SharePoint Foundation 2010

Level 1

Student Manual

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Contents

Introduction

After reading this introduction, you will know how to:

A Use ILT Series manuals in general.

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

C Re-key this course after class.

Topic A: About the manual

ILT Series philosophy

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

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

Manual components

Custom ILT manuals can contain these components:

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

Each element is described below.

Table of contents

The table of contents acts as a learning roadmap.

Introduction

The introduction contains information about our training philosophy and our manual components, features, and conventions. It also contains learning objectives for the specific course.

Units

Units are the largest structural component of the course content. A unit begins with a title page that lists objectives for each major subdivision, or topic, within the unit. Within each topic, conceptual and explanatory information alternates with activities, which can be hands-on, question-and-answer, or a combination of both. Units conclude with a summary comprising one paragraph for each topic, and an independent practice activity or review questions section to help you reinforce the concepts and skills that you've learned.

The conceptual information takes the form of text paragraphs, exhibits, lists, and tables. The activities are structured in one or two columns. In two-column activities, the left column tells you what to do, while the right column provides explanations, descriptions, and graphics.

Appendices

An appendix is similar to a unit in that it contains objectives and conceptual explanations. However, an appendix does not include activities, a summary, an independent practice activity, or review questions.

Course summary

This section provides a text summary of the entire course. It is useful for providing closure at the end of the course.

Glossary

The glossary provides definitions for all of the key terms used in this course.

Index

The index at the end of this manual makes it easy for you to find information about a particular software component, feature, or concept.

Manual conventions

We've tried to keep the number of elements and the types of formatting to a minimum in the manuals. This aids in clarity and makes the manuals more classically elegant looking. However, there are some conventions and icons you should know about.

Item	Description
Italic text	In conceptual text, indicates a new term or feature.
Bold text	In unit summaries, indicates a key term or concept. In an independent practice activity, indicates an explicit item that you select, choose, or type.
`Code font`	Indicates code or syntax.

`Longer strings of ►`
`code will look ►`
`like this.`
	In the hands-on activities, any code that's too long to fit on a single line is divided into segments by one or more continuation characters (►). This code should be entered as a continuous string of text.

Select **bold item**	In the left column of hands-on activities, bold sans-serif text indicates an explicit item that you select, choose, or type.
Keycaps like ↵ ENTER	Indicate a key on the keyboard you must press.

Activities

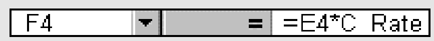
The activities are the most important parts of our manuals. Depending on the subject matter, an activity can have a one-column or two-column format.

Two-column format

In a typical two-column activity, the “Here’s how” column gives short instructions to you about what to do. The “Here’s why” column provides explanations, graphics, and clarifications. Here’s a sample:

Do it!

A-1: Creating a commission formula

Here’s how	Here’s why
1 Open Sales	This is an oversimplified sales compensation worksheet. It shows sales totals, commissions, and incentives for five sales reps.
2 Observe the contents of cell F4	 The commission rate formulas use the name “C_Rate” instead of a value for the commission rate.

For these activities, we have provided a collection of data files designed to help you learn each skill in a real-world business context. As you work through the activities, you will modify and update these files. Of course, you might make a mistake and therefore want to re-key the activity starting from scratch. To make it easy to start over, you will rename each data file at the end of the first activity in which the file is modified. Our convention for renaming files is to add the word “My” to the beginning of the file name. In the above activity, for example, a file called “Sales” is being used for the first time. At the end of this activity, you would save the file as “My sales,” thus leaving the “Sales” file unchanged. If you make a mistake, you can start over using the original “Sales” file.

In some activities, however, it may not be practical to rename the data file. If you want to retry one of these activities, ask your instructor for a fresh copy of the original data file.

One-column format

The one-column format is typically used for question-and-answer activities. Here's a sample:

Do it!

A-2: Examining the elements of organizational structure

Questions and answers

1 Which of the following refers to the grouping of employees?

A Staff division

B Centralization

C Standardization

D The extent of control

2 What are the advantages of having a wider extent of control?

Topic B: Setting your expectations

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

Course objectives

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

After completing this course, you will know how to:

- Navigate a SharePoint Foundation 2010 Team Web site.
- Work with SharePoint Foundation lists (announcement, calendar, link, task, and contact lists).
- Use SharePoint Foundation libraries (document, picture, wiki page, asset, and form libraries).
- Communicate and share opinions with other team members by using discussion boards, surveys, and blogs.
- Change views and create personal views.
- Modify personal SharePoint user information and set notifications on content.

Topic C: Reviewing the course

Setup instructions and requirements for reviewing this course after class are provided separately, in Microsoft Word format. In those instructions, you will find:

- Complete lists of any materials required, including (as applicable) any computer hardware and software you will need.
- Detailed explanations, where necessary, of how to set up your workspace in preparation for reviewing the course on your own.

If this custom course contains material selected from more than one ILT Series title, there may be multiple Setup documents, one for each course from which content was chosen. These Setup files should be available from your instructor, along with any student data files that might be required for reviewing the course or performing its activities.

Unit 1
Getting started

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

A Identify the components of, and navigate through, the Microsoft SharePoint Foundation 2010 environment.

Topic A: SharePoint Foundation sites

Explanation

Microsoft SharePoint Foundation 2010 is a team collaboration system. It is the base software in the SharePoint family of products. There are two SharePoint Server versions (Standard and Enterprise), which can be layered on top of SharePoint Foundation (SPF) to add features to your collaboration solution.

SharePoint Foundation 2010

You can use Microsoft SharePoint Foundation 2010 to organize, manage, and share information. The information is stored in a central location within a SQL Server database. This information can be accessed by multiple users, regardless of their geographical location. You can access this information by using either a Web browser or various desktop applications, such as Microsoft Office 2010.

To view the information in a Web browser, you connect to a SharePoint site. A *SharePoint site* is a collection of related Web pages where you can do such things as:

- Post documents that you want to share or collaborate on with other users
- Control the versions of the documents you create
- Conduct discussions
- Create events (calendar entries) and announcements to let the other users know about team activities
- Create libraries for storing documents, images, and forms
- Create tasks and assign them to team members
- Create contacts for storing information about team members
- Schedule meetings and keep track your schedule

Although SPF works well for team collaboration, it isn't a good platform to use as a corporate portal or enterprise search solution. If you need either of these features, use one of the two SharePoint Server 2010 products. SharePoint Server 2010 also includes a publishing feature that allows you to create pages and publish them using workflow forms.

The SharePoint hierarchy

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

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

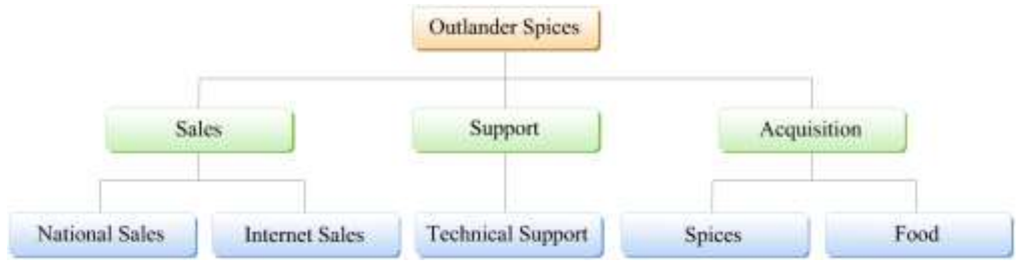


Exhibit 1-1: A site collection

Navigation

The SharePoint site window contains links you can click to navigate through and between the content of your site and any subsites, as shown in Exhibit 1-2.

Exhibit 1-2: Navigation tools in the SharePoint window

When the Browse tab is selected, as shown in Exhibit 1-2, breadcrumbs and the top navigation bar are displayed.

- *Breadcrumbs* are a series of links that show you where you are in the current site's hierarchy. Using the breadcrumb links, you can navigate through the hierarchy, up to the home page of the current site.
- The top navigation bar provides another way to navigate up to the home page of the current site. The top navigation bar is sometimes referred to as *global navigation*.

The left navigation bar provides links to various content areas on the site. This bar is often referred to as the *Quick Launch bar* and sometimes referred to as *current navigation*. The Quick Launch bar might not contain links to all content on the site. To view all content, click the All Site Content link at the bottom of the Quick Launch bar.

