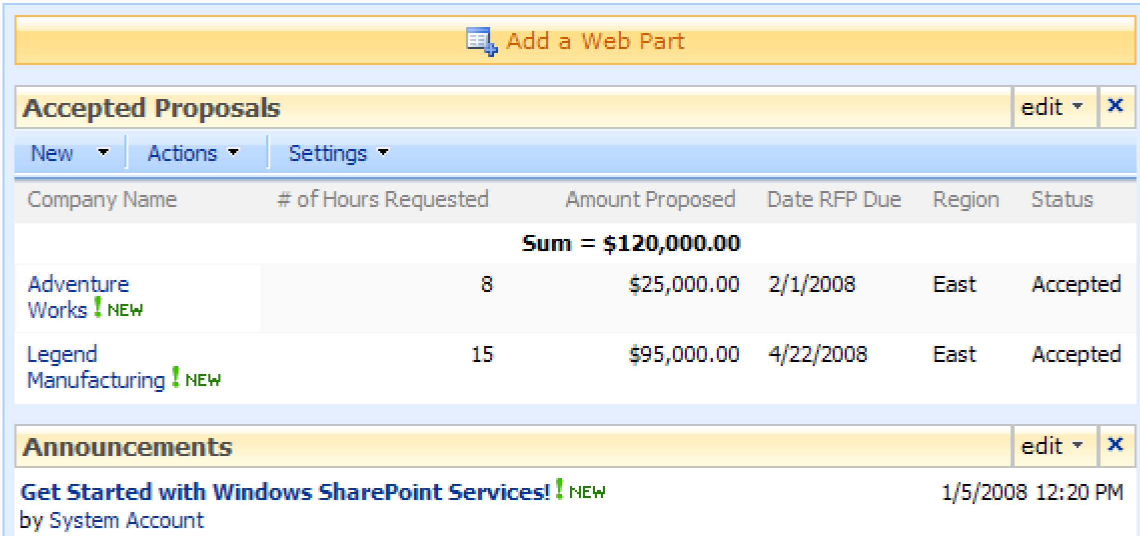
G) You will notice that a new box has popped up on the right-hand side of the page. Under the **Selected View** section, select **Accepted Proposals**. A warning box will pop-up, click **OK.**

H) Expand the Appearance node, and change the title to **Accepted Proposals**

I) Click **OK**.



J) You will see that your new web part has been filtered and is now showing only those documents that correspond to the view you have selected.



3) Create another **Proposal Tracking web part**, but filter this one to the **Rejected Proposals** view and rename it **Rejected Proposals**

A) Use step 2 A-G to create and modify your web part. Remember to select **Rejected Proposals** as your view instead of **Accepted Proposals** and rename it **Rejected Proposals.**

B) On the upper right-hand side of the page, click on **Exit Edit Mode**.

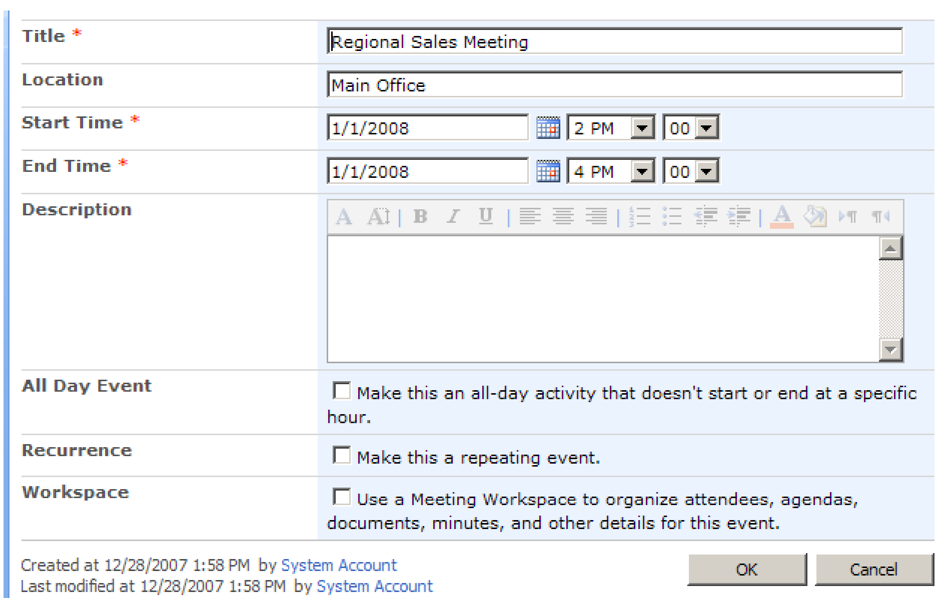
4) Add an event to the **Calendar** list.

A) Under the **Calendar** list click on the link for **Add new event**. You should be taken to the **Calendar: New Item** page. Notice all the settings you can make for an event.

i) For the **Title**, enter **Regional Sales Meeting**.

ii) For the other settings, enter in a generic **Location, Start Time,** and **End Time**.

iii) Click **OK**.



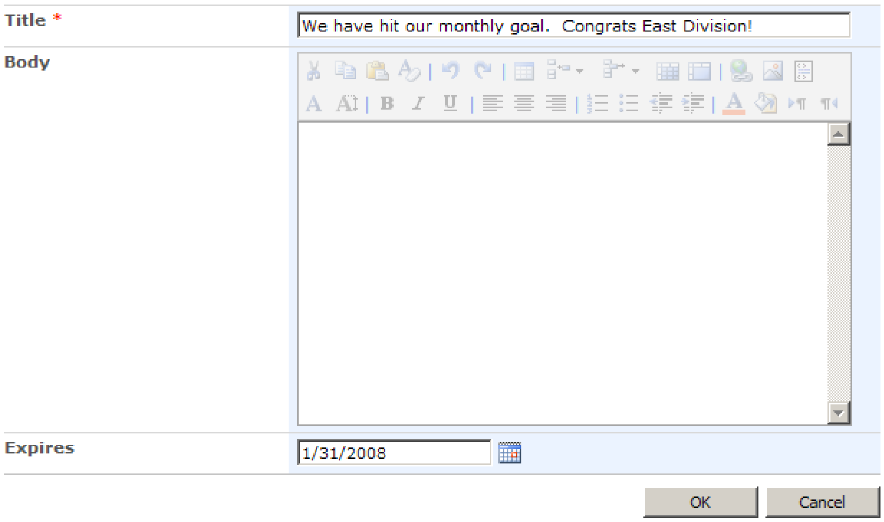
B) You should see your event under the **Calendar**.

5) Add an announcement to the **Announcements** list.

A) Under the **Announcements** section, click on the link **Add new announcement**.

i) For the **Title**, enter **We have hit our monthly goal. Congrats East Division!**

ii) For the **Expires** section, enter a date a month from now. We chose this date because of the announcement we are posting. The announcement was to congratulate the East Division for hitting their goal this month, but next month may be different. We don't want to keep old material on the site. Managing the site's information is very important.



iii) Click **OK**.

B) Back on the **Sales** home page; verify that your announcement has been posted properly.

6) Add a **Content Editor Web Part** to the **Sales** page.

A) Click on **Site Actions**, and then click on **Edit Page**.

B) On the left zone, click on **Add a Web Part**.

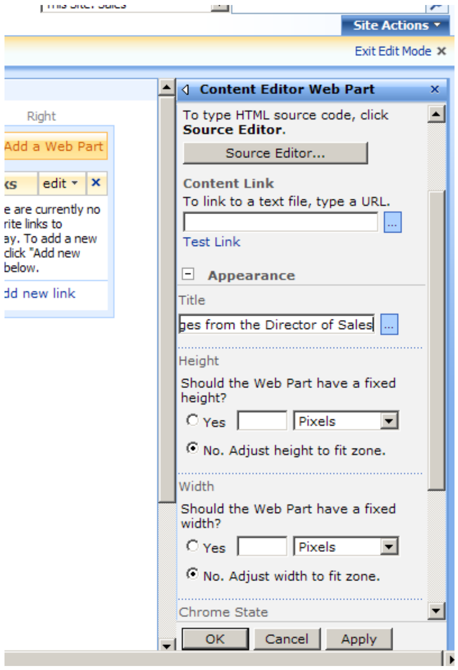
C) Under the **Miscellaneous** section, click the box for **Content Editor Web Part**.

D) Click **Add**.

E) Once your new web part has been added, click on the **Edit** drop-down menu and click on **Modify Shared Web Part**.

F) You will notice a new box pop-up on the right-hand side of the page. Expand the **Appearance** section.

i) For the **Title**, enter **Messages from the Director of Sales**.



ii) Click **OK**.

G) You should see that your new title is up. Now let's add a little message. Notice that this web part is different from the others. There is no **New** drop-down menu to add documents. Instead, there is a link to **open the tool pane**. Click on this link.

H) To enter a message, click on the **Rich Text Editor…** box.

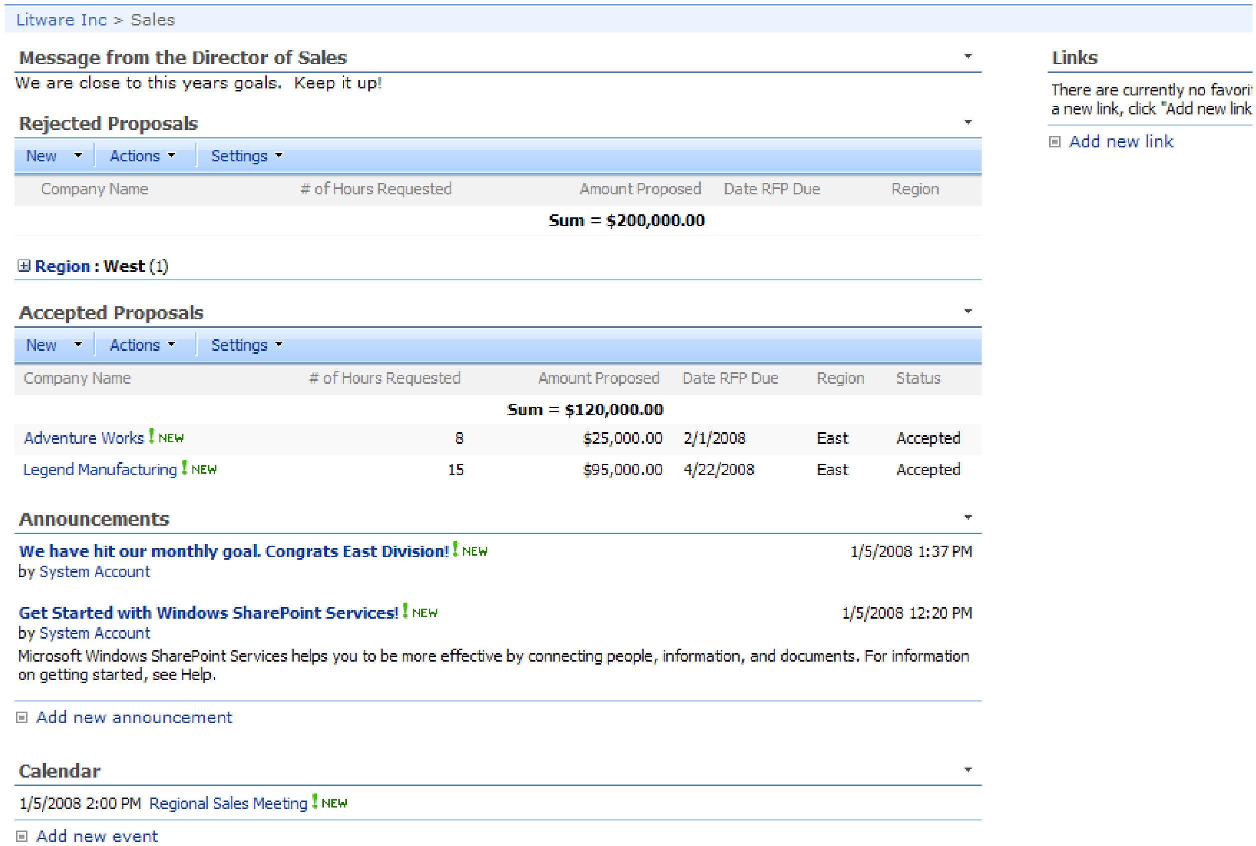
I) Go ahead and make up a message about this year's goals.

J) Click **OK**

K) Click **OK** to finishing editing the Content Editor Web Part.

L) Click **Exit Edit Mode**.

M) Your **Sales** site should now look like this:



Lab 03: Document Management

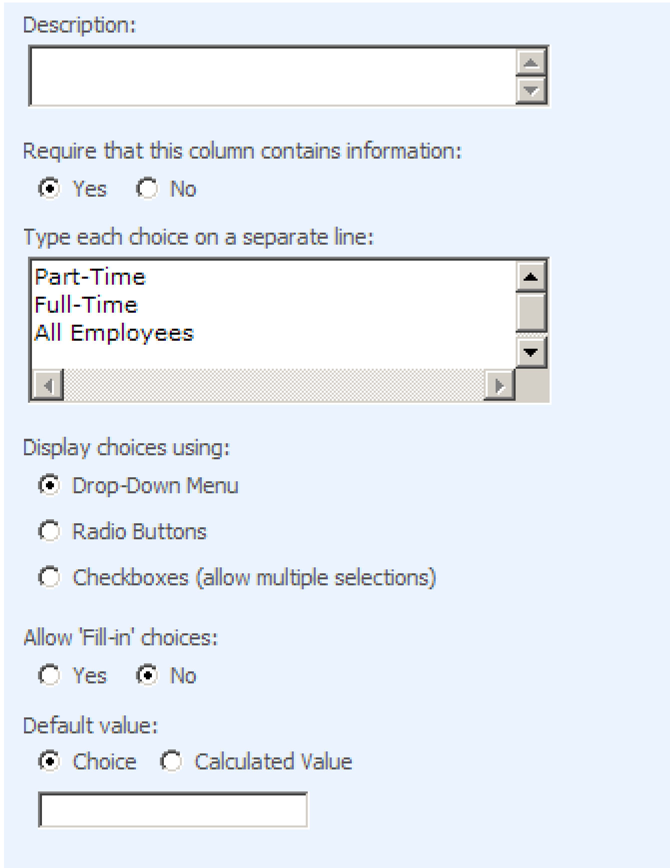
Note: Keep in mind that as we move on to the rest of the labs, you will be asked to recall and use the knowledge and navigation skills from the previous labs. We will be changing the format for some of our steps. Rather than say, "Click on the **Site Actions** drop-down menu, and click on the link for **Create**," we will simply say, "Click on **Site Actions > Create**." Do not get this confused with the **Breadcrumb navigation** in the upper portion of the sites.

Exercise 1:

The Litware Human Resources Department has decided to use Microsoft SharePoint Technologies to store its documents and to use SharePoint to make their documents available to all of Litware's employees. Your task is to create this new document library. In addition, it is important that 2 major versions of each policy are kept in case any mistakes are found. To ensure there are as few mistakes as possible, content approval will need to be turned on as well as requiring checkout.

1) Navigate to the **Human Resources** site.
2) Create a new document library.
   A) Click on **Site Actions > Create.**
   B) Click on **Document Library** (Under the **Libraries** list).
      i) For the **Name**, enter **Employment Policy**.
      ii) Click **Create**.
3) Create two new columns for your new document library.
   A) On the menu bar of the document library, click **Settings→Document Library Settings**
   B) Scroll down to the **Columns** section and click on the link for **Create Column**.
      i) For the **Column Name**, enter **Employment Status**.
      ii) For the **Type**, select **Choice**.
      iii) Scroll down to the **Additional Columns Settings** section, make sure that **Yes** has been selected for **Require that this column contains information**.
      iv) In the same area, in the box for your choices, enter **Part-Time**, **Full-Time**, and **All Employees**. Remember to type each choice on a separate line.
      v) Under the default value section, remove the text "**Part-Time**"

vi) Click **OK**.



C) Verify that your new column has been created.

D) Click on **Create Column**.

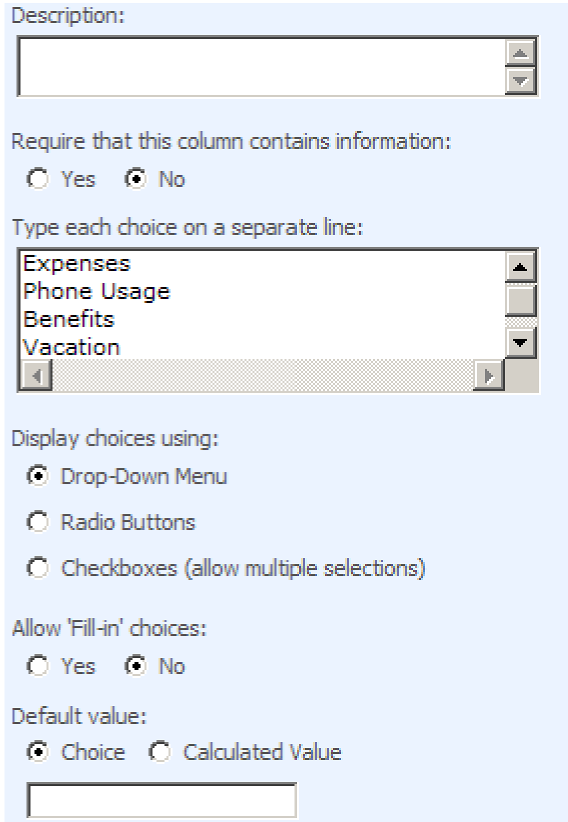
i) For the **Title**, enter **Applies to**.

ii) For **Type**, select **Choice**.

iii) Scroll down to the **Additional Columns Settings** section, in the box for your custom choices, enter **Expenses, Phone Usage, Benefits, Vacation.**

iv) Remove the text from the **Default Value** section

v) Click **OK**.



4) Edit the **Versioning settings** on the **Customize Employment Policy** page.

A) Under the **General Settings** list, click on the link for **Versioning settings**.

i) In the **Content Approval** section, make sure that the box for **Yes** has been selected.

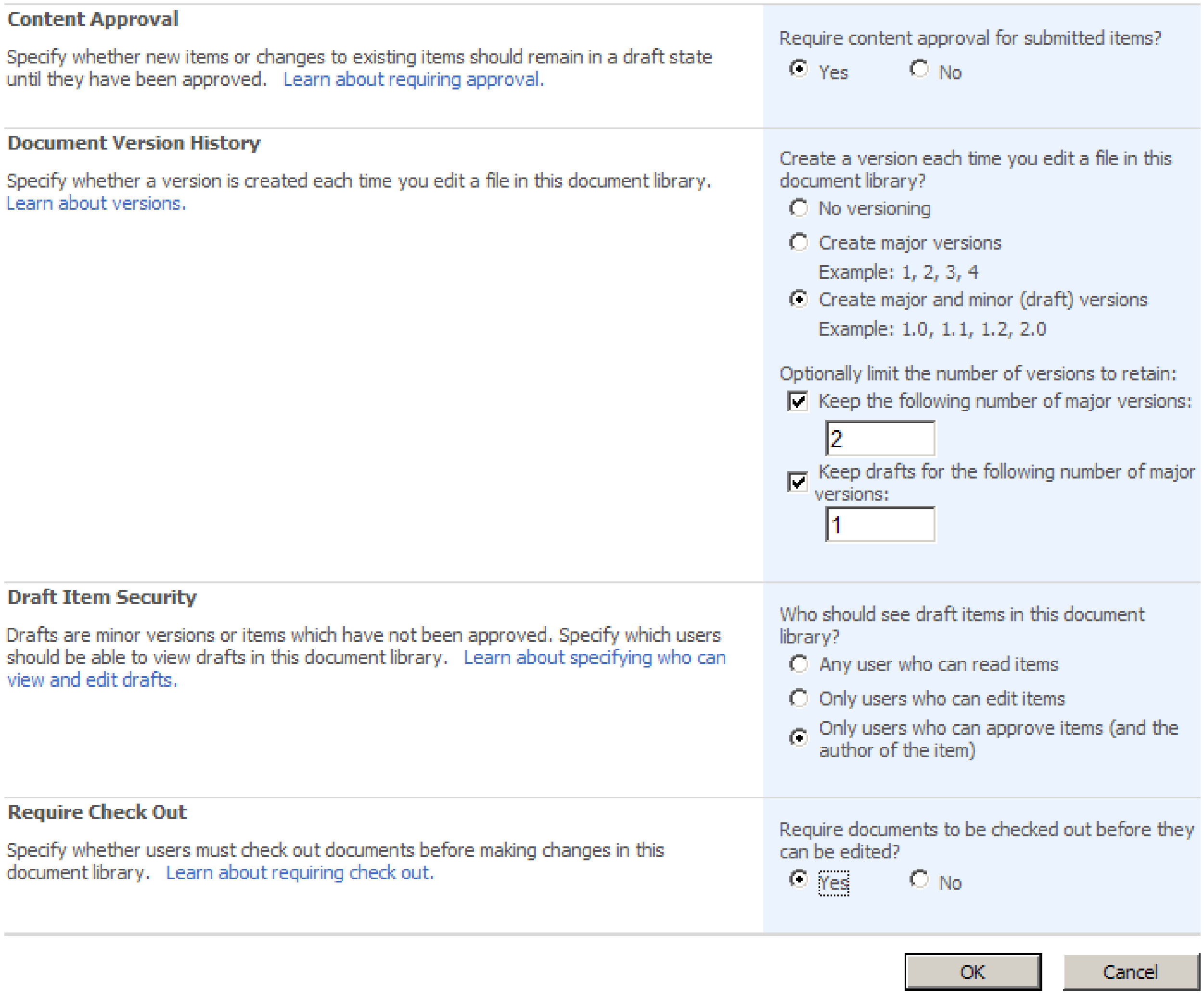
ii) In the **Document Version History** section, select the choice **Create major and minor (draft) versions**.

iii) Check the box and Set **Keep the following number of major versions: 2**

iv) Check the box and Set **Keep drafts for the following number of major versions: 1**

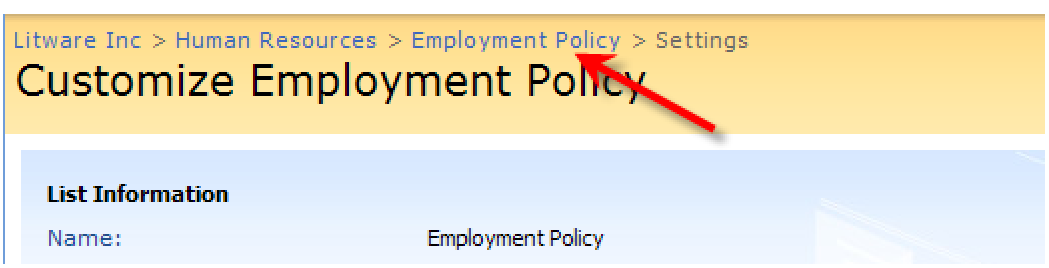
v) In **Draft Item Security** select **Only Users who can approve items**

vi) Make sure that in the **Required Check Out** section, that **Yes** has been selected.



i) Click **OK**.

5) Upload a document into your new list. Navigate back to the **Employment Policy** document library. There are several ways in which we can do this, but the easiest way would be to use the breadcrumb in the upper portion of the page



A) Click on **Upload**.

i) Click **Browse**

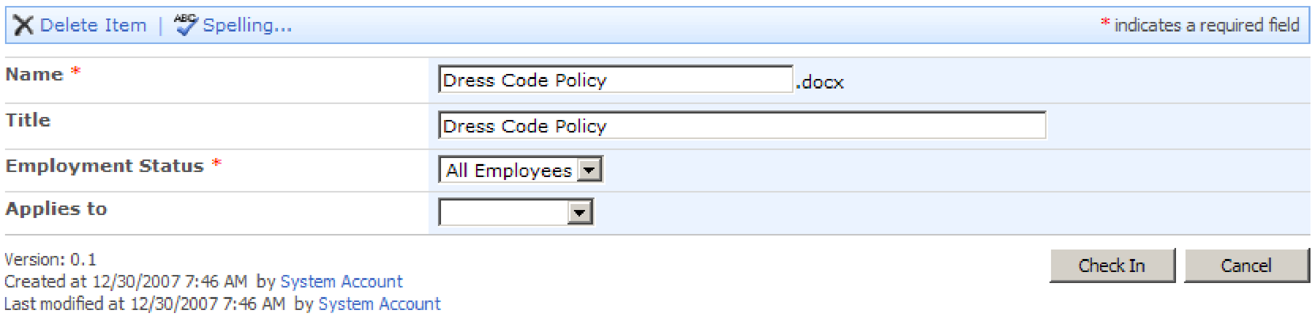
ii) Navigate to the Dress Code Policy.docx **(…\SBU201Student\Labs\03-Document Management\Dress Code Policy.docx)**

iii) Click **OK**. Your screen will reload and you will need to fill out the metadata for your uploaded document. Notice how the document has been checked out to you and that your upload requires approval.

iv) For the **Title**, enter **Dress Code Policy.**

v) For **Employment Status**, enter **All Employees**.

vi) We will not enter a value for **Applies to**. Note that this field is not required.



i) Click **Check In**.

B) After your computer reloads, you should be back at the **Employment Policy** document library and you will notice that your document has been uploaded with the corresponding metadata. Also see that the Approval Status is **Draft**. This is because the current version is not a **Major version**. We need to publish this document to a major version.

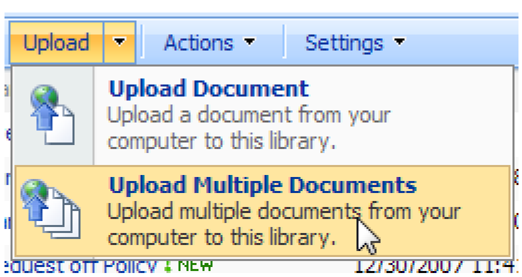
C) Move your cursor over **Dress Code Policy** and click **Publish a Major Version.**

D) Click **OK**.

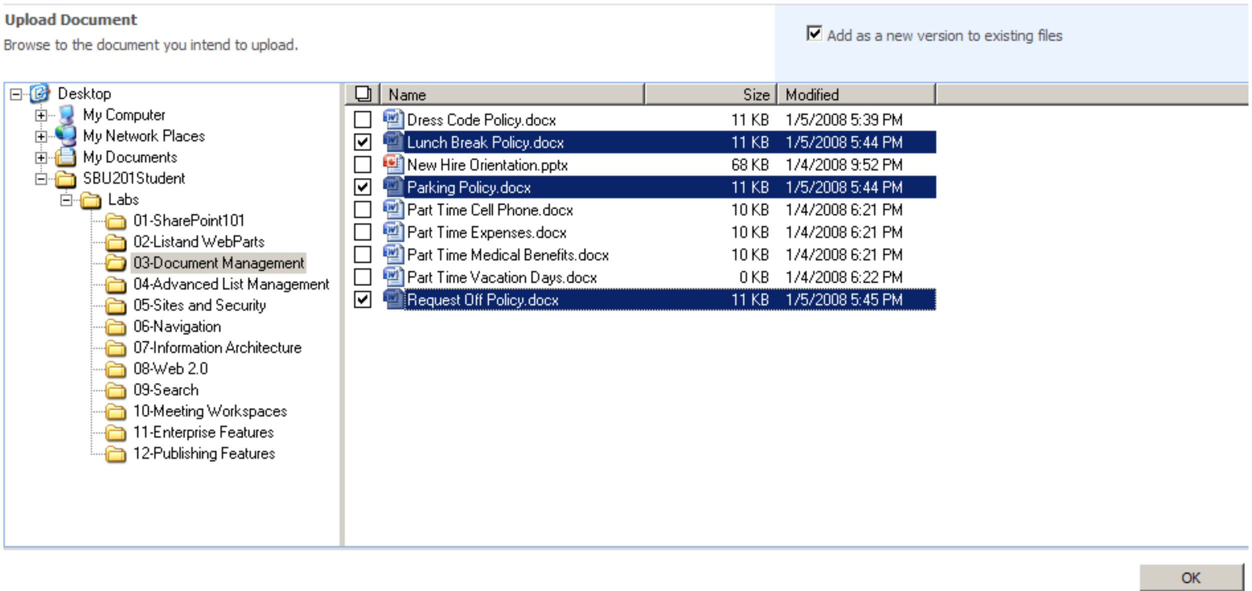
E) You will see the **Approval Status** change to **Pending**.

6) Next we are going to upload three documents using the **Multiple Document** option.

A) Click **Upload > Upload Multiple Documents**.



vii) Browse for the three documents titled **Lunch Break Policy.docx, Parking Policy.docx, Request off Policy.docx.** All three are located in the 03-Document Management folder **(…\SBU201Student\Labs\03-Document Management\Dress Code Policy.docx)**

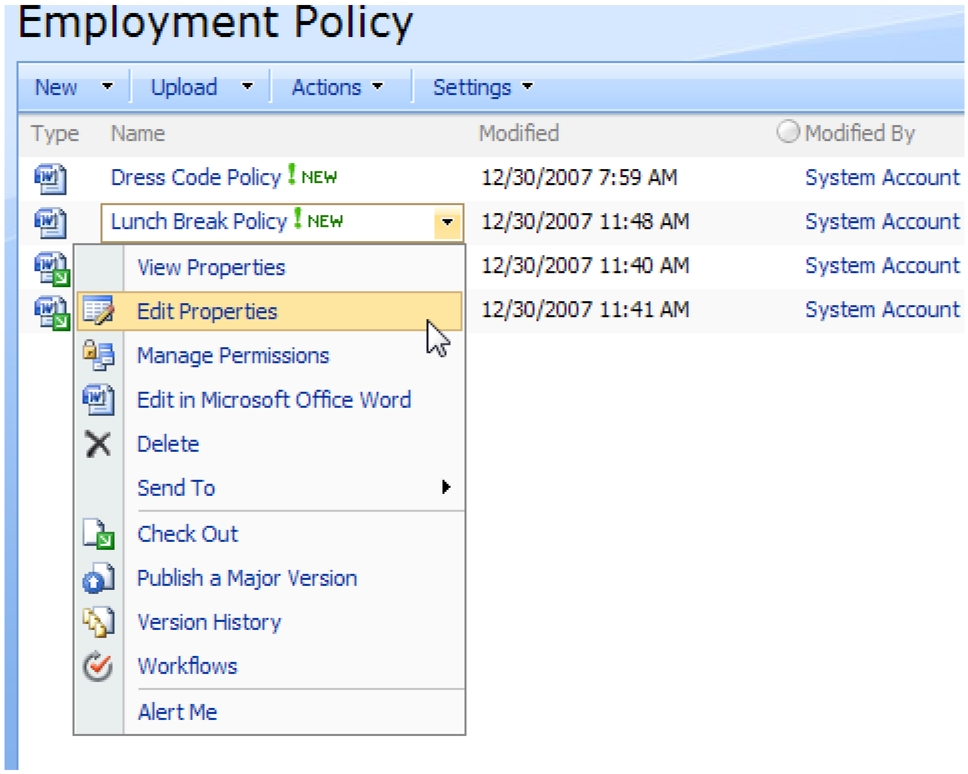


B) Click on the checkbox for those three documents.

C) Click **OK**. Click **Yes** when the Internet Explore box pops up.

D) Your page will reload back to the **Employment Policy** site. Verify that your documents have been uploaded properly. Notice that when you uploaded these documents that you did not have to fill out the metadata for each document. This is because you were using the **Multiple Document** option. Because we used this option, we will have to enter the metadata for each document separately. When uploading multiple documents, it is safe to assume that the metadata for the documents could vary.

E) Move your cursor to **Lunch Break Policy**. A box will come up around this document. Move your cursor to the right where the drop-down menu is. Click on the drop-down menu and click on **Edit Properties**.



I) For the **Title**, enter **Lunch Break Policy**.

II) For **Employment Status**, select **Full-Time**.

III) Again, leave **Applies to** blank.

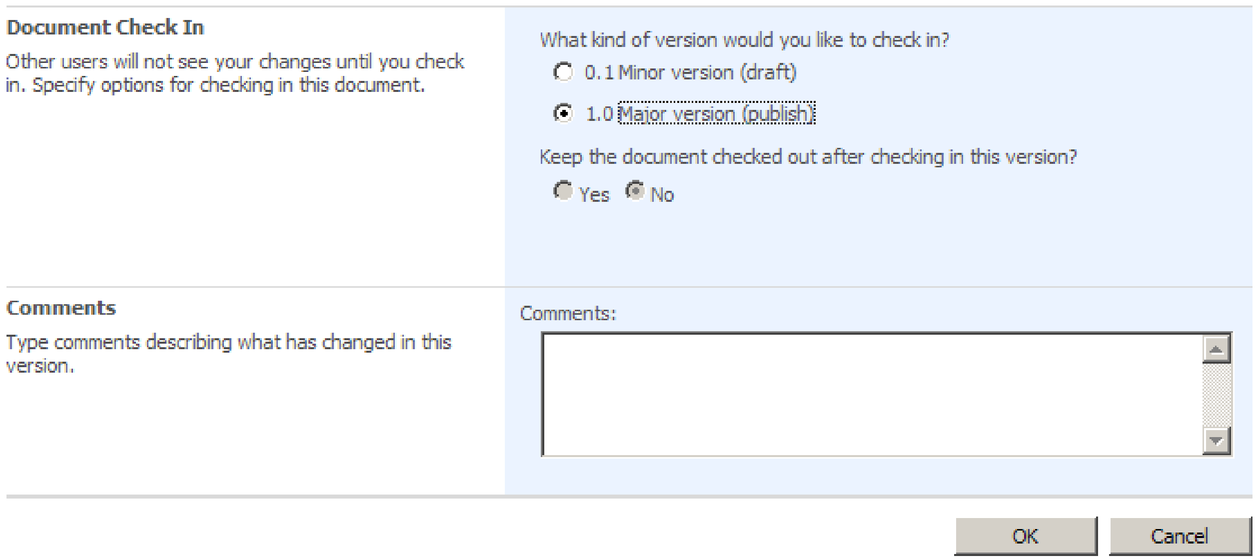
IV) Click **OK**.

V) After your screen reloads you should see the metadata you entered.

F) Repeat Step F above for **Parking Policy.docx** and **Request off Policy.docx.** Select **All Employees** for both. For **Request off Policy.docx**, select Vacation for applies to.

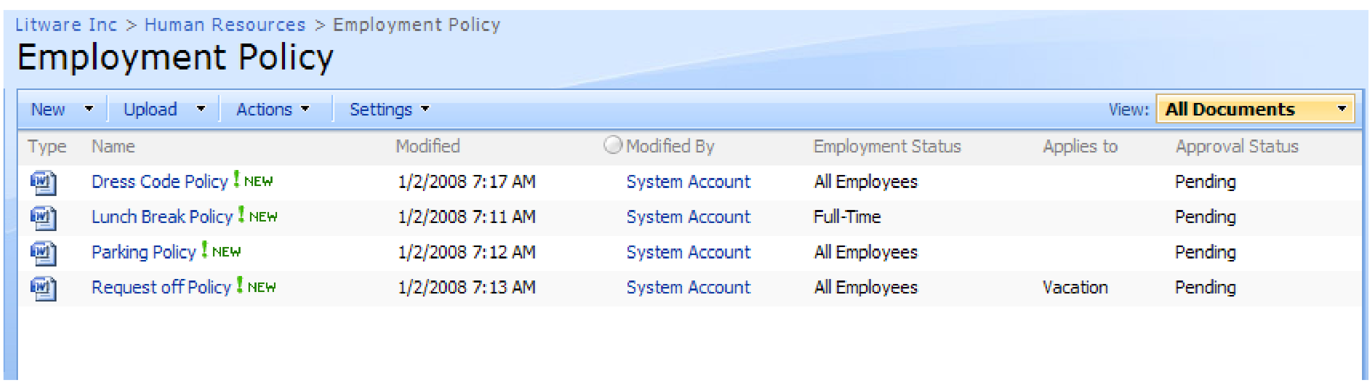
G) Now we will **Check In** each document we uploaded using the **Multiple Document** option. Move your cursor over the first document in this group, click on the **Edit** drop-down menu. Click on **Check In.**

i) Select **1.0 Major version (publish)**.



i) Click **OK**.

H) Repeat these steps to check in the last two documents. When you are finished, your screen should look like this:



7) Create a new policy.

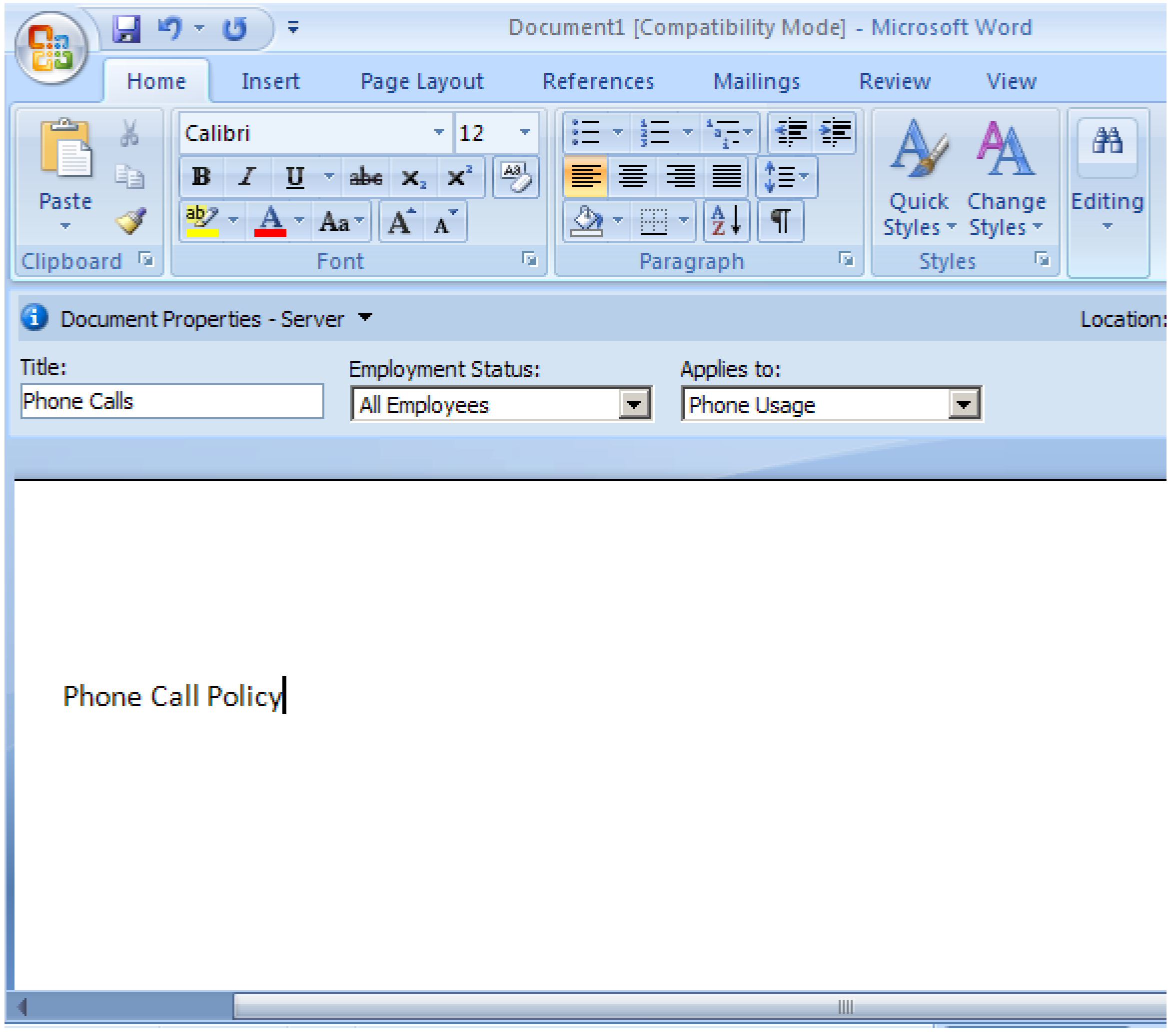
A) Click on **New > New Document**. Click **OK** if a warning box pops up.

B) Microsoft Word should open up and you should be able to add some content for your new policy. Also note that in the upper portion of you new policy, there are metadata sections for you to fill out.)

i) For the **Title**, enter **Phone Calls**.

ii) For **Employment Status**, enter **All Employees**.

iii) For **Applies to**, enter **Phone Usage**.



C) To save the document back to the Employment Policy library, click the save icon in the top left corner.

D) For the File Name: **Phone Call Policy.docx**

E) Click **Save**

F) If any boxes pop-up, click **OK**.

G) Attempt to exit out of the document, a box will pop-up and it will ask you if you would like to **Check In** the policy you created. Go ahead and click **Yes**.