In addition to using the breadcrumbs and navigation bars, you can click the Navigate Up button to display the hierarchy of the page you are viewing. The Navigate Up button shows the hierarchy all the way up to the root site in the site collection. You click a link in the hierarchy to navigate up. Whereas breadcrumbs show you the hierarchy of the current site, the Navigate Up button displays the hierarchy of the entire site collection.

Navigating to a SharePoint site

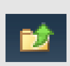
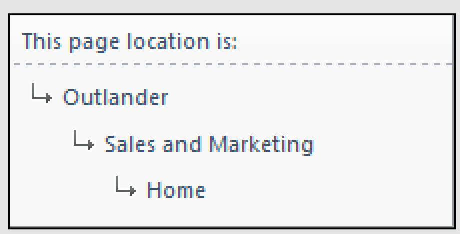
To go to a SharePoint site:

1. Open a Web browser.
2. In the Address bar, enter the URL of your SharePoint site.
3. If prompted, enter your password and click OK.

Often, the SharePoint administrator will set the site up to authenticate using your Windows user name and password, so you aren't prompted to enter credentials. Instead, the site automatically uses the credentials from your Windows login.

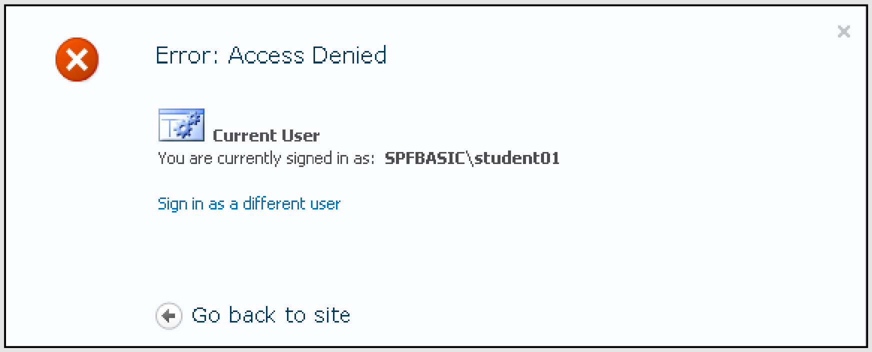
Do it!

A-1: Navigating SharePoint sites

Here's how	Here's why
1 Log on to Windows 7 as **Student##** with a password of **!pass1234**	Where ## is your unique student number.
2 Open Internet Explorer	
3 In the Address bar, enter **http://spfbasicsql-sp/salesandmarketing**	
4 Observe the breadcrumbs	 You are on the home page of the Sales and Marketing site.
5 Click 	 (The Navigate Up button.) To display the hierarchy of the site collection. The Sales and Marketing site is a subsite of Outlander.

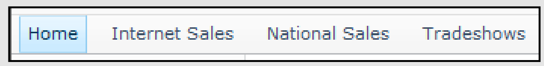
6 Click **Outlander**

You don't have access to the parent site.



7 Click your browser's Back button

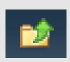
8 Observe the top navigation bar



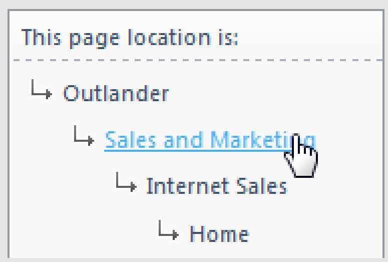
The Sales and Marketing site has three subsites—Internet Sales, National Sales, and Tradeshows.

9 Click **Internet Sales**

To go to the home page of the Internet Sales subsite. This is a Team site just like the Sales and Marketing one.

10 Click 

Click **Sales and Marketing**



To navigate back to the Sales and Marketing site's home page.

11 Navigate to the **National Sales** home page

It is also a Team site.

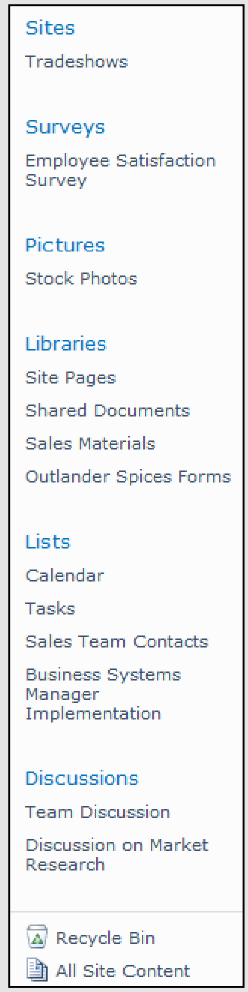
12 Navigate to the **Sales and Marketing** home page

13 Navigate to the **Tradeshows** home page

This subsite is a blog site.

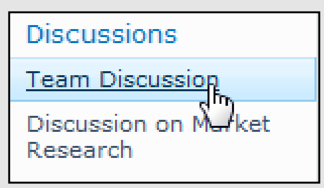
14 Navigate to the **Sales and Marketing** home page

15 Observe the Quick Launch bar



(Also referred to as "current navigation.") This bar contains links to content on the Sales and Marketing site. Note that the Quick Launch bar might not contain links to all content on the site.

16 Under Discussions, click **Team Discussion**



To go to the Team Discussions page. There are two items on the page.

17 Click **Home**

To return to the Sales and Marketing site's home page.

Elements of a SharePoint site

Explanation

A SharePoint site holds more than Web pages. It is a container that holds lists and libraries and can have subsites. All SharePoint sites have common elements:

- **Lists** — Used to store, share, and manage information. A list is similar to a simple database or spreadsheet. The Discussion Boards and Surveys elements are variations of the List element.
- **Libraries** — Used to store, share, and manage files.
- **Views** — Used to determine how list or library information will be displayed. Views can be public (available for anyone to use) or private (available only to the user who created the view).
- **Web parts** — Used to build SharePoint pages. Web parts are the modular building blocks of SharePoint pages.

The Ribbon

SharePoint 2010 uses a Ribbon interface similar to the one used in Microsoft Office 2010. The Ribbon displays menus and buttons you can use to accomplish tasks. The Ribbon has several tabs, including Browse and Page. On some tabs, the buttons for related commands or tasks are shown in groups. For instance, the tab shown in Exhibit 1-3 includes the Edit, Clipboard, Font, Paragraph, and Styles groups.

Similar to the Office Ribbon tabs, the SharePoint Ribbon tabs are context sensitive and change based on where you are on the site and what task you are completing. Sometimes the Ribbon isn't large enough to display all the links for a particular set of tasks. In those cases, there will be multiple tabs to switch between, such as the Editing Tools | Format Text tab and the Editing Tools | Insert tab, shown in Exhibit 1-3.

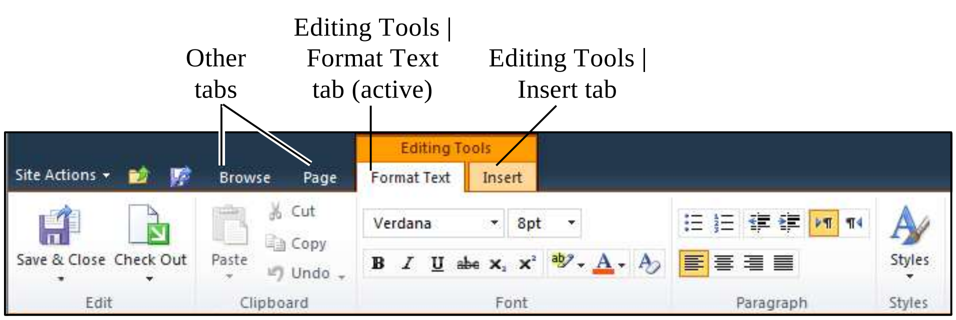
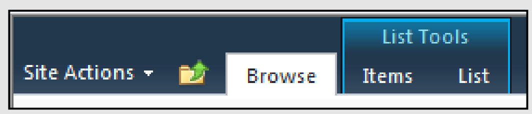


Exhibit 1-3: The Editing Tools | Format Text tab on the Ribbon in SharePoint

Do it!