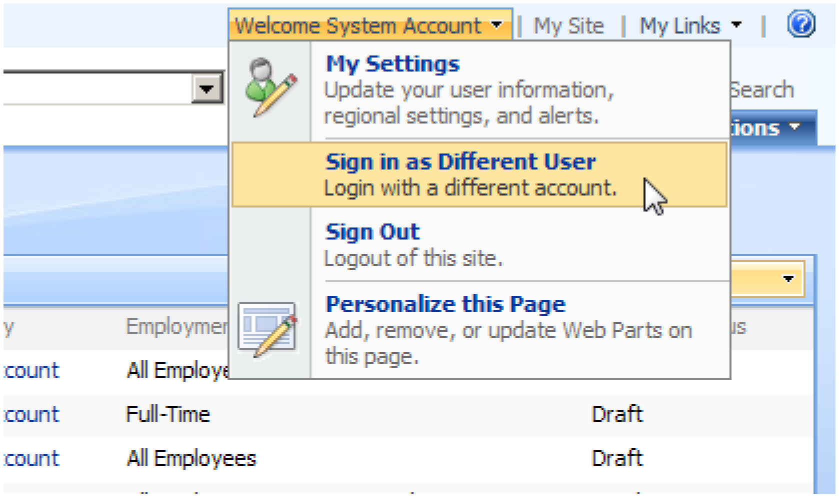
i) Select **1.0 Major version**.

ii) Click **OK**.

iii) Back on the **Employment Policy** site, notice that the **Approval Status** is **Pending**. Because this document is a **Major Version**, it is ready to be approved and published.

8) So that you can see how some of the security settings work, we are going to log out as Administrator and log back in as a regular employee.

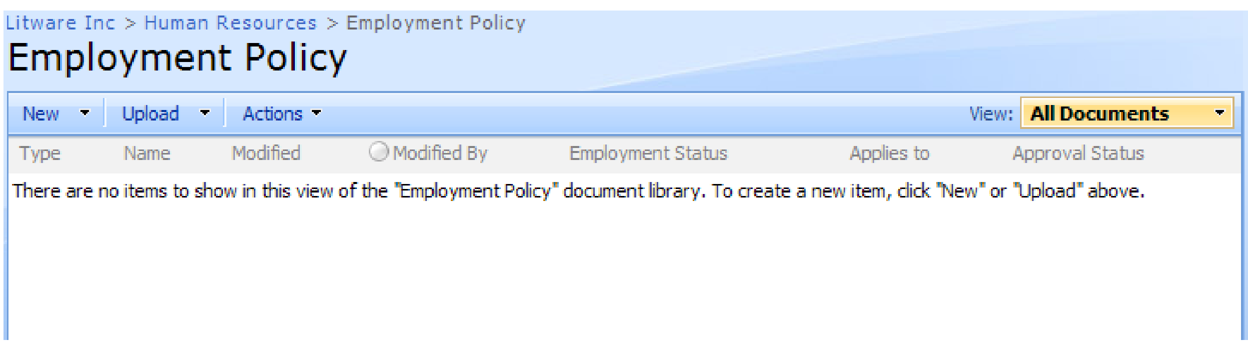
A) In the upper left-hand portion of the page, click on the **Welcome System Account** drop-down menu and click on **Sign in as Different User**. The security login box should pop-up.



i) The user is **LITWAREINC\BrianC**

ii) Password is **pass@word1**.

iii) After logging in as Brian, you will notice that he cannot view the documents in the **Employment Policy** site. He does not have permission or rights to view these documents because none of them have been approved.



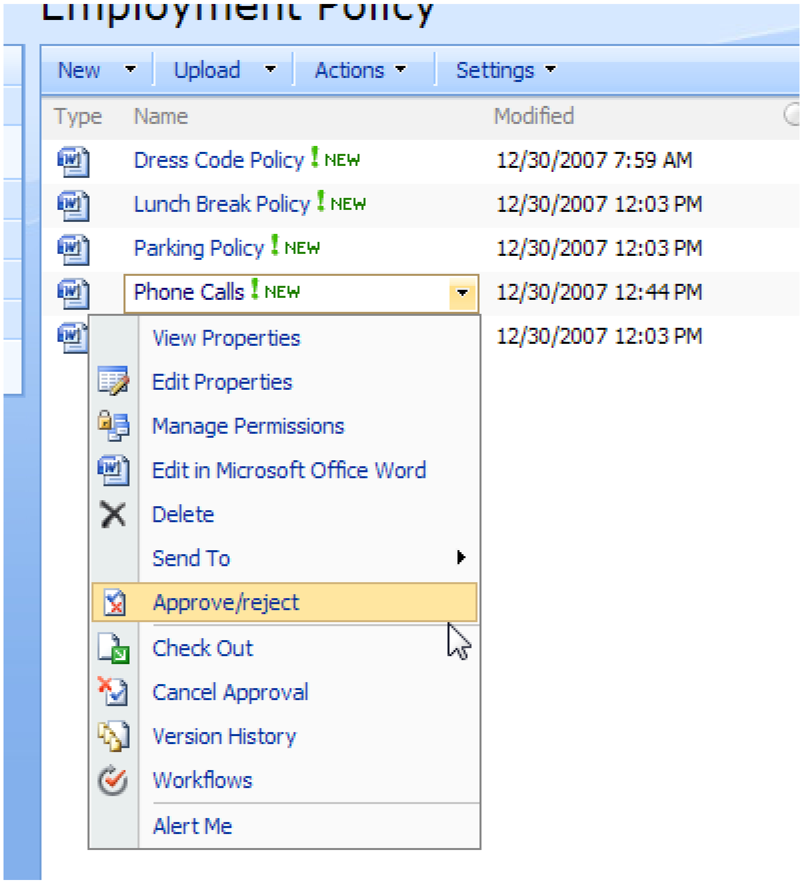
B) Let's log back in as the Administrator and approve the documents. Go back up to the upper right-hand corner and click on the **Welcome System Account > Sign in as Different User**.

i) Login is **LITWAREINC\Administrator**

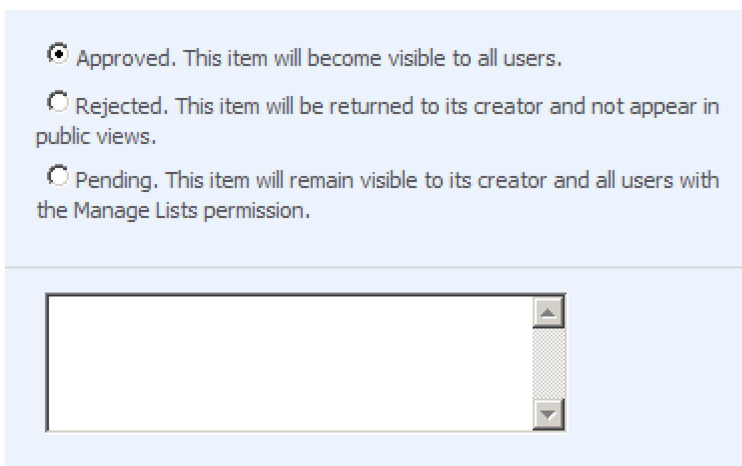
ii) Password is **pass@word1**

C) Now that we are logged back in as the Administrator, let's approve our **Pending** policy **Phone Calls**.

D) Move your cursor over the **Phone Calls** policy and click on the **Approve/Reject**.



i) Select **Approved**.



ii) Click **OK**.

E) You will see that the status for the policy has been changed to **Approved**. It should now be visible to all users. Let's make sure that it is.

F) Log back in as BrianC (see step 8)

G) Verify that you can now see the **Approved** documents.

H) Log Back in as the Administrator

9) To complete the rest of this lab, you will be turning off Content Approval. This will allow us to explore some other options in Document libraries.

A) Click on **Settings→Document Library Settings**

B) Click on **Versioning Settings**

C) In the Content Approval section set it to **No**

D) Click **Ok** to the warning

E) Click **Ok**

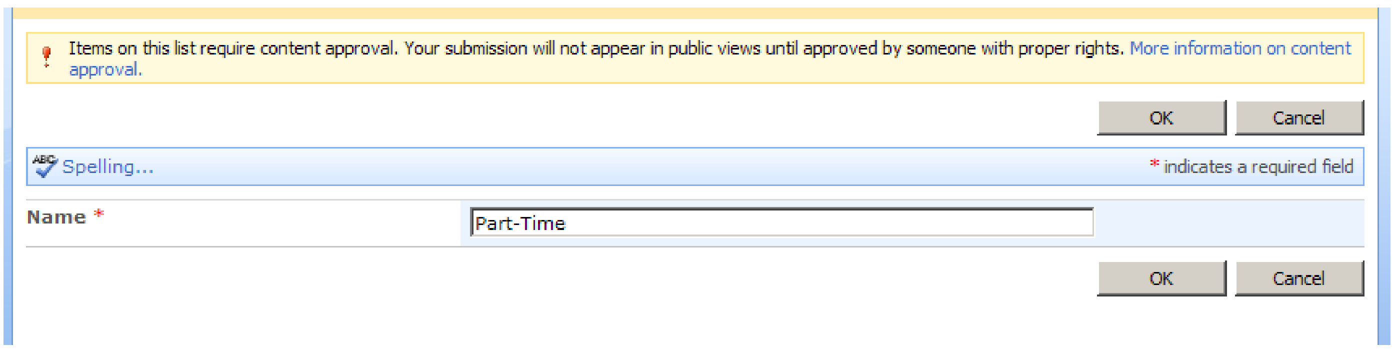
F) Click on **Employment Policy** in the breadcrumb

10) In every organization it is important to choose the appropriate form of organization. As the administrator of the Human Resources site, you need to choose between Folders and using Metadata to create views or sort and filter. In this next step, you will create a **Part-Time Folder**.

A) On the **Employment Policy** site, click on **New > New Folder**.

i) For the **Name**, enter **Part-Time**.

ii) Click **OK**.



iii) Double Click on the **Part-time** folder

iv) Your page should reload and you will be on the **Part-Time** folder page.

B) Create four new folders within the **Part-Time** folder: **Vacation, Expenses, Phone Usage,** and **Benefits**. Notice that these titles match the **Applies To** column.

i) Click on **New > New Folder**

ii) Enter the title for each of the four new folders.

11) Upload the following documents to your **Employment Policy Document Library**: **Part Time Cell Phone, Part Time Expenses, Part Time Medical Benefits,** and **Part Time Vacation Days**.

A) Navigate to the **Employment Policy** library using your breadcrumb.

B) Click on **Upload > Upload Multiple Documents**.

viii) Browse and select the documents listed above; they are located in the 03-Document Management Folder **(…\SBU201Student\Labs\03-Document Management\Dress Code Policy.docx)**

C) Click **OK**. Click **Yes** at the Pop Up.

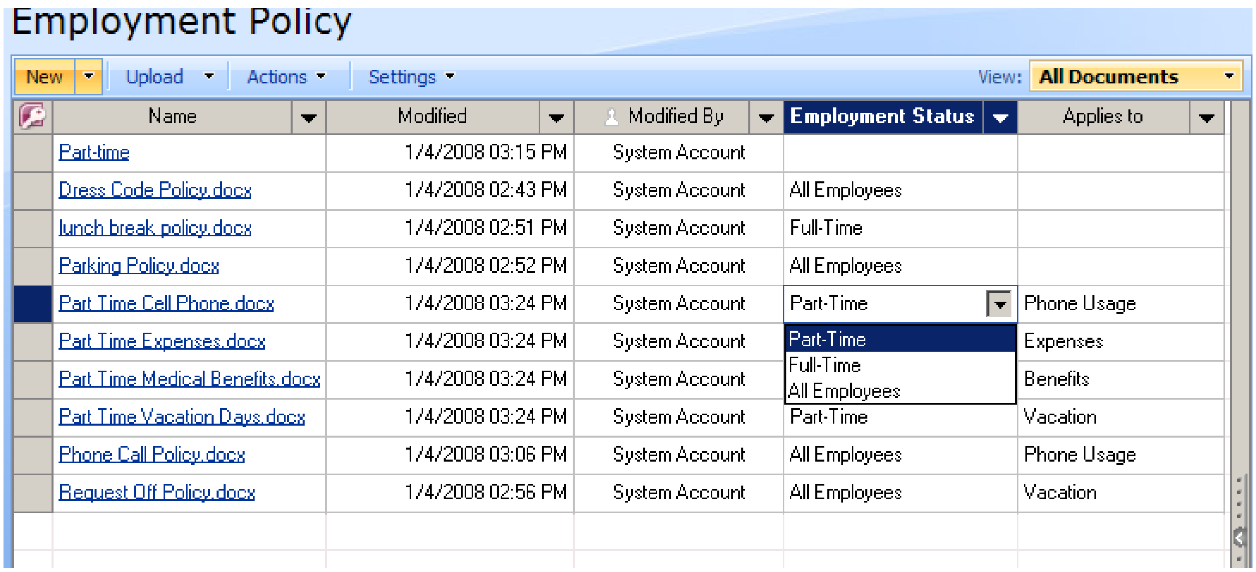
D) Verify that your documents have been added.

E) Click on **Actions > Edit in Datasheet**.

F) Enter the corresponding metadata for each document. This view allows you to edit the columns for all of the documents at once. To edit a column, click the drop down and select the metadata you would like.

   i) **Employment Status** will be **Part Time** for each document.

   ii) Enter the corresponding entry for the **Applies to** section (See the title of each document)



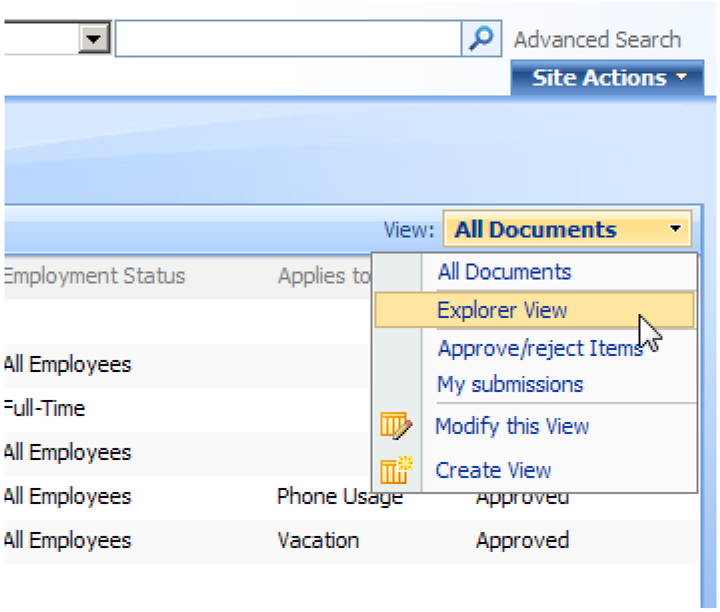
G) To return to the standard view, Click **Actions→Show in Standard View**

H) Check In all of your new documents and publish a major version. (see step 6G)

12) Change the view of **Employment Policy** to **Explorer View**.

A) In the upper right-hand side of the page, click on the **View** drop-down box.

B) Click on **Explorer View**.



13) Drag all the documents you added in step 9 into the **Part-Time** folder.

14) Open the **Part-Time** folder by double clicking it.

15) Drag each document to its corresponding folder. Return to the **All Documents** View.

16) On our **Employment Policy** library we have our documents set up in two different ways. We have five documents that are organized using metadata and we have four documents that are organized using the traditional folder method. Think about your employees trying to find documents and see what documents are available and choose the appropriate method for your organization.

17) It is important to require **Check Out** if more than one person is going to be editing a document. The **Check Out** option ensures that any changes made to the document will not be lost. Since Litware Inc. has an **Employee Policy** team of five members, we have turned on required **Check Out**. Let's take a look at what happens when someone tries to edit a document that has already been checked out by another employee.

A) Navigate to the **Employment Policy** library using the link on the Quick Launch Bar (Left navigation)

B) Click on the **Edit** drop-down menu for **Dress Code Policy**.

C) Click on **Check Out**, click **Ok** at the notification.

D) Now log on to BrianC's Remote Desktop Connection and see what happens when you attempt to edit **Dress Code Policy.** To log on **double click** the **BrianC** icon on the desktop.

i.) Open Internet Explorer and navigate to http://portal/hr

ii.) Click on the **Employment Policy Library**

iii.) Double Click on **Dress Code Policy**

iv.) At the warning message click **OK** v.) Notice the document open in reading pane mode and has an information bar at the top stating to check the document out if you would like to modify. Click **Check Out**

vi.) At the popup, click **read only**

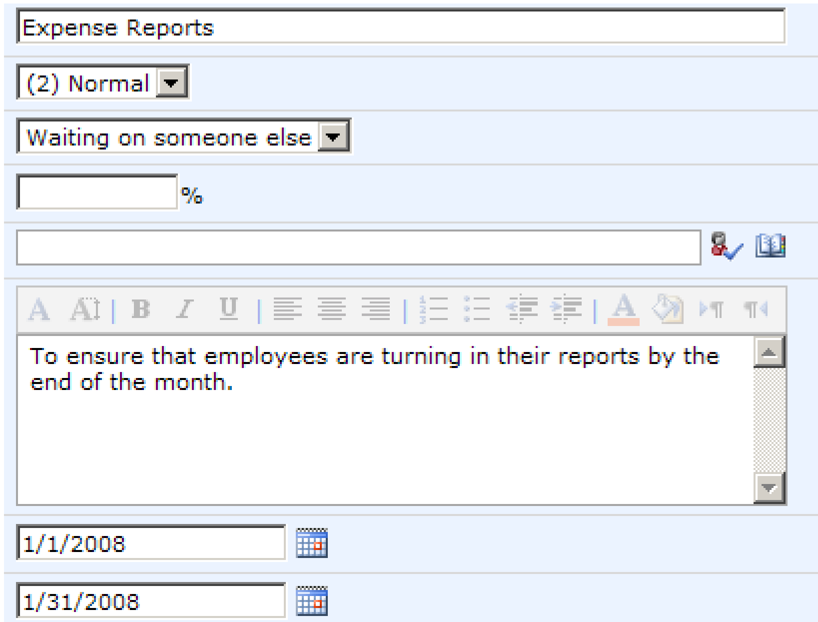
vii.) Exit out of the document, close the internet explorer browser and log off of the BrianC RDP.

Exercise 2:

Angela Barbariol is the manager of the Employee Policy Team. She would like to have a task list to monitor the progress of a new policy being written. This task list will be connected to Outlook for offline integration and since she spends most of her day in Outlook this will make managing the list easier. She would also like to take the Employee Policy Document Library offline as well in case an employee needs a policy and the internet is unavailable.

1) On the HR Site, create a new task list.
   - A) Click **Site Actions > Create**.
   - B) Under the **Tracking** section, click on the link for **Tasks**.
     - i) For the **Name**, enter **New Policy Progress**.
     - ii) Click **Create**.
2) Create two tasks for our new task list to monitor.
   - A) Click on **New > New Item**.
     - i) For the **Title**, enter **Expense Reports**.
     - ii) For the **Priority,** enter **Normal**.
     - iii) For the **Status**, enter **Waiting on someone else**.
     - iv) Enter a brief **Description**.
     - v) Select a dates for the first and last days of the current month.

vi) Click **OK**.



B) We still have one task to create. Click on **New > New Item**.

i) For the **Title**, enter **Policy Confirmation**.

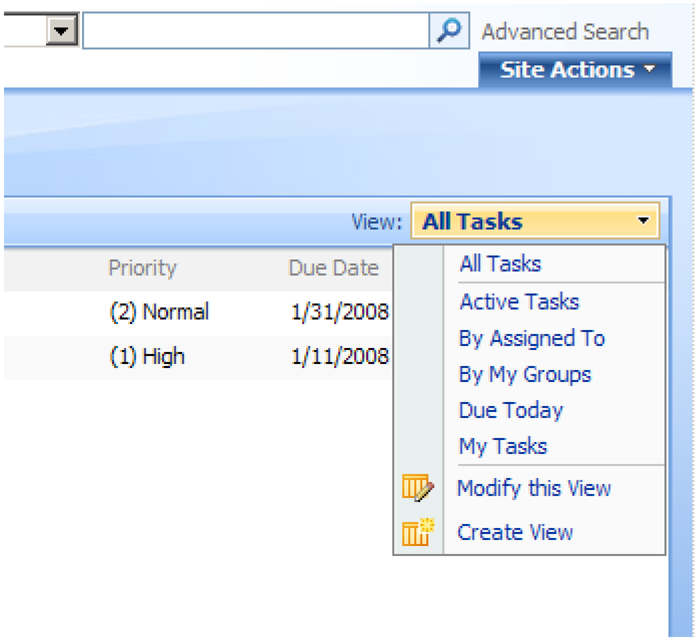
ii) For the **Priority**, enter **High**.

iii) For the **Assigned to** section, enter **AngelaB** and hit **CTR + K**. This will validate her to **Angela Barbariol**.

iv) Enter a brief description.

v) Enter generic dates that are a couple weeks apart.

vi) Click **OK**. Back in the **New Policy Progress** list, notice all the **Views** that are available for this task list. Notice how there is already several views created for you that filter to a piece of metadata.



3) Connect this task list to Angela's Outlook application.

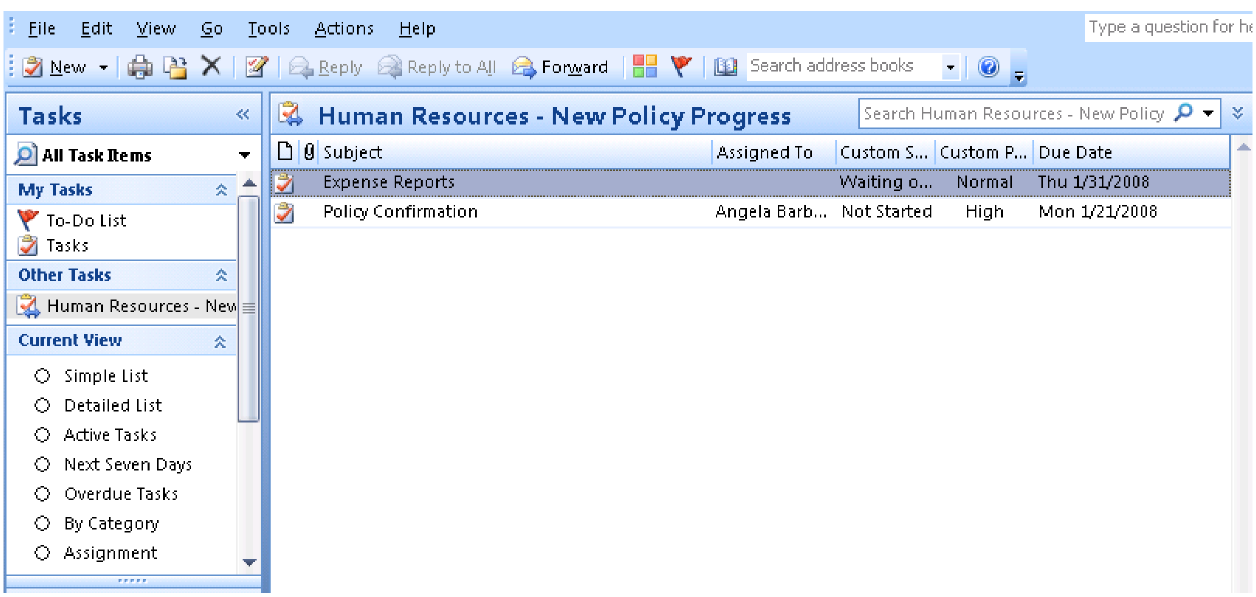
A) Log in to Angela's Desktop by double click the AngelaB.RDP icon on your desktop.

B) Using Internet Explorer, go to http://portal

C) Navigate to the **New Policy Progress** list on the Human Resources site.

D) Click **Actions > Connect to Outlook**.

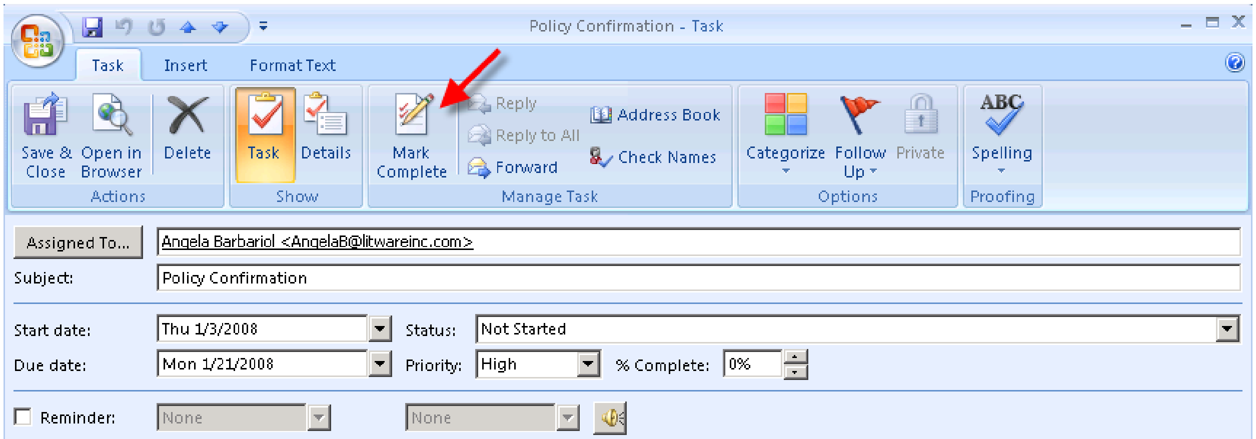
E) Two boxes should pop-up in Outlook. Click **Yes** to both.



4) Edit a task using Outlook.

A) Double Click the **Policy Confirmation** task.

B) When the task is open, click **Mark Complete** located in the center of the ribbon.



C) Back in Internet Explorer, refresh the browser. Notice the Policy Confirmation task has been marked completed.

5) Last, we need to make the **Employee Policy** document library available offline.

A) Navigate to the **Employment Policy** document library on the HR site.

B) Click on **Actions > Connect to Outlook**.

C) A box will pop-up in Outlook. Click **Yes**.

D) Verify that the document library has been connected. Notice that the documents text to the documents appears in the reading pane as you click through the documents.

E) If you double click on the document it will open in Word.

F) Go ahead and close all of the open programs and log off of Angela's desktop.

Exercise 3:

Litware Inc. uses a slide presentation for the orientation of all their new employees and they would like to store this presentation in a slide library. The slide library will allow them to tailor the presentation based on the group of new hires, whether they are part-time, full-time, or temporary.

1) Create a slide library.

A) Navigate to the **Human Resources** homepage.

B) Click on **Site Actions > Create**.

C) Under **Libraries**, click **Slide Library**.

i) For the **Name**, enter **New Hire Orientation Slide Library**.

ii) Click **Create**.

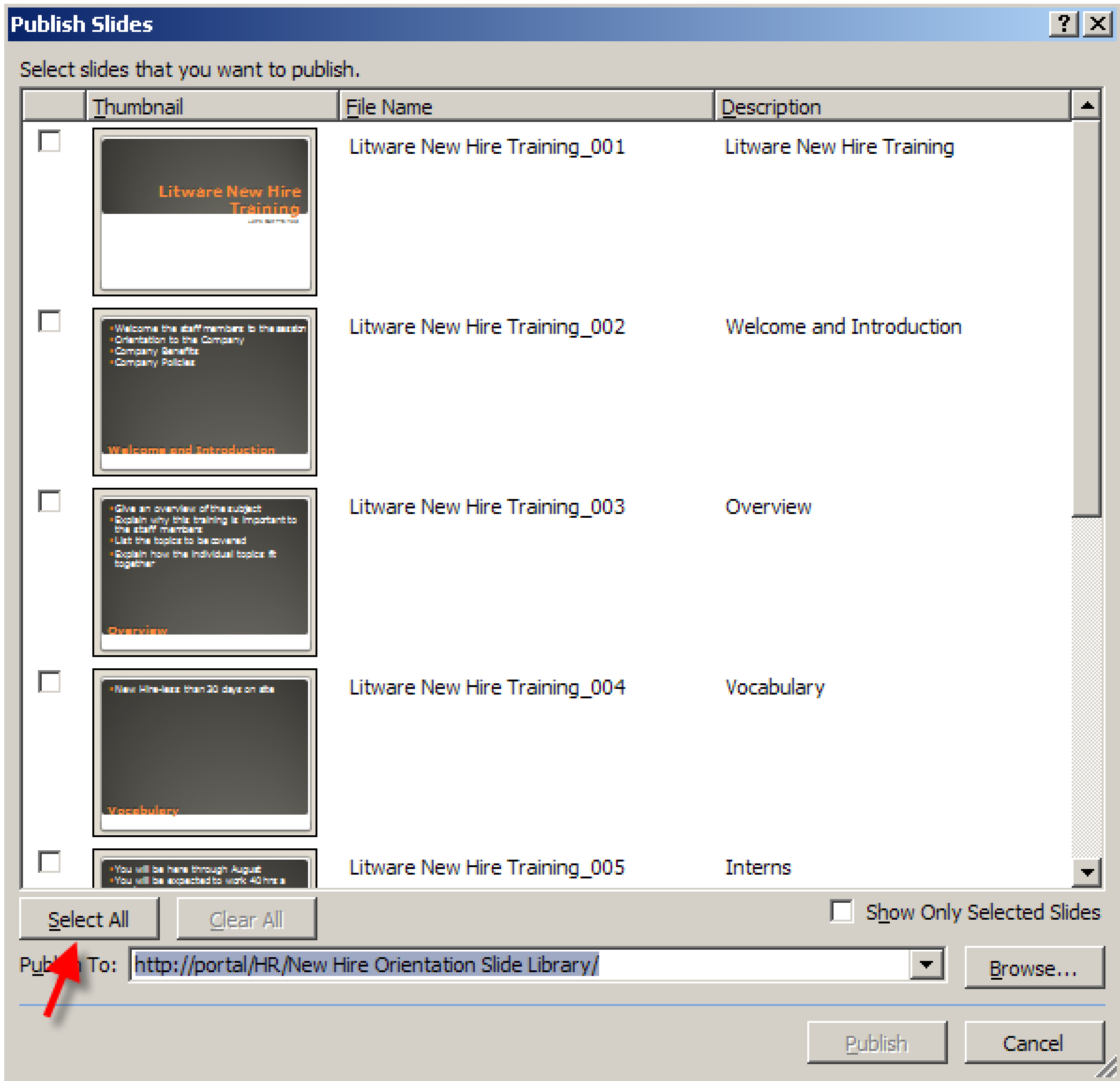
2) Upload the presentation to the slide library.

A) Click **Upload→Publish Slides**

B) Browse to **New Hire Orientation.pptx** located in the 03-Document Management folder **(…\SBU201Student\Labs\03-Document Management\Dress Code Policy.docx)**

C) Double Click the flle

D) A dialog box will appear asking you to select the slides you would like to publish. Click **Select All**

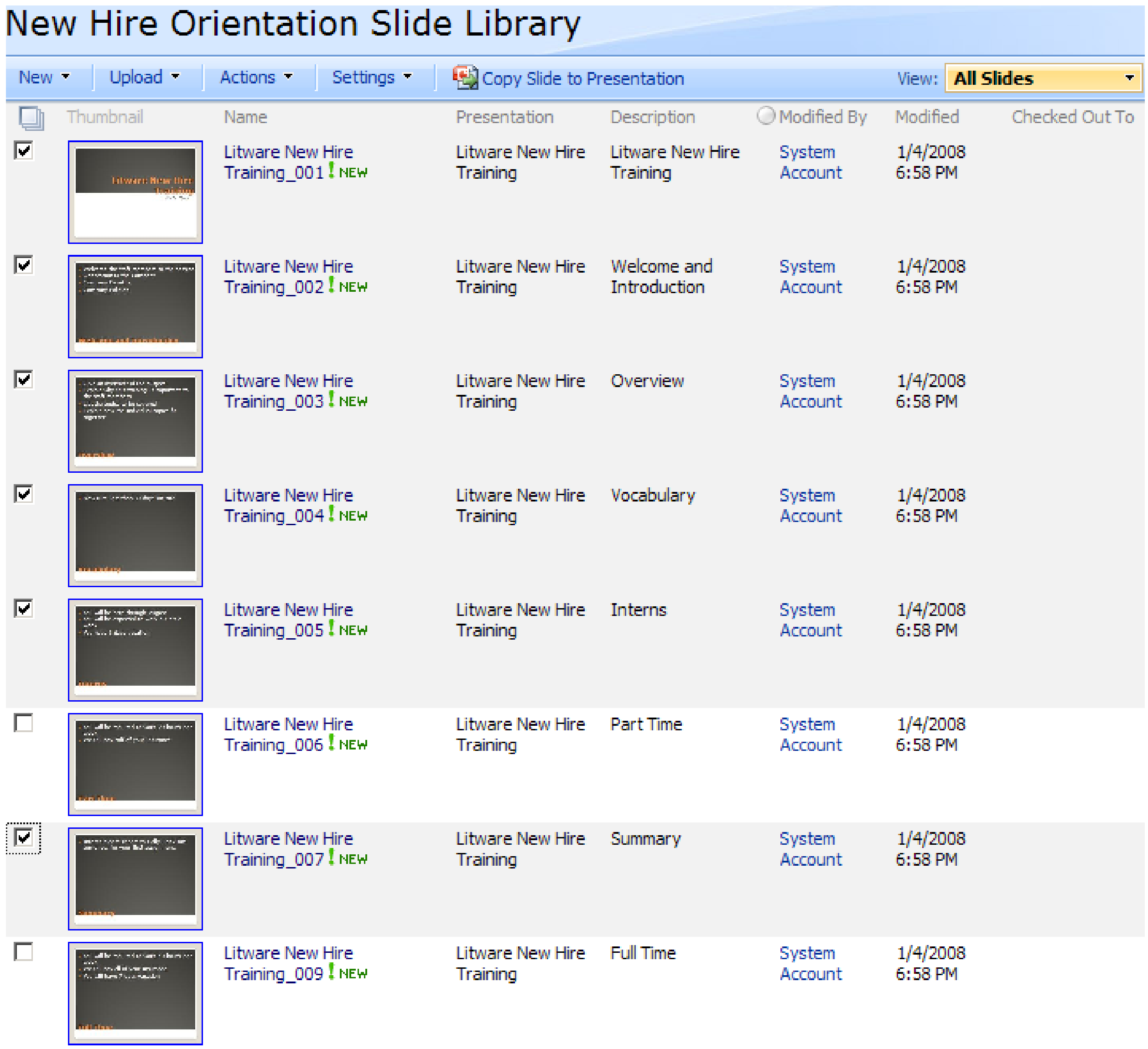


E) Click **Publish**

F) Back in the Slide library, you may need to refresh to see the slides.

G) Notice the slide library shows you a thumb nail of the slide, it also presents you with a description column which is pulling its information from the title of the slide.

H) You need to create a presentation for the interns coming in tomorrow morning. Select the check boxes next to the following slides, instead of the using the name the slides will be selected using the description column: Litware New Hire Training, Welcome and Introduction, Overview, Vocabulary, Interns, and Summary.



I) Click **Copy to Presentation**

J) Read the options on the pop up box and then click **Ok**

K) The presentation opened but it did not keep the formatting. Let's see if we can fix that. Close this presentation. Click **NO** when it asks if you would like to save.

L) Repeat steps H-I from above

M) At the pop up box this time, check the box next to **Keep the source presentation format**

N) Click **Ok**

O) The slides should now appear with the formatting applied.

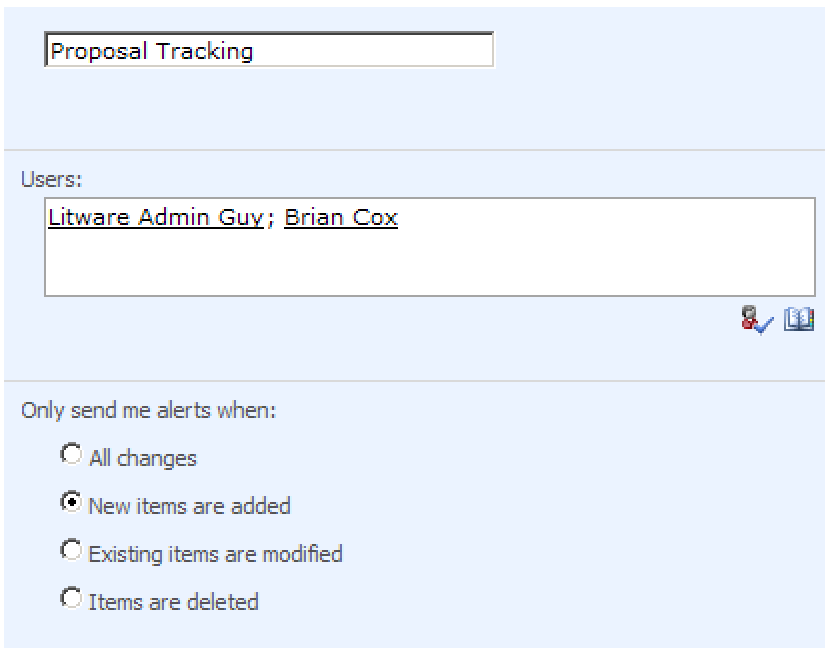
Lab 04: Advanced List Management

Lab Overview: In this lab you will be using the more advanced list features to make the portal more useful. You will be adding alerts to a list, creating a workflow, and using the content query web part to aggregate company news announcements from all of the sub-sites on the homepage of the portal.

Exercise 1: Using Alerts and Workflows to manage the proposal library

Navigate to the proposal library on the http://portal/sales site.

1) Set-up an alert for Brian Cox and Litware Admin Guy on the proposal library for them to be notified when a new proposal is added.
    - A) Navigate to the **Proposal Tracking** library.
    - B) Click on **Actions >Alert Me**.
        - i) For the **Title**, enter **Proposal Tracking**
        - ii) We are sending the alerts to two people: Brian Cox and Administrator. Enter each name and hit **CTR + K**. Their names should be verified.
        - iii) For **Change Type**, we only want these two people to be alerted when new documents are created, so select **New items are added**.



        - iv) Click **OK**.
2) Add a new proposal to the library and confirm that the alert is in place.
    - A) Click **New > New Item**.
        - i) **Company Name** is **HighTech**
        - ii) **Hours Requested** is **15**.
        - iii) **Amount Proposed** is **$10,000**
        - iv) Create a generic **Date RFP Due**.
        - v) **Region** is **East**
        - vi) **Status** is **Submitted**

vii) Click **OK**.

B) Login to BrianC.RDP (Minimize Internet Explorer and simply double click the icon labeled BrianC.RDP)

C) Open up BrianC's Outlook and verify that he received an email alerting him to a new proposal.

D) Close Outlook and log off of BrianC's desktop.

3) Create a workflow for Patricia to determine whether or not we are going to bid on a new proposal that is added.

A) On the **Proposal Tracking** list, click on **Settings > List Settings**.

B) Under **Permissions and Management**, click on the link for **Workflow settings**.

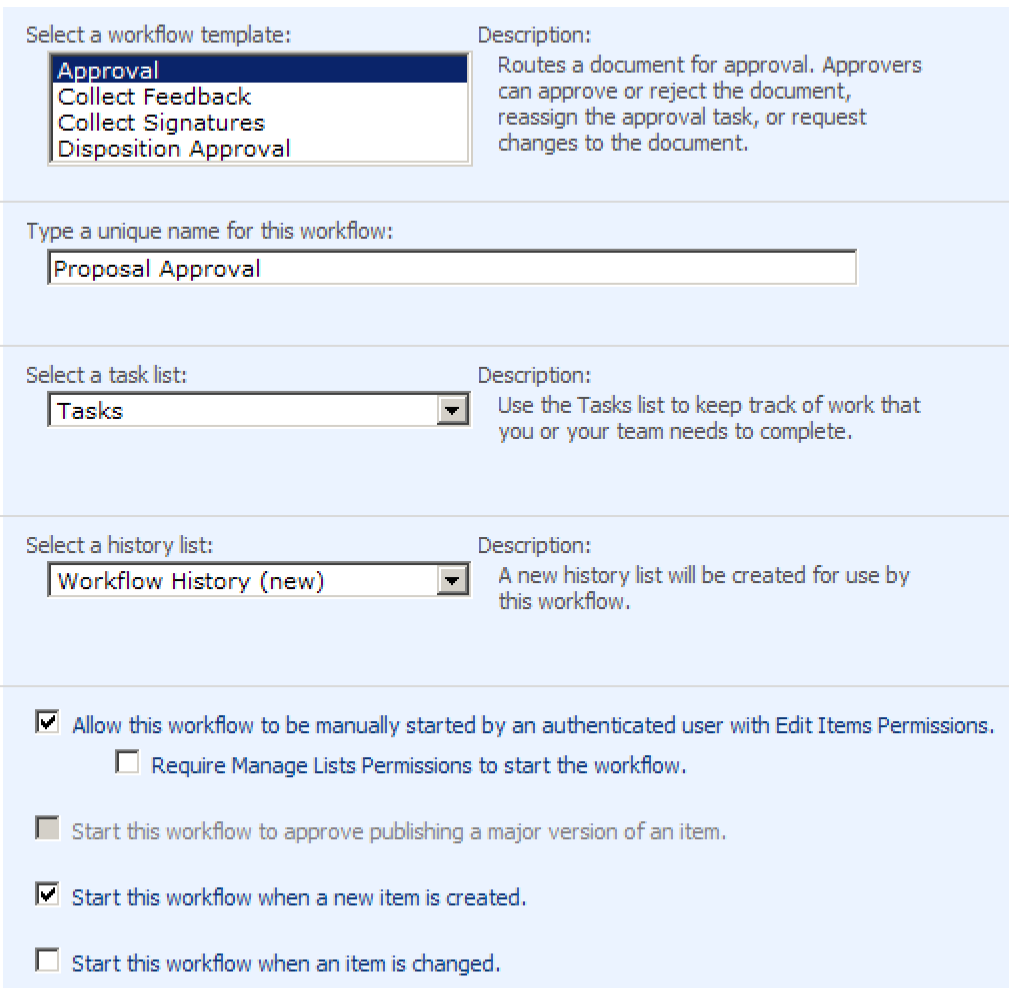
C) Because no workflows currently exist, this link will take you directly to the **Add a workflow: Proposal Tracking** page.

i) Select the **Approval** template

ii) **Name** your workflow **Proposal Approval**.

iii) Leave **Task List** and **History List** at the default settings.

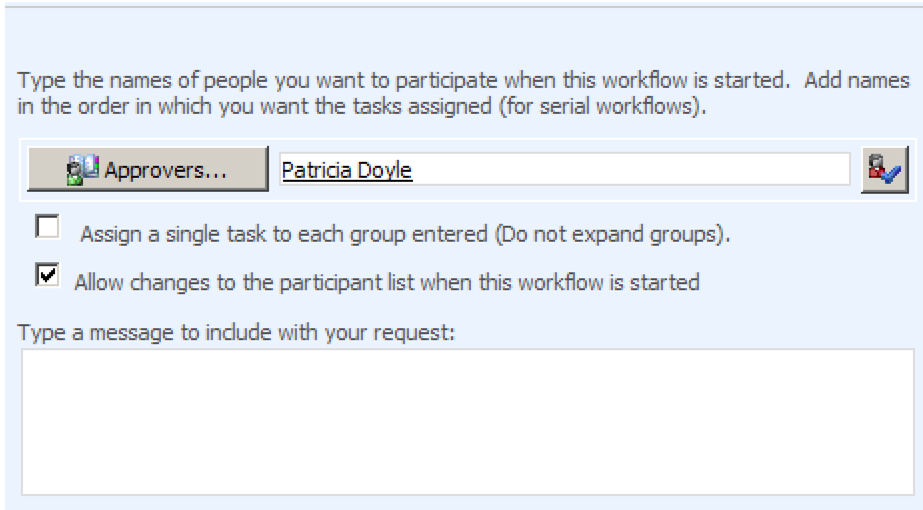
iv) For the **Start Options**, make sure to check both the manually start workflow and when new item is created boxes.



v) Click **Next**.

vi) On the next page, add **Patricia Doyle** to the **Approvers** section.

vii) Leave the rest of the sections to the default values and click **OK**.



viii) Navigate back to the **Proposal Tracking** list.

D) To confirm that the workflow has been setup properly, log onto Patricia's RDP

E) Open Internet Explorer and go the http://portal/sales site.

F) Minimize Patricia's RDP and bring up your browser. You should still be at the **Proposal Tracking** list. Add a new proposal. Click **New**.

i) For the **Name**, enter **Midwest Financial**.

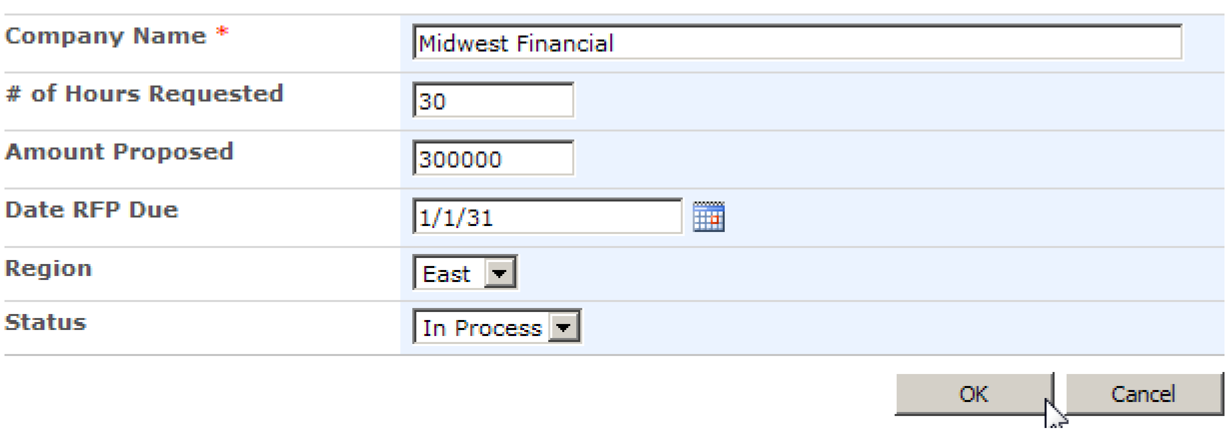
ii) For the **Hours**, enter **30**.

iii) The **Amount Proposed** is **$300,000**.

iv) Choose a **Date RFP Due**.

v) The **Region** is **West**.

vi) The **Status** is **In Process**.

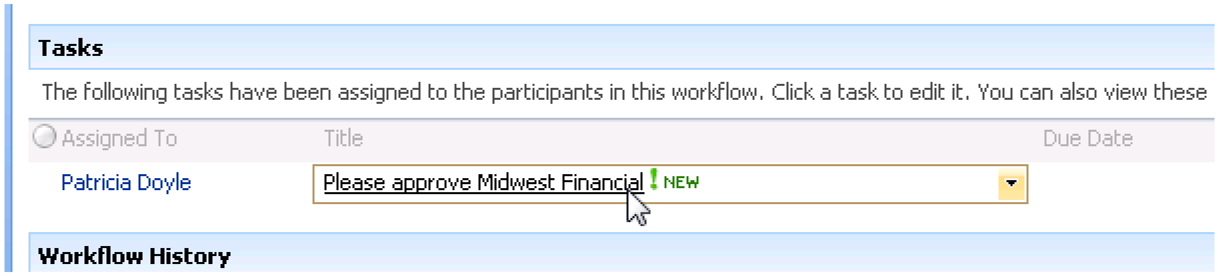


vii) Click **OK**. You will notice that back on the **Proposal Tracking** list, your list has added a new column and that your new document's workflow status is **In Progress**.

G) Now go back into Patricia's RDP and navigate to the **Proposal Tracking** list.

H) Click on the link for **In Progress**.

I) Under **Tasks**, you will see that Patricia has been asked to approve the **Midwest Financial** proposal. Click on the link.



i) Add the comment: **Make sure this gets completed by Friday. We want to be the first to have our bid in front of them**.

ii) Click **Approve**.

J) Patricia's page will reload. Navigate back to the **Proposal Tracking** list and you will see that your **Proposal Approval** status is **Approved**.

K) Minimize Patricia's RDP and bring up your browser **Proposal Tracking** list.

L) Add another proposal. Click **New**.

i) For the **Name**, enter **Activa**.

ii) Enter **22** for the **# of Hours Requested**

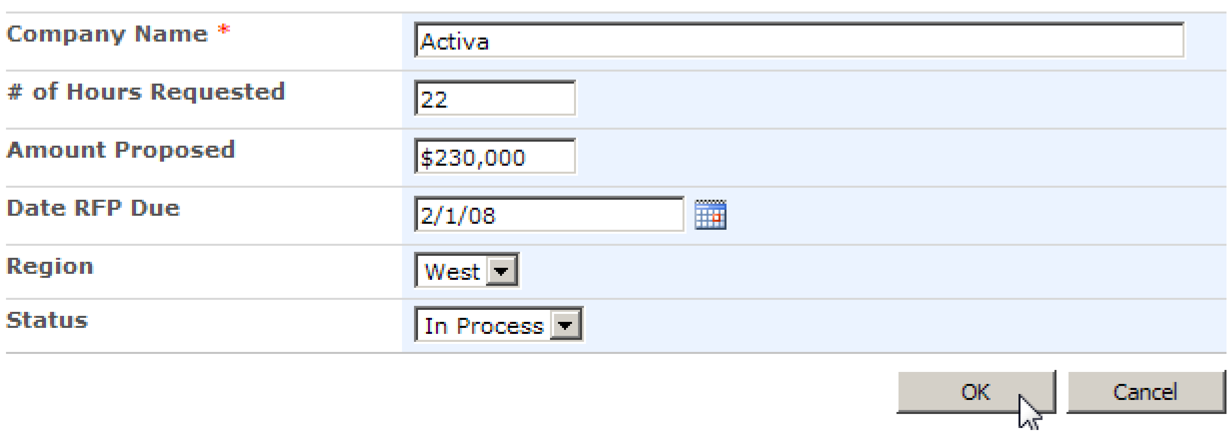
iii) The **Amount Proposed** is **$230,000**.

iv) Enter a date.

v) The **Region** is **West**.

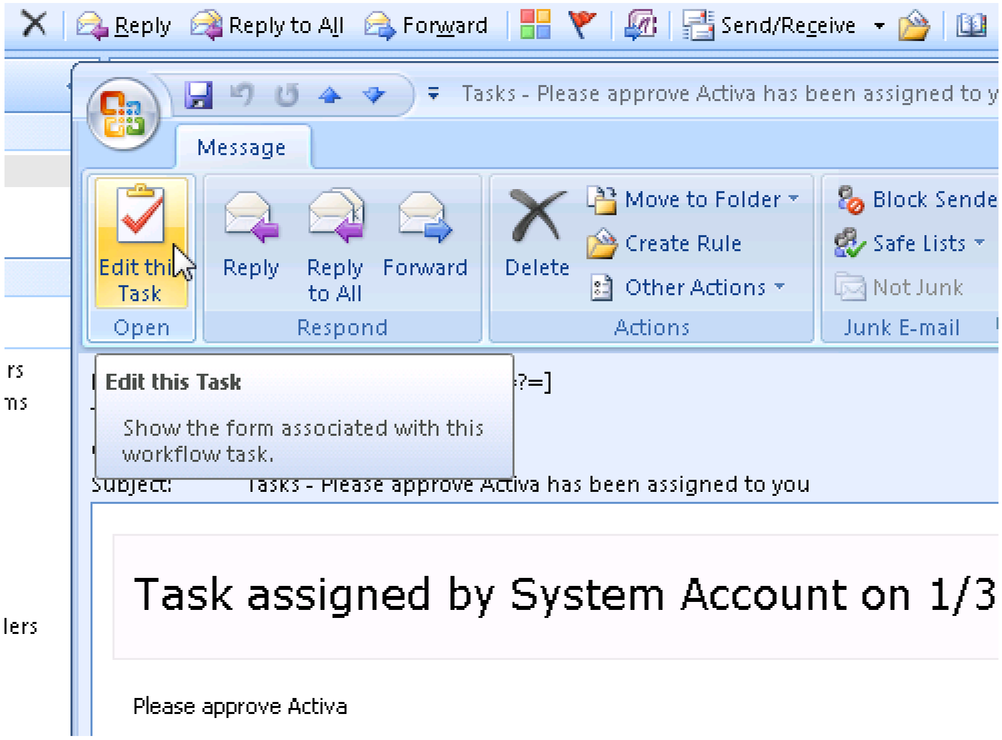
vi) The **Status** is **In Process**

vii) Click **OK**.



M) Bring up Patricia's LDP and open her Outlook. You will see emails for the two approval requests that your workflow has sent. Disregard the email for the first approval request as we have already approved that proposal. Open the approval request email for Activa. It may take a minute or two for the email to arrive.

N) In the upper left-hand corner, click on the box for **Edit this Task**.



O) You will see the same box come up for you to approve the proposal. Click **Approve**.

P) Go to Patricia's internet browser and to your internet browser and verify that the Activa request has been approved. You may need to hit the refresh key to see the changes.

Q) Close all open programs and log off of Patrica's desktop.

Exercise 2:

The Litware Inc. portal team would like the news items from the business units to automatically roll up to the homepage if the news item is for the entire company. In this exercise we will be creating a content type for company news and using the content query web part to display the content to accomplish this task.

1) Create a new site column. On the Litware Inc. homepage.

A) Navigate to the main Litware Inc. homepage.

B) Click on **Site Actions > Site Settings > Modify All Site Settings**.

C) Under **Galleries** click on the link **Site Columns**.

D) Click **Create**.

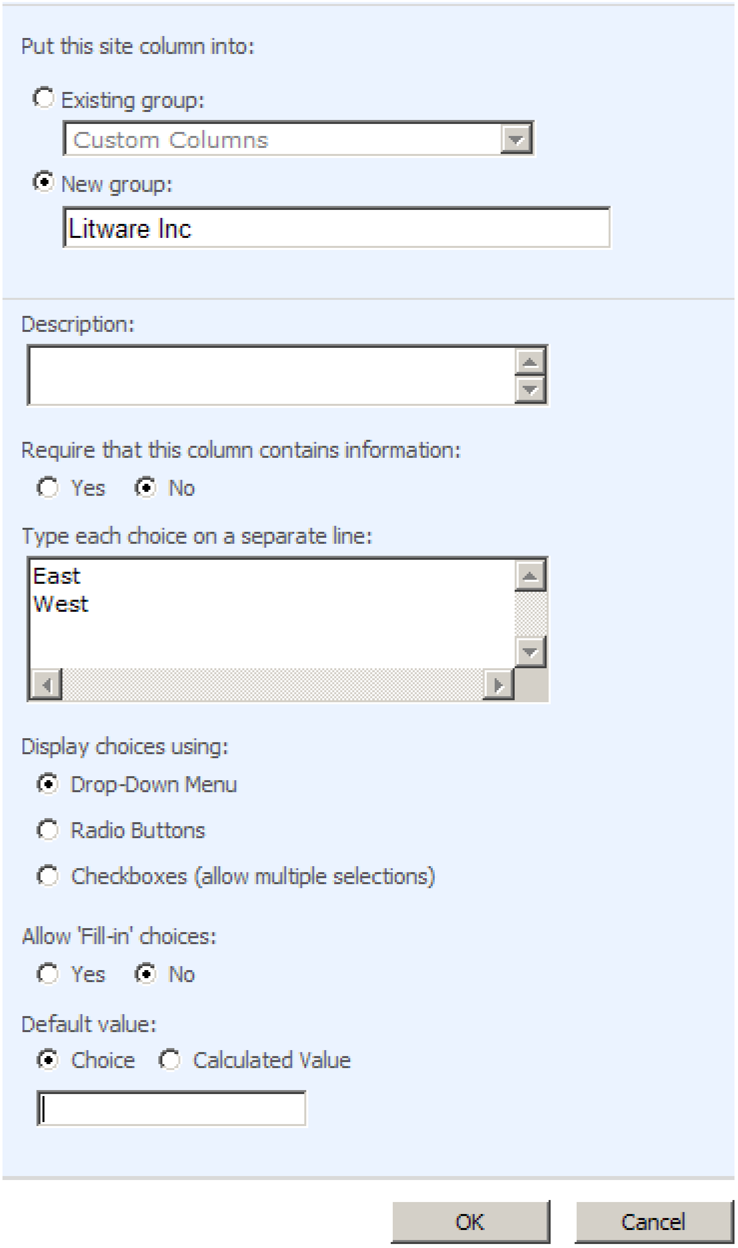
i) **Column name** is **Region**

ii) **Type** is **Choice**.

iii) For the **Group** section, add the new group **Litware Inc.**

iv) Enter **East** and **West** in the box for choices.

v) Clear the default value.



vi) Click **OK**.

2) Create a new content type: Company News

A) Use the breadcrumb and navigate back to the **Site Settings** page.

B) Under **Galleries**, click on the link **Site content types**.

C) Click **Create**.

i) The **Name** is **Company News**.

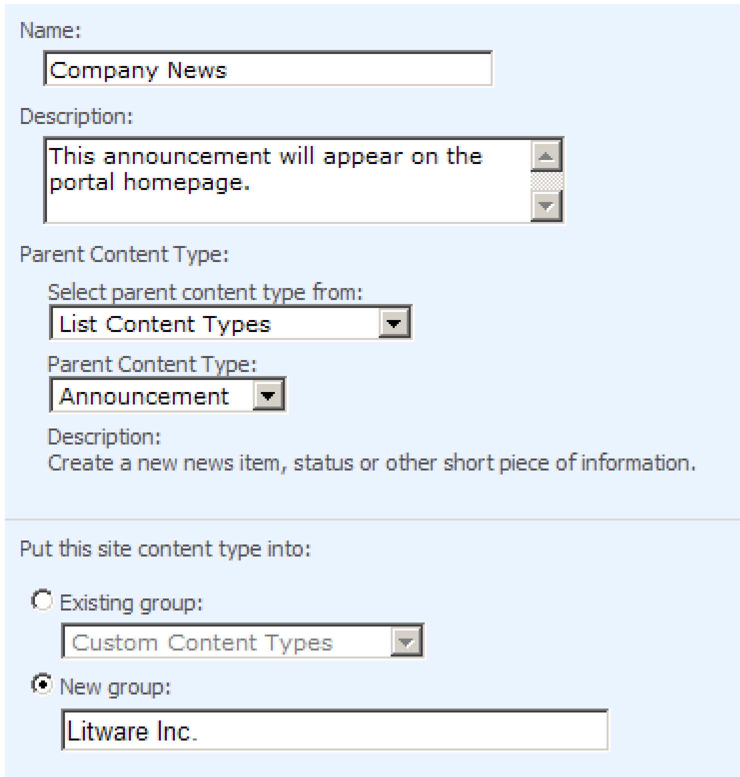
ii) For the **Description**, enter: **This announcement will appear on the portal homepage.**

iii) The **Parent content type** will be selected from **List Content Types**.

iv) The **Parent content type** is **Announcements**.

v) Put the content type into the **New Group: Litware Inc.**

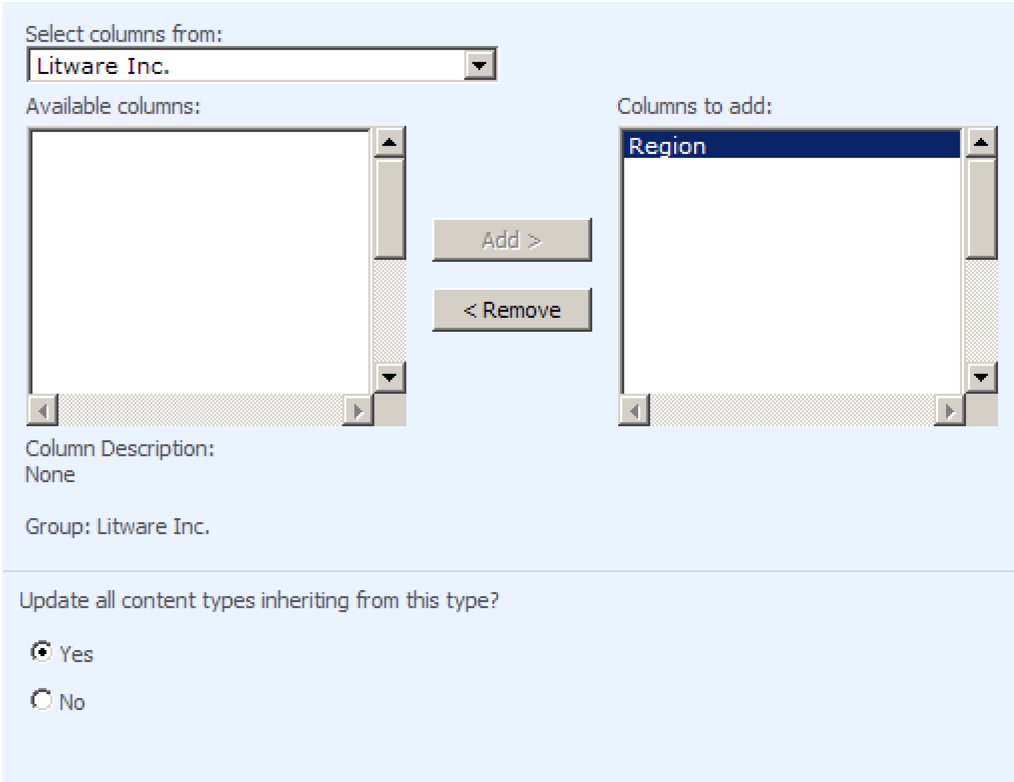
vi) Click **OK**



D) When your page reloads, you should be at the **Site Content Type: Company News** site. Scroll down to the **Columns** section and click on the link **Add from existing site columns**.

E) Make sure you choose **Litware Inc.** in the **Select columns from:** box.

F) Add the **Region** column.



G) Click **OK**.

3) Modify content type settings on Human Resources and Sales sites.

A) Navigate to the **Sales** site.

B) Click on the **Announcements** link in the center part of the page.

C) Click on **Settings > List Settings**.

D) Under **General Settings**, click on **Advanced Settings**.

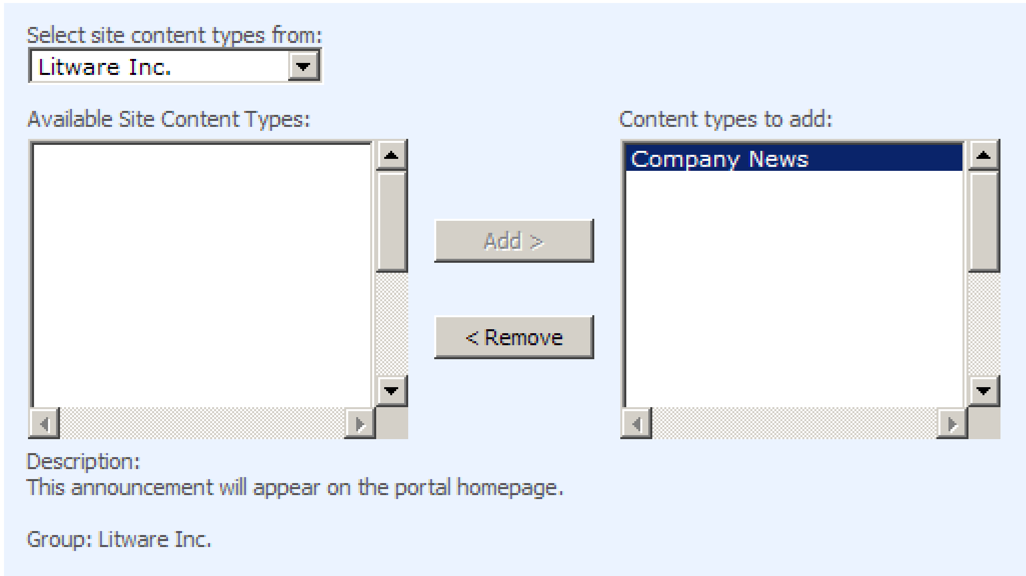
i) Under **Allow management of content types?** select **Yes**

ii) Click **OK**.

E) Under **Content Types**, click on **Add from existing site content types.**

i) Select from **Litware Inc.**

ii) Add **Company News**.



iii) Click **OK**.

F) Navigate to the **Human Resources** site.

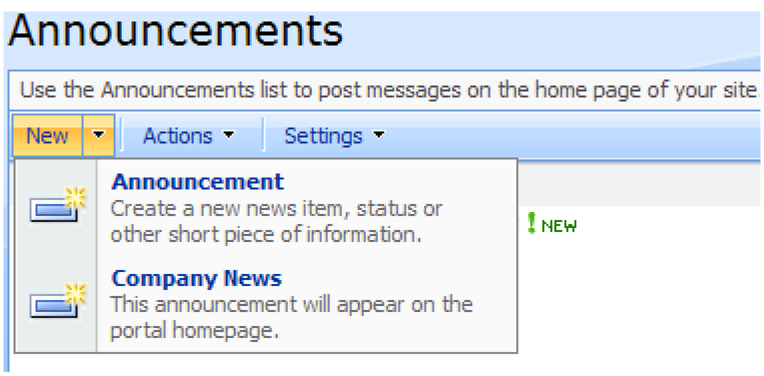
G) Click on the **Announcements** list in center of the page.

H) Follow steps C-E above to allow the content type on this announcements list.

4) Now that we have our announcements lists on both sites and their content types are configured, it is time to add some announcements.

A) Since you just finished up with the **Human Resources' Announcements** site, let's start there.

B) Click on the **dropdown arrow** next to new, notice both the announcement content type and the company news content type are available for you to choose from.



C) Click on **New > Announcement**

i) The **Title** is, **Be sure to collect all new hire paperwork by the end of the month.**

ii) Click **OK**.

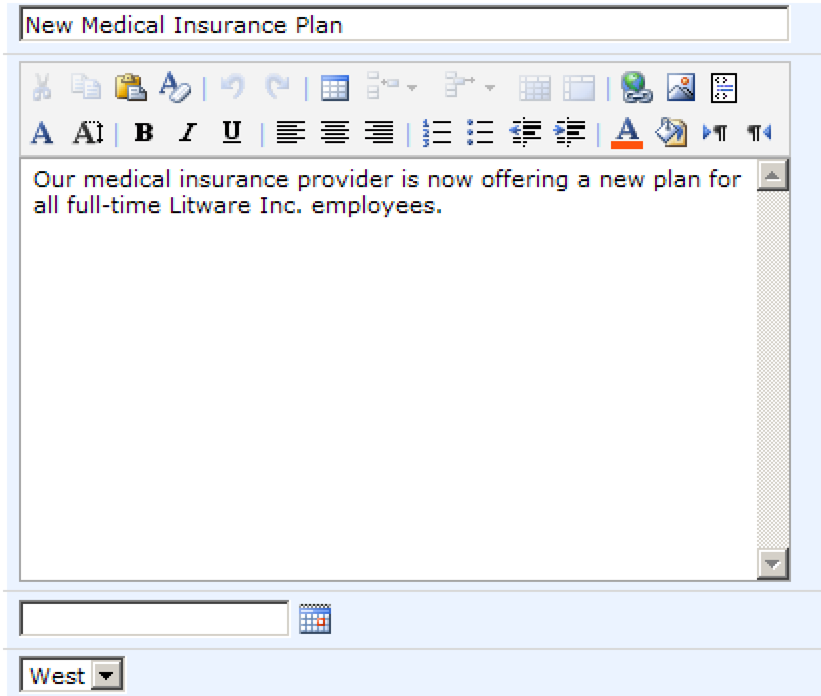
D) Click on **New > Company News**

i) The **Title** is, **New Medical Insurance Plan**

ii) The **Body** is: **Our medical insurance provider is now offering a new plan for all Litware Inc. employees.**

iii) The **Region** is **West**

iv) Click **OK**.



E) Click on **New > Company News**

i) The **Title** is **401k Changes**

ii) For the **Body**, add, **Please have all 401k plan changes into your human resources representative by the end of the month.**

iii) The **Region** is **East**.

F) Now navigate to the **Sales' Announcement** list and add three more announcements.

G) Click on **New > Announcement**.

i) The **Title** is **Congratulations John Smith!**

ii) For the **Body,** add, **Congratulations to John for celebrating his 15th year with Litware Inc.**

iii) Click **OK.**

H) Click **New > Company News**

i) For the **Title**, enter **Congratulations to the East Region for closing the Bromstead account!**

ii) The **Region** is **East**.

iii) Click **OK**.

I) Click **New > Company News**.

i) For the **Title**, enter **The West region is on pace for another great year!**

ii) The **Region** is **West**.

iii) Click **OK**.

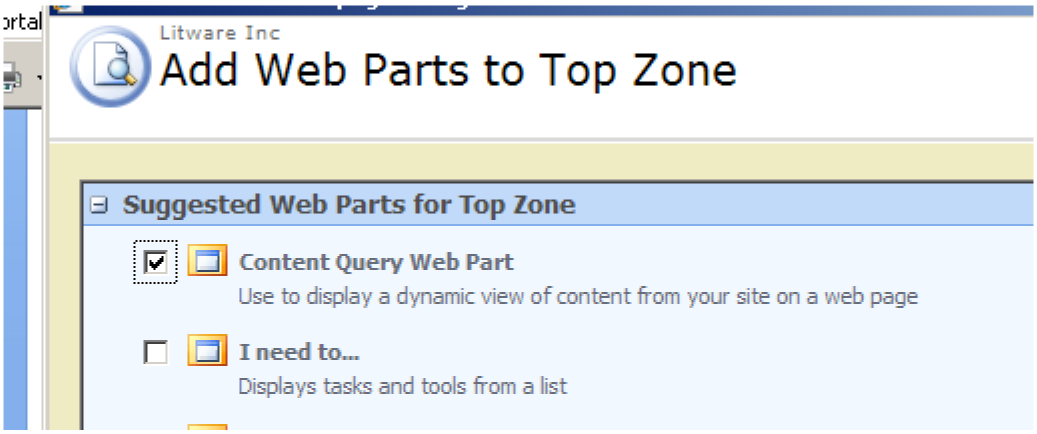
5) Add a Content Query Web Part to the main Litware Inc.site.

A) Navigate to the main Litware Inc. homepage.

B) Click on **Site Actions > Edit Page**

C) Scroll down and click on **Add a Web Part** in the **Top Zone**.

D) Select the **Content Query Web Part** and click **Add**



E) In the **Edit** drop-down menu for your new web part, click on **Modify Shared Web Part**.

F) A new box will pop-up on the right side of the page.

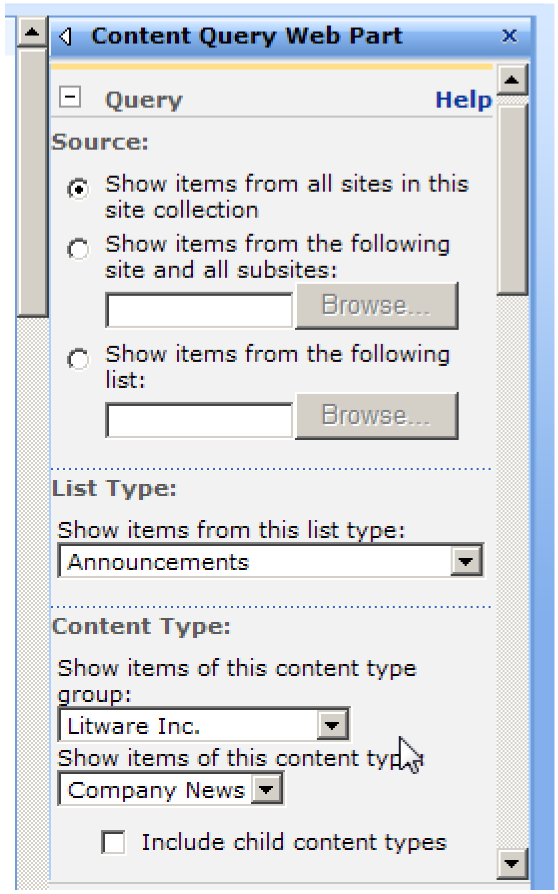
G) Expand **Query**.

i) Leave Source set to Show items from all sites in this site collection.

ii) **List Type** is **Announcements**

iii) **Content Type Group** is **Litware Inc.**

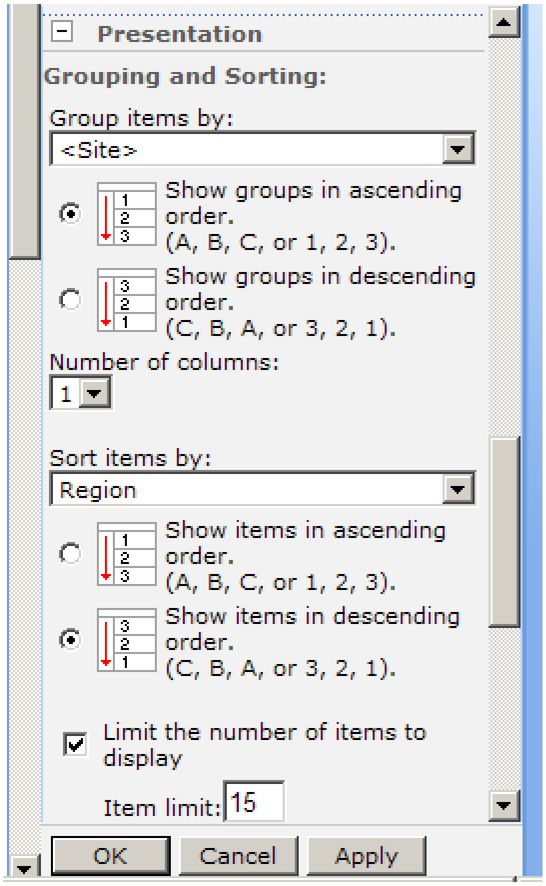
iv) **Content Type** is **Company News**



H) Expand **Presentation**

i) **Group items by: <site>**

ii) **Sort items by: Region**



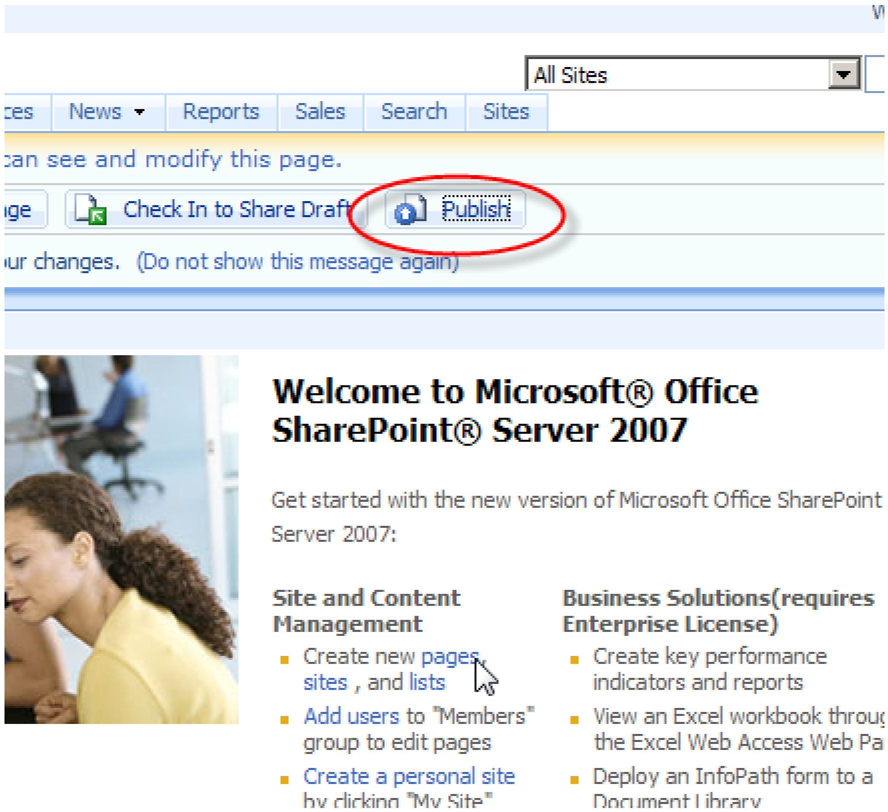
I) Expand **Appearance**

  i) Make the **Title, Company News**

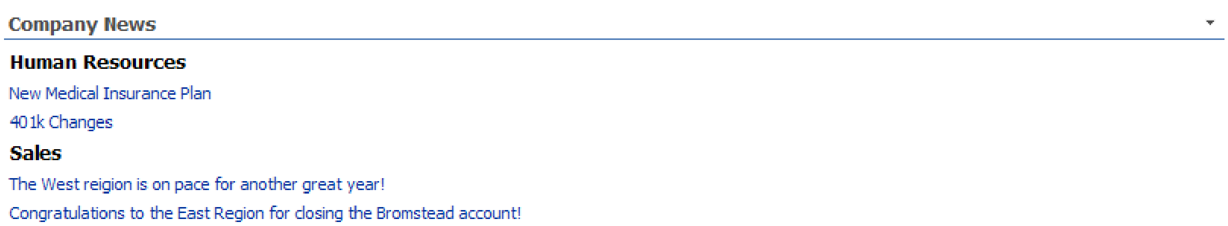
J) Click **Apply**

K) Click **OK**

L) Click **Publish**



M) You should see the following:



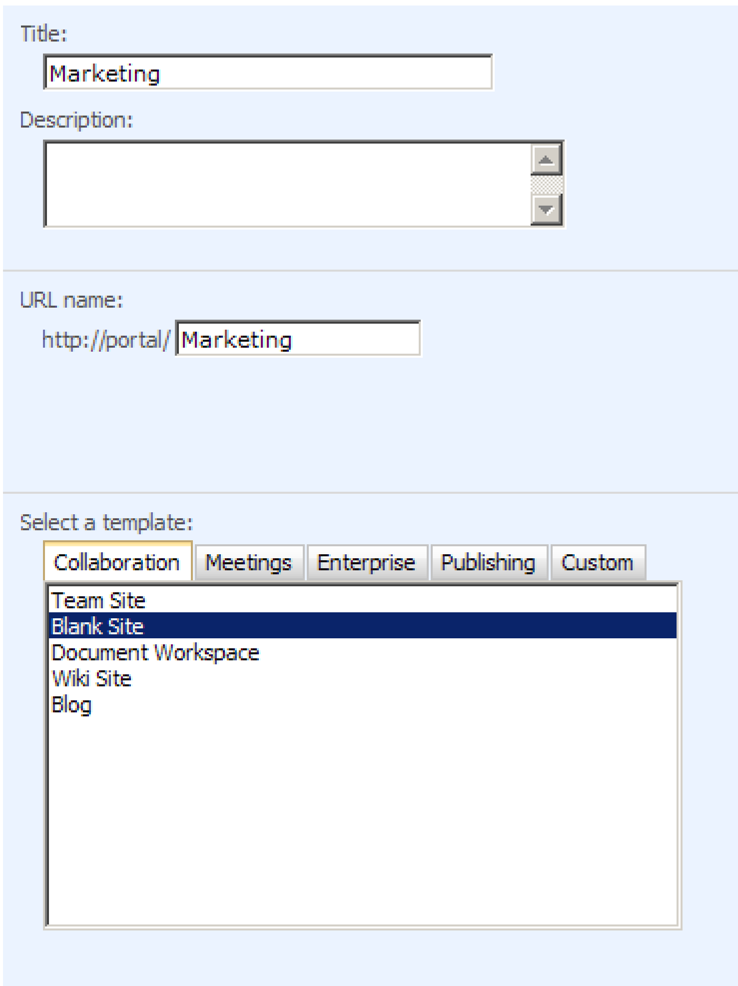
Lab 05: Sites and Security

Lab Overview: Up until this point all of your sites and security had been created for you. Now it is time to take a look at how you would create a site and ensure it is secure.

Exercise 01: Site and Security

The Sales and Human Resources sites are up and running and now Marketing and IT want to create sites to collaborate and share information with the rest of the company. It will also be improtant in these sites to give certain users contribute rights and everyone else read only rights.