A-2: Examining the content of a SharePoint site

Here's how	Here's why
1 In the Quick Launch bar, click **All Site Content**	This page lists all the content on the site.
2 Observe the categories	By default, the Team site contains Document Libraries, Picture Libraries, Lists, Discussion Boards, Surveys, Sites and Workspaces, and a Recycle Bin.
3 Observe the following items: Outlander Spices Forms, Stock Photos, Business Systems Manager Implementation, Sales Team Contacts, Spice Price List, Discussion on Market Research, Internet Sales, National Sales, and Tradeshows	These items don't have descriptions. The items were created during class setup, and descriptions weren't entered.
4 In the Quick Launch bar, click **Discussion on Market Research**	To go to the Discussion on Market Research page.
5 Observe the Ribbon tabs	 You navigated to a list element, so the Ribbon displays two contextual tabs under List Tools: Items and List.
6 Click the **Items** tab Click the **List** tab	(Under List Tools.) The two List Tools tabs contain buttons for performing common tasks when you're working with lists and list items.
7 Go to the **Sales and Marketing** home page	
8 Close Internet Explorer	

Unit summary: Getting started

Topic A

In this topic, you identified the components of a **SharePoint Foundation 2010 site** and learned how to display the content on a SharePoint Team Web site.

Independent practice activity

In this practice activity, you will go to a SharePoint Team site and navigate among content areas on the site.

1 Open Internet Explorer.

2 Go to the Administration Team Web site at **http://spfbasicsql-sp/administration**.

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

4 Does this site have any subsites? What are they?

5 Go to the Accounting subsite. What type of site is it?

6 Return to the Administration site's home page.

7 Go to the Human Resources subsite. What type of site is it?

8 Return to the Administration site's home page.

9 Go to the Updates from the Admin Team subsite. What type of site is it?

10 Return to the Administration site's home page.

11 How can you get to the discussion boards on the site?

12 Are there any discussion boards on the current site?

13 Are there any items in the Team Discussion board?

14 Close Internet Explorer.

Unit 2

Lists

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

A Create and modify announcements.

B Create and modify events.

C Create and modify links.

D Create and modify tasks.

E Create, modify, and export contacts.

F Delete and restore list items.

Topic A: Announcements

Explanation

Announcements are one of several types of lists available on SharePoint sites.

Overview of lists

A SharePoint *list* is simply a container used for collecting and organizing information on a SharePoint site. As shown in Exhibit 2-1, in a list, information is organized into rows. Each row is called a *list item*. The data for each list item is organized in columns. The columns are referred to as *properties*, *fields*, or *metadata*.

Lists are the most common method for organizing information on a SharePoint site. Links, tasks, discussions, announcements, and events are all examples of SharePoint lists. If you've been assigned at least the Contribute permissions set on a site, you can view, add, update, and delete list items and documents.

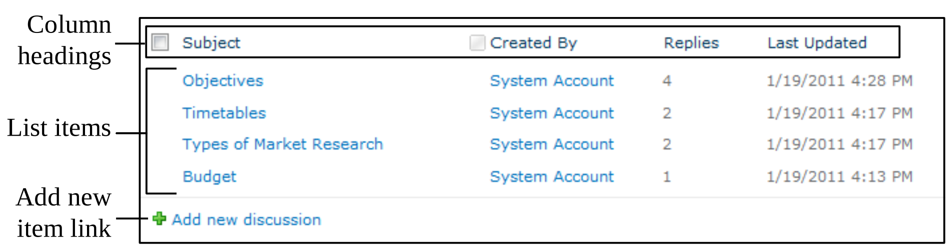


Exhibit 2-1: A discussion list

Creating list items

To create a list item:

1 Display the list:
- In the Quick Launch bar, under Lists, click the desired list.
- In the Quick Launch bar, click All Site Content. Under Lists, click the desired list.

2 Open the <*List*> - New Item dialog box:
- Directly below the list, click the "Add new <*item*>" link (such as "Add new discussion" or "Add new announcement").
- Click the List Tools | Items tab and click New Item.

3 In the dialog box, enter data for the new list item.

The type of information you can enter varies depending on the type of list. Fields with a red asterisk (*) are required. Exhibit 2-2 shows the dialog box used for creating announcement items. The description field is a Rich Text field, where you can apply formatting to your text.

4 When you're finished entering data in the fields, click Save.

Announcement lists

An *announcement* is used to inform the team members about news or the status of an event. As shown in Exhibit 2-2, an announcement item has a title, a body, and an expiration date. You must specify a title for an announcement item, but a short description and an expiration date are optional. You can also attach a file to an announcement.

If you set an expiration date for an announcement, any Web-part views that filter announcement items by expiration date will display the item in the list until the expiration date.

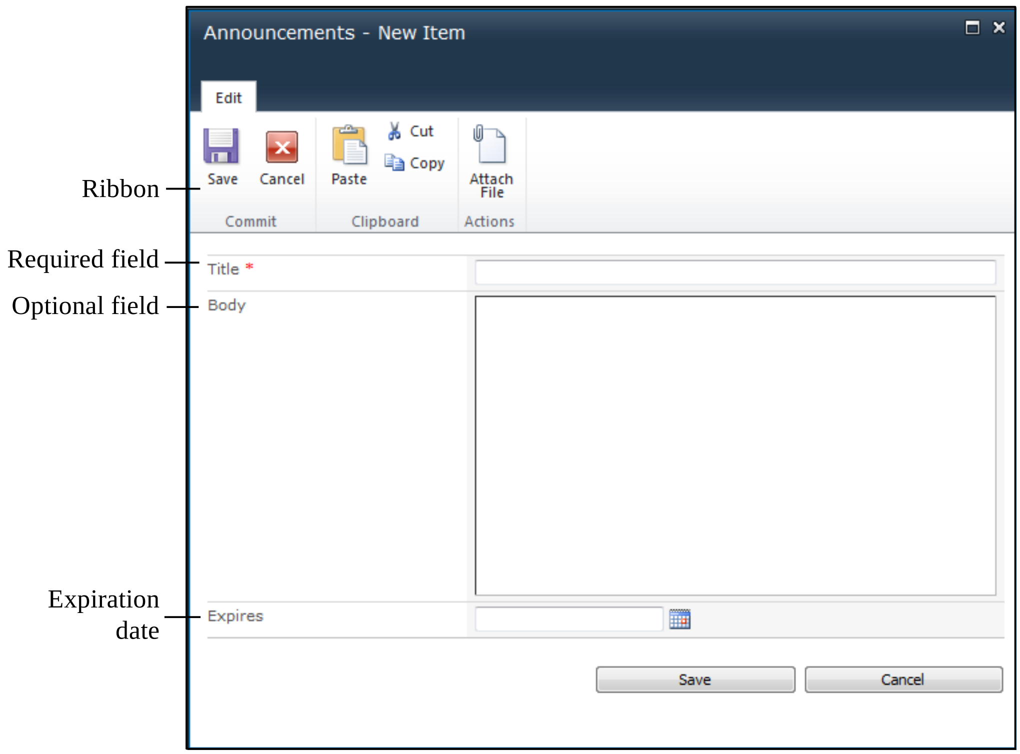


Exhibit 2-2: Creating an announcement

Do it!

A-1: Creating an announcement

Here's how	Here's why
1 Open Internet Explorer	
2 In the Address bar, enter **http://spfbasicsql-sp/site##**	Where ## is your assigned student number. This is a default Team site that was created for you during class setup. It doesn't have any content. You've been assigned Contribute permissions on this site.

3 Click **Tools** and choose **Internet Options**

To open the Internet Options dialog box.

Click **Use current**

To change your home page to your individual SharePoint Team site.

Click **OK**

To close the dialog box.

4 In the Quick Launch bar, click **Lists**

By default, a Team site includes lists for announcements, calendar entries, links, and tasks.

5 Click **Announcements**

To display the list. It has one announcement item: "Get Started with Microsoft SharePoint Foundation!"

6 Click **Add new announcement**

To open the Announcements - New Item dialog box, shown in Exhibit 2-2.

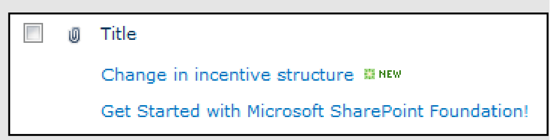
7 In the Title box, enter **Change in incentive structure**

8 In the Body box, enter **There has been a change in the incentive structure for the Sales group.**

9 In the Expires box, enter or select the date that is a week from today

If the site administrator has created views that filter the Announcement list by the Expires date, your announcement will be removed from the display in those views after the Expires date. The announcement is not automatically removed from the site.