1) Create the Marketing site.
   A) Navigate to the main Litware Inc. site
   B) Click **Site Actions > Create Site**
      i) **Title: Marketing**
      ii) **URL name: Marketing**
      iii) For the **Template Selection**, look under the **Collaboration** section and select **Blank Site**.
      iv) Use the default values for the rest of the sections
      v) Click **Create**



2) Verify the creation of your new site. Notice that a new navigation tab has been created on the top part of the page. Add a user to the **Marketing** site.
   A) Click on **Site Actions > Site Settings**
   B) Under the **Users and Permissions** section, click on **People and Groups**

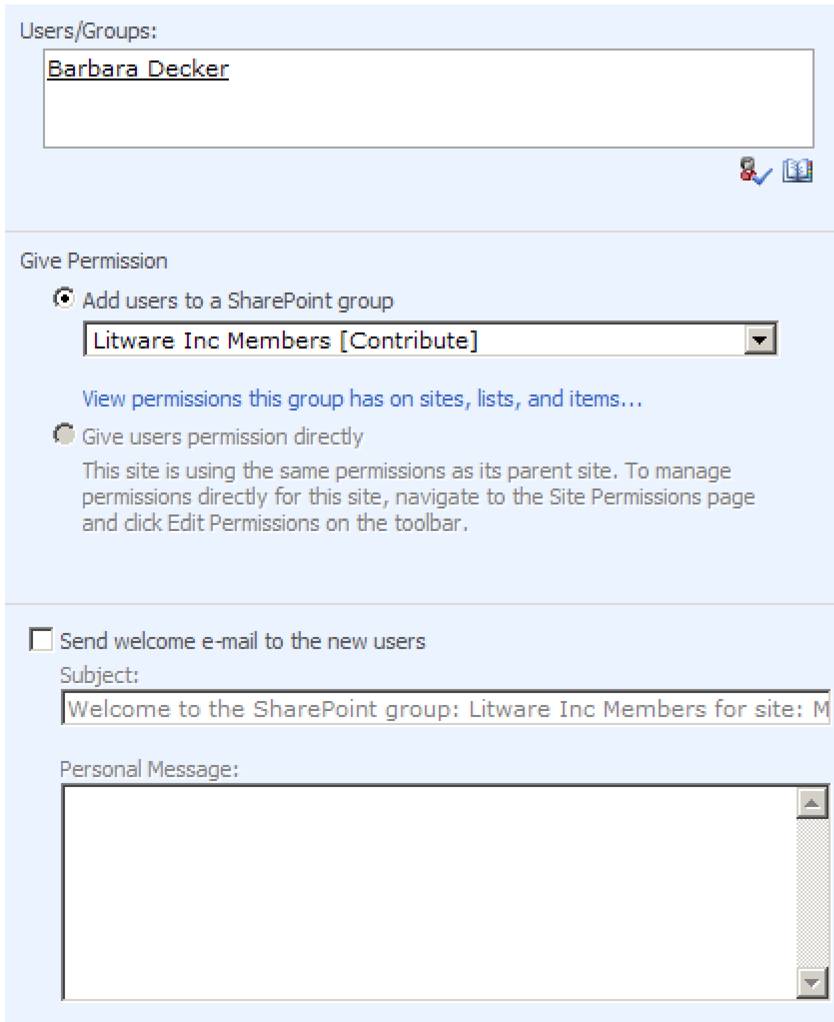
C) You will be adding Barbara Decker to the Litware Members Group. In the Quick Launch menu on the left-hand side of the page and under the **Groups** section, click on **Litware Inc Members**

D) Click **New > Add Users**

i) Add User **Barbara Decker** and click **CTR + K**.

ii) Add the user to the **Litware Inc Members [Contribute]** group.

iii) Uncheck the box to send the welcome email. Always uncheck this box.



iv) Click **OK.** Note: Although you have added Barbara as a Litware Member on the Marketing site, be advised that her rights will extend throughout the entire portal. This is because the membership of groups stays intact.

3) Create the IT department site.

A) Navigate back to the Litware Inc. homepage

B) Click on **Site Actions > Create Site**

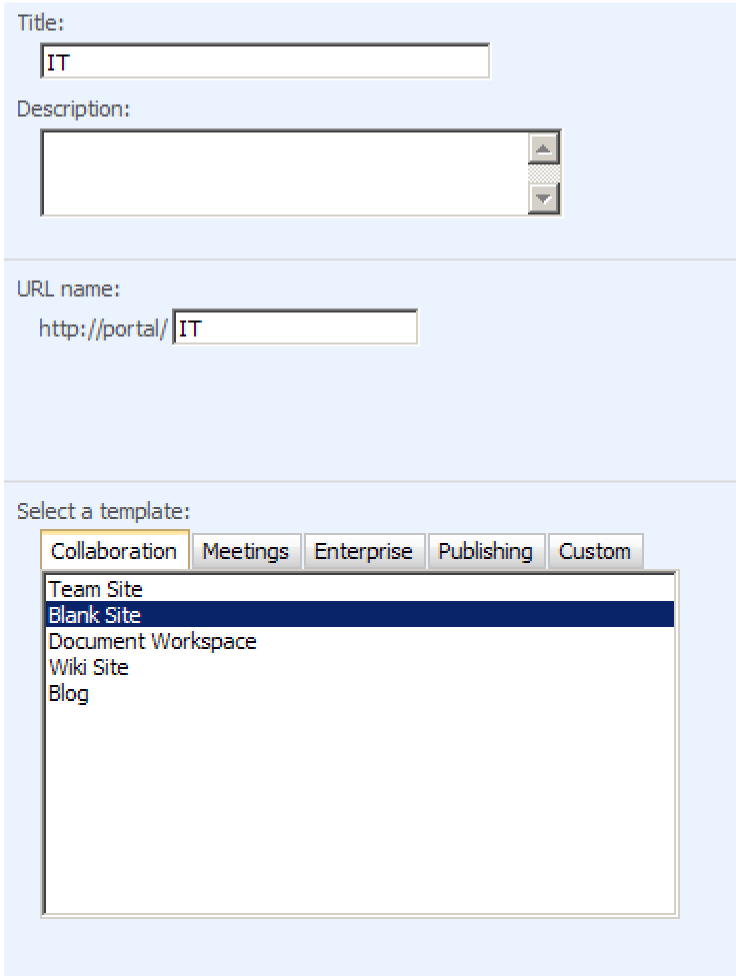
i) **Title: IT**

URL name: IT

ii) For **Template Selection**, look under the **Collaboration** section and select **Blank Site**.

iii) Use the default values for the rest of the sections

iv) Click **Create**



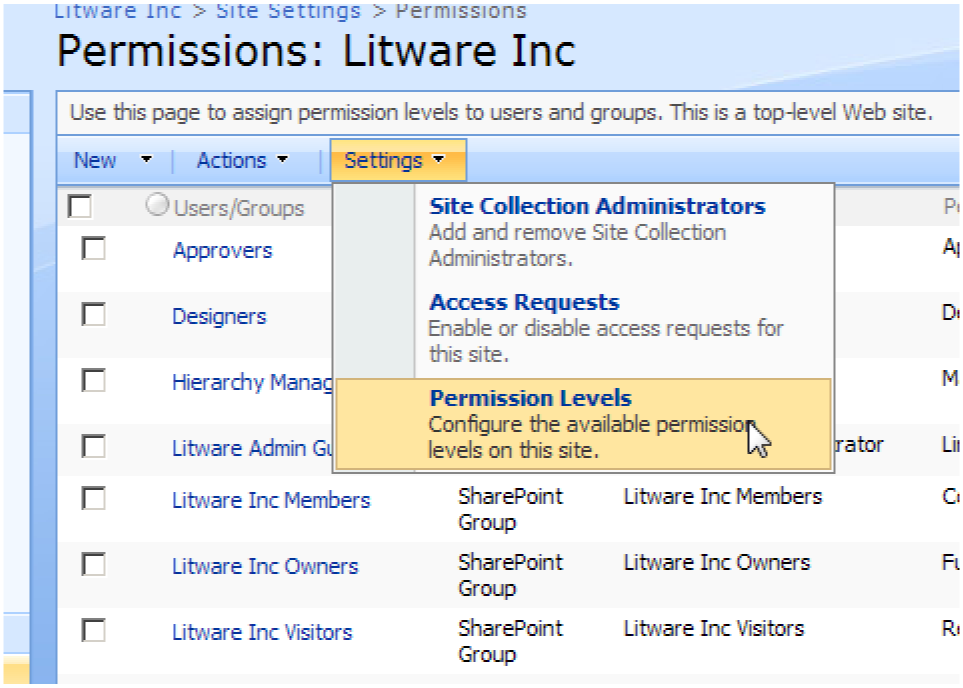
4) Create a custom permission level to apply to the IT group you will create later. What we want is to give all the IT Members contributor rights and also the permission to manage lists.

A) Navigate to the Litware Inc. homepage.

B) Click on **Site Actions > Site Settings > Modify All Site Settings**

C) Under **Users and Permissions**, click on **Advanced permissions**

D) Click on **Settings > Permission Levels**



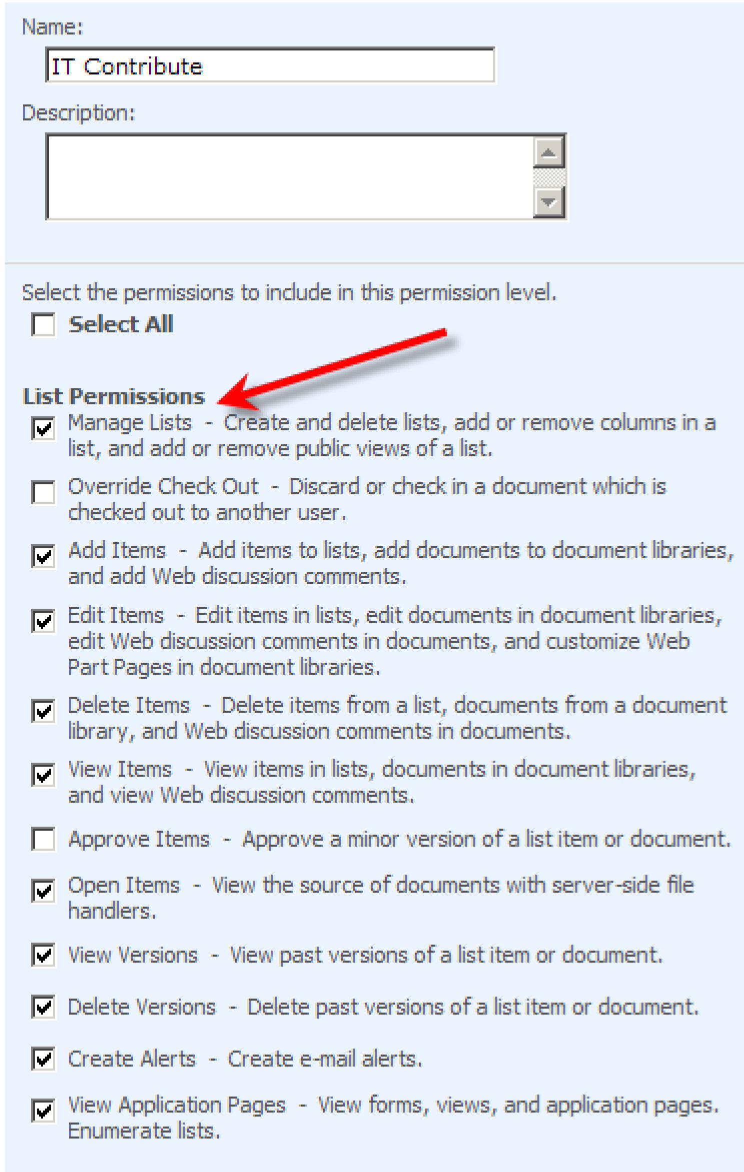
E) Click **Contribute**

F) Scroll down to the very bottom of the page and click on **Copy Permission Level**. As you are scrolling down, take a minute and look over all the permissions that are available.

G) The screen should reload and we can now create our new IT Members group with permissions similar to that of contributors.

i) **Name: IT Contribute**

ii) **Permissions:** only add **Manage Lists**



iii) Don't make any other changes.

iv) Click **Create**

H) Use the breadcrumb and navigate back to **Permissions**

5) Create your new IT group

A) Click on **New > New Group**

i) **Name: IT Members**

ii) **Owner: Administrator**. Hit **CTR + K** to verify the name to **<u>Litware Admin Guy</u>**

iii) Do not select any permission levels.

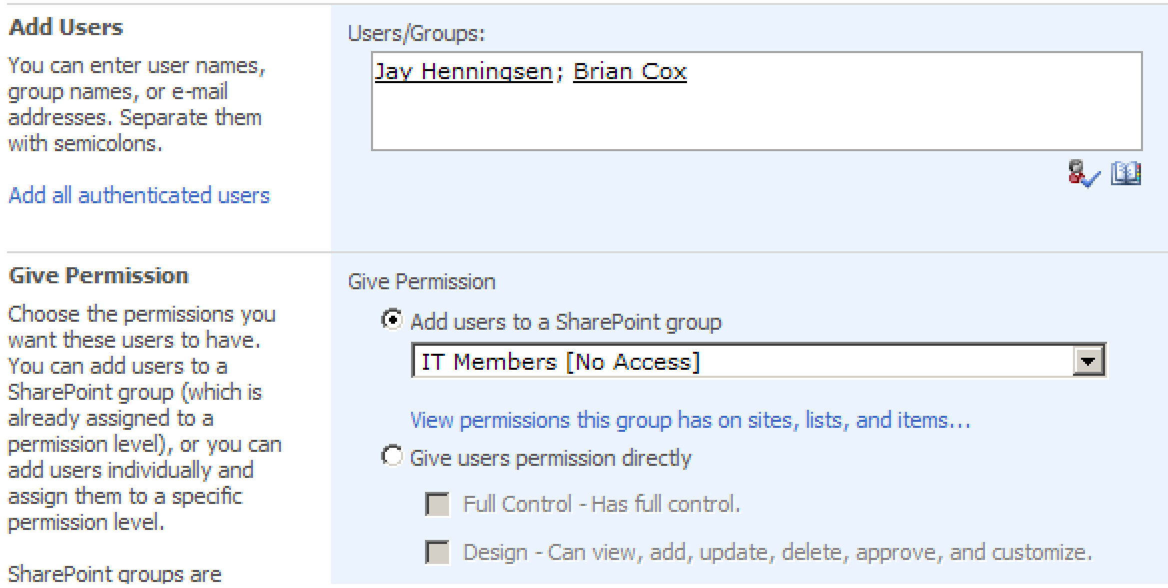
6) Click **Create**. Once the page reloads, you should see that on Quick Launch menu, **IT Members** has been added to the **Groups** section. You will be using this group when setting up the permissions on the IT site.

7) Add users to the **IT Members** group

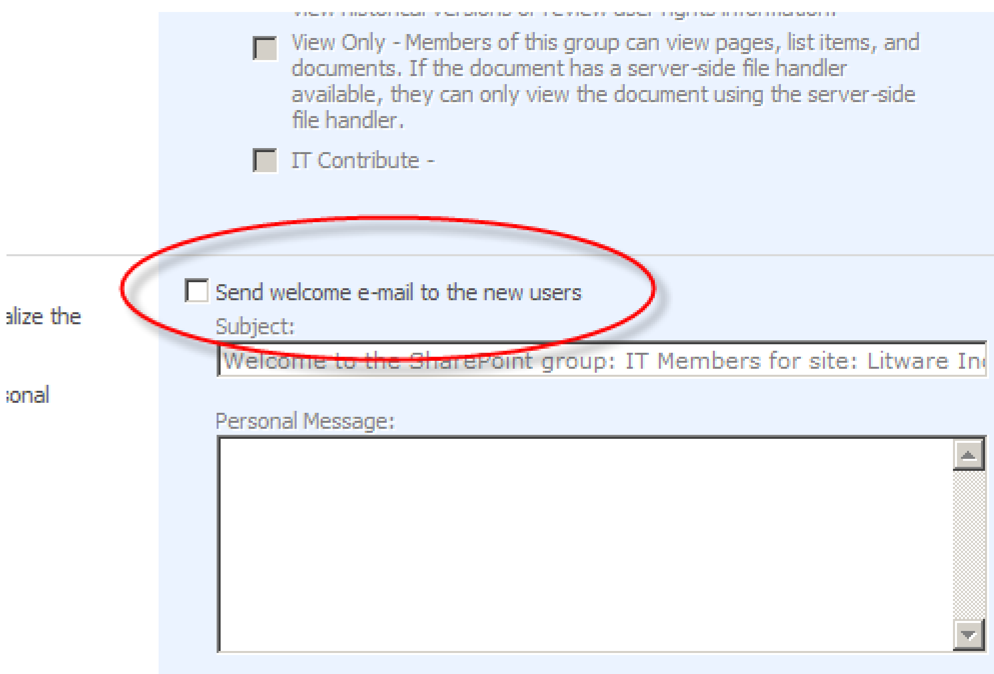
A) Click on **New > Add Users**

i) Add users **JayH; Brian Cox** and hit **CTR + K**.

ii) By default the permission setting is on **IT Members [No Access]**



iii) Under the **Send E-Mail** section, make sure that the box is not checked. Always uncheck the send e-mail box



iv) Click **OK**.

8) Navigate to the IT site.
   A) Click **Site Actions→ Site Settings**
   B) Select **Advanced permissions**
   C) Click **Actions → Edit Permissions**
   D) At the pop up box, click **OK**

E) Check the boxes next to all of the Groups except **Litware Inc Owners** and **Litware Inc Visitors**

F) Click **Actions → Edit User Permissions**

G) For Choose Permissions, select **Read**

H) Click **OK**

I) Click **New**

i) In the Add Users section, add **IT Members**

ii) Click the radio button **Give users permission directly**

iii) Select **IT Contribute**

iv) Uncheck the **Send Email Box**

v) Click **OK**

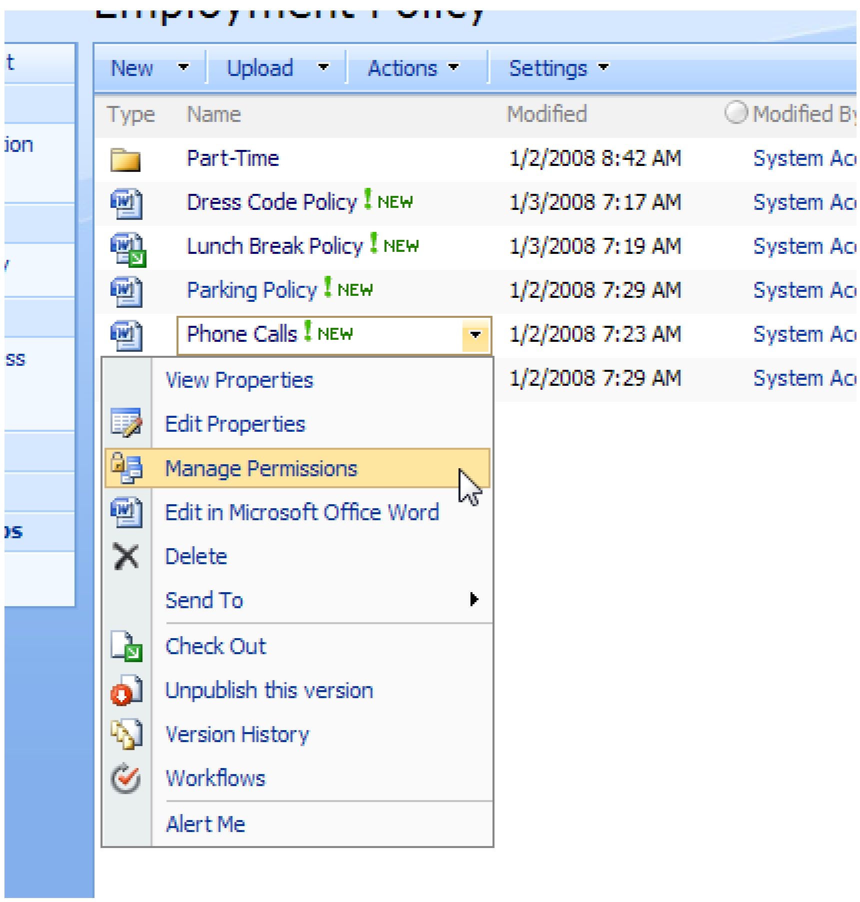
J) Let's test the new security. Log in to the site as AngelaB. Notice when you click **View all site Content**, she does not see the Create button.

K) Log back in as the administrator.

9) On the Human Resources site, the **Phone Calls** policy is for managers only. Set the permissions so that Patricia and Barbara are the only ones to view this policy.

A) Navigate to the **Employment Policy** library in the **Human Resources** site.

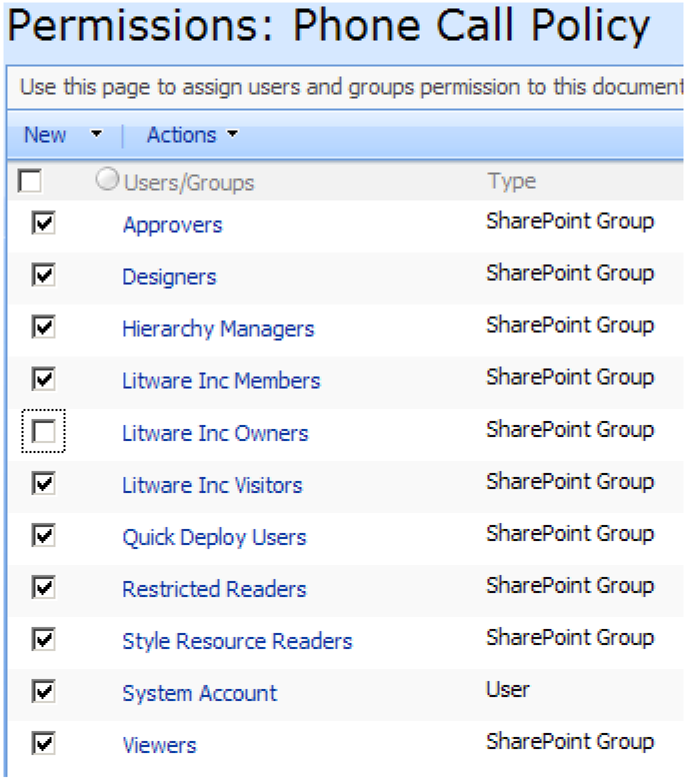
B) Move your cursor over the **Phone Calls** policy and click **Manage Permissions** the **Edit** drop-down menu



C) Click **Actions→Edit Permissions**

D) At the warning box, click **OK**

E) Check all the boxes except for the **Litware Inc Owners**



F) Click **Actions > Remove User Permissions**

G) Click **OK**. The Litware Admin guy should be the only one left.

H) Now add Barbara Decker and Patricia Doyle as users. Click on **New > Add Users**

i) **Users: Barbara Decker; Patricia Doyle** hit **CTR + K**

ii) **Give Permission** of **Full Control**

iii) Uncheck the welcom e-mail

iv) Click **OK**

I) Open **BrianC RDP** and open his internet browser to http://portal/

J) Navigate to the **Employment Policy** library under **Human Resources**. You will see that he cannot view the **Phone Calls** policy. Log off of **BrianC RDP**.

K) Open **PatriciaD RDP** and open her internet browser to http://portal/

L) Navigate to the **Employment Policy** site under **Human Resources**. You should be able to see the policy.

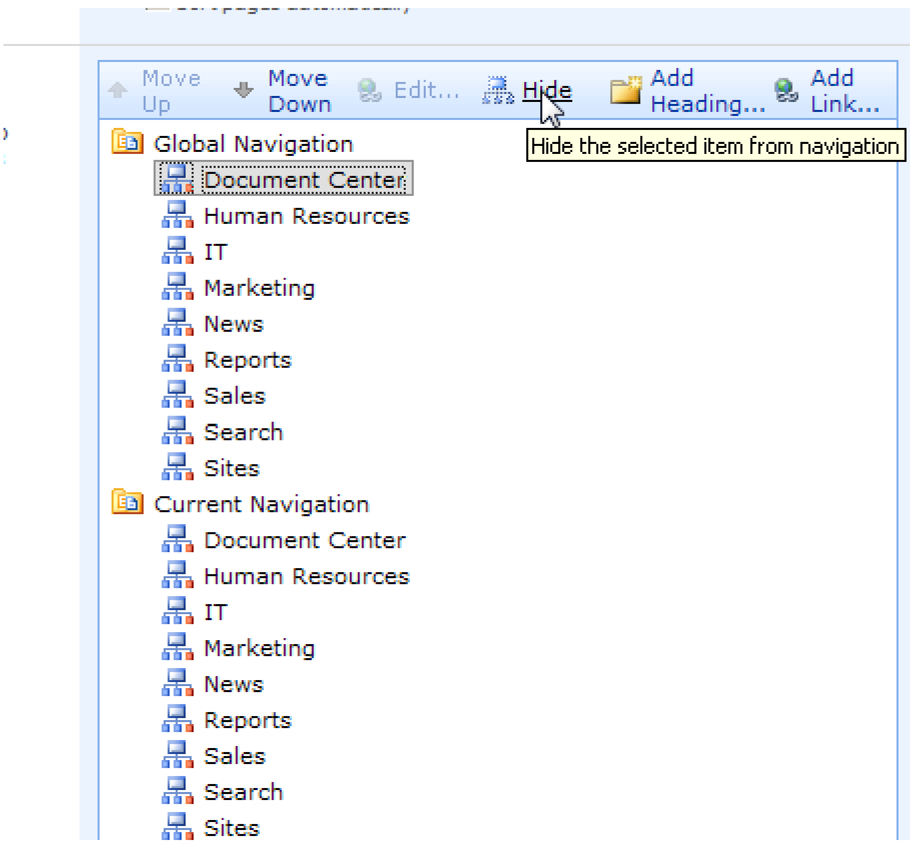
Lab 06:

Lab Overview: Now that the portal is starting to contain more information it is important to create a consistent and understandable navigation system. SharePoint already has built in features to help you accomplish this. The top navigation will be our consistent navigation while the left hand navigation will be our current (changing) navigation. You will then use audience targeting to help prevent overcrowding a page, but still show all of the appropriate links to a group of users. Finally the site directory will help you to create a categorized listing of all of the sites. This is to help your users find the site they are looking for if they do not see it in the navigation.

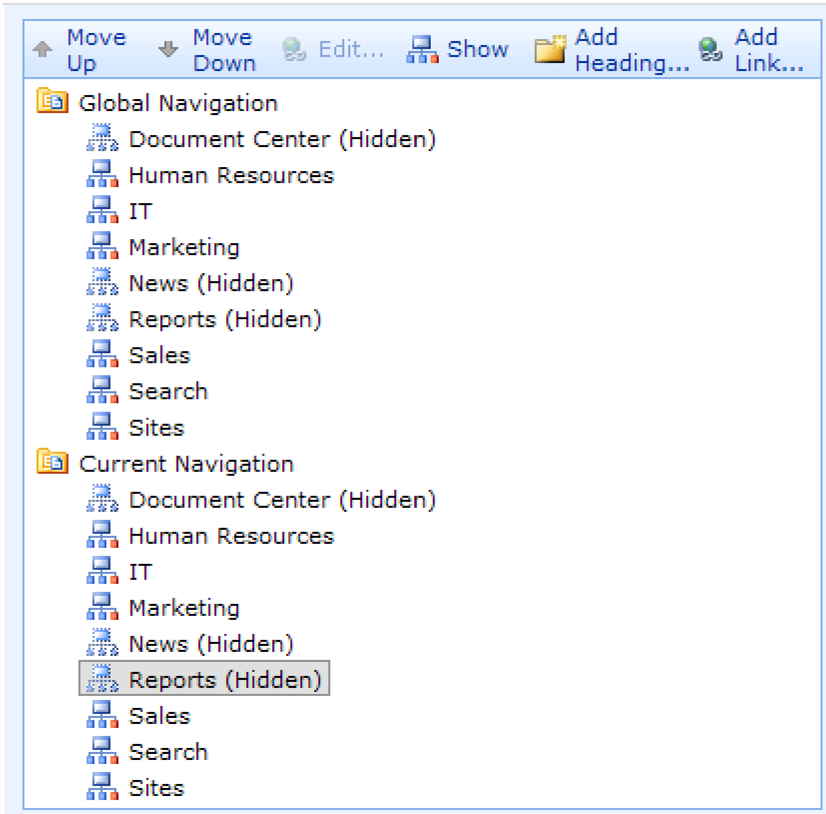
Exercise 1:

You would like all of the departments to appear on the top link bar as well as links to your public websites, litwareclients.com and litwarepartners.com. The left hand navigation will change depending on the site the user is on. Because the Litware PubZip team site has many links that need to be shown and most of the users will be spending the majority of their work day on this site, you will be breaking the navigation to show relevant sites and pages beneath the PubZip site. Go into the navigation settings on the top site, hide the document center, news, and reports sites on both the top navigation and quick launch.

1) Modify your **Global** and **Current Navigation**
   - A) Navigate to the Litware Inc homepage, be sure you are signed in as the administrator.
   - B) Click **Site Actions > Site Settings > Modify Navigation**
   - C) Scroll down to the **Navigation Editing and Sorting** section.
   - D) Let's start by hiding some of the navigation items. Click on the navigation item you want to hide and click **Hide**.
   - E) You will do this for **Document Center, News,** and **Reports** for both **Global Navigation** and **Current Navigation**.



F) Your page should look like this when you are finished:



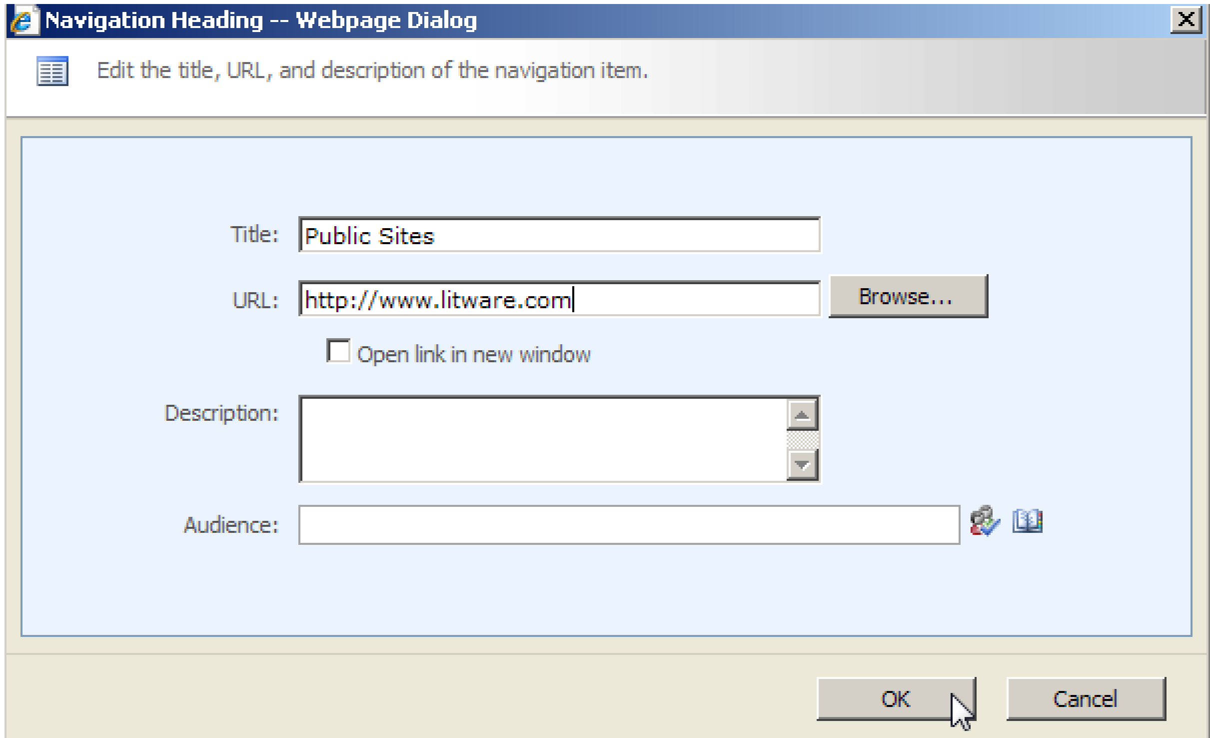
G) Click on **Global Navigation**

H) Click on **Add Heading…**

i) **Title: Public Websites**

ii) **URL: http://www.litware.com**

iii) Click **OK**



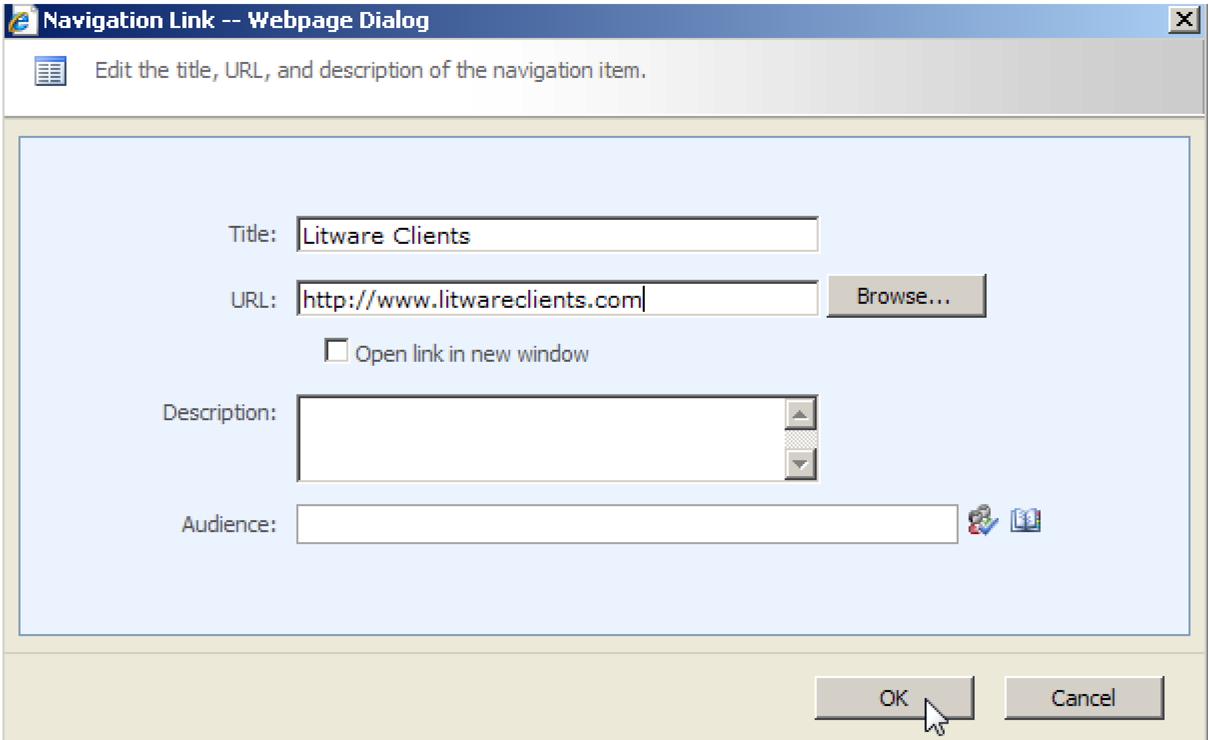
I) Click on the new **Public Websites** heading.

J) Click **Add Link…**

i) **Title: Litware Clients**

ii) **URL: http://www.litwareclients.com**

iii) Click **OK**.



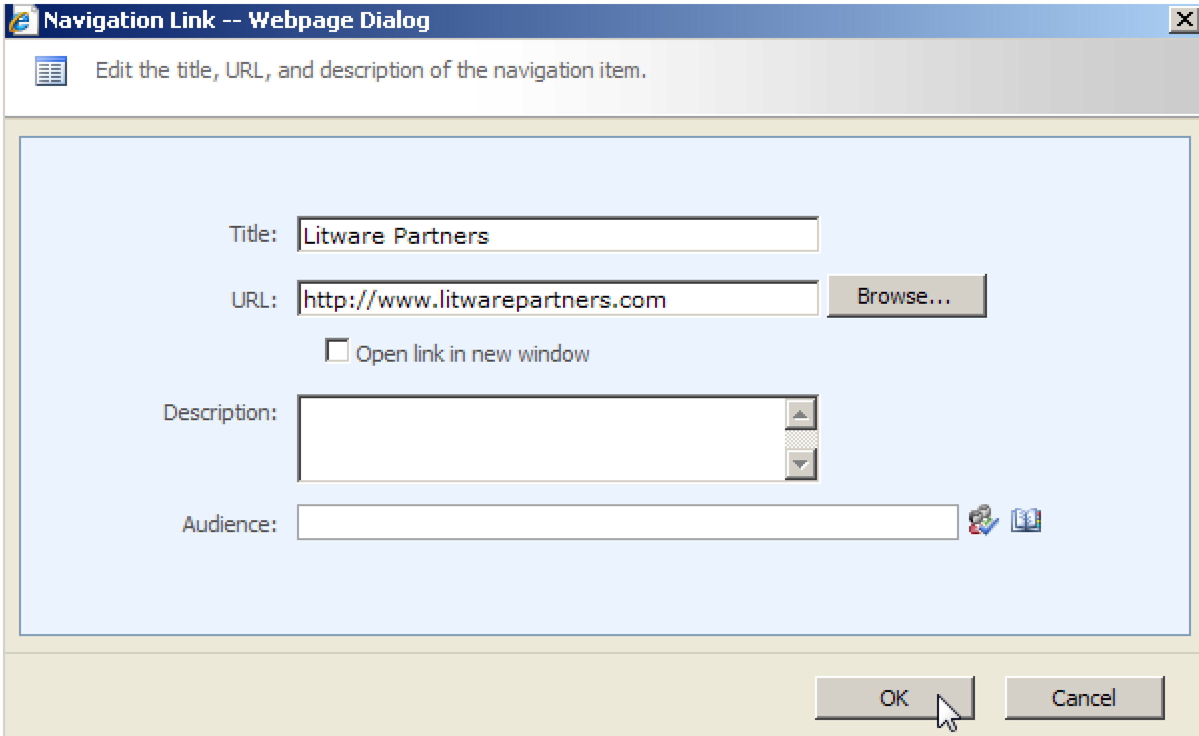
K) Click on the **Public Websites** heading.

L) Click **Add Link…**

i) **Title: Litware Partners**

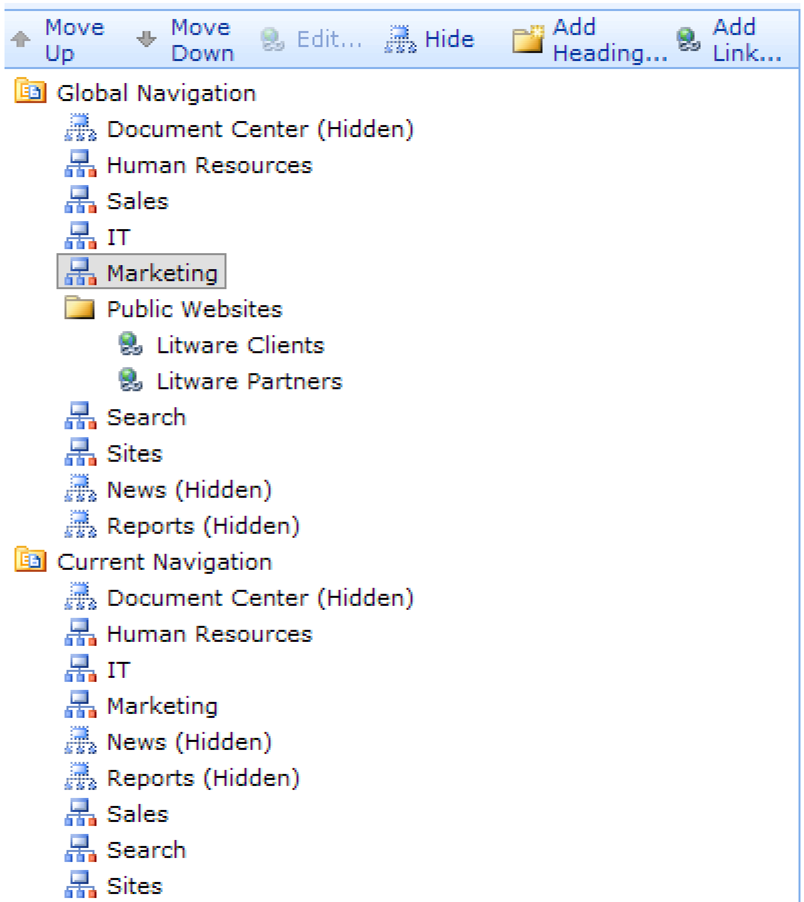
ii) **URL: http://www.litwarepartners.com**

iii) Click **OK**



M) Move the links under **Globacl Navigation** so that the order is **Human Resources, Sales, IT** and **Marketing, Public Websites, Search, Sites,**. Click on the navigation item you want and click the **Move up** or **Move down** links to move the items.

N) When you are finished, your screen should look like this:



O) Click **OK**.

P) Back on the Litware Inc. homepage, you should see that your navigation has changed.

2) Create the **Litware PubZip** team site.

A) Click **Site Actions > Create Site**

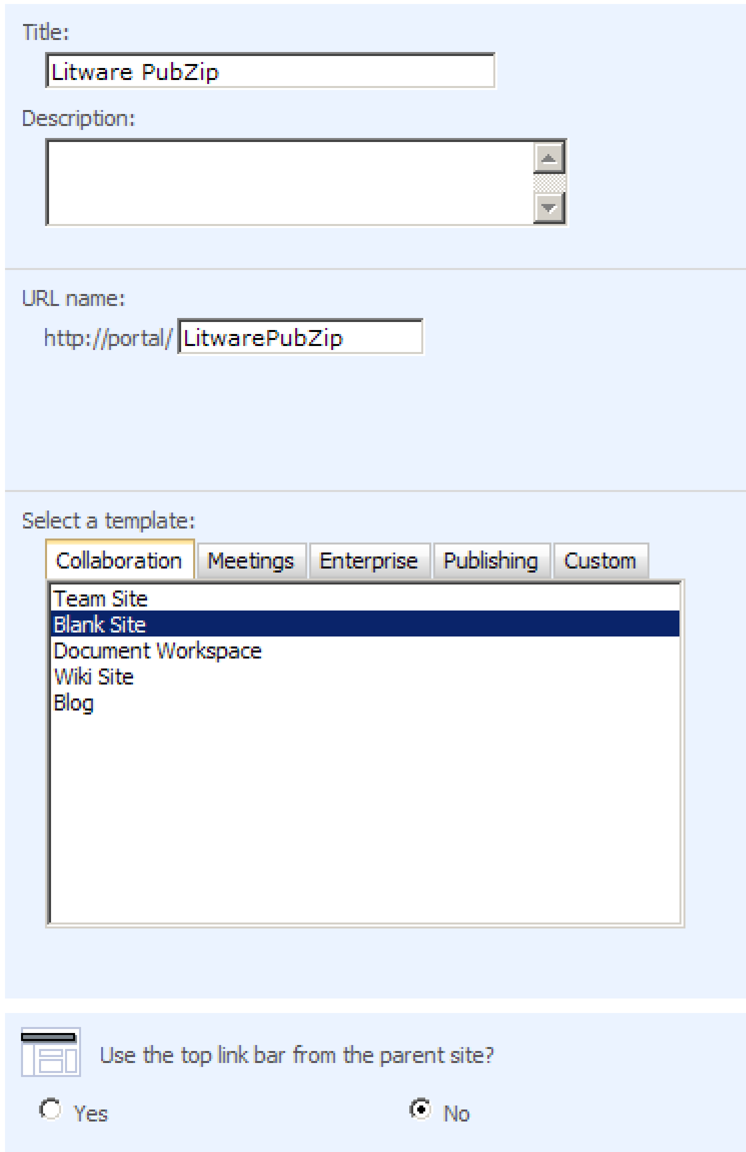
i) **Title: Litware PubZip**

ii) **URL: LitwarePubZip**

iii) **Template: Collaboration – Blank Site**

iv) **Navigation Inheritance: No**

v) Click **Create**.



B) Notice that the navigation is different from that of the site collection and the other sites. The navigation for this site will show items that are within this site

3) On the **Litware PubZip** site, create a subsite called **Launch**.

A) Click **Site Actions > Create**

B) Under the **Web Pages**, click on **Sites and Workspaces**

i) **Title: Launch**

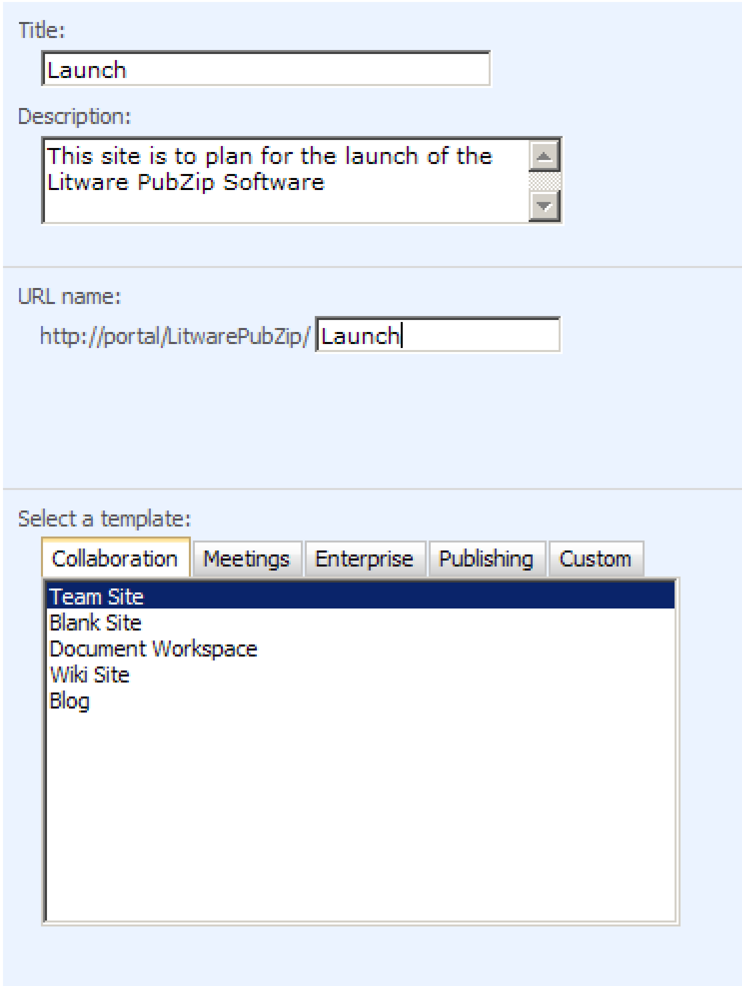
ii) **Description: This site is to plan for the launch of the Litware PubZip Software**

iii) **URL: Launch**

iv) **Template: Collaboration – Team Site**

v) Use the default values for the rest of the settings.

vi) Click **Create**.



4) You will notice that even though your navigation is different for the **Litware PubZip** site and **Launch** subsite, that there is a breadcrumb in the upper left-hand corner of the page that will take you back to the main Litware Inc. homepage.

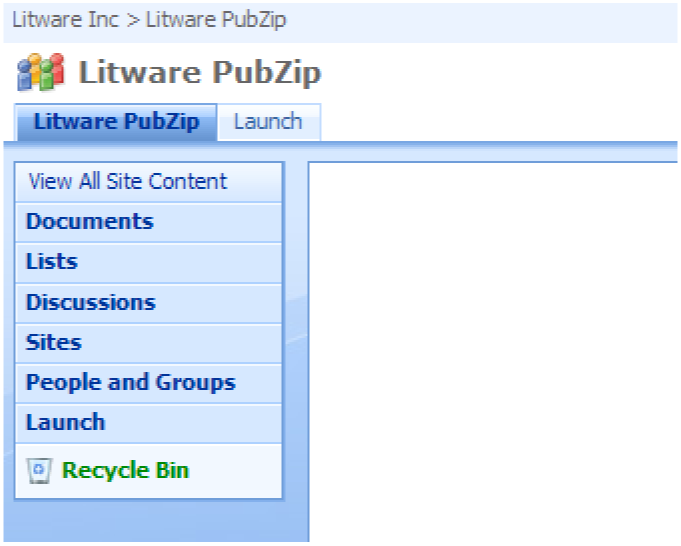
5) Click the breadcrumb to go to the **Litware PubZip** site. You would like this site to show the sites beneath is in the top navigation. Click **Site Actions→Site Settings**

6) Under the Look and feel section select **Navigatio**n

7) Check the box for **Show Subsites**

8) Click **Ok**

9) Click on the link to **Litware PubZip**

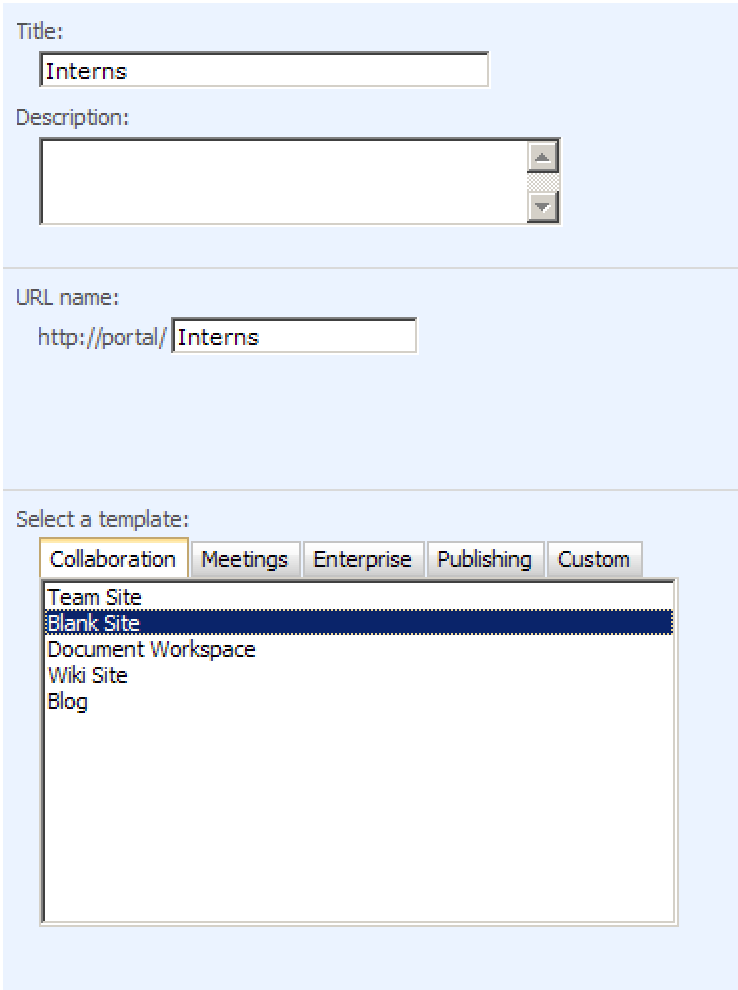


10) Return to **LitWare Home Page,** by clicking the link in the upper lefthand corner (Global Breadcrumb)

Exercise 2:

You will be using audience targeting to target the Intern website to just the Litware Interns Security Group

1) Create the **Interns** team site.
   A) Click **Site Actions > Create Site**
      i) **Title: Interns**
      ii) **URL: Interns**
      iii) **Template: Collaboration – Blank Site**
      iv) Click **Create**



B) Grab the URL to the Interns site.

C) Navigate back to the **Litware Inc. homepage**.

2) Modify the navigation on the Litware Inc. homepage.

A) Click on **Site Actions > Site Settings > Modify Navigation**

B) Under the **Global Navigation** click on the **Interns** navigation item and click hide.

C) Click the **add link** button to add a link to the interns and target the item.

a. Title: **Interns**

b. URL: Link to interns site (paste the URL)

c. Audience: Click browse icon and search for interns in the distribution/Security group. Select the **Litware interns**. Click **Add**

D) Click **Ok**

E) Click **Ok**

F) Be sure to Click **Ok** at the bottom of the page

G) Notice that you do not see the Interns site in the Top Navigation but you do see it in the left hand navigation. Always remember audience targeting is not security.

Exercise 3:

In order to create a listing of site, you will be utilizing the site directory template and changing out the current categories and choices to something appropriate for your business.

1) View and modify Site Directory, the site directory is titles **Sites**, you can find it in the top link bar.

   A) Navigate to the **Sites** site.

   B) Click on **View All Site Content**

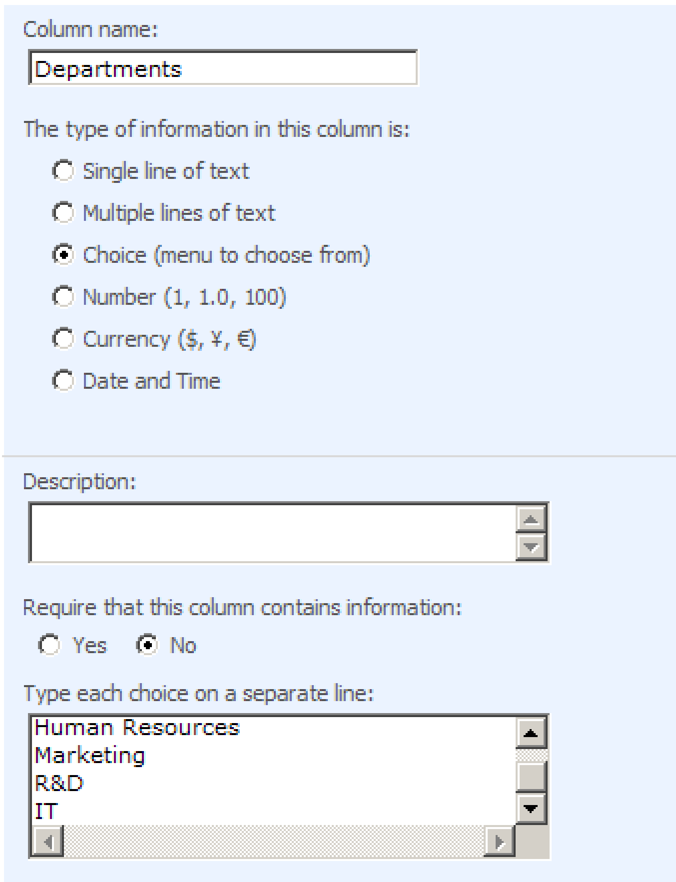
   C) Under **Lists**, click on **Sites**. Notice that the categories you saw on the **Sites** homepage are simply columns on this list.

   D) Click on **Settings > List Settings**.

   E) Under the **Columns** section, click on the **Division** column.

      i) **Column Name: Departments**

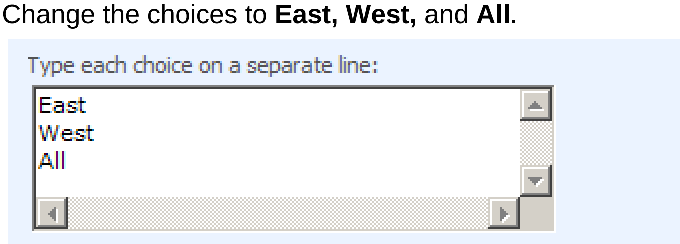
      ii) Change the choices to **Sales, Human Resources, Marketing, R&D,** and **IT**.



      iii) Click **OK**.

   F) Click on the **Region** column.

      i) Change the choices to **East, West,** and **All**.



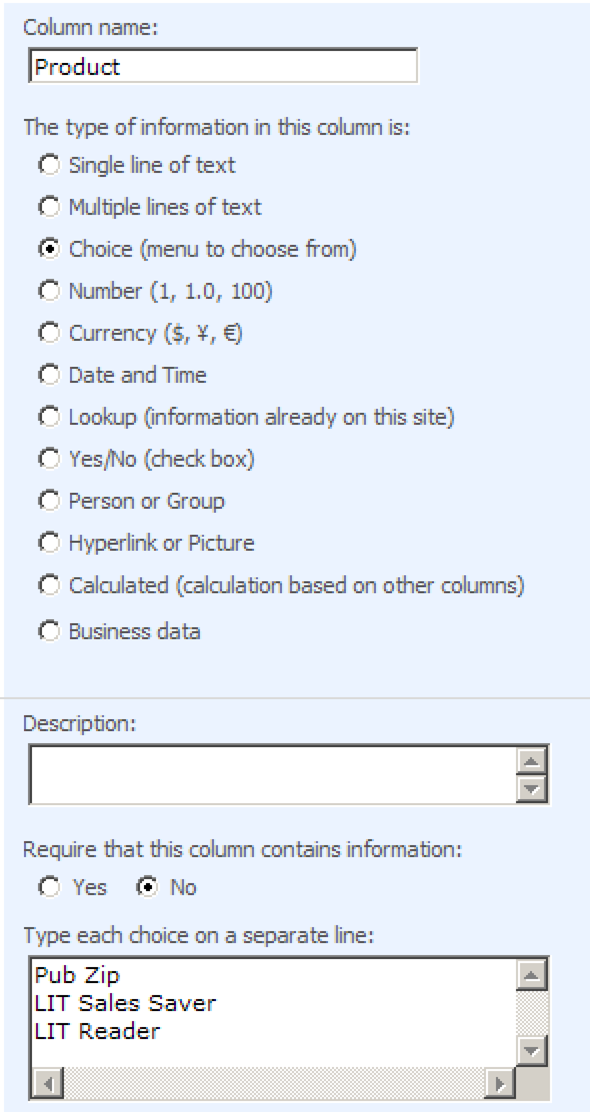
      ii) Click **OK**.

   G) Click on **Create Column**.

      i) **Column Name: Product**

ii) **Type: Choice**

iii) **Choices: Pub Zip, LIT Sales Saver, LIT Reader**

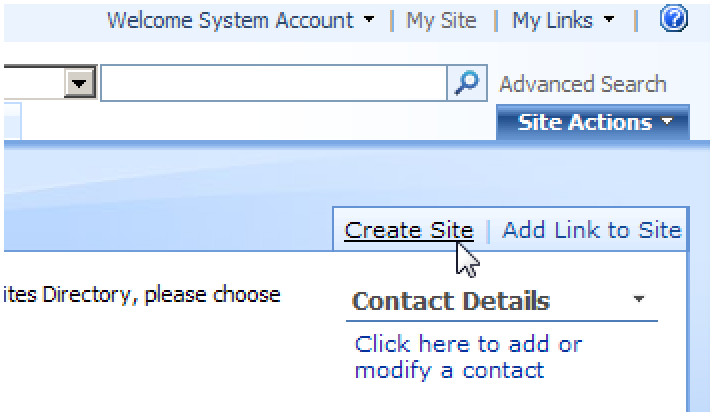


iv) Clear the default value

v) Click **OK**.

H) Navigate back to the **Sites** homepage.

l) In the upper right-hand corner, click on **Create Site**.



i) **Title: Pub Zip**

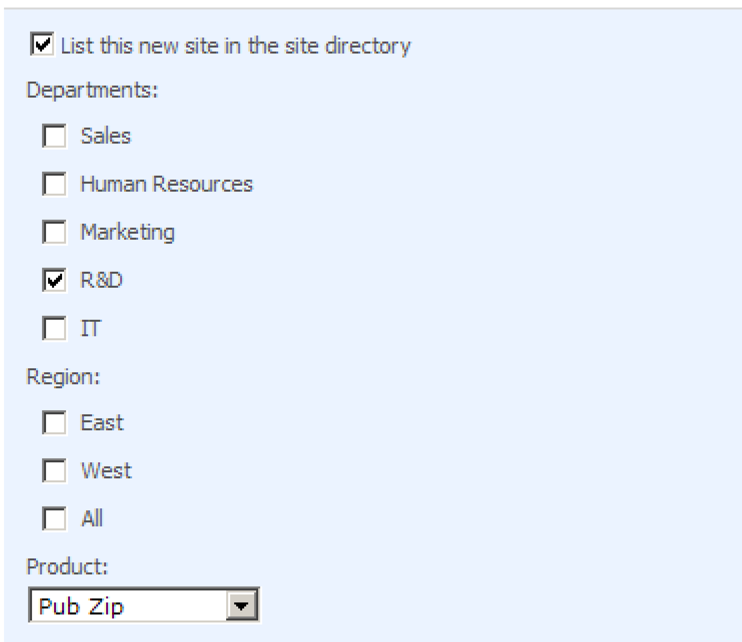
ii) **URL: PubZip**

iii) **Template: Collaboration – Team Site**

iv) Check the box for **List this new site in the directory**

v) **Departments: R&D**

vi) **Product: Pub Zip**



vii) Click **Create**.

2) Add a new sub-site on the **Sales** site.

A) Navigate to the **Sales** site.

B) Click on **Site Actions > Create**.

C) Under **Web Pages**, click on **Sites and Workspaces**.

i) **Title: East Sales Strategy**

ii) **URL: EastSalesStrategy**

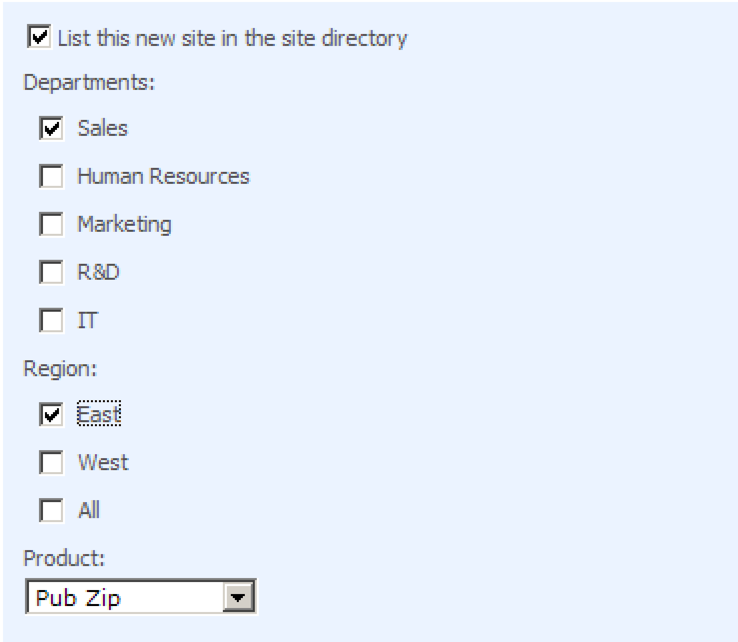
iii) **Template: Collaboration – Team Site**

iv) Check the box for **List this new site in the directory**

v) **Departments: Sales**

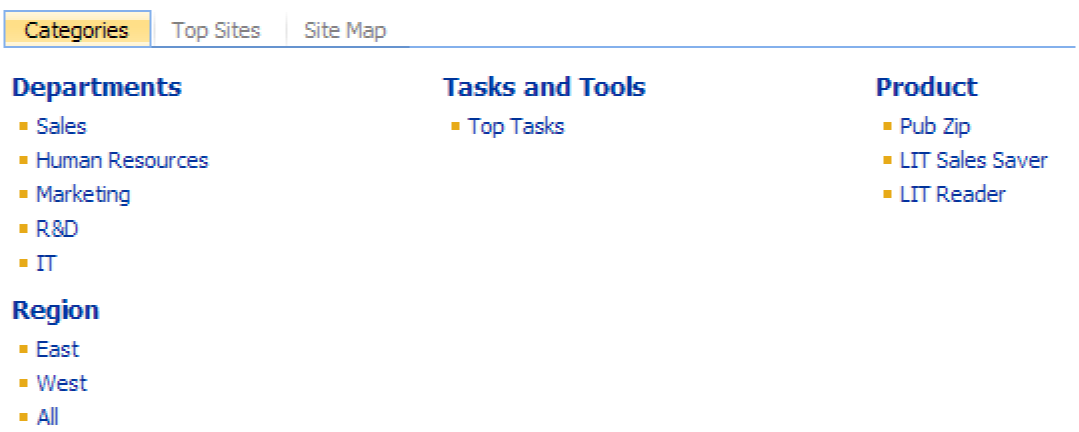
vi) **Region: East**

vii) **Product: Pub Zip**



viii) Click **Create**.

3) Go back to the site directory and view the changes.



4) Under **Region**, click on **East**. You should see the new Sales Strategy site.

It is important to create an appropriate architecture for your site. Even if the site should be set up in a certain manner, it is more important that your users feel it is set up in the correct manner. To ensure you understand what the users are looking for you have sent out several surveys to the different departments that will have sites in the portal. The first section describes the information you believe should be included in the portal; the second section has three survey responses for you to read. Once you have read all of the information use, the note cards given to you to create a taxonomy. While you are deciding on the structure think about the following things:

Should the information be presented as a site, site collection, or a single page?

Should the sites that are for collaboration among teams be placed under the department site or should all of the collaboration sites be under a separate area?

If the information is going to be a site, what site template should be used?

Will it inherit security or does the site need to break security?

What terminology will best convey this information to the user?

Should all of the functionality desired be rolled out in the first phase?

Are their items desired by the users that are not appropriate for the portal?

After you have completed your taxonomy, you will be forming a group. You will first discuss the site structure you have designed. Then, as a group you will need to create a site structure to present to the class.

Information about the portal

The portal will be used as an internal portal for Litware Inc. At the current time there will not be any partners or vendors using the portal, however it is our goal in the future to create a site for each of our clients. There are approximately 2,000 users. The portal will be used to allow each department to share information with the entire company. Each department will also have collaboration spaces to create new content and do their jobs more efficiently.

<u>Departments</u>

- Sales
    - There is one sales VP located in Phoenix and regional managers for each division. The sales representatives are spread all over the country.
- Human Resources
- Accounting
- IT
    - Main IT office is in Cincinnati, but there is a regional team in Phoenix to maintain the infrastructure.
- Research and Development

<u>Divisions</u>

We currently have an East and West Division with offices in Cincinnati (East Division) and Phoenix (West Division) Each office has members from all of the departments.

Information that needs to be available on the portal:

Company Mission Statement

Messages from the President

News

Reporting Area-a place for employees to report things that should not be going on anonymously

Contacts List for entire company

Vendor Contacts list

HR Site

The HR site will be for sharing employee forms and policies.

Sales Site

All of the current sales data will be available. It needs to be viewed as an entire company, for each division, and for each individual sales representative.

IT

Help Desk for both asking questions and viewing a Q&A. Also, an area where resources can be provided for learning about the software we are using throughout the company.

Accounting

This area will be used to turn in expense reports, and submit a check request for a purchase order. The budgets for each year and previous years need to be available.

Research and Development

Notes on each software project we are in the processes of developing, so the sales team and the rest of the company will know what is coming. Show announcements on the status of the project.

Survey Response #1

Joe Smith, Sales Representative

What information do you want to see available on the portal?

I am frequently looking for maps of our different territories. A breakdown of how we are doing based on our different stats; for example number of sales vs. dollar amount. I know these reports exist but I cannot seem to locate them.

What types of things would you like to share/store on the portal?

I would like to have a way to turn in my sales calls online, we are always sending emails. Also, a place to store information for the future regions team; the team consists of members from the land, accounting, sales and marketing departments and it is hard to organize all of the information we need to plan for when going into a new market.

Any ideas you have for things that would be nice to see done on the portal?

It would be nice to have a list of everyone's home addresses; I went to send Holiday cards this year and had a tough time. We have also been passing around MP3's and it would nice to have a place to share them with everyone.

Survey Response #2

Tim Burke, Human Resources Administrator

What information do you want to see available on the portal?

Even though the products we create do not directly affect my job, when I am out and people ask about the company I work for I would like to be knowledgeable. Company statistics and information about our products and marketing initiatives would be helpful.

What types of things would you like to share/store on the portal?

Memos, I currently write quite a few and emailing them out or placing them in mailboxes does not seem to be efficient. Especially since there are people who do not check email and they are rarely in the office. The memos usually pertain to updates to policies and holidays.

Any ideas you have for things that would be nice to see done on the portal?

A get to know your colleagues area, I see so many names being in HR but I hardly know anything about them. Things like Birthdays/Anniversaries this month, maybe even Birth and Marriage announcements. A few of us have started sharing MP3's, and a friend of mine at another company said they use a website to share their MP3's. If we have a way to do this, that would be nice.

Survey Response #3

Lily Taylor, VP of R&D

What information do you want to see available on the portal?

Location information would be helpful; hotels, restaurants, shopping, etc. I frequently visit our Phoenix location and some tips about the area would be nice. Information about our general travel guidelines; when I send new employees on a business trip it is quite tedious to round up the information they will need about booking a flight, appropriate meal expenses, etc.

What types of things would you like to share/store on the portal?

Upcoming products, product updates, known issues, etc.

Any ideas you have for things that would be nice to see done on the portal?

As the VP of R&D, it is important to always be thinking of new things. A virtual suggestion box would be great, or even a competitor's info area where people can report what our competitors are doing as far as new products and even their sales and marketing initiatives. A way to track requests from the sales team; the present and potential clients are constantly asking for customizations to a particular product. Usually the sales representative sends an email to the manager of R&D, the accounting representative for that region, and copies me and the VP of Sales requesting a customization. It is then a series of emails that everyone is included on deciding the amount the request will cost us versus the benefit of having the company as a client.

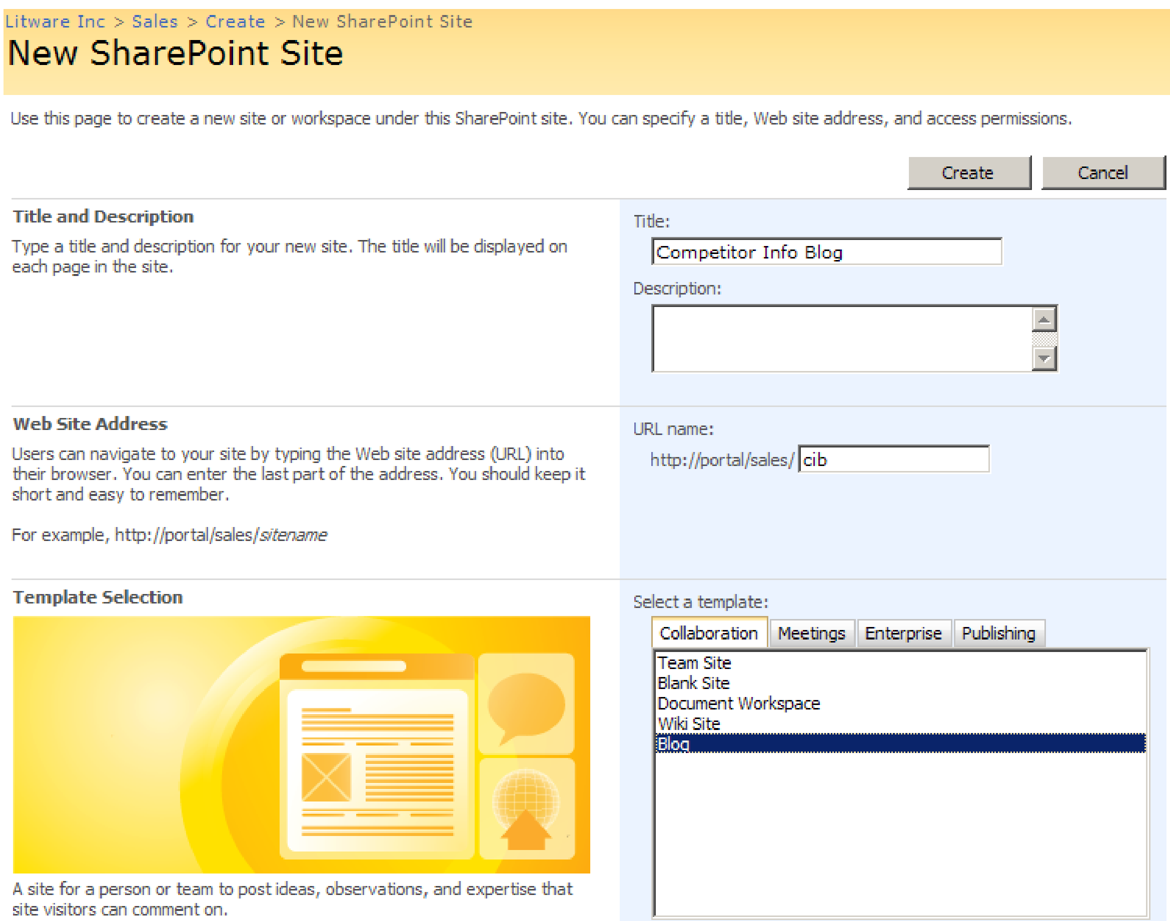
Lab 08 Web 2.0

Lab Overview: In this lab you will be using the features of SharePoint to create an environment to share information and ideas. In Exercise 1, the VP of Sales has asked you to create a Competitor Info Blog to help track what Litware's competitors are doing in the markets they compete in. In Exercise 2, Research and Development team will be using a Wiki to create pages for each of the products they are developing. Finally in Exercise 3, you will be RSS enabling a list and aggregating the content using the built in RSS reader in Outlook 2007.

Exercise 1

The VP of Sales would like to create a competitor info blog to share among the sales representatives. All of the sales representatives will have contribute rights to the posts and comments. This will allow them to post competitor info and comment on posts. You will also be opening up the comments to any authenticated user on the portal. This will allow even people in the R&D department to comment on a competitor's information. The sales representatives will be posting on products they see and sales and marketing initiatives made by the competitor. To incentivize sales representatives to post, the VP of Sales will be drawing a name from all of the reps who have posted during the previous month and giving a $50 gift card.

1) The first step is to create the Competitor Info Blog Site. Navigate to http://portal/sales
   - A) Click **Site Actions**
   - B) Select **Create**
   - C) On the Create page, select **Sites and Workspaces** under the **Web Pages** heading.
   - D) Fill out the Screen as follows, leave everything else set to the default.



   - E) Click **Create**

2) To allow the rest of the portal to comment on the posts, you will need to break permissions on the posts list.

   A) Click **View all Site Content**

   B) Select the **Comments** list

   C) Click **Settings→ List Settings**

   D) Under Permissions and Management, select **Permissions for this list**

   E) On the **Actions** menu, select **Edit Permissions**

      i. *At the Pop Up message, click* ***OK***

   F) Check the box next to **Litware Inc Visitors** and click **Edit User Permissions** on the Action menu.

   G) Uncheck **Read** and check **Contribute**

   H) Click **Ok**

   I) Click **Competitor Info Blog** in the Bread Crumb navigation to go back to the main page of the site.

3) Using categories to organize your posts will help visitors find the posts that are relative to what they are looking to read. To do this you will be editing the current items in the Categories list to create 3 new items: Price, Promotion, and Product.

   A) Click **View all Site Content**

   B) Select the **Categories** list

   C) Click the icon next to **Category 1**

   D) Delete the text **"Category 1"** from the Title field

   E) Enter **"Price"**

   F) Click **OK**

   G) Repeat steps 3C-F from above to create the **Promotion** category in place of Category 2 and the **Product** category in place of Category 3.

   H) Click **Competitor Info Blog** in the Bread Crumb navigation to go back to the main page of the site.

   I) Notice in the left hand navigation, the three categories you just created now appear for a user to select from.

4) It is now time to test creating a blog post and allowing a visitor to the blog site to comment on it.

   A) Click Welcome System Account in the upper right hand corner of the site and select Sign in as Different User

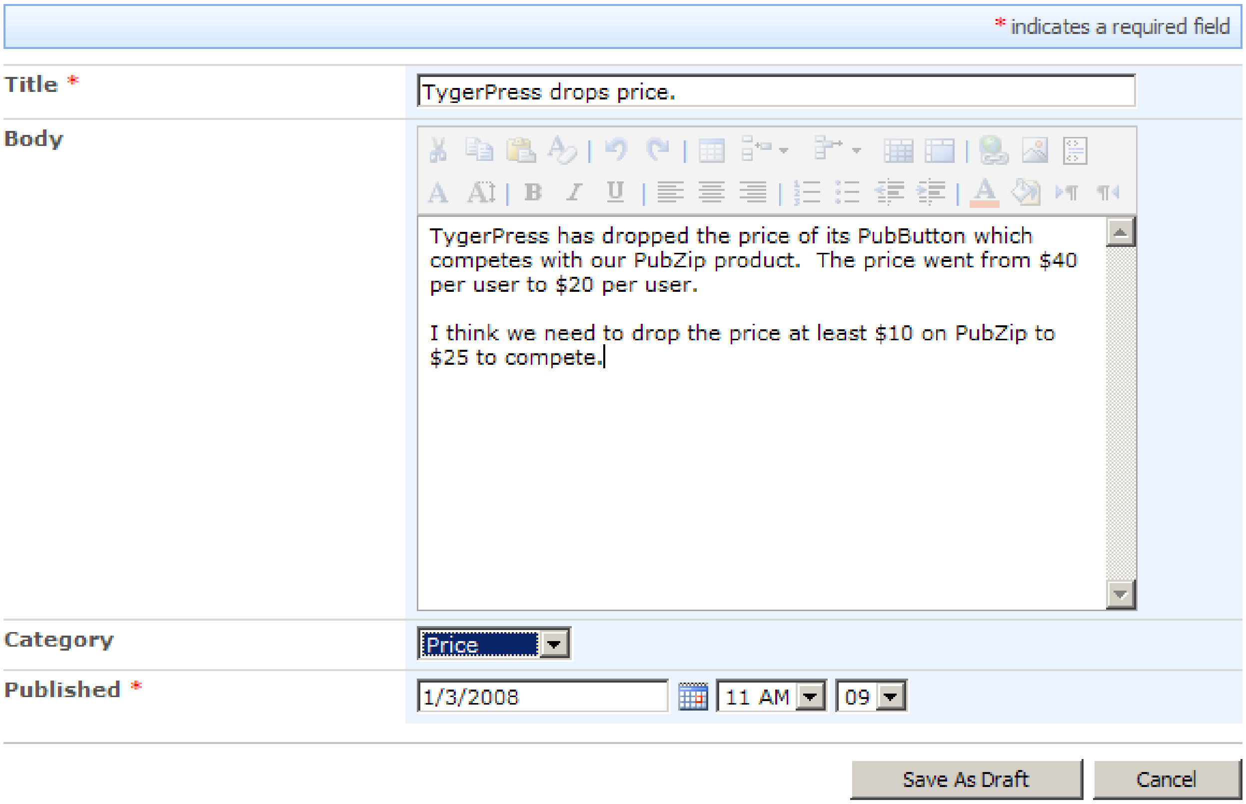
      i. *User name:* ***litwareinc\jayh***

      ii. *Password:* ***pass@word1***

      iii. *Click* ***OK***

   B) Under the Admin Links heading, select **create a post**.

C) Fill in as seen below:



D) Click **Save as Draft**

E) Before the Post will be viewed by others it needs to be approved, log back in as the Administrator. See step 4A. The user name is **litwareinc\admistrator**, and the password is the same.

F) Under Admin Links, select **Manage Posts**

G) On the drop down menu for *TygerPress drops price,* select **Approve/Reject**

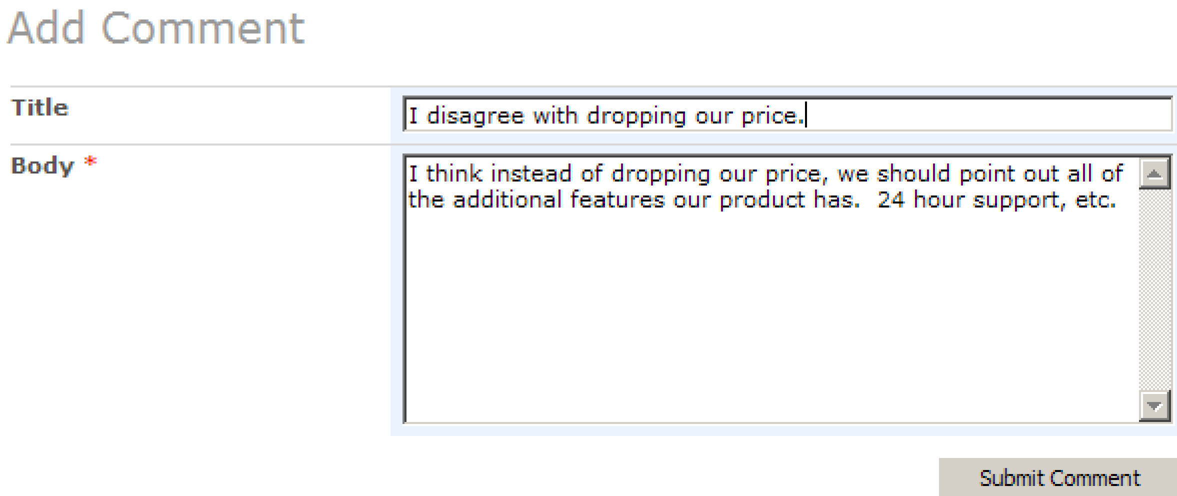
H) Click **Approved→OK**

I) Click **Competitor Info Blog** in the Bread Crumb navigation to go back to the main page of the site

J) Log in as Chris A. See step 4A. The user name is **litwareinc\chrisa**, and the password is the same. Notice the Admin links on the right hand side are gone because Chris does not have owner or member rights to the site.

K) Click **Price** under the Categories heading.

L) Click **Comments.** Fill in as seen below and click **Submit Comment.**



J) Navigate back to http://portal and log back in as the administrator.