10 Click **Save**



To close the dialog box. The new announcement appears on the Announcements page. The NEW icon appears next to the announcement's title.

Editing announcements

Explanation

If you have permissions to modify content, you can edit an announcement if you need to postpone the date or change the title or description of the announcement. To edit an announcement:

1 Open the announcement for editing:
   - Click the announcement in the Announcements list and then click the Edit Item button, as shown in Exhibit 2-3.
   - Click the down-arrow next to the announcement in the Announcement list and choose Edit Item, as shown in Exhibit 2-4.

2 Make the desired changes.

3 Click Save.

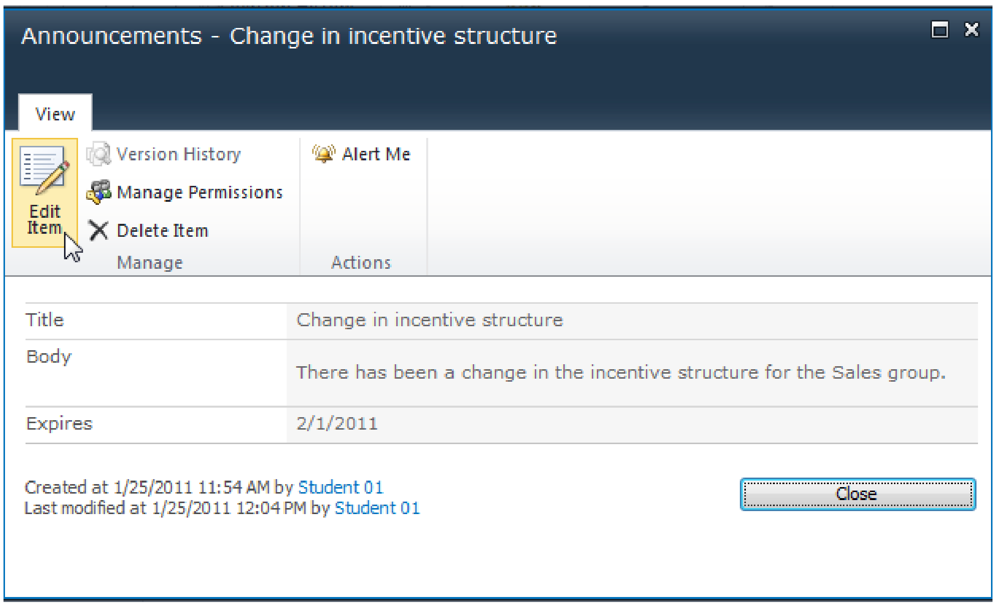


Exhibit 2-3: Editing an announcement by using the Ribbon

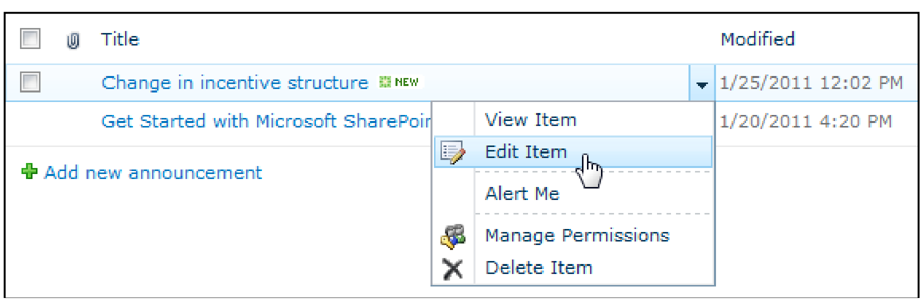


Exhibit 2-4: Editing an announcement by using the item's menu

Do it!

A-2: Editing an announcement

Here's how	Here's why
1 Click the down-arrow next to "Change in Incentive Structure"	When you point to the right of the title link, the down-arrow is displayed. Clicking the arrow displays a menu.
2 Choose **Edit Item**	This page shows the announcement's title, body (description), and expiration date.
3 In the Body box, after the current text, type **The incentive structure has been e-mailed to you.**	
4 Edit the Expires box so the date is two weeks from today	
5 Click **Save**	

Topic B: Events

Explanation

You use the Calendar to post information about important occasions and meetings that your team needs to attend. Calendar items are also called *events*.

To add an event:

1 Display the Calendar:
   - In the Quick Launch bar, under Lists, click Calendar.
   - On the All Site Content page, click Calendar.

2 Open the Calendar - New Item dialog box:
   - In the calendar, point to the date box where you want the item to be displayed and click Add.
   - Select the date on which you want the item to be displayed. On the Calendar Tools | Events tab, click New Event and choose Event.

3 Enter the data for your new event.

   When you create an event, you need to specify a title, a start date and time, an end date and time, and a description. As shown in Exhibit 2-5, the title, start date and time, and end date and time are mandatory fields. (If you choose to make the event an All Day Event, the start and end times are not required.) You can also specify a location for the event, a description, a category, its recurrence (daily, weekly, monthly, or yearly), and whether or not the event uses a Meeting Workspace.

   The default event categories are:
   - Meeting
   - Work hours
   - Business
   - Holiday
   - Get-together
   - Gifts
   - Birthday
   - Anniversary

   You can also enter a category of your own.

   As with announcements, you can attach files to calendar items.

4 Click Save.

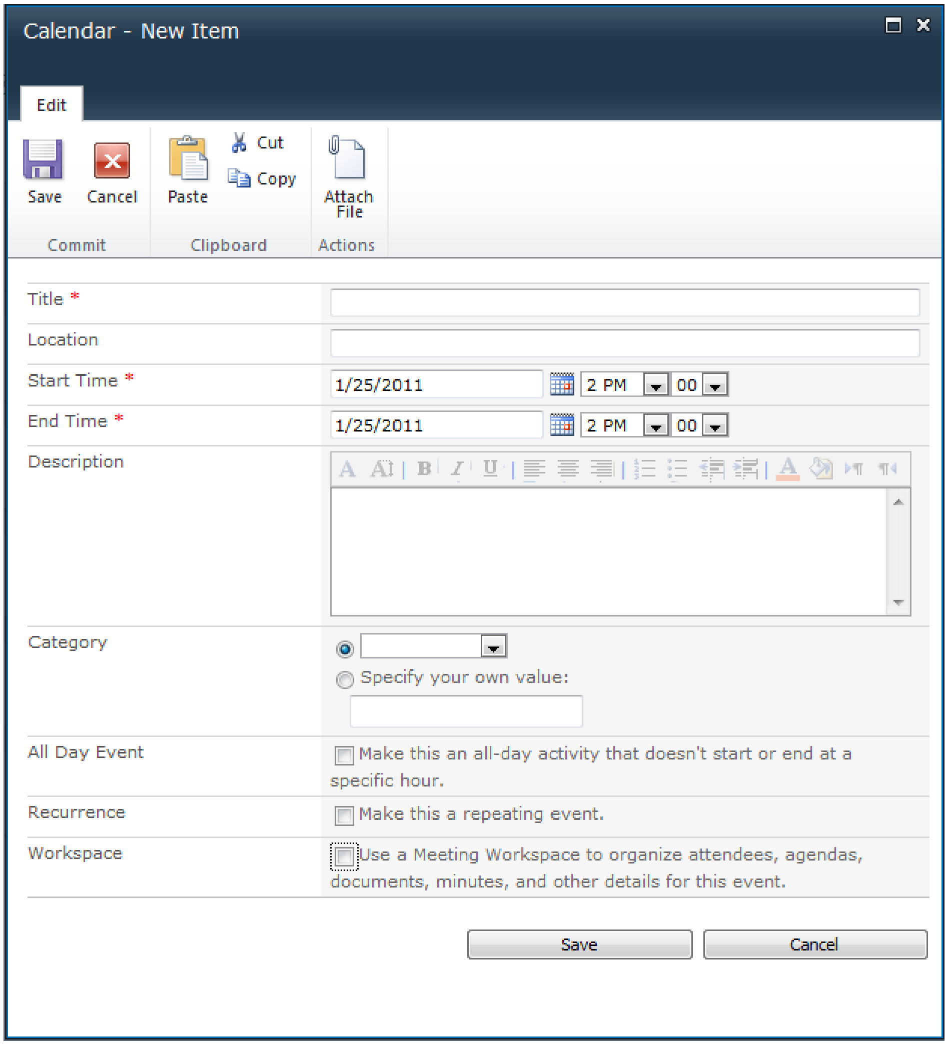
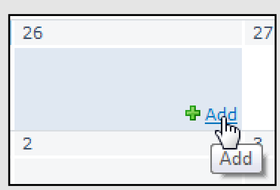


Exhibit 2-5: Creating a calendar item

Do it!