Exercise 2

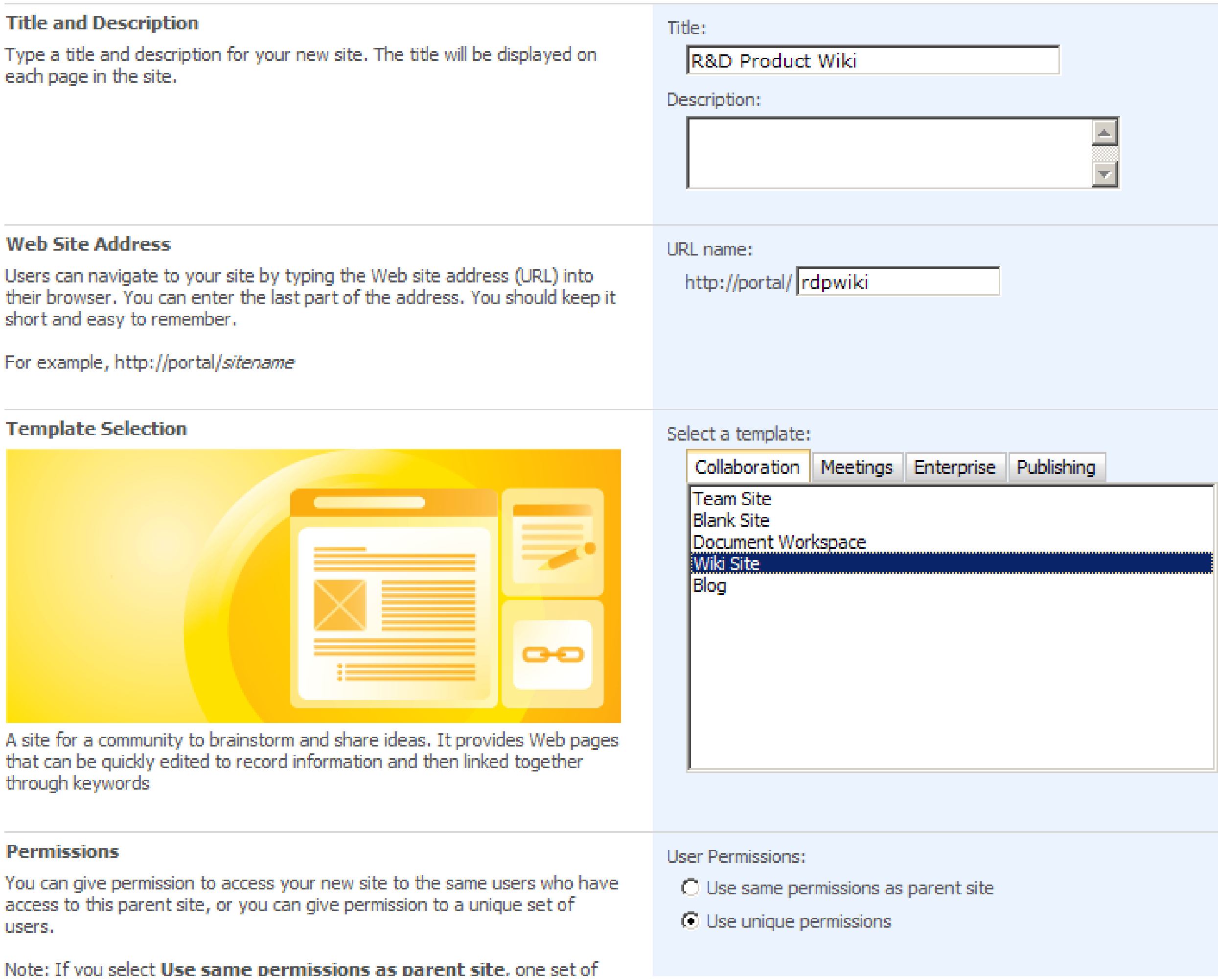
The Research and Development team would like to have a way to share information about all of their products. To do this, you will be creating a wiki to work as a knowledge base. The R&D team will have contribute rights and the rest of the company will have read only rights.

1) The first step is to create the R&D Product Wiki Site.

   A) Click **Site Actions**

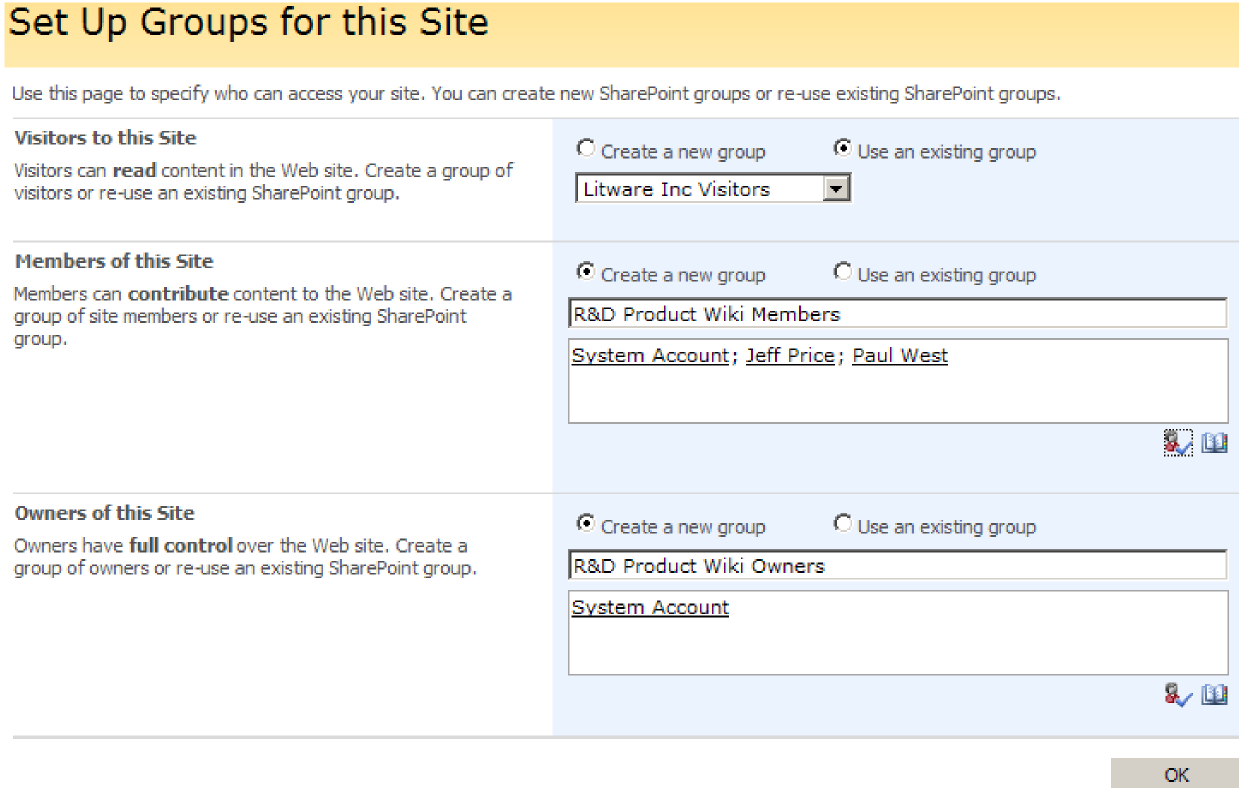
   B) Select **Create Site**

C) Fill out the Screen as follows, leave everything else set to the default.



D) Click **Create**

E) On the Set Up Groups for this Site page, add Jeff Price litwareinc\jeffp (CTR+K) and Paul West litwareinc\paulw (CTR+K) to the Members of this Site. Leave all other options set to the default.

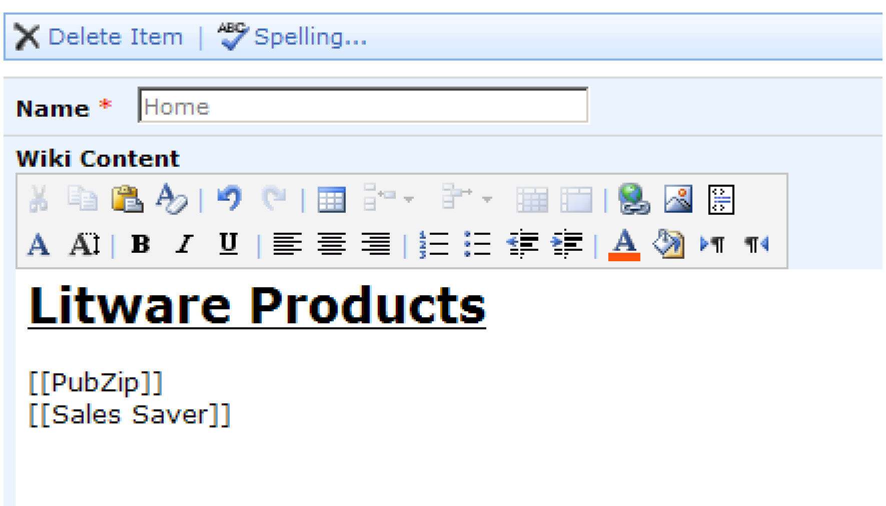


F) Click **Ok**

2) The next step is to create two pages for our products: PubZip and Sales Saver. Log in as Jeff Price. See step 4A from Exercise 1. The user name is **litwareinc\jeffp**, and the password is the **pass@word1**.

A) Click **Edit** on the Home page.

B) Delete the content on the page and replace it with: (Font size or style does not matter.)



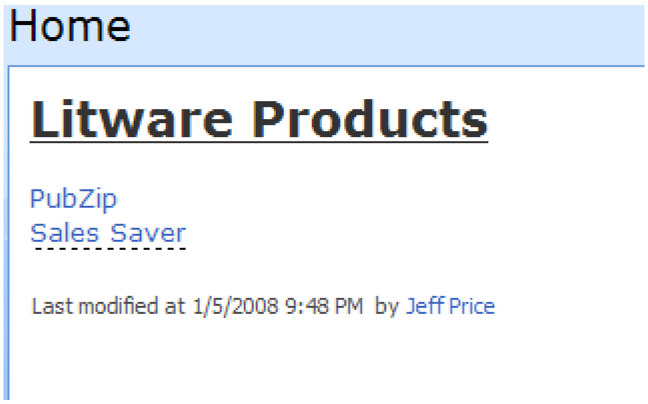
C) Click **Ok**

D) Click on the **PubZip** link.

E) Type the text "**This is the PubZip info page**"

F) Click **Create**

G) Click on the **R&D Product Wiki** in the bread crumb navigation. Log in as Paul West. See step 4A from Exercise 1. The user name is **litwareinc\paulw**, and the password is the **pass@word1**.



H) Click on the **PubZip** link.

I) Click **Edit**

J) Add the text, "**The PubZip product was released in March of 2007**"

K) Click **Ok**

3) Paul may have realized it was a mistake to put in the product release date; he could either edit the page or use the history to revert back to a previous version. Since you already know how to edit, let's walk through reverting back to a previous version.

A) Click **History**

B) On the left hand side, notice the links for versions 2.0 and 1.0. As you are looking at the 2.0 version, notice that the text that is changed is highlighted in tan if is it added or gray if it is deleted.

C) Click on **Version 1.0**

D) Select **Restore this version;** at the warning message click **OK**

E) The page has now been restored. Navigate back to the homepage of the **Litware Inc Portal** and log back in as the **administrator**.

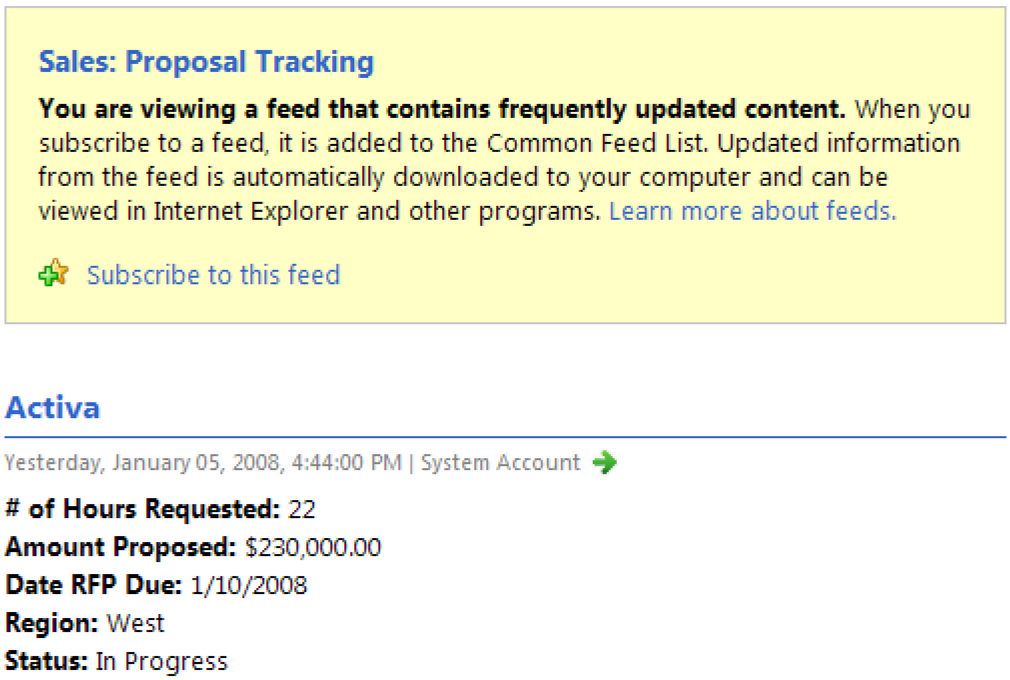
Exercise 3

Several users would like to be notified of changes in the proposal list without receiving alerts. To accomplish this, you will be RSS enabling the proposal list and then aggregating it using Outlook 2007 RSS capabilities.

1) Navigate to the Proposal Tracking list on the Sales Site

A) On the actions menu, click **View RSS Feed**

B) You should now be viewing the RSS feed through the browser, highlight the URL, **right click** and select **copy**.



2) Open **Outlook**

A) On the Menu Bar select **Tools** and then **Account Settings**.

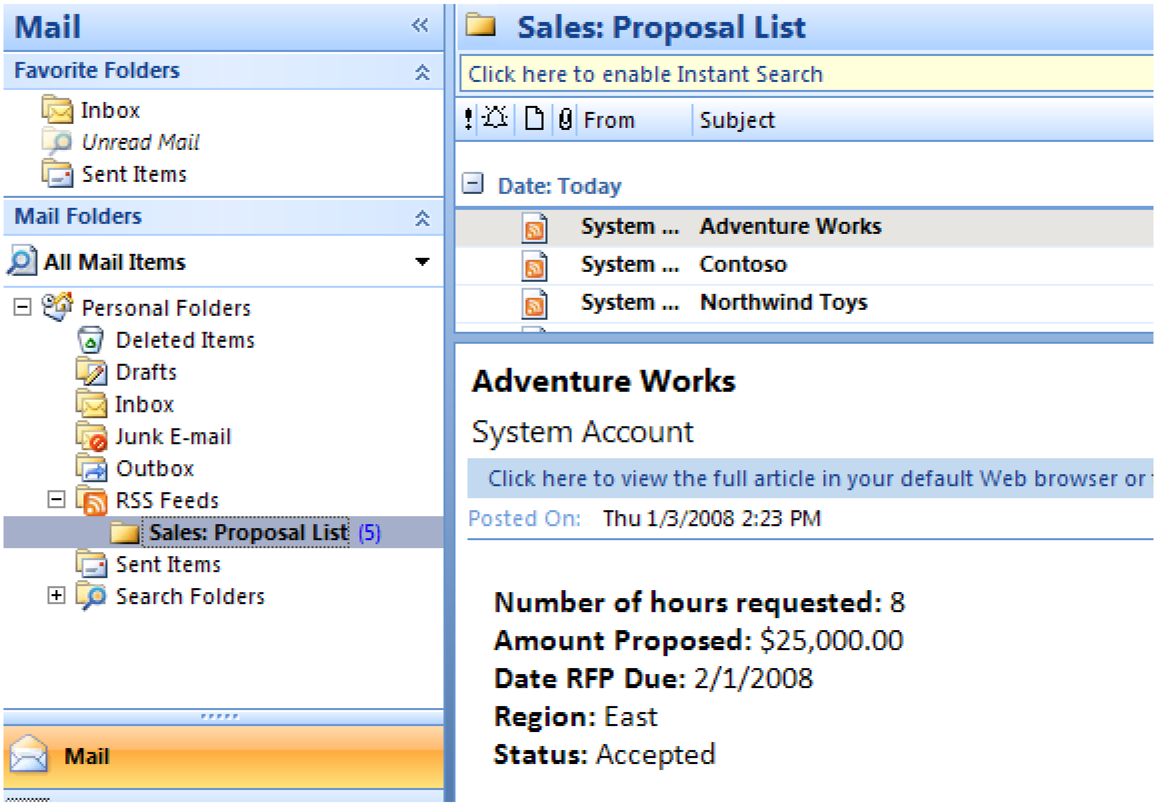
B) Select the **RSS Feeds tab** and click **New**

C) Paste the URL in the box and click **Add**

D) Click **OK→Close**

3) Expand the new **RSS Feeds** folder in the Folder Pane on the left

4) Click on **Sales: Proposal List** and view the feeds



Lab 09: Search

Lab Overview: Even with the best navigation, half of the visitors to your site will just search for what they are looking for. It is important to plan and prepare for these users. To do this, you will be setting up a search scope for just the Research and Development Wiki. You know that many times people are coming to the portal just to find an answer about one of the products. In addition, you want to create and keyword and best bet for your new product, Litware PubZip because you know in the next few months it will be searched for frequently. Finally, you will be using people search to locate the members of the sales team because you have a lead for the new Liware PubZip software.

Exercise 2: Configuring Search: Scopes, Keywords

1) Creating a scope can help your users to return more specific and relevant results. In this step, you will create a scope for the Research and Development Wiki Pages Library on the R&D Product Wiki Site.

   A) Navigate to http://portal

   B) On the **Site Actions** Menu, Select **Site Settings→Modify all site settings**

   C) Under the **Site Collection Administration** heading, select **search scopes**

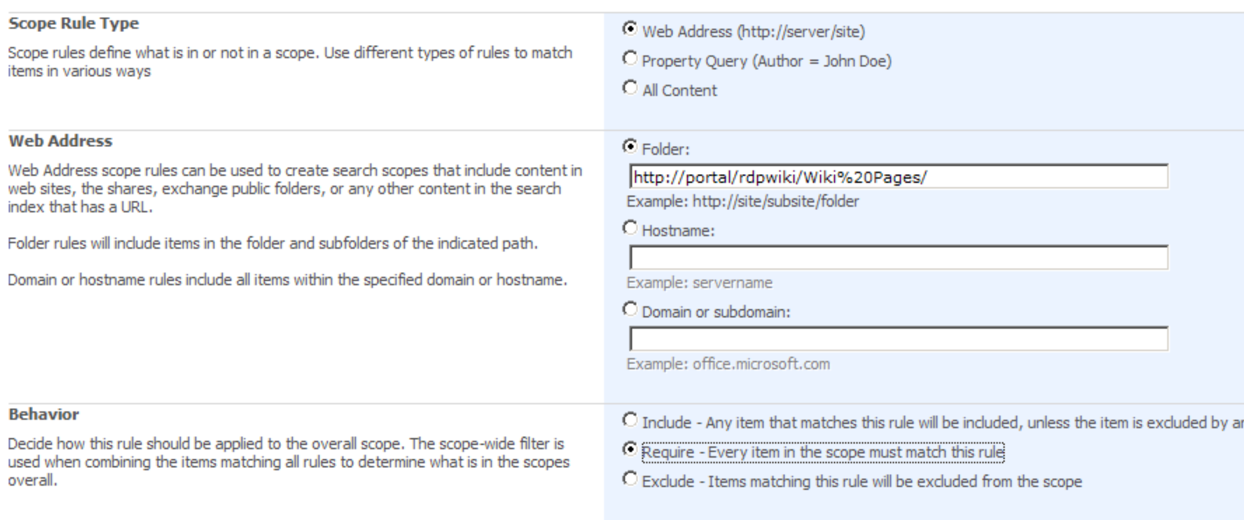
   D) Click **New Scope,** on the **Create Scope** page fill it in as follows:

      i) *Title**: R&D Product Wiki***

      ii) *Display Groups**:** Select both **Search Drop Down and Advanced Search***

      iii) *Click **Ok***

   E) Notice that even though the scope has been created it currently does not have any rules associated with it. Click **Add rules**, and fill it in as follows:

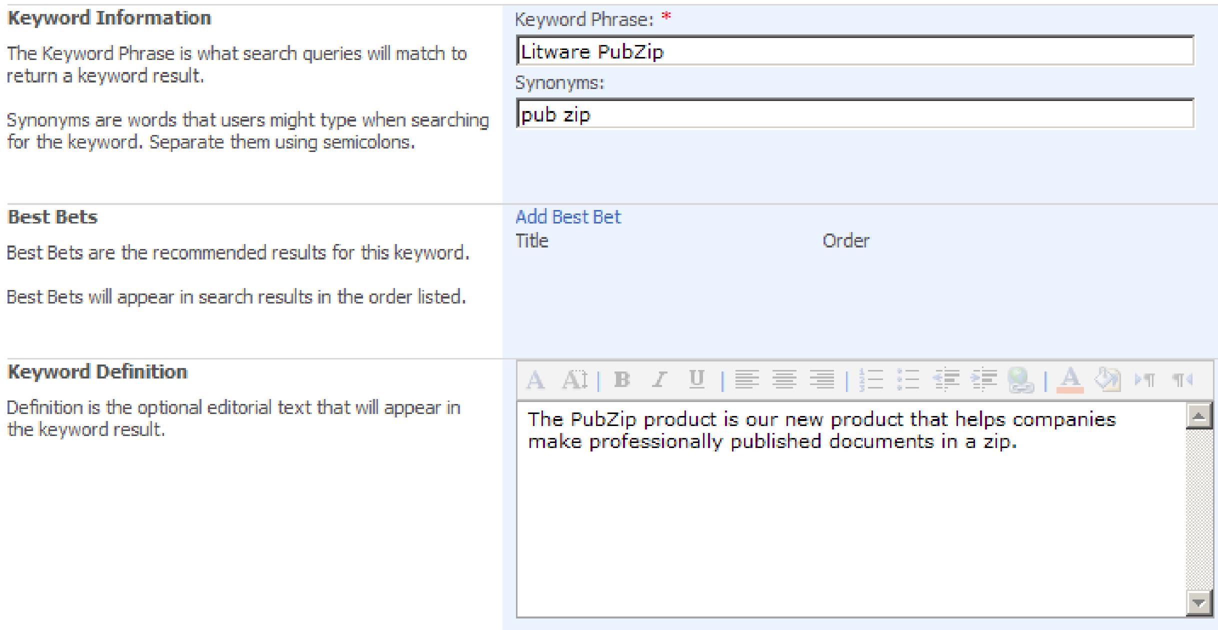


   F) Click **OK.** Click on **Site Settings** in the breadcrumb to navigate back to the **Site Settings** page.   It will take approximately ten minutes for the scope to be ready. We will try out the scope at the end of the lab.

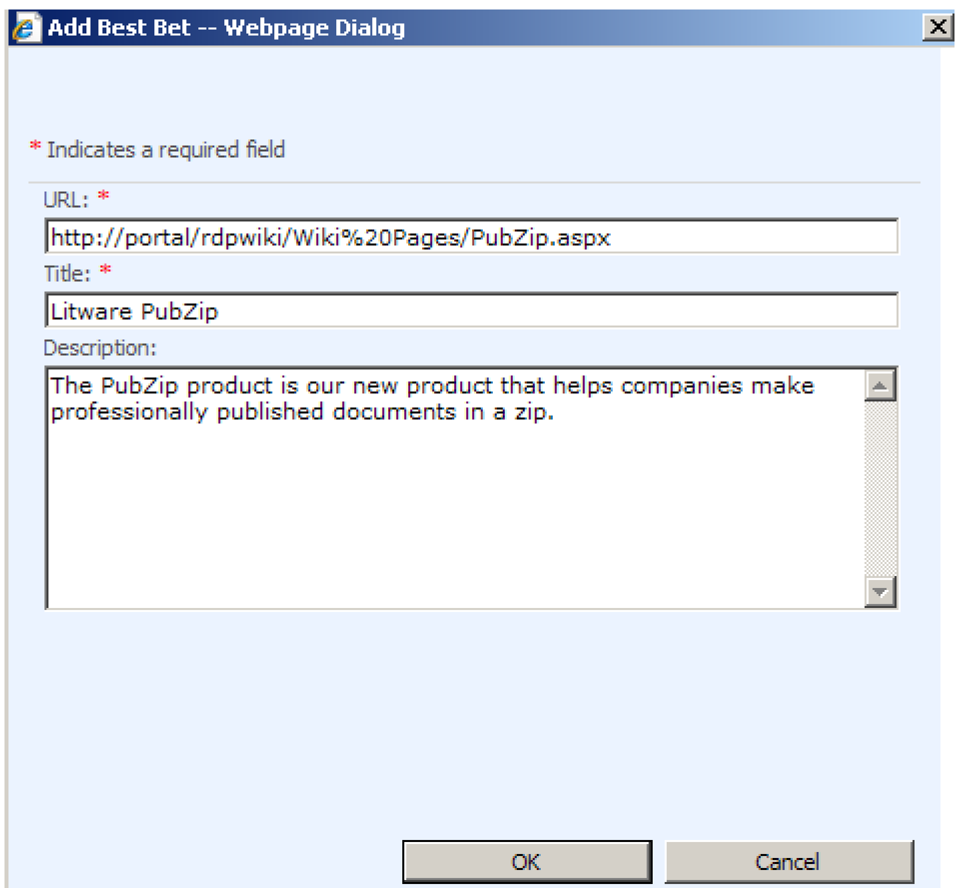
2) It has been noticed that users are searching for the product Litware PubZip. To improve the user experience we will be creating a Keyword and Best Bet.

   A) Under **the Site Collection Administration** heading, select **Search Keywords**

B) Click **Add Keyword**, and fill it in as follows:



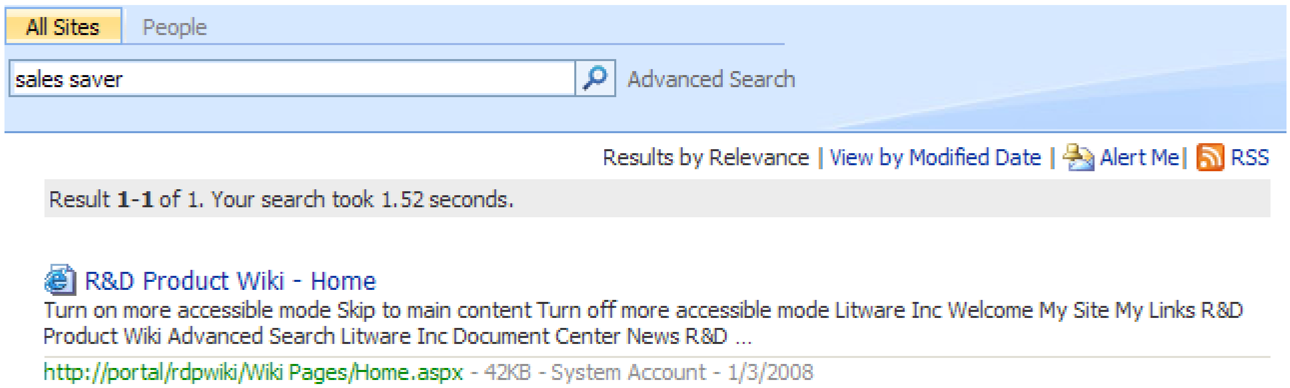
C) Click **Add Best Bet** (Note for the best bet URL, open another browser and navigate to the PubZip Wiki page on the R&D Product Wiki site, http://portal/rdpwiki/Wiki%20Pages/PubZip.aspx, and grab the URL.)



D) Click **OK, OK.**

E) Click on **Litware Inc** in the Top Link bar.

F) In the search box in the right hand corner, select R&D Product Wiki from the dropdown, type "Sales Saver" in the search box and click the icon.

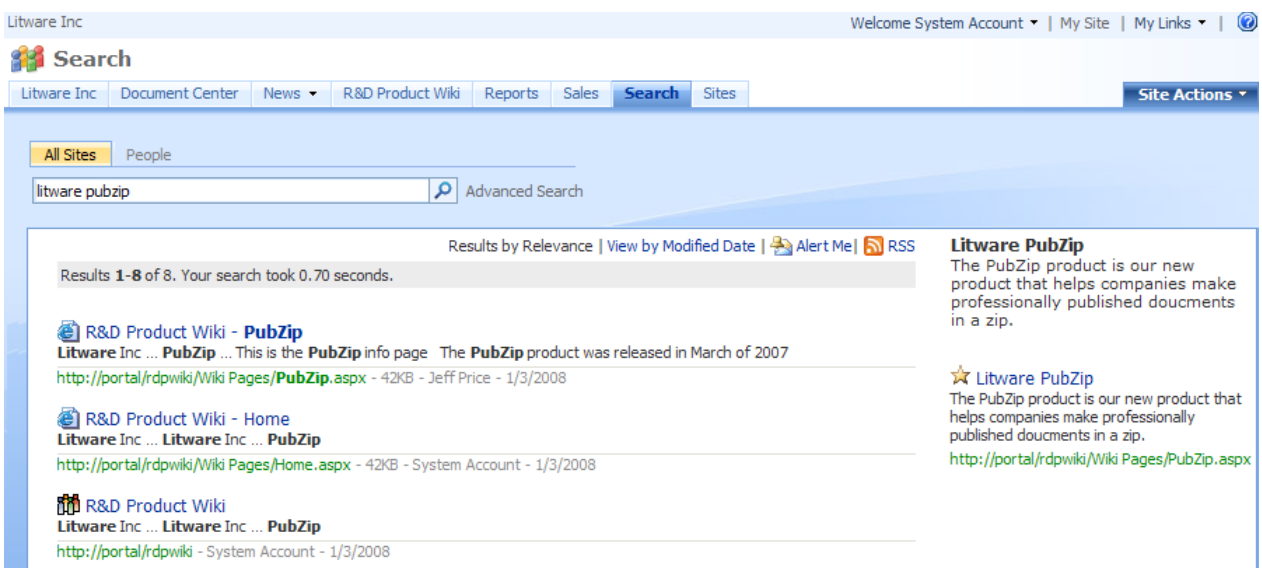


Note: If you did not get any results you may need to run a crawl on the server to populate the search index. Follow the following steps only if you did not return any results.

1. Open the **Start Menu** and click **SharePoint 3.0 Central Administration**
2. In the left hand navigation, select **Litware SSP**
3. Under the Search heading, select **Search Settings**
4. Select **Content Sources and crawl schedules**
5. On the drop down for **Local Office SharePoint Server Sites**, select **start incremental crawl**
6. It will take a few minutes for the crawl to complete, refresh the page and when the status next to Local Office SharePoint Server Sites is idle complete the lab.

G) Click on **Search** in the Top Link bar.

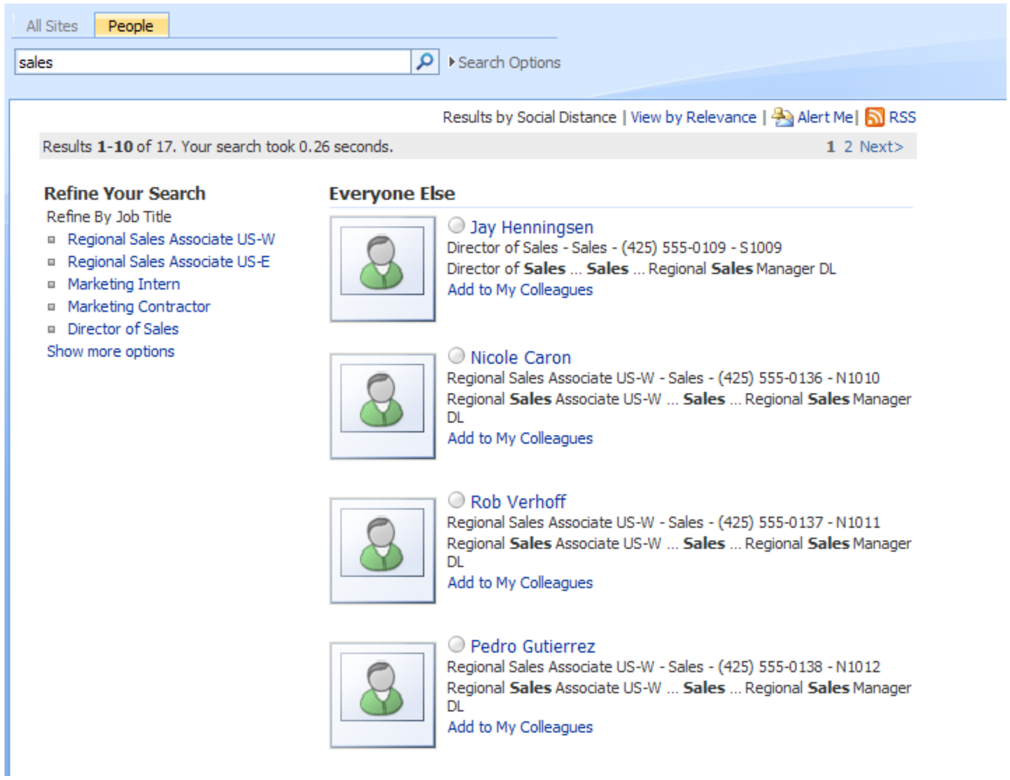
H) In the search Dialog box, type **Litware PubZip** click the **search icon**. Your results should be:



I) Click on **Search** in the Top Link bar.

J) Select **People** above the Search box.

K) Type “Sales” and click the search icon.



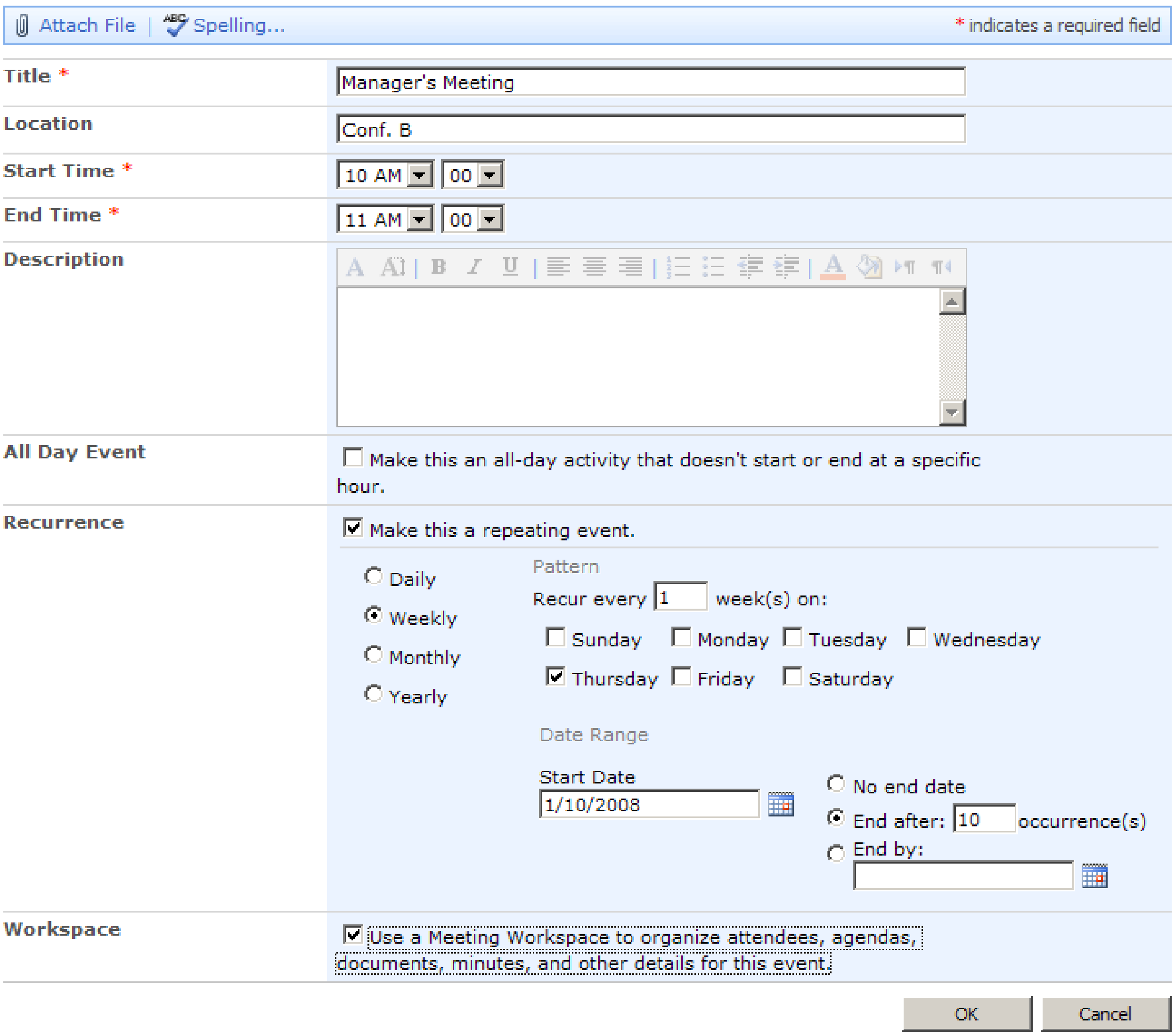
L) If you click on **All Sites** above the search box now, you will notice it also ran an all sites search at the same time.

Lab 10- Meeting Workspaces

Lab Overview: Each week the managers meet to discuss how each department is running. They have asked you for a way on the new portal to keep track of who is in attendance, decisions that were made, and documents that need to be handed out. To make this happen, you will be creating a meeting workspace as a sub site of the portal.

Exercise 1

1) To ensure if changes are made to the date of the reoccurring manager's the meeting workspace is updated; you will be creating the meeting workspace using the calendar method.
   A) Navigate to homepage of the portal, http://portal/.
   B) You will be using the events list on the portal site. Click **View all site content** and then select the **Events** list.
   C) Click **New** on the menu bar to create a new calendar item and fill it out as follows:



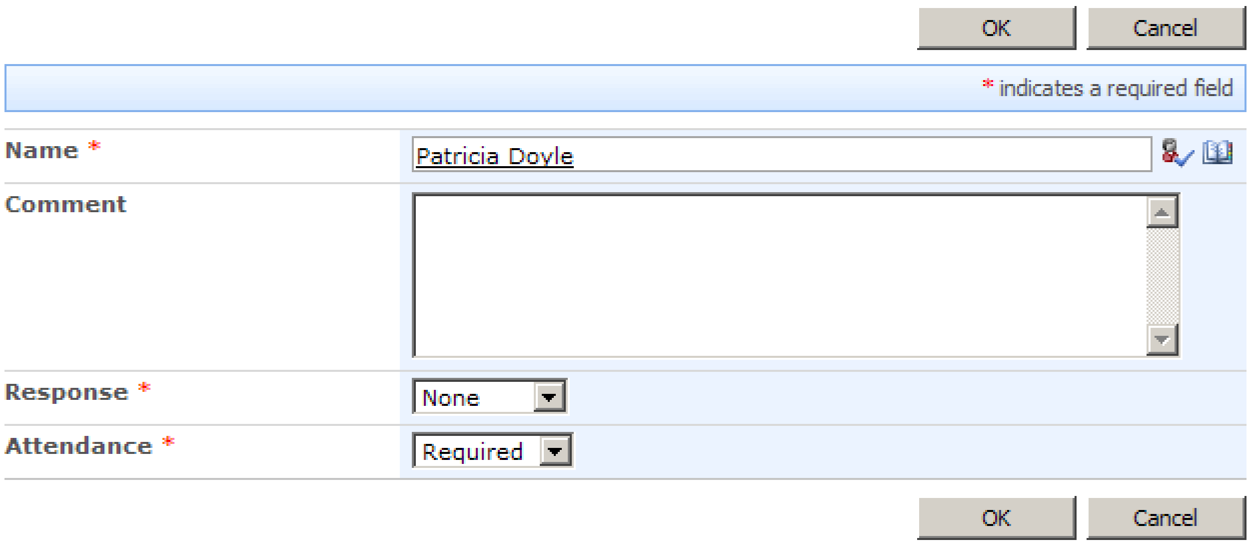
   D) Click **OK**
   E) On the New Meeting Workspace page, leave the defaults and click **OK**
   F) On the Template Selection page, select **Basic Meeting Workspace**, and click **OK**

2) You can see the basic meeting template populated four list templates for us: Objectives, Agenda, Attendees, and Document library. If you get some extra time at the end of the lab, try out one of the other meeting workspace templates you will notice the major difference between them is what list templates are created by default. To get started setting up our Manager's meeting, add our attendees: PatriciaD, Litware admin Guy, and AngelaB.

A) Click **Manage attendees**

B) Click **New**

C) Fill in as seen below:



D) Click **OK**

E) Repeat steps B & C above to add Litware admin Guy and AngelaB

F) Click on **Manager's Meeting** in the breadcrumb

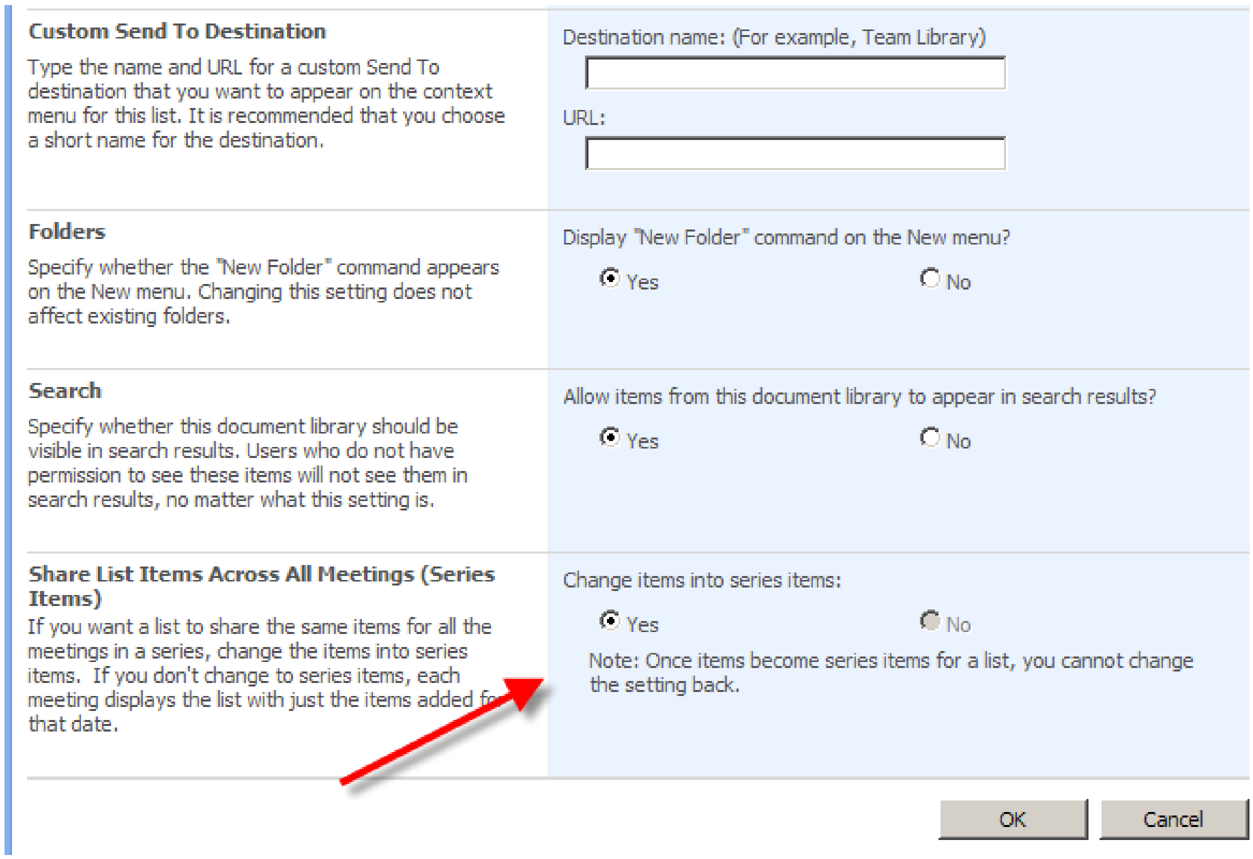
3) At each manager's meeting there are several documents that are distributed, instead of the users needing to remember which meeting the document was distributed at we will be making the list a Series List. All documents will always be shown. If you would like you could also create a column for what meeting the document was distributed to allow your users to create views. This is an extra item for the lab that you might try at the end of the lab once you have finished the lab.

A) Click on the **Document Library**

B) Once in the Document library, click **Settings→Document Library Settings**

C) On the Customize Document Library page, click **Advanced settings**

D) At the bottom of the page for Share List Items across all Meetings, select **Yes→ OK**



E) Navigate back to the document library

F) Upload the file **New Employee Incentives** located in the 10-Meeting Workspace folder **(…\SBU201Student\Labs\10-Meeting Workspaces)**

G) Click on **Manager's Meeting** in the breadcrumb

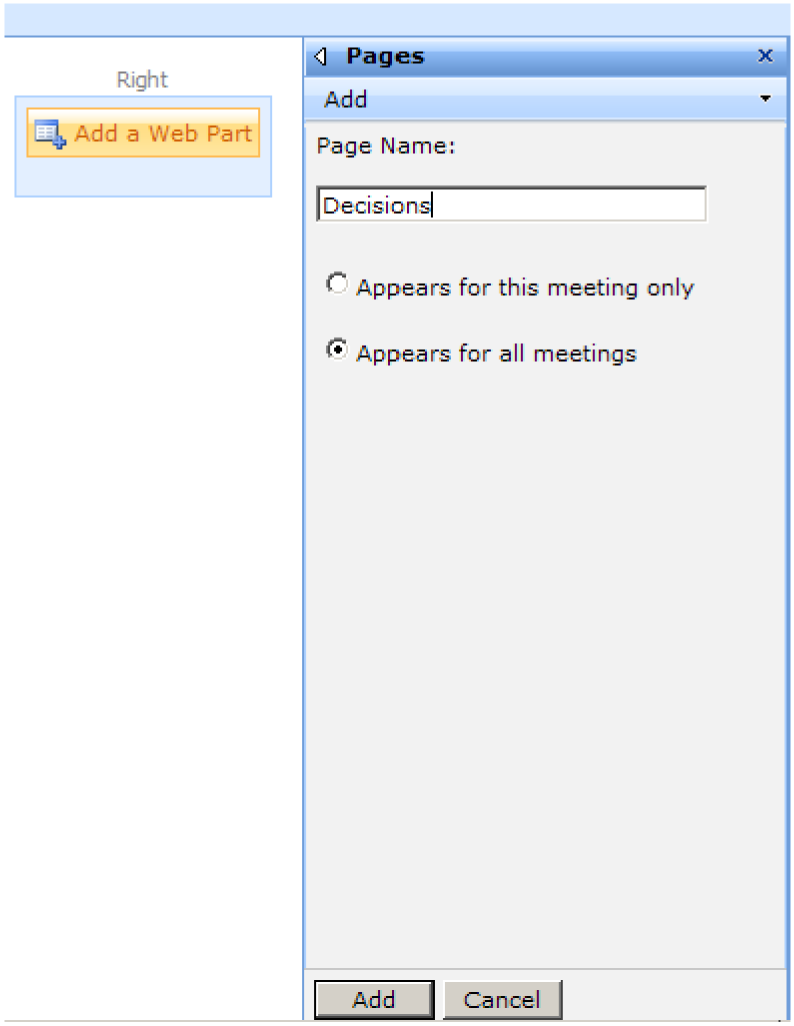
H) Notice as you flip through the different meeting dates, the New Employee Incentives documents is always present in the Document Library.

Note: If earlier in the lab you had clicked on any of the dates, you will see in the Document Library a folder for that date. You will only see the folder created for dates that have been clicked on.

4) You would now like to add a page to record decisions that are made at each meeting. The page displaying the list will appear at each meeting how you do not want the decisions list to be a series list, you would like each meeting to only display the decisions made at that meeting.

A) Click **Site Actions→Add Pages**

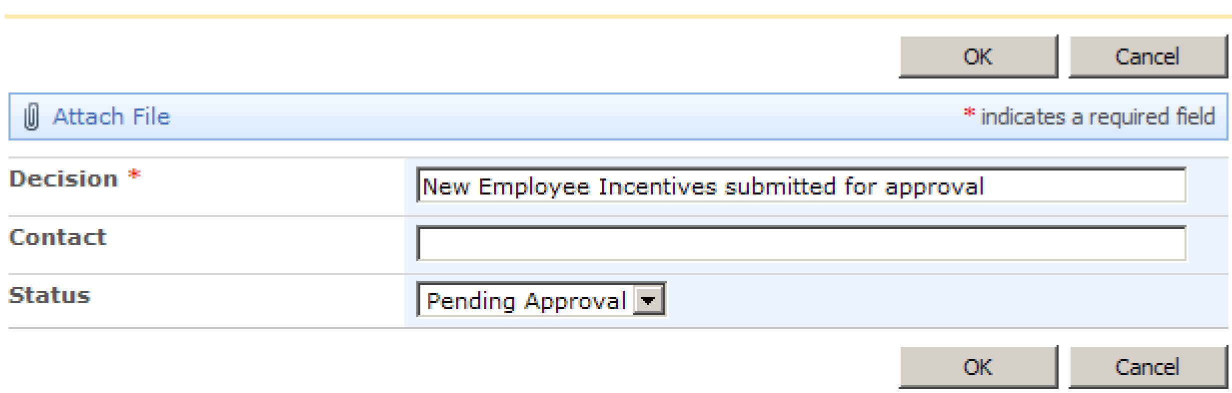
B) You will see a tool pane pop up on the right hand side of the page. For Page Name, type "**Decisions**", and Click **Add.**



C) On the next tool pane, you will see a list of list templates to choose from. This is for creating a new list; this is not a list that already exists on the site. Select the **Decisions** list, and **add** it to the **left** zone.

D) Click **Exit Edit Mode** in the right hand corner.

E) Select **Add new item**, and fill in as follows

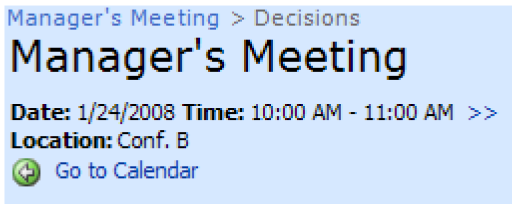


F) Click **OK**

G) Now select another meeting date, notice the Decisions page and decisions list is still present however your item from the first meeting does not appear. If you would like this to be a series list follow steps 3B-D.

5) You need to change one of the meeting times to Friday instead of the usual Thursday, due to an all day company meeting at headquarters.

A) Click on the **Go to Calendar** link beneath the title.



B) Once back at the Events list, click on the link to the meeting in two weeks (select any meeting you would like).

C) Click **Edit Item** in the menu bar

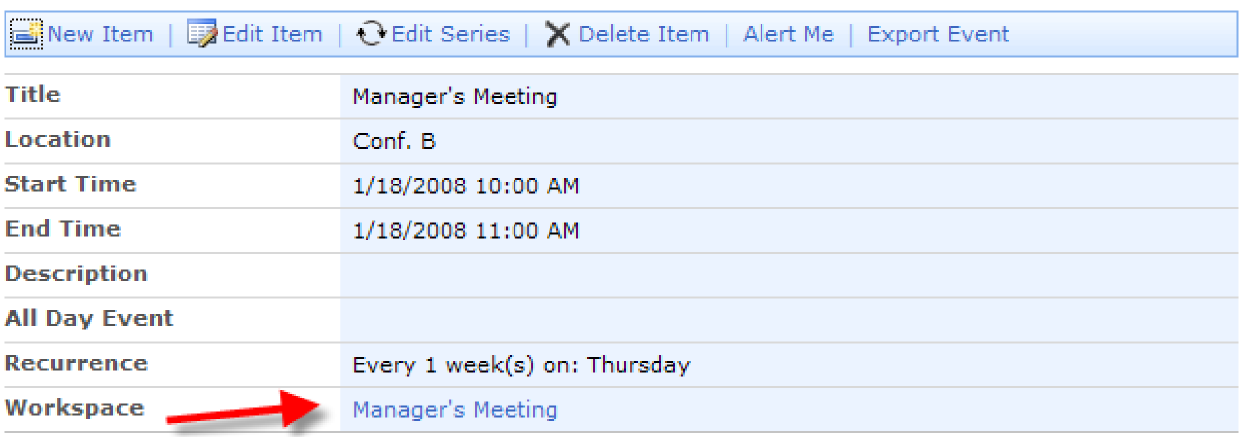
D) Increase the date of the meeting by one. Be sure to change both the **Start Time** and **End Time.**

E) Click **OK**

F) Notice the change on the calendar.

G) Click on the meeting you just changed again

H) At the bottom, click on the link to the **workspace**



l) Finally, notice on the left hand navigation the date of the meeting has changed. In the example the meeting date was changed from 1/17/08 to 1/18/08

Lab 11 Enterprise Features

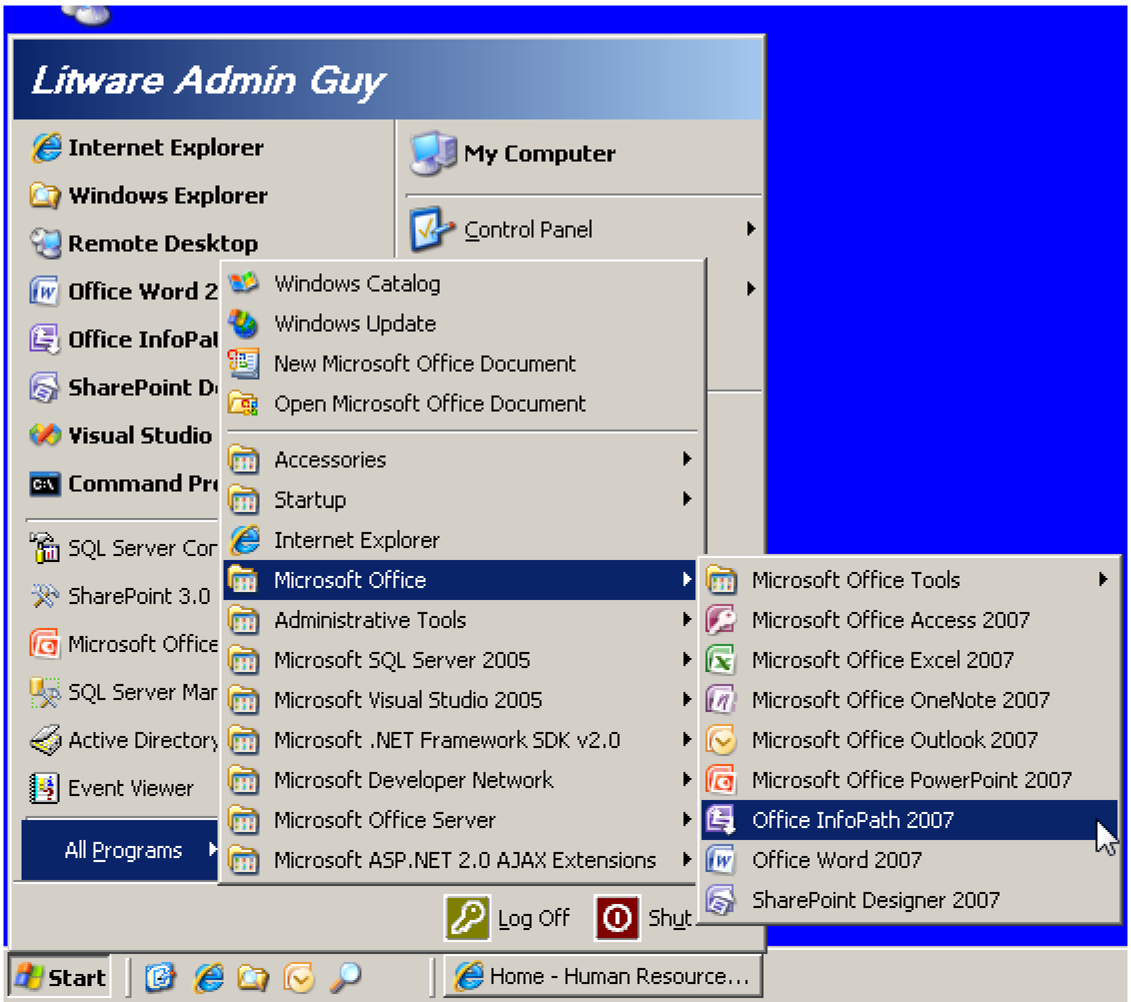
Exercise 1

The Litware Human Resources department would like us to create a form for their employees to fill out whenever they need to arrange travel plans. They need this form to be easily accessible. Luckily for them, we already have a form created. It will be your responsibility to upload this form into a new library that you will create and demonstrate how the new form could be used.

1) Publish a new form.

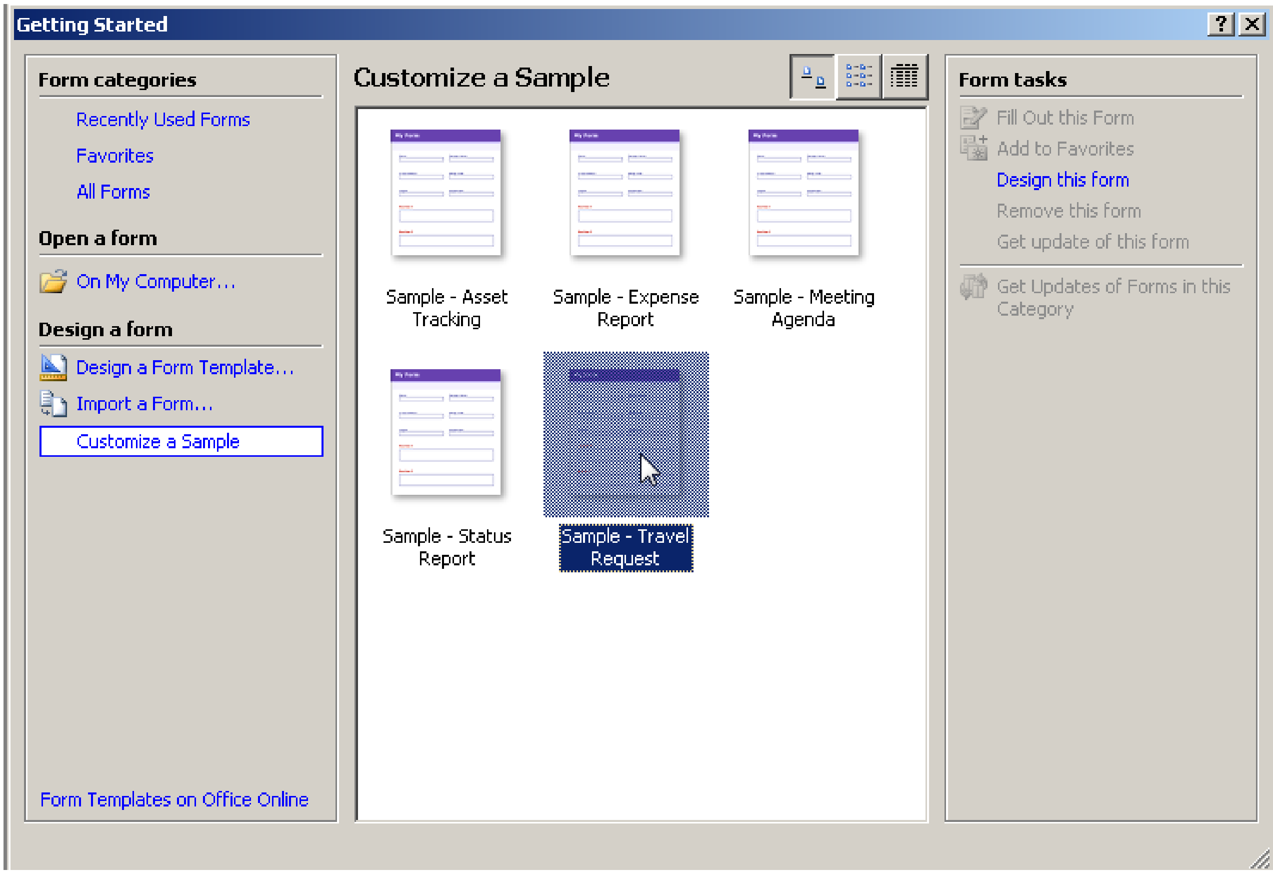
   A) Click on your **Start** menu.

   B) Click on **All Programs > Microsoft Office > Office InfoPath 2007**

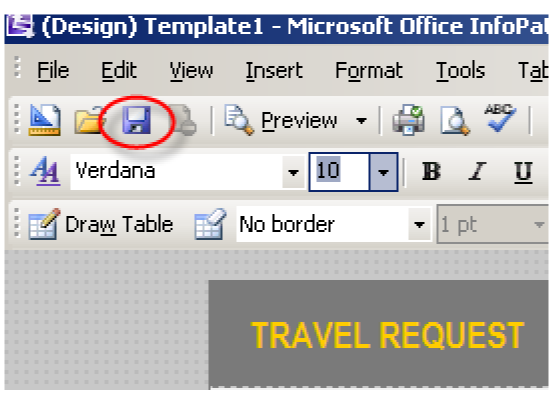


   C) When InfoPath opens the **Getting Started** box should be showing.

D) Double Click on the **Sample – Travel Request** document.



E) The form will open. Since this template is already complete, all we need to do is save the document and publish it. Go ahead and click on the save icon.



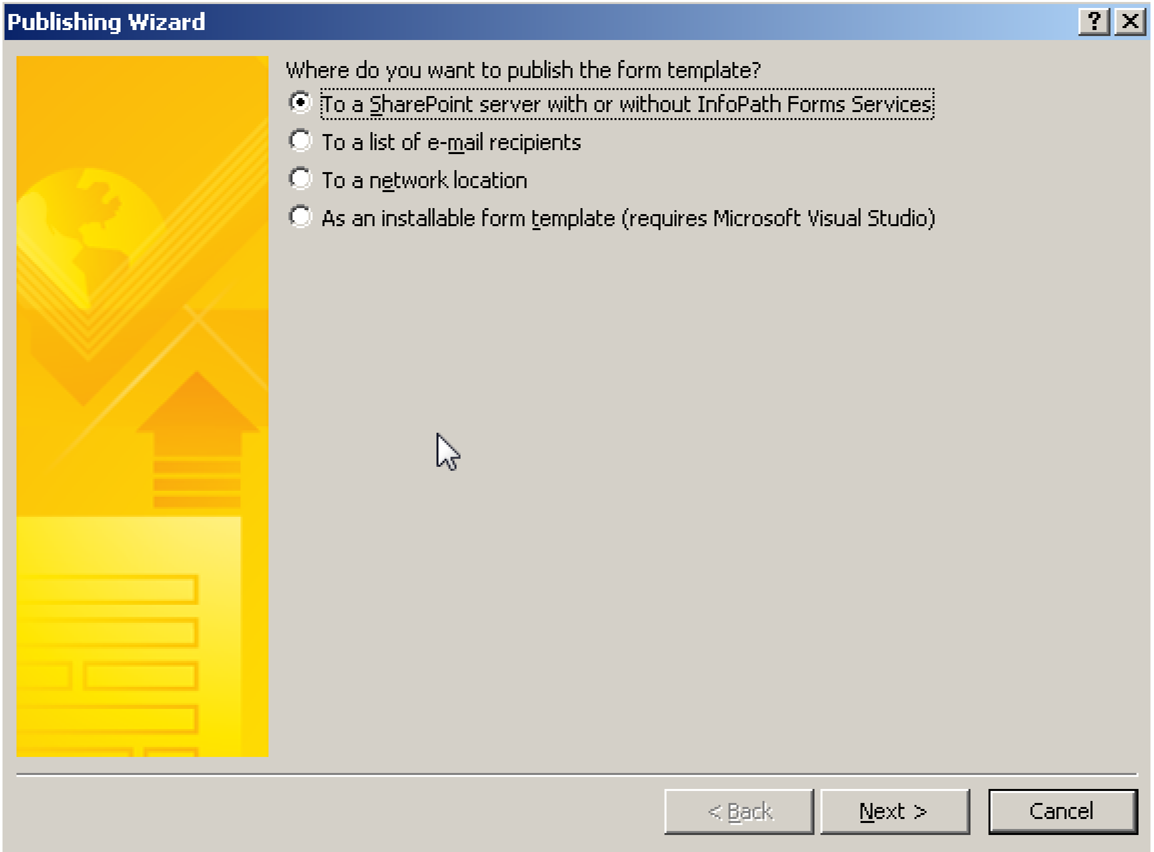
F) A box will pop-up. Click **OK**.

G) Save the document to your **Desktop**.

H) In the upper left-hand corner, click on **File**.

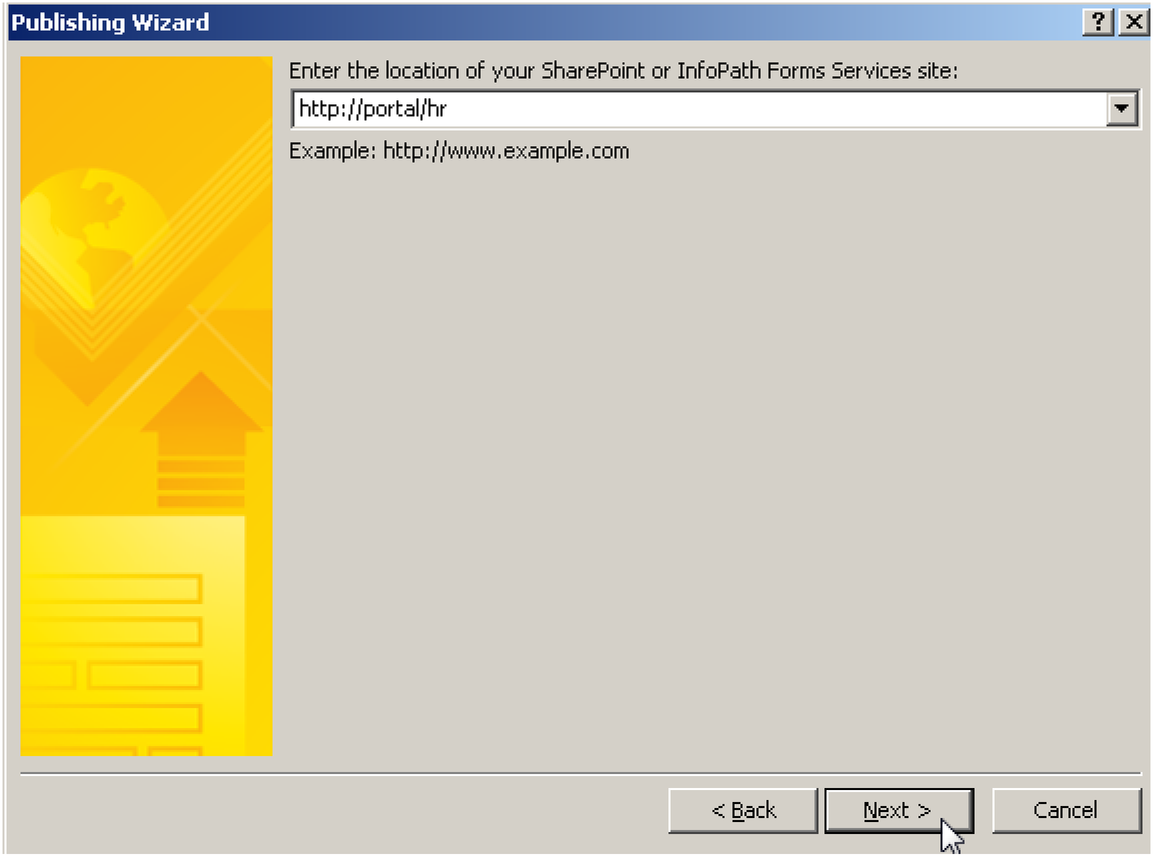
I) Click on **Publish**.

J) A box will pop-up asking **Where do you want to publish the form template**? Select **To a SharePoint server with or without InfoPath Forms Services**.



K) Click **Next**.

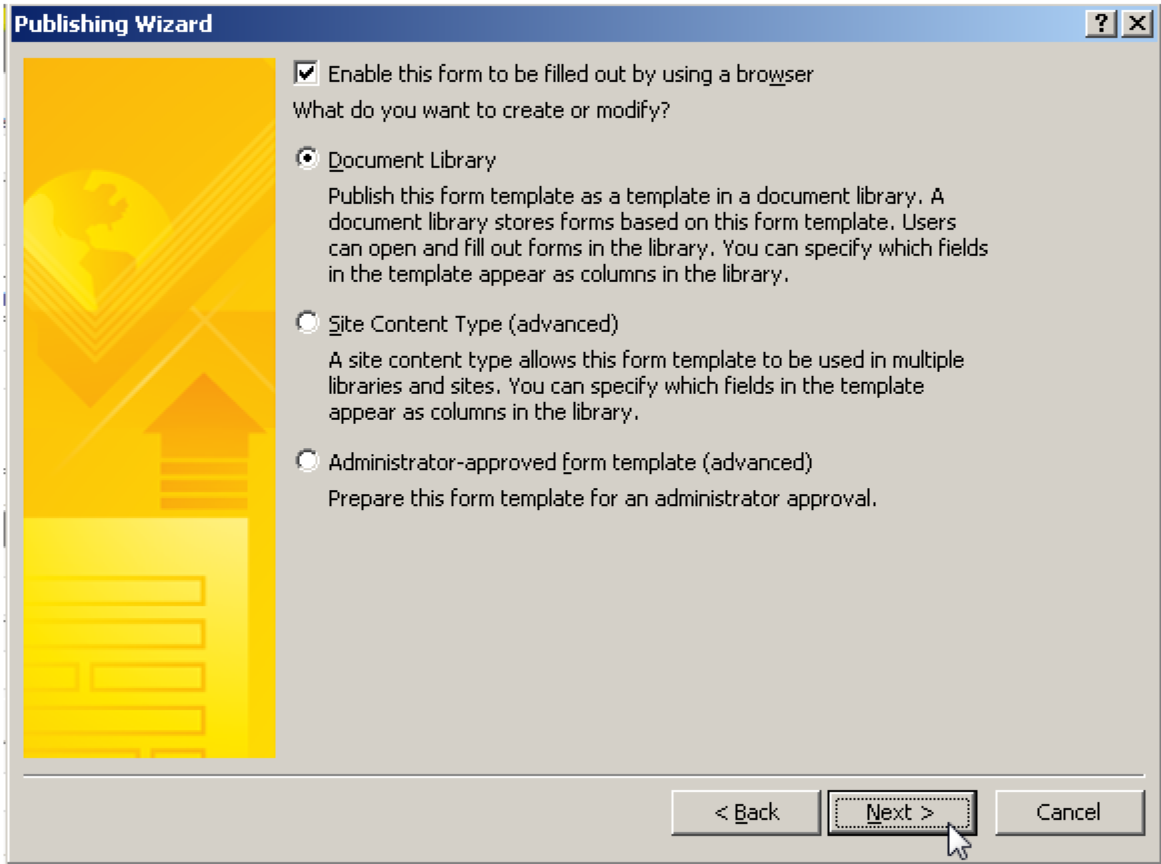
L) For the location of your SharePoint site, enter **http://portal/hr/**



M) Click **Next**.

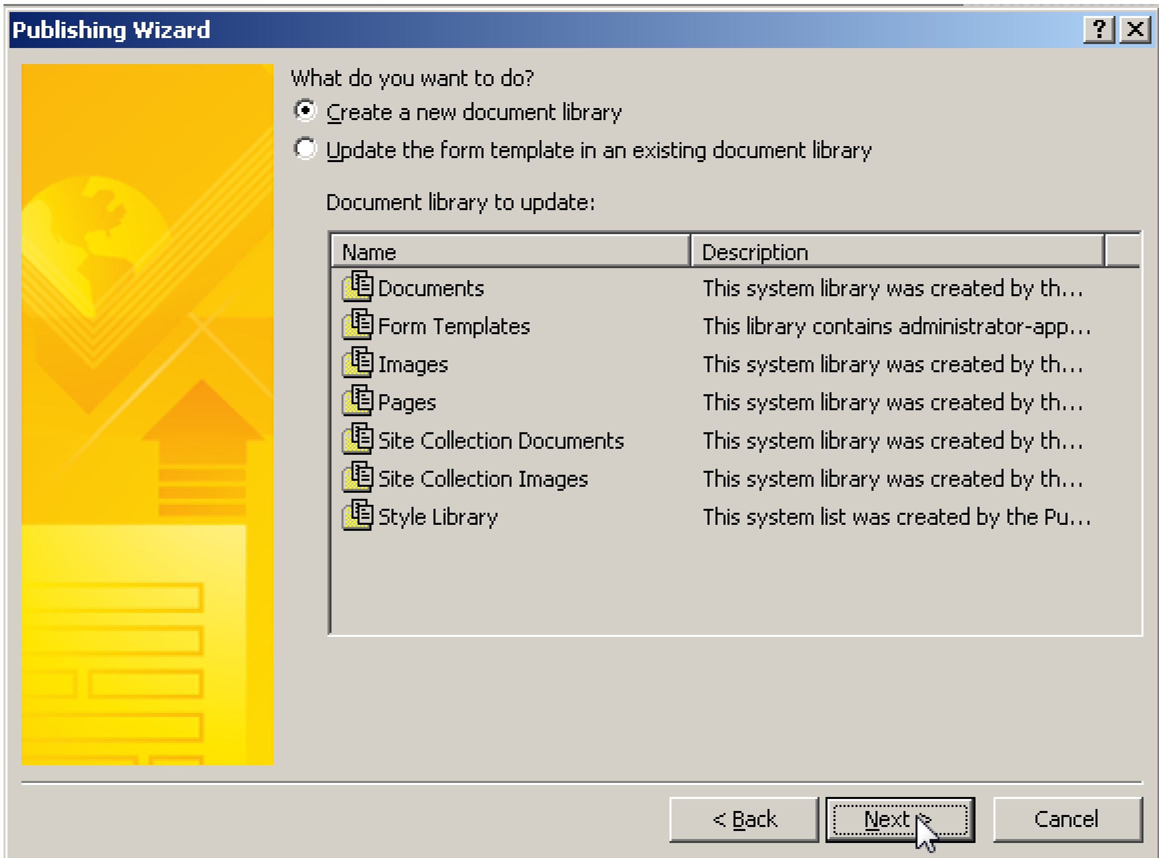
N) You want to check the box to **Enable this form to be filled out by using a browser.**

O) Also select **Document Library**.



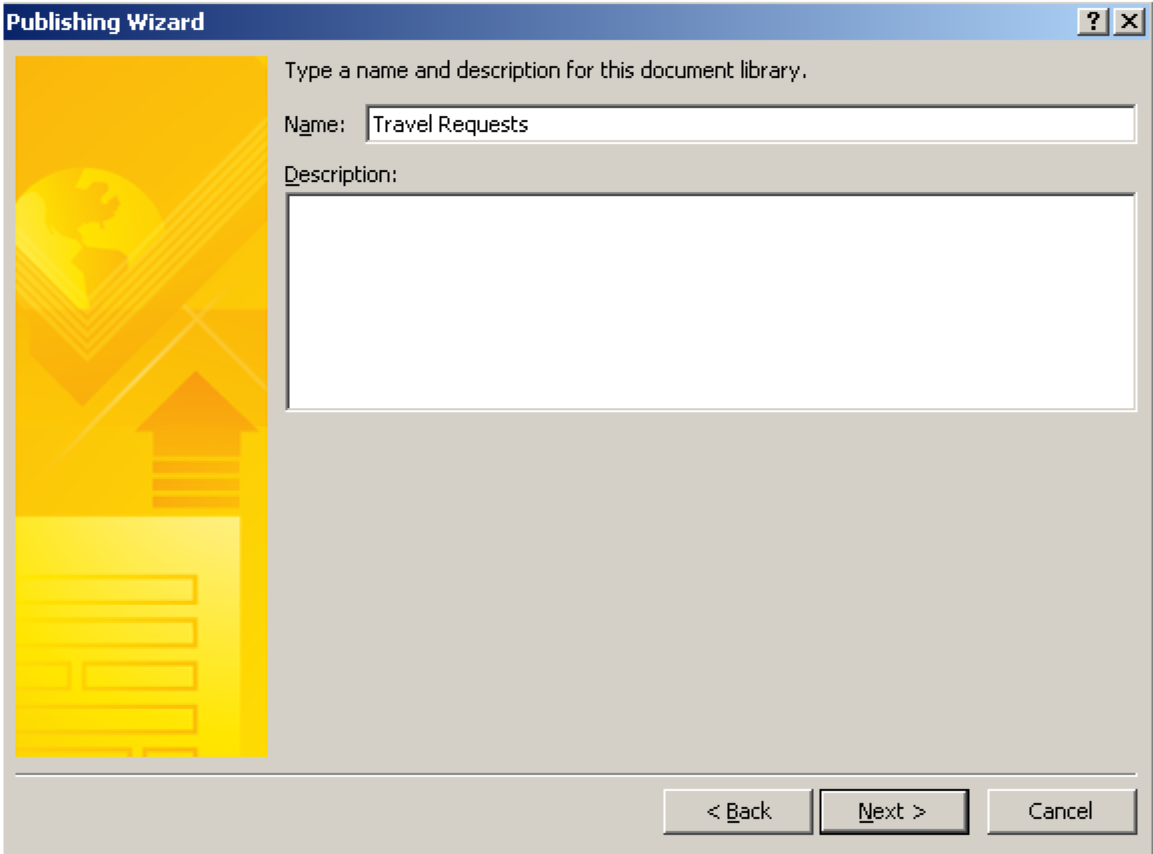
P) Click **Next**.

Q) Select **Create a new document library**



R) Click **Next**.

S) Name your new document library **Travel Requests Information**.



T) Click **Next**.

U) Click **Next.**

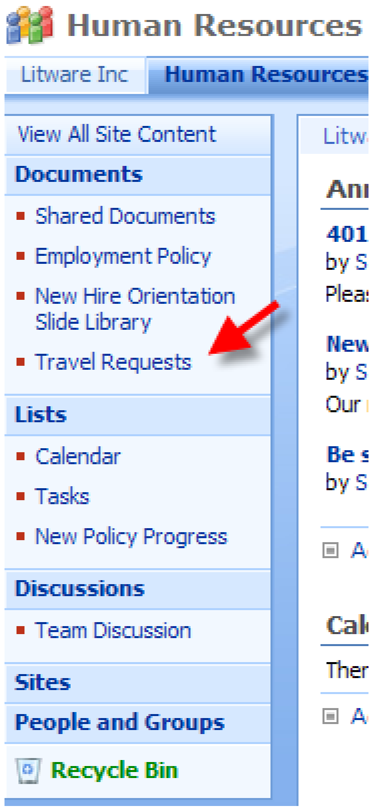
V) Click **Publish**.

W) Click **Close**.

X) Close Microsoft Office InfoPath.

Y) In your internet browser, navigate to http://portal/hr

Z) On the **Human Resources** site, in your Quick Launch menu, you should see your new document library.



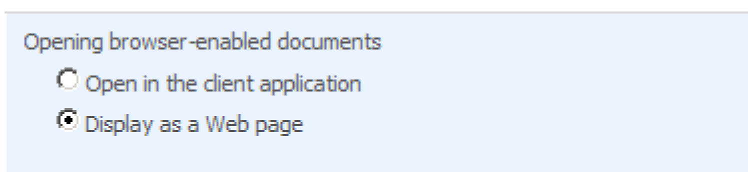
2) Enable the **Travel Requests** library; edit the settings to that the browser enabled form can open as a web page.

A) Click on the link for the **Travel Requests** library.

B) Click on **Settings > Form Library Settings**.

C) Under **General Settings**, click on the link for **Advanced Settings**.

D) The third section down is **Browser-enabled Documents.** In this section, select **Display as a Web page**.



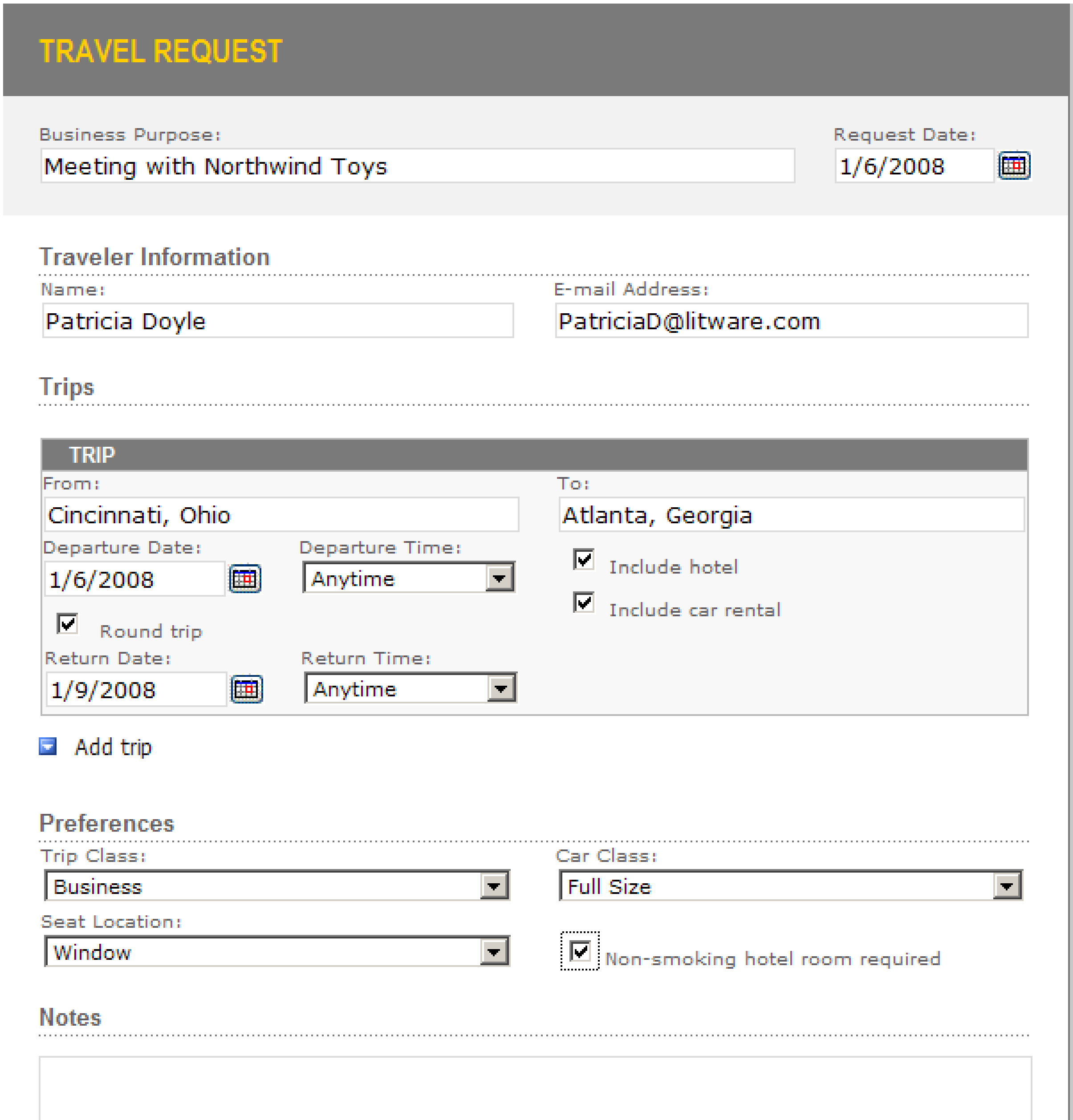
E) Click **OK**.