B-1: Creating a calendar item

Here's how	Here's why
1 In the Quick Launch bar, under Lists, click **Calendar**	To display the Calendar.
2 Point to tomorrow's date	
3 Click **Add**	 To open the Calendar - New Item dialog box.

4 In the Title box, enter **Outlander: Annual Sales Meeting**

5 In the Location box, enter **Conference Room, 5th floor**

6 In the Start Time and End Time boxes, select the date two weeks from today

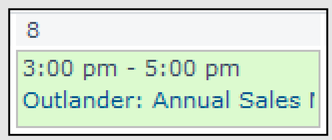
7 Enter **3 PM** as the start time and **5 PM** as the end time

8 In the Description box, type **Meeting to discuss progress on our sales goals for this year.**

Because the Description field is a Rich Text field, you can format your Description text.

9 From the Category list, select **Meeting**

10 Click **Save**



To close the dialog box. To see the event you just created, you might need to navigate to display the next month.

11 Create an event with the following settings:

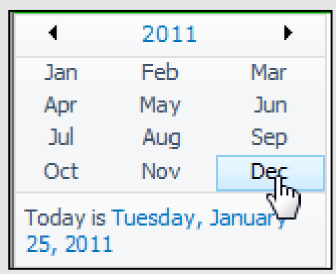
Title: **Winter Party**

Location: **The Park Hotel**

Begin date: **12/20/201*** Time: **8:00 PM**

End date: **12/21/201*** Time: **12:00 AM**

Category: **Get-together**



You can use the calendar in the Quick Launch bar to quickly move to December.

Use the current year for * unless the date has passed. If the date has passed, use next year.

Editing events

Explanation

If you have permissions to modify content, you can edit an event if you need to change information in any of the data fields. To edit an event:

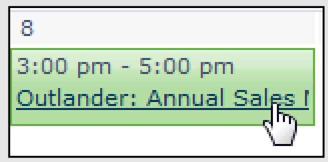
1 Open the event for editing:
   - Select the event in the Calendar and click the Edit Event button on the Calendar Tools | Events tab.
   - Click the event title in the Calendar and click the Edit Item button.

2 Make the desired changes.

3 Click Save.

Do it!

B-2: Editing an event

Here's how	Here's why
1 Navigate to display the Outlander: Annual Sales event	
2 In the Calendar, click the **Outlander: Annual Sales Meeting** event title	 (The event title is a link, which is underlined when you point to it.) A dialog box for the event opens.
3 Click 	(On the Ribbon in the dialog box.) To open the event for editing.
4 Edit the description to read **In the meeting, we will discuss the projected growth rate for the next quarter.**	
5 Select the word **projected**	
6 Apply red text formatting to the word	The Description field allows text formatting.
7 Click **Save**	To save and close the edited event.

Topic C: Link lists

Explanation

You can use *links* to go to a Web page on the Internet or an intranet. You can also use a link to display a page or a resource, such as a document or an image on a SharePoint site.

To create a link:

1 Display the All Links page:
   - In the Quick Launch bar, click Lists and then click Links.
   - On the All Site Content page, click Links.

2 Open the Links - New Item dialog box, shown in Exhibit 2-6:
   - Below the Link items, click "Add new link."
   - Click the List Tools | Items tab and click New Item.

3 Enter the data for your new link.

4 Click Save.

When you create a link, you need to specify the URL (Uniform Resource Locator, or address) for the document or a page to which the link should point. For example, http://www.google.com is a URL. You can also enter a short description and a longer note for the link. The text you enter in the "Type the description" box appears as a short description on the Links page.

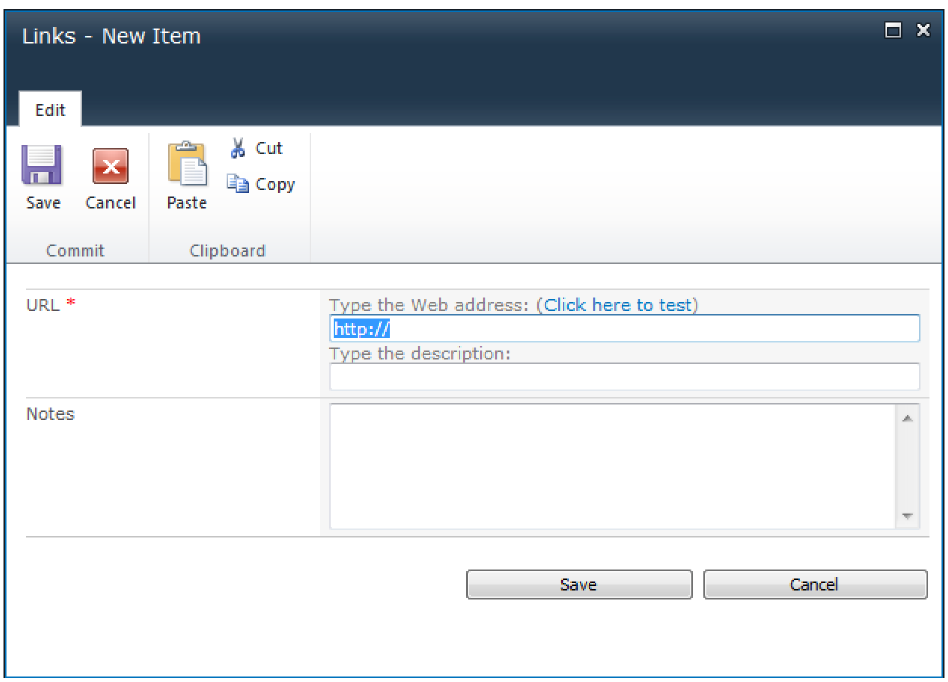


Exhibit 2-6: Creating a link item

Do it!

C-1: Creating a link

Here's how	Here's why
1 In the Quick Launch bar, click **Lists**	
2 Click **Links**	To display the Links list.
3 Click the **Items** tab	Under List Tools, on the Ribbon.
4 Click 	To display a menu.
Choose **New Item**	To open the Links - New Item dialog box, where you can specify the URL for the link and enter a short description.
5 Edit the URL box to read **http://maps.google.com**	
	You'll create a link to this page. (You need to enter the `http://`.)
6 In the "Type the description" box, enter **Maps**	To specify a short description for the new link.
7 In the Notes box, enter **Hi All! This Web site will be useful to us while traveling.**	
8 Click **Click here to test**	To open the entered URL in a browser to test the new link before you save it to the site.
Close the Google Maps Internet Explorer window	
9 Click **Save**	To save the new link and close the dialog box.
10 Add two more links with the following settings: URL: **http://support.microsoft.com** Description: **Microsoft Support site** Notes: **For assistance with Microsoft products** URL: **http//www.bing.com** Description: **Bing** Notes: **Microsoft's search engine**	

Changing the order of links

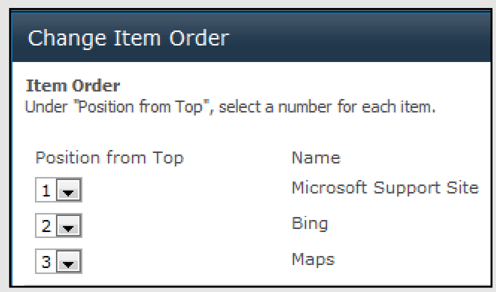
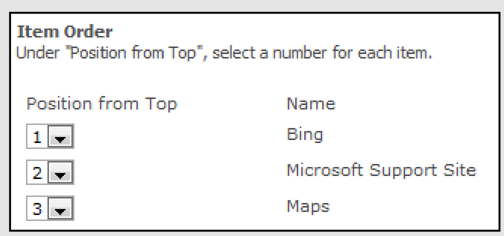
Explanation

The links appear in the order in which they were created. You can change the order of the links if you want to arrange them in the order of importance to your team. For example, you can arrange the links so that the first five links open the search sites, and the next five links open the sites pertaining to sales.

To change the order of links, click Change Order on the Links page. This opens the Links: Change Item Order page.

Do it!

C-2: Changing the order of links

Here's how	Here's why
1 On the List Tools | Items tab, click 	Maps is in the first position, Microsoft Support Site is in the second, and Bing is in the third.
2 From the first drop-down list, select **3**	 To change the order of the links. Notice that Maps has moved to the third position. Microsoft Support Site and Bing each moved up a position.
3 From the first drop-down list, select **2**	 Microsoft Support Site has moved down one position.
4 Click **OK**	The links are displayed in the order you specified.

Topic D: Task lists

Explanation

In SharePoint, you use *tasks* to organize and track work that you and your team need to complete. To create a task item:

1. Display the All Tasks page:
   - In the Quick Launch bar, under Lists, click Tasks.
   - On the All Site Content page, click Tasks.
2. Open the Tasks - New Item dialog box, shown in Exhibit 2-7:
   - Below the task items, click the “Add new item” link.
   - Click the List Tools | Items tab and click New Item.
3. Enter the data for your new task. The only required field for a task item is Title. Optional fields are:
   - **Predecessors** — Task items that need to be completed before this task item can be finished. Setting a predecessor doesn’t prevent you from marking an item’s status as completed before its predecessor is marked completed.
   - **Priority** — Options are (1) High, (2) Normal, and (3) Low.
   - **Status** — Options are Not Started, In Progress, Completed, Deferred, Waiting on someone else.
   - **% Complete** — Enter a percentage value, working toward 100% complete.
   - **Assigned To** — Enter the name of the user who will complete the task.
   - **Description** — Enter an explanation of the task. This is a Rich Text field.
   - **Start Date** — Enter the date you expect work to begin on the task.
   - **Due Date** — Enter the date you expect the task to be 100% complete.

   As with announcement items and events, you can attach a file to a task item.
4. Click Save.

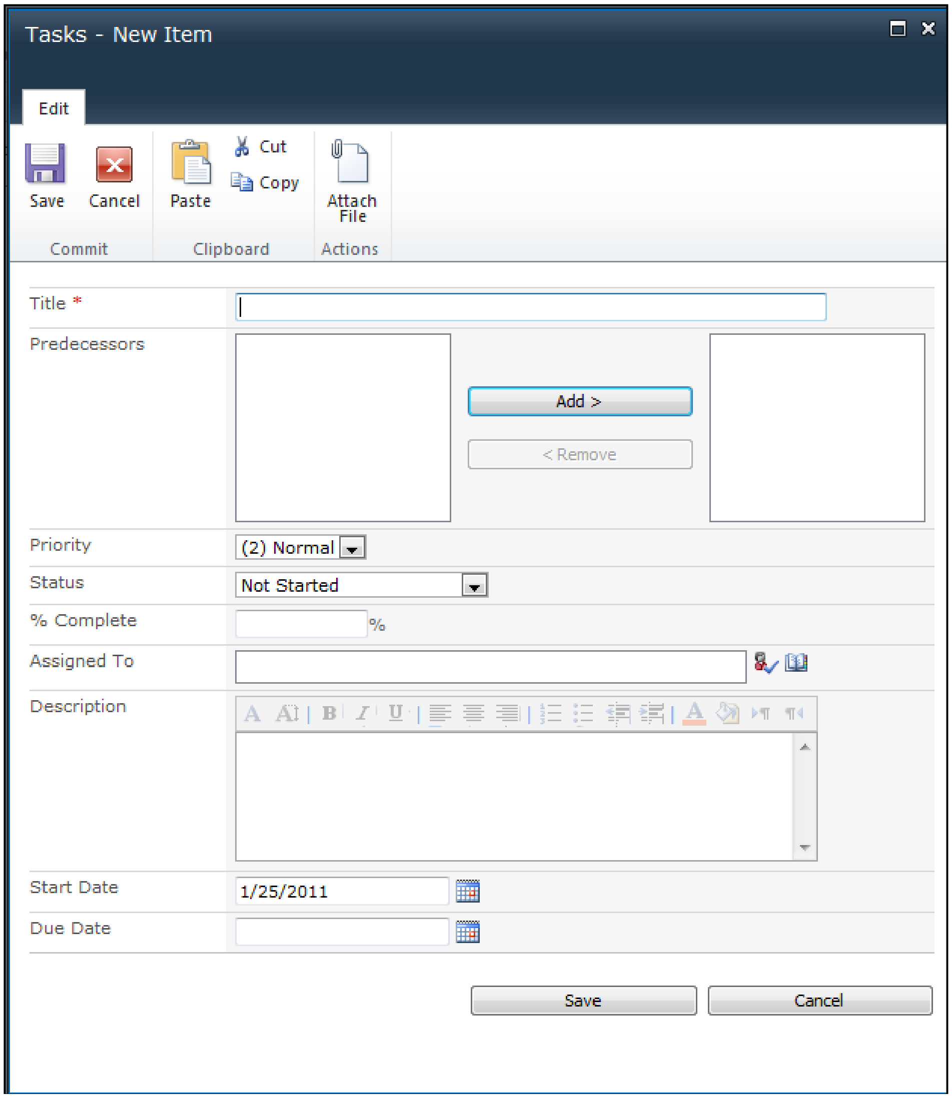


Exhibit 2-7: Creating a task

Do it!

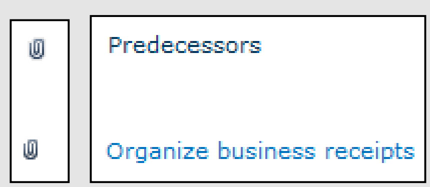
D-1: Creating a task

Here's how	Here's why
1 In the Quick Launch bar, under Lists, click **Tasks**	To display the list of tasks.
2 Click **Add new item**	To open the Tasks - New Item dialog box, shown in Exhibit 2-7.
3 In the Title box, type **Organize business receipts**	
4 In Assigned To, type **student##**	Where ## is your assigned student number.
Next to the Assigned To box, click 	To verify that the user name you entered is a valid name in Active Directory.
5 In the Description box, type **Gather and organize all business receipts for travel to Fon du Lac, Sheboygan, and Milwaukee.**	
6 Select tomorrow as the due date	
7 Click **Save**	To save the task and close the dialog box.

Do it!

D-2: Creating a task with a predecessor

The files for this activity are in Student Data folder **Unit 2\Topic D**.

Here's how	Here's why
1 Click **Add new item**	(Below the list of tasks.) To open the Tasks - New Item dialog box.
2 In the Title box, type **Submit expense report**	
3 Observe the Predecessors box	Current tasks are listed.
With "Organize business receipts" selected, click **Add**	
4 In the Assigned To box, type **student##**	Where ## is your assigned student number.
Click 	To verify that the user name you entered is a valid name in Active Directory.
5 In the Description box, type **Complete expense report for last month's business travel using form TR-2011.**	
6 Select a due date of next Monday	
7 Click 	On the Ribbon in the dialog box.
8 Browse to the current topic folder and select **TR-2011**	Use the Browse button to navigate to the Student Data folder Unit 2\Topic D.
Click **Open**	
Click **OK**	
9 Click **Save**	To save the new task.
10 Observe the attachment and the Predecessors column for the "Submit expense report" task	 The item shows that there is an attached file and that the "Organize business receipts" task must be done first.

Editing tasks

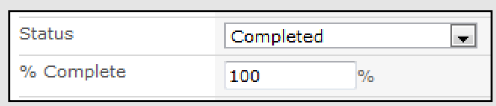
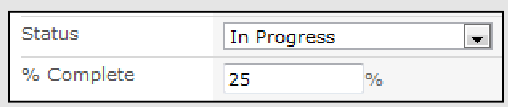
Explanation

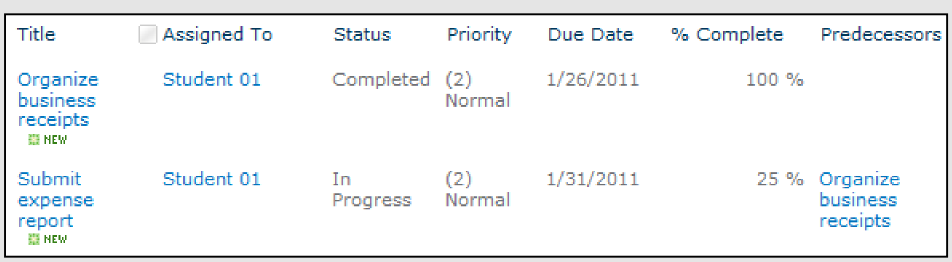
If you have permissions to modify content or you've been assigned a task, you can edit the task. To edit a task:

1. Open the task for editing:
   - Select the task in the All Tasks list and click the Edit Item button on the List Tools | Items tab.
   - Click the arrow next to the task's title in the All Tasks list and choose Edit Item.
   - Click the task title in the All Tasks list and click the Edit Item button.
2. Make the desired changes.
3. Click Save.