3) Fill out two vendor forms.

A) Use the breadcrumb to navigate back to the **Travel Requests** library.

B) Click **New > New Document**.

C) Fill out the document to match the image below:



TRAVEL REQUEST

Business Purpose: Meeting with Northwind Toys

Request Date: 1/6/2008

Traveler Information

Name: Patricia Doyle

E-mail Address: PatriciaD@litware.com

Trips

TRIP

From: Cincinnati, Ohio

To: Atlanta, Georgia

Departure Date: 1/6/2008

Departure Time: Anytime

☑ Include hotel

☑ Include car rental

☑ Round trip

Return Date: 1/9/2008

Return Time: Anytime

Add trip

Preferences

Trip Class: Business

Car Class: Full Size

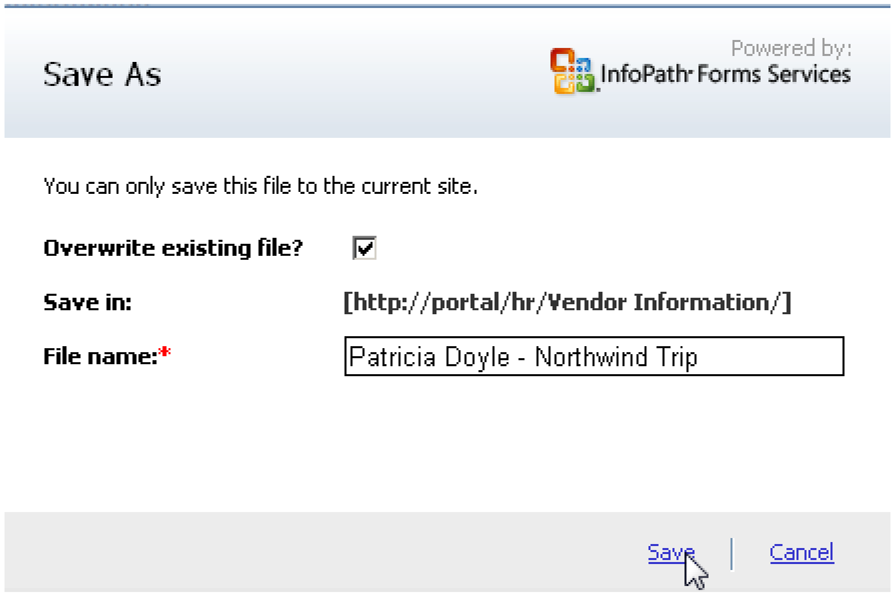
Seat Location: Window

☑ Non-smoking hotel room required

Notes

D) In the upper left-hand corner, click **Save**.

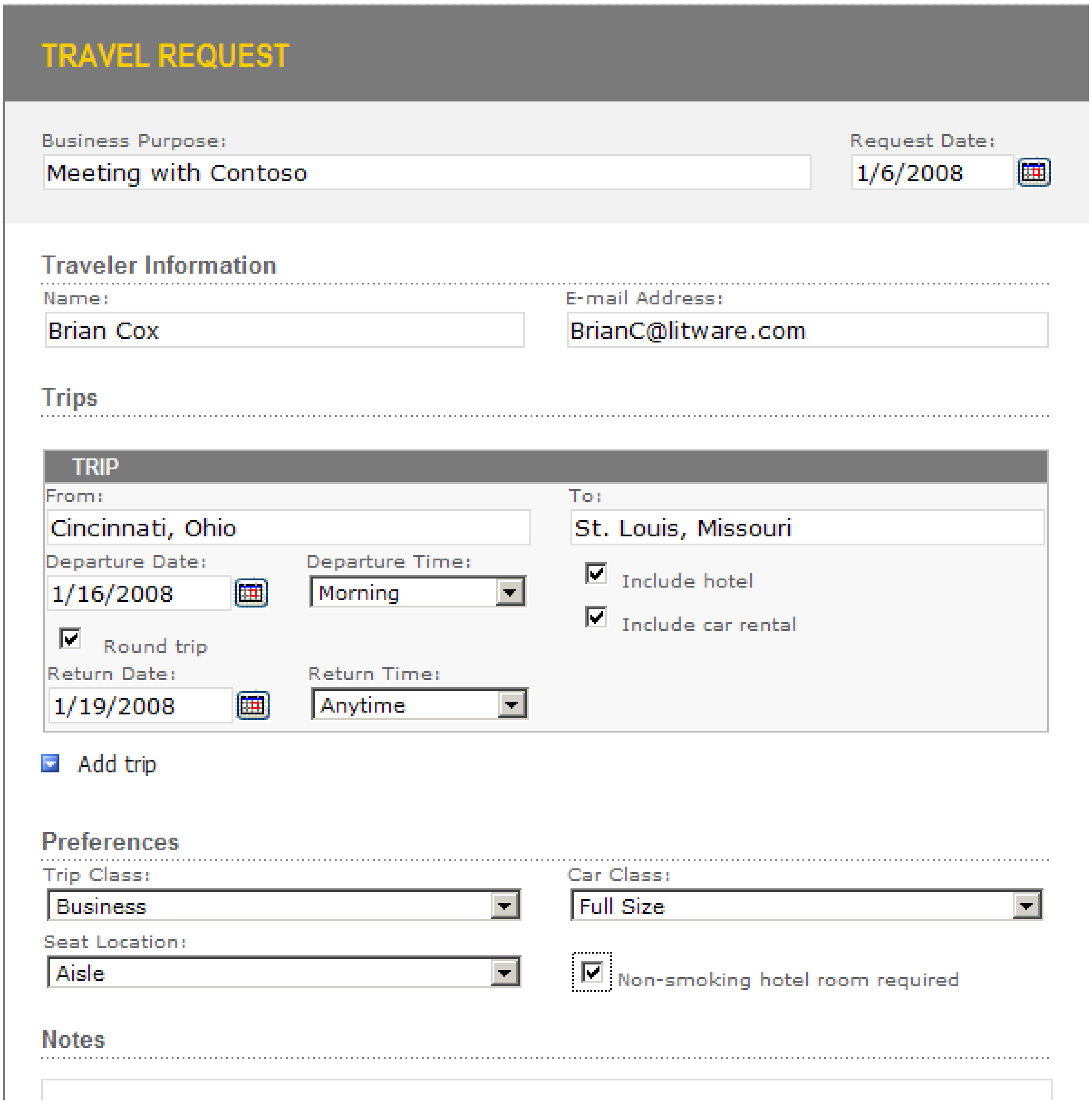
E) For the **File Name**, enter **Patricia Doyle – Northwind Trip**.



F) Click **Save**.

G) In the upper left-hand corner click on **Close**.

H) Repeat steps B-G for the images below


TRAVEL REQUEST

Business Purpose:
Meeting with Contoso

Request Date:
1/6/2008

Traveler Information

Name:
Brian Cox

E-mail Address:
BrianC@litware.com

Trips

TRIP

From:
Cincinnati, Ohio

To:
St. Louis, Missouri

Departure Date:
1/16/2008

Departure Time:
Morning

☑ Include hotel

☑ Include car rental

☑ Round trip

Return Date:
1/19/2008

Return Time:
Anytime

Add trip

Preferences

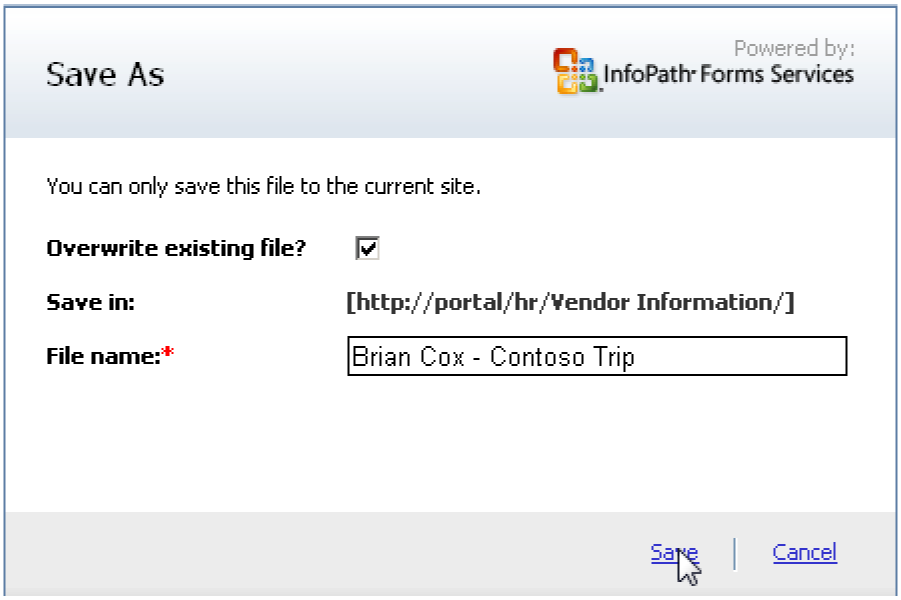
Trip Class:
Business

Car Class:
Full Size

Seat Location:
Aisle

☑ Non-smoking hotel room required

Notes



I) Verify that the documents were created in the **Travel Requests**.

Exercise 2

The sales team would like to show a table of their sales by sales rep on the homepage of the sales site. They would also like to see one key performance indicator showing how the entire company is doing. You will accomplish this using the Excel Web Access web part and the KPI list and web part.

1) Open your lab documents folder and open the **Sales Spreadsheet**. **(…\SBU201Student\Labs\11-Enterprise Features)** Give it a quick glance over.
2) Upload the **Sales Spreadsheet** to the **Shared Documents** library on the **Sales** site.
   A) Navigate to the **Sales** site.
   B) In the Quick Launch menu, click on the link for the **Shared Documents** library.
   C) Click **Upload > Upload Document**
   D) Browse your lab documents and select the **Sales Spreadsheet**. **(…\SBU201Student\Labs\11-Enterprise Features)**
   E) Click **Open**.
   F) Click **OK**.
   G) Use the breadcrumb and navigate back to the **Sales** site.
3) We have our spreadsheet uploaded to the **Shared Documents** library, but before we can use a web part to view the uploaded spreadsheet, we must first make the **Shared Documents** library a "trusted location."
   A) In the lower right corner, click on the **Start** menu.
   B) Click on **All Programs > Administrative Tools > SharePoint 3.0 Central Administration**
   C) In the Quick Launch menu, under **Shared Services Administration,** click on **Litware SSP**.
   D) Under **Excel Services Settings**, click on **Trusted file locations**.
   E) Click on **Add Trusted File Location**.
      i) **Address: http://portal/sales/Share%20Documents/**
      ii) Click **OK**.

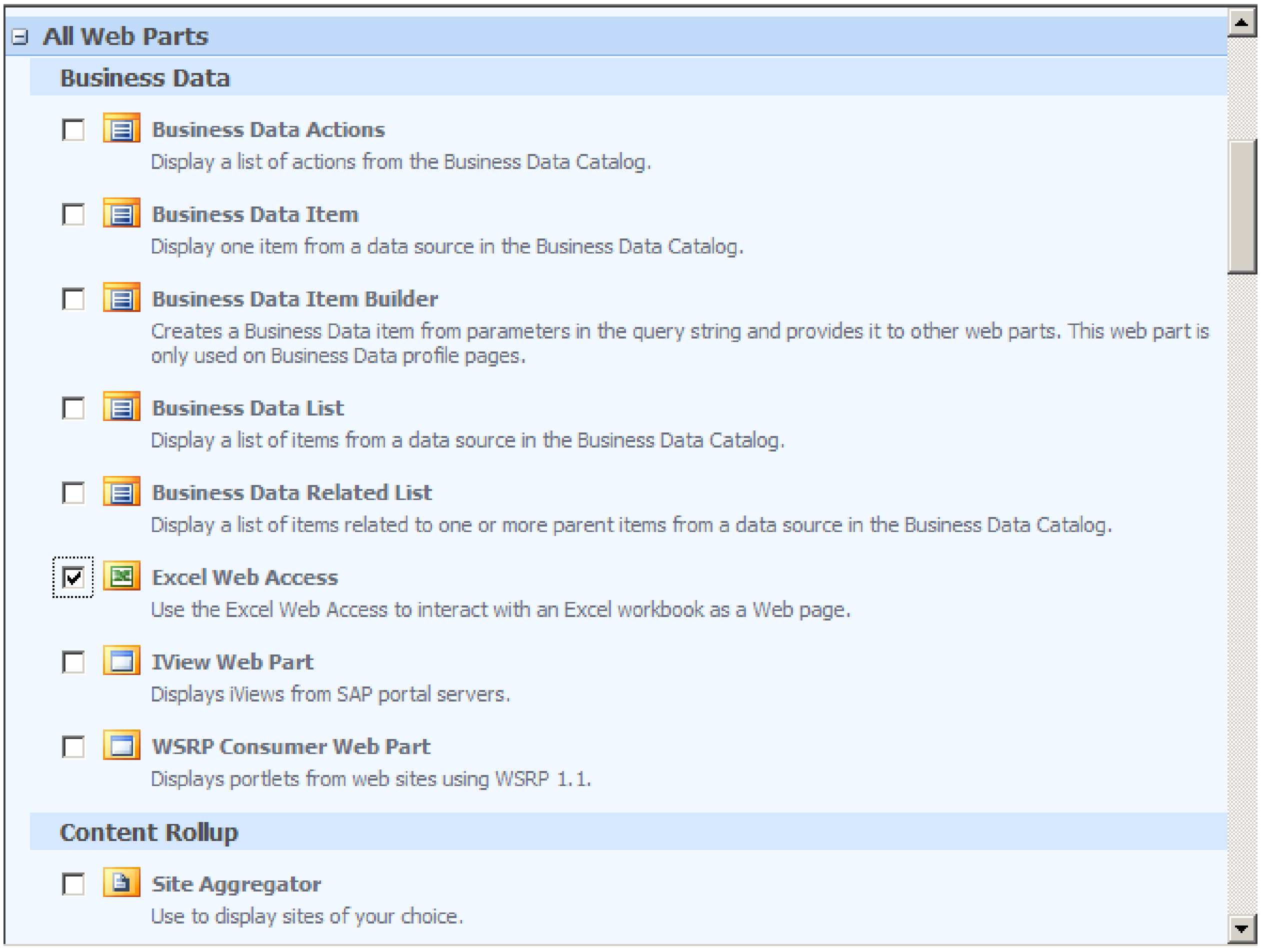
4) Add a **Excel Web Access Web Part** to the **Sales** site.

A) Back on the portal, Use the breadcrumb and navigate back to the **Sales** site.

B) Click on **Site Actions > Edit Page**

C) In the **Left** zone, click on **Add a Web Part**.

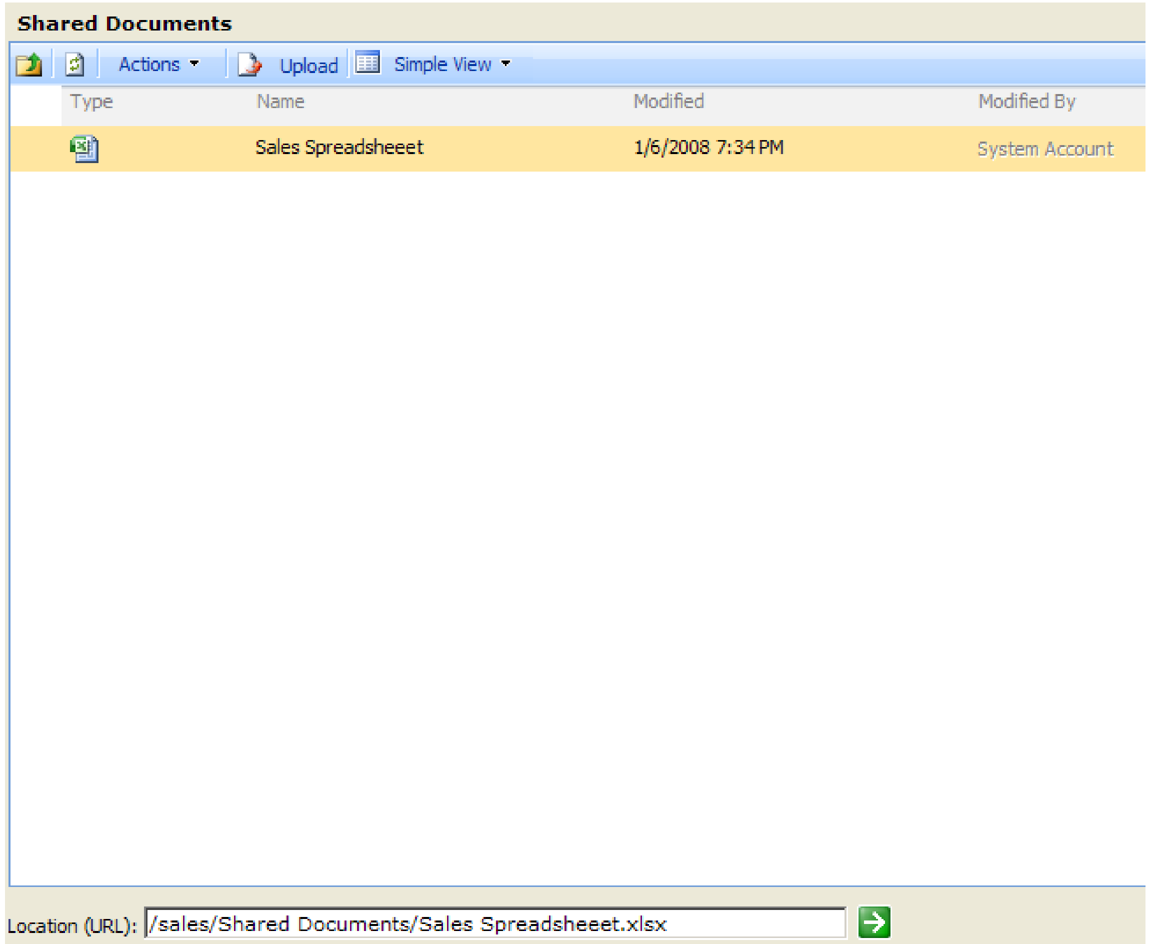
D) Select the **Excel Web Access Web Part**.



E) Click Add.

F) In the new web part, click on **Click here to open the tool pane**.

i) **Workbook:** Open the browse link ... and locate the **Sales Spreadsheet** within the **Shared Documents** library.



ii) Click **OK**.

iii) **Named Item: SalesRep**

iv) Expand **Appearance**

v) **Title: Litware Performance**

vi) For **Height,** click **yes** and change to **2 inches**

vii) For **Width**, click **yes** and change to **4 inches**

viii) Click **Apply**

ix) Click **OK**

x) Click **Exit Edit Mode**

5) Next the KPI list needs to be created to show the company's sales for the year.

A) Click **View all Site Content**

B) Click **Create**

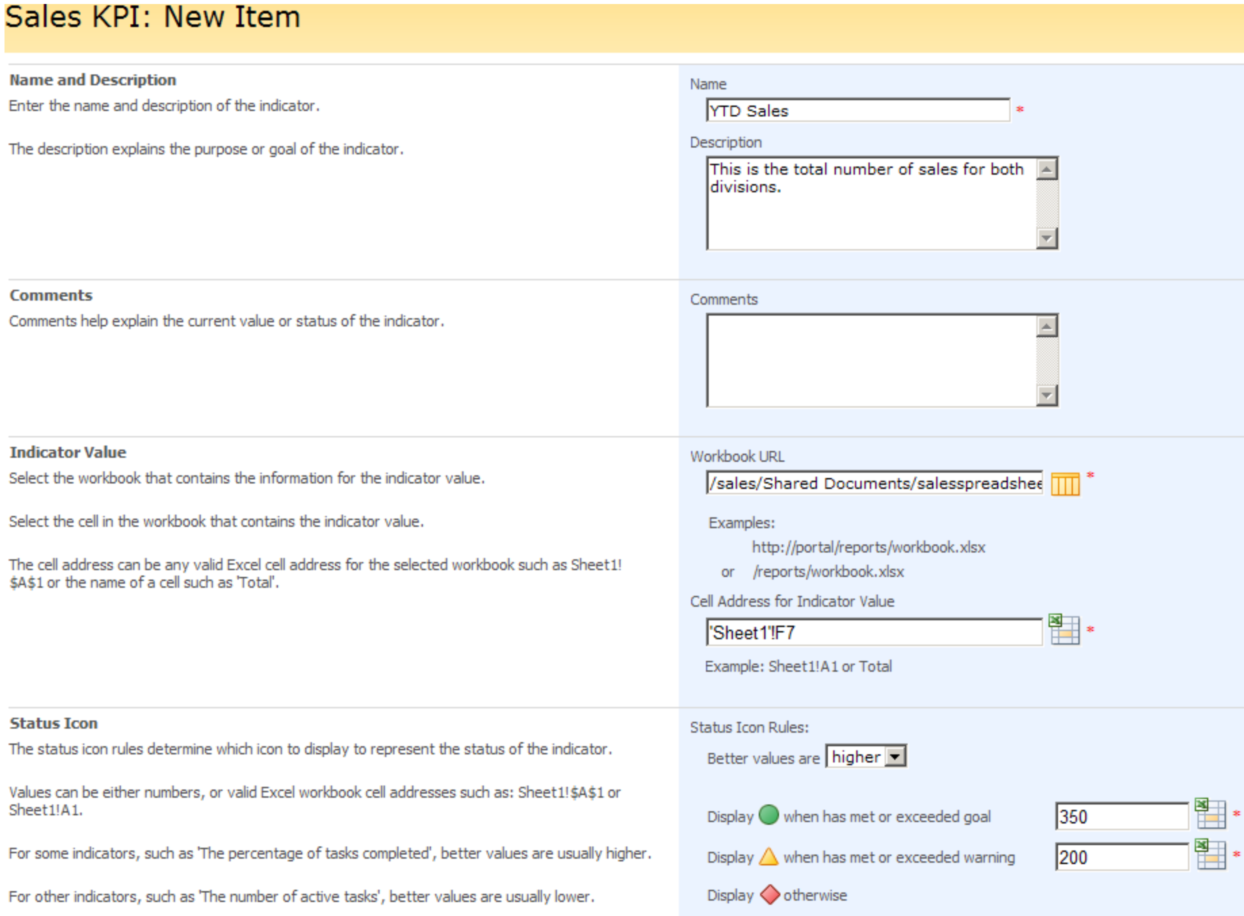
C) Click **KPI List**

i) Name: Sales KPI

ii) Click **Create**

D) Click **New→Indicator using data in excel workbook**

E) Fill in the data as seen below, for Workbook URL, navigate to the **Sales Spreadsheet in the Share Documents Library.** For indicator value, use cell **F7.**



F) Click **OK**

G) Navigate back to the **Sales** site.

6) The final step is to add the KPI to the homepage of the sales site.

A) Click **Site Actions→Edit Page**

B) In the **Right Zone**, Select **Add a Web Part**

C) Select the **KPI Details** Web Part

D) Click **Add**

E) On the web part, click **edit→modify shared web part**

i) For **KPI List**, click the browse icon and navigate to the **Sales KPI** List (You may need to select current site under the Look In header)

ii) Click **OK**

iii) Click **OK** to close the Indicator Tool Pane

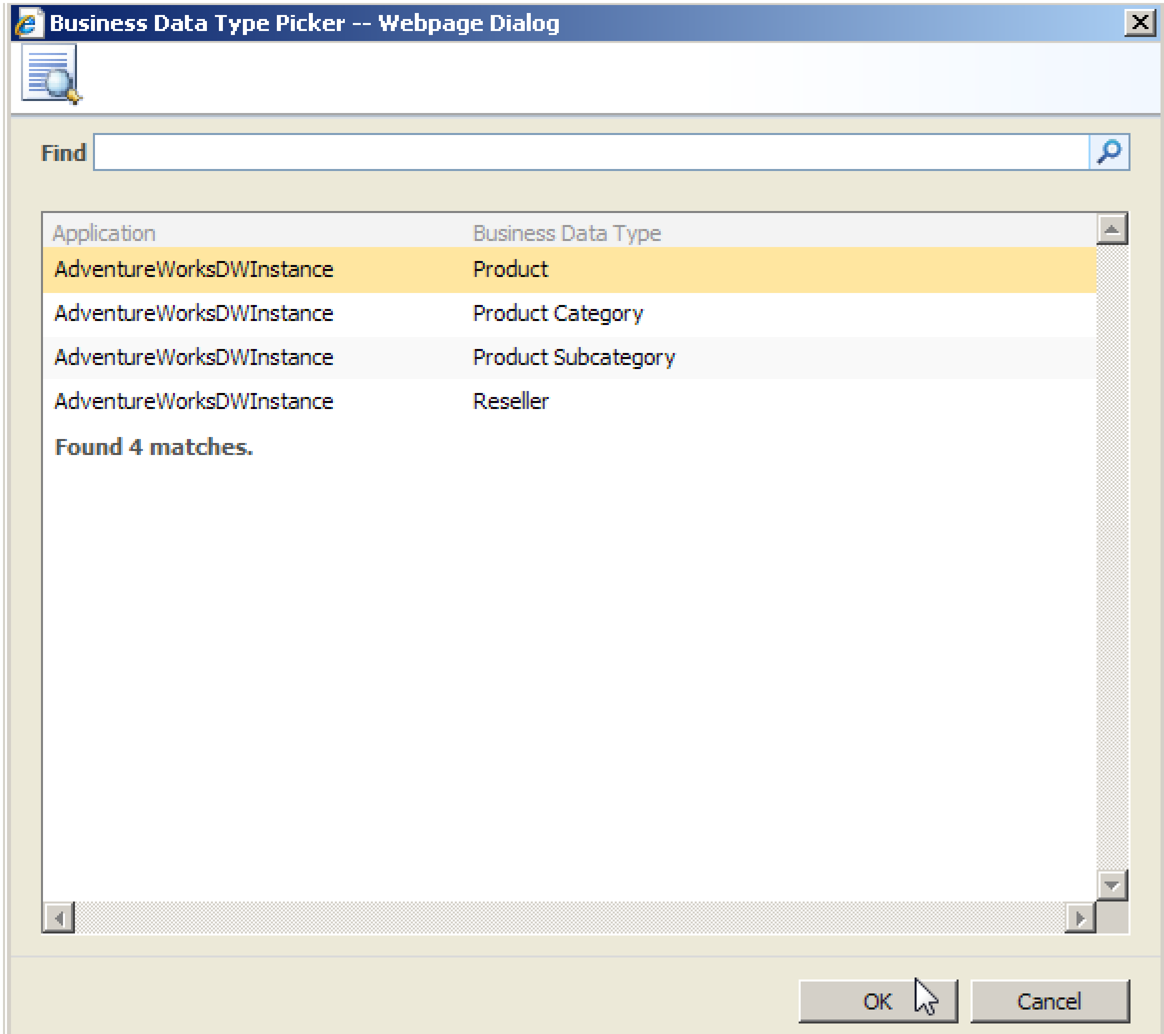
iv) Click **Exit Edit Mode**

Exercise 3

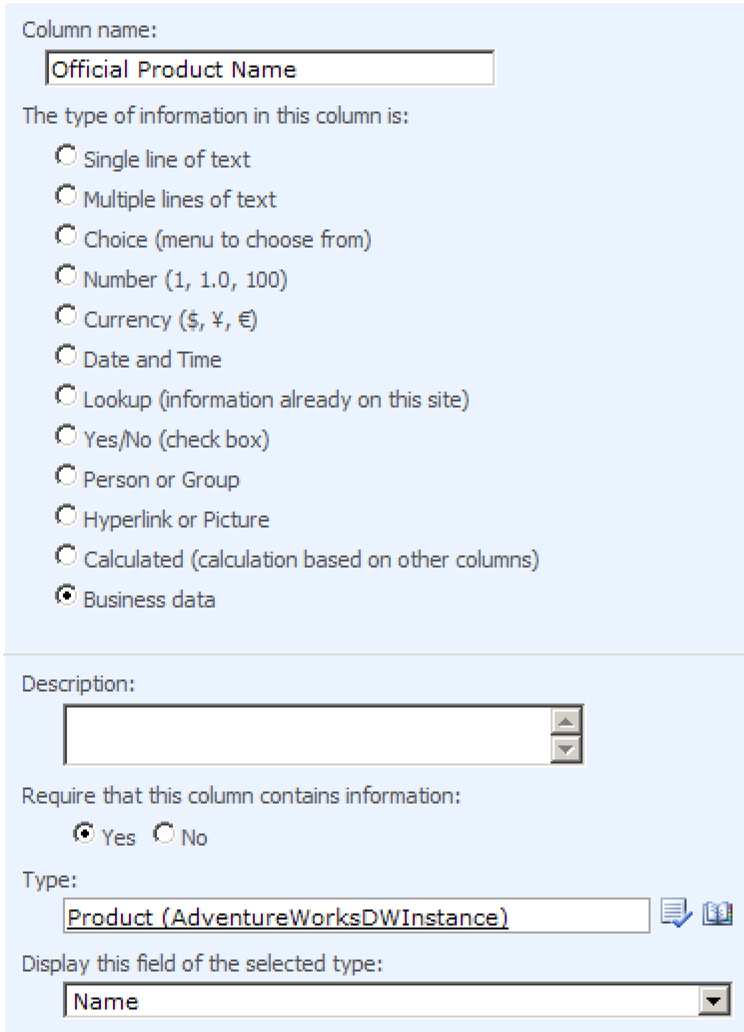
Our sister company, Adventure Works Bicycles, stores information about their products in a database. Since there is a sales incentive if you pass along a lead, the sales representatives like to keep up on all the products Adventure Works offers. You will be using the BDC, Business Data Catalog, to allow users to access the data. You will add the data to columns on a list and do a search for one of their products.

1) Create an **Adventure Works Products** list on the **Sales** site.
   - A) Navigate to the **Sales** site.
   - B) Click on **View All Site Content**.
   - C) Click **Create**.
   - D) Under **Custom Lists**, click on the link for **Custom List**.
     - i) **Name: Adventure Works Products**
     - ii) Click **Create**.
2) Create two new columns.
   - A) Click on **Settings > List Settings**
   - B) Under **Columns**, click **Create Column**.
   - C) **Column Name: Official Product Name**
   - D) **Type: Business Data**
   - E) **Require that this column contains information: Yes**

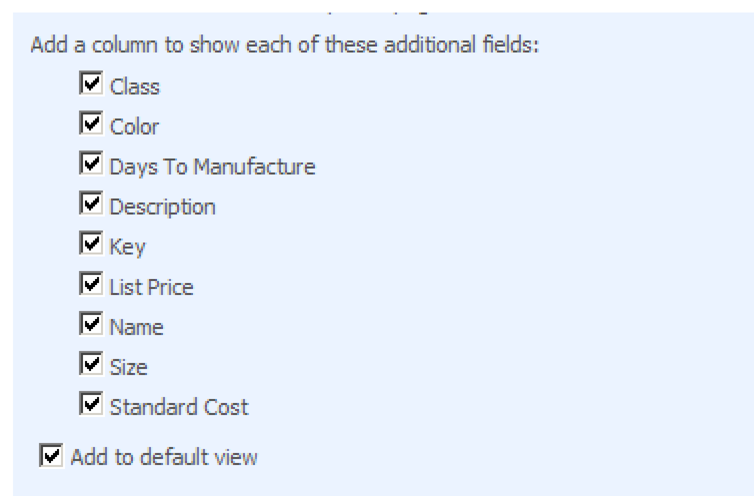
F) **Type:** Click on . Select **Product**. Click **OK**.



G) **Display this field of the selected type: Name**



H) Add all the columns



I) Click **OK**.

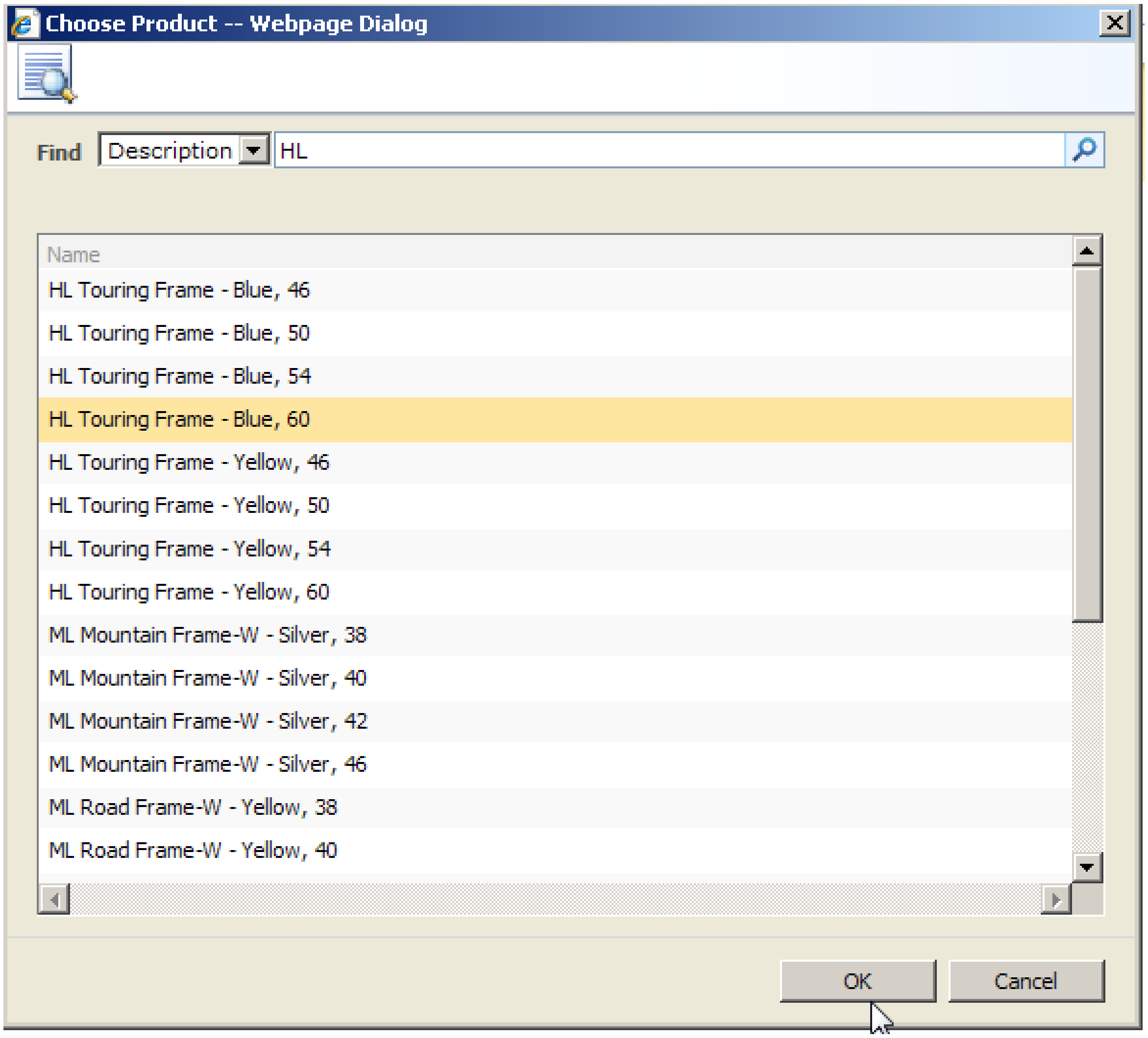
3) Add two products to the **Adventure Works Products** list.

   A) Use the breadcrumb and navigate back to the **Adventure Works Products** list.

   B) Click on **New > New Item**

      i) **Title: Mongoose**

      ii) **Official Product Name:** Click on . Look-up "**HL.**" Select **HL Touring Frame – Blue, 60**. Click **OK**.

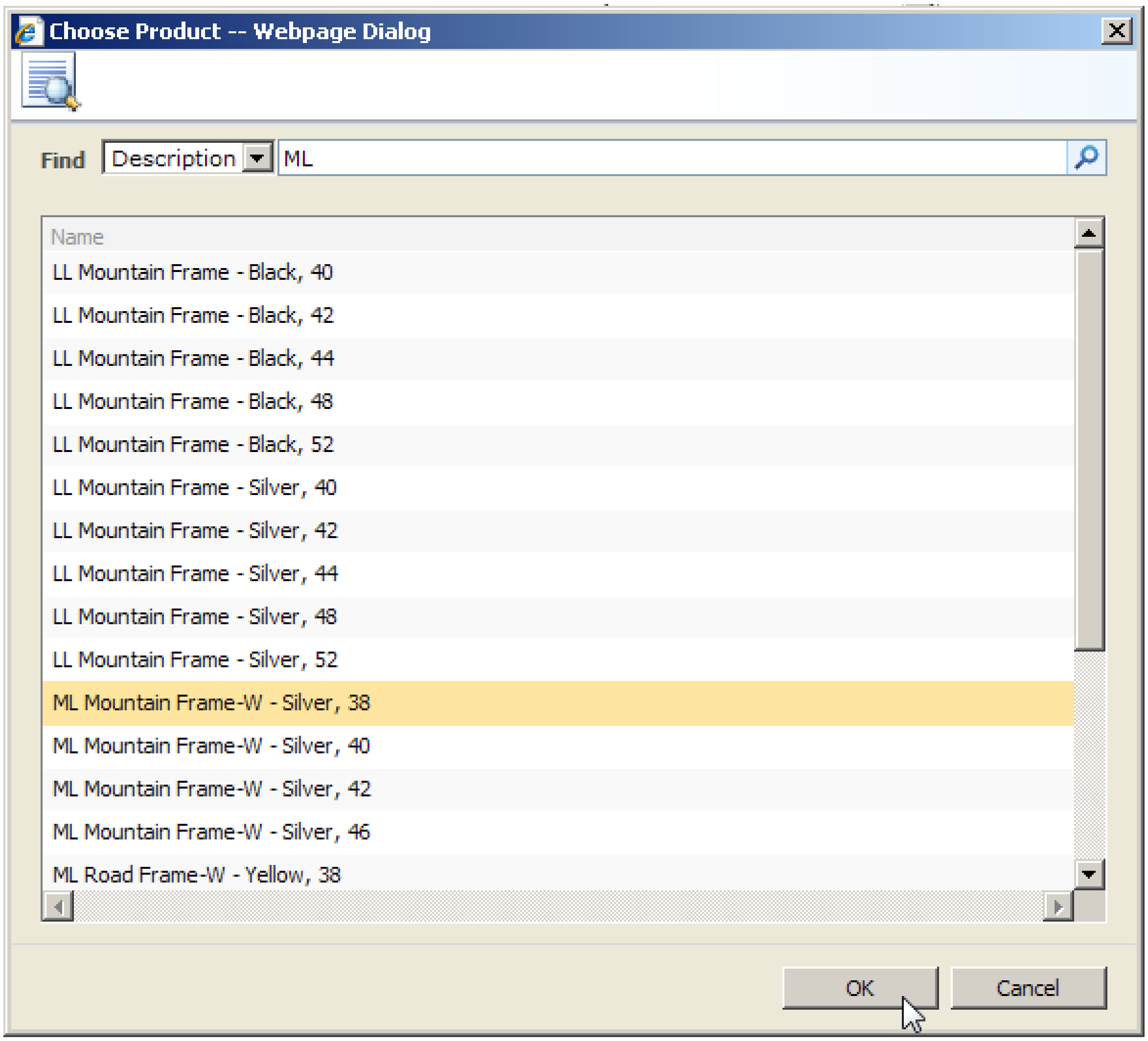


iii) Click **OK**.

C) Click **New > New Item**

i) **Title: Sabre**

ii) **Official Product Name:** Click on . Look-up "**ML**." Select **ML Mountain Frame-Silver, 38**. Click **OK**.



iii) Click **OK**.

D) Verify that your new items have been created.