Do it!

D-3: Editing a task

Here's how	Here's why
1 Click the down-arrow next to "Organize business receipts"	To display a menu for the task.
Choose **Edit Item**	To open the task for editing.
2 Change the Status to **Completed**	
In the % Complete box, type **100**	
3 Click **Save**	To save the edited task.
4 Edit the "Submit expense report" task so it is **In Progress** and **25% Complete**	
5 Observe the Status and % Complete columns	



Title	Assigned To	Status	Priority	Due Date	% Complete	Predecessors
Organize business receipts NEW	Student 01	Completed	(2) Normal	1/26/2011	100 %	
Submit expense report NEW	Student 01	In Progress	(2) Normal	1/31/2011	25 %	Organize business receipts

They show that the "Organize business receipts" task is Completed and 100% complete. The "Submit expense report" task has been started and is 25% complete.

Topic E: Contacts

Explanation

By default, a Team site does not include a contact list; the designer of the Web site has to add it. You use contacts to store information about people.

To create a contact:

1. Go to the contact list’s All Contacts page.
2. Open the <*Contact list*> - New Item dialog box:
   - Click “Add new item.”
   - On the List Tools | Items tab, click New Item.
3. Enter a last name for the contact. Last Name is the only required field for a contact.
4. Enter additional information about the contact, using the fields shown in Exhibit 2-8.
5. Click Save.

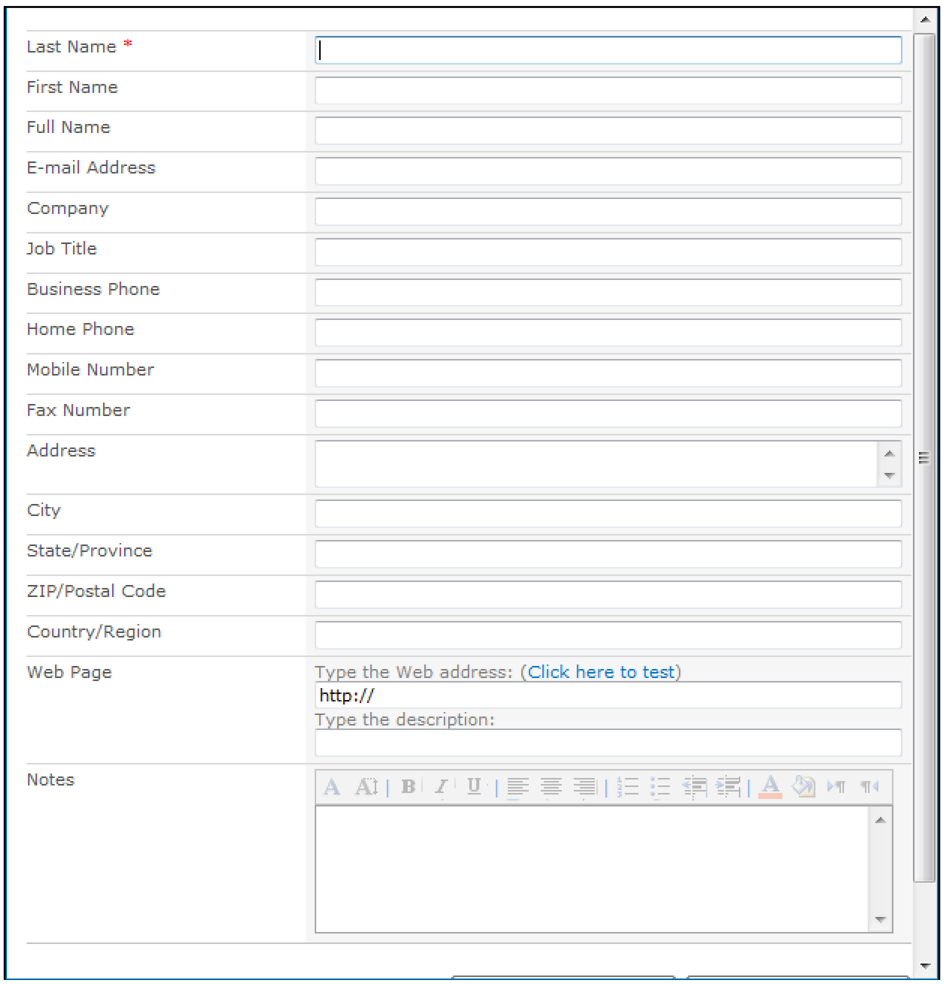


Exhibit 2-8: Creating a contact item

Do it!

E-1: Creating a contact

Here's how	Here's why
1 In the Quick Launch bar, click **Lists**	A contact list isn't created by default on a Team site. The designer of the Web site has to add the list.
2 Go to **http://spfbasicsql-sp/salesandmarketing**	
3 In the Quick Launch bar, observe the links under List	The designer of the Sales and Marketing Team site added a contact list called Sales Team Contacts.
4 Under Lists, click **Sales Team Contacts**	To go to the Sales Team Contacts - All Contacts page.
5 Click **Add new item**	To open the Sales Team Contacts - New Item dialog box.
6 Enter the following information for the contact: Last Name: *your last name* First Name: *your first name* Full Name: *your full name* E-mail address: **student##@spfbasic.class** (where ## is your assigned student number) Company: **Outlander Spices** Job Title: **Sales representative** Business phone: **877-555-12##** (where ## is your assigned student number) Address: **123 Outlander Way** City: **Oshkosh** State/Province: **WI** ZIP/Postal Code: **54902** Country/Region: **United States**	
7 Click **Save**	To save the new contact and close the dialog box.

Editing a contact

Explanation

If you have permission to modify content, you can edit contact information. To edit a contact:

1. Open the contact for editing:
   - Select the contact in the All Contacts list and click the Edit Item button on the List Tools | Items tab.
   - Click the arrow next to the contact's title in the All Contacts list and choose Edit Item.
   - Click the contact title in the All Contacts list and click the Edit Item button.
2. Make the desired changes.
3. Click Save.

Do it!

E-2: Editing a contact

Here's how	Here's why
1 Pick a partner	
2 Click the title link for your partner's contact item	You might need to refresh the view in Internet Explorer to see your partner's entry.
3 Click 	
4 Change the last two numbers of the phone number to your assigned student number	If you are Student01 and your partner is Student02, change Student02's phone number from 877-555-1202 to 877-555-1201.
5 Click **Save**	

Exporting a contact

Explanation

You can export the information from a contact item in SharePoint to Outlook. To export a single contact:

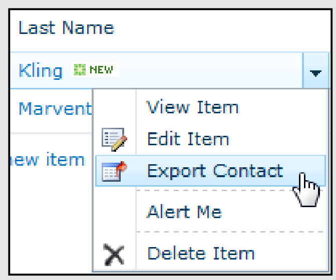
1. Click the arrow next to the last name of the contact you want to export and choose Export Contact.
2. Click Open.
3. Click Save & Close.

To export multiple contacts from SharePoint to Outlook:

1. Check the checkbox next to each contact you want to export.
2. On the List Tools | List tab, click Connect to Outlook.
3. Click Allow twice.
4. Click Yes.

Do it!

E-3: Exporting contact information to Outlook

Here's how	Here's why
1 Click the down-arrow next to your partner's last name	To display a menu for the contact item.
2 Choose **Export Contact**	
3 Click **Open**	
4 Click **Save & Close**	
5 Open Outlook	
6 Click **Contacts**	Your partner's contact information from the SharePoint list has been imported into Outlook.
7 Close Outlook	

Topic F: Deleting list items

Explanation

You can delete list items if they are no longer relevant to team members. You can delete link items if the links are inaccessible. To delete a list item:

1. Display the list:
   - In the Quick Launch bar, under Lists, click the desired list.
   - In the Quick Launch bar, click All Site Content. Under Lists, click the desired list.
2. Delete the list item:
   - Click the down-arrow next to the list item you want to delete, and choose Delete Item.
   - Click the title of the list item you want to delete, and then click Delete Item. (For links, clicking the link title opens a browser window to the link address, so you need to click the Edit icon next to the link item instead.)
   - Select the list item you want to delete. On the List Tools | Items tab, click Delete Item.

   For Calendar items:
   - Click the title of the event you want to delete and then click Delete Item.
   - Select the event you want to delete. On the Calendar Tools | Events tab, click Delete Item.
3. Click OK.

Do it!

F-1: Deleting a list item

Here's how	Here's why
1 Return to your SharePoint site Site##	Click the Home button in Internet Explorer.
2 Go to the Announcements - All Items page	
3 Next to Getting Started with Microsoft SharePoint Foundation! click the down-arrow	To display a menu for the announcement item.
4 Choose **Delete Item**	
Click **OK**	
5 Display the Calendar	
6 Go to the Winter Party event on December 20th	
7 Select the event	Don't click the title.

8 On the Calendar Tools | Events tab, click 

Click **OK**

9 Go to the Links - All Links page

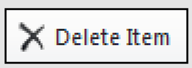
10 Next to Bing, click 

11 Click 

Click **OK**

12 Go to the Tasks - All Tasks page

13 Click the title for **Organize business receipts**

14 Click 

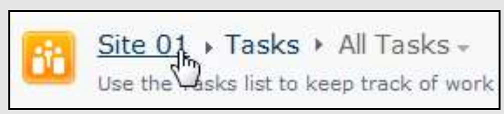
Click **OK**

15 Observe the Predecessors column for “Submit expense reports”

It’s now blank. The task item specified as a predecessor no longer exists.

16 Return to the Site ## home page

Where ## is your assigned student number.



Use breadcrumbs.

Restoring deleted objects

Explanation

SharePoint Foundation uses a Recycle Bin feature similar to that in Windows. By default, SharePoint Foundation keeps objects you've deleted in the Recycle Bin for 30 days. An example of the Recycle Bin, with deleted objects, is shown in Exhibit 2-9.

The list of deleted items displays the following information for each item:

- The name of the deleted object
- The original location of the object
- Who created the object
- The date and time the object was deleted
- The size of the object

It's important to note that the site administrator can change the number of days the Recycle Bin stores objects, so you might want to ask what the value is for your site. After 30 days, objects move to the administrator's Recycle Bin and you must ask the administrator to restore the objects for you.

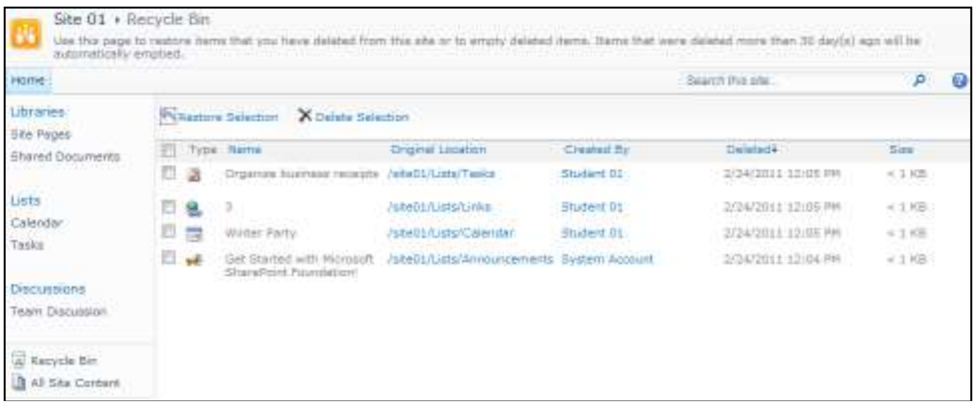


Exhibit 2-9: The SharePoint Foundation Recycle Bin

To restore an object from the Recycle Bin:

1. In the Quick Launch bar, click Recycle Bin.
2. Check the box next to the object or objects you want to restore.
3. Click Restore Selection.
4. Click OK.

You can also permanently delete an object from the Recycle Bin:

1. In the Quick Launch bar, click Recycle Bin.
2. Check the box next to the object or objects you want to permanently delete.
3. Click Delete Selection.

Do it!

F-2: Restoring deleted list items

Here's how	Here's why
1 In the Quick Launch bar, click **Recycle Bin**	
2 Check **Organize business receipts** and **Winter Party**	In the list of deleted items.
3 Click **Restore Selection**	Above the list.
4 Click **OK**	
5 In the Quick Launch bar, click **Tasks**	"Organize business receipts" has been restored.
6 In the Quick Launch bar, click **Calendar**	
Go to December 20th	The Winter Party event has been restored.
7 Close Internet Explorer	

Unit summary: Lists

Topic A In this topic, you learned that a SharePoint announcement is used to inform team members about news or the status of an event. You created and modified items in a **SharePoint Announcement list**.

Topic B In this topic, you learned that the **Calendar** is used to post information about important meetings and occasions that your team needs to attend. You created and modified **events** in a SharePoint calendar.

Topic C In this topic, you learned that **links** are used to visit a Web page from the Internet or an intranet. Link items can also provide quick links to SharePoint site pages. You created multiple links and changed the order in which they appeared in the Links list.

Topic D In this topic, you learned that **tasks** are used to organize and track work that you and your team need to complete. You created a basic task and a task with a **predecessor**, and you edited a task.

Topic E In this topic, you learned that **contacts** are used to store information about people. You created a contact, edited an contact, and then **exported** contact information to Outlook.

Topic F In this topic, you learned that SharePoint Foundation uses a **Recycle Bin** feature similar to that in Windows. By default, SPF keeps objects you've deleted in the Recycle Bin for 30 days. You **deleted** list items and then **restored** them from the site's Recycle Bin.

Independent practice activity

In this activity, you'll practice working with lists on a SharePoint Team site.

The files for this activity are in Student Data folder **Unit 2\Unit summary**. Use your assigned student number for ##.

1 Open Internet Explorer.

2 Go to the Administration Team site at **http://spfbasicsql-sp/administration**.

3 Create the following Calendar item on the date, in the next month, that corresponds with your assigned student number:

- Title: *Your first name's* Performance Evaluation
- Location: **Ms. Parker's office**
- Start Time: **9 AM**
- End Time: **10 AM**
- Category: **Business – Private** (Create your own value)
- Attach file: Performance review

4 Create the following task:

- Title: **Student## system scan**
- Priority: (1) High
- Assigned To: Your student## account
- Description: **Use antivirus program to scan computer before next shutdown.**
- Due Date: Today

5 Create the following announcement:
- Title: **Team## vacation requests due**
- Description: **Team## members: If you are planning on taking vacation in the next three months, you must turn in your request forms by this Friday.**
- Apply bold formatting to the words "this Friday."
- Expires: Select the date of the next Friday in the calendar.

6 Create a link to **http://office.microsoft.com/en-us/sharepoint-help**. Add a descriptive note for the site. Test the link before saving it.

7 Delete your Student## system scan task and the link to SharePoint help.

8 Restore your Student## system scan task from the Recycle Bin.

9 Close Internet Explorer.

Unit 3
Libraries

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

A Manage documents in document libraries.

B Work with picture libraries.

C Create wiki pages in wiki libraries.

D Examine asset libraries.

E Manage forms in form libraries.

Topic A: Document libraries

Explanation

A *library* is a central repository that you can use to store files, images, and forms. You can then share the files in these libraries with other team members. Libraries are similar to lists, but they have additional features, such as sorting, filtering, and grouping. You can also control the versions of items in the libraries. SharePoint Foundation 2010 provides several types of libraries:

- Asset libraries
- Document libraries
- Form libraries
- Picture libraries
- Wiki page libraries

Adding documents

A default Team site has three document libraries—Shared Documents, Site Assets, and Site Pages—as shown in Exhibit 3-1. A user with Design or Full Control permissions can create additional document libraries.

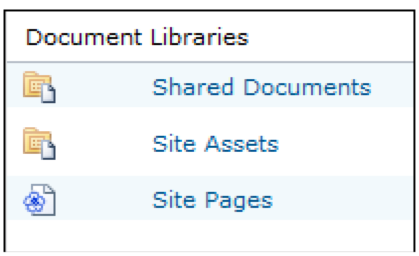


Exhibit 3-1: The default document libraries on a Team site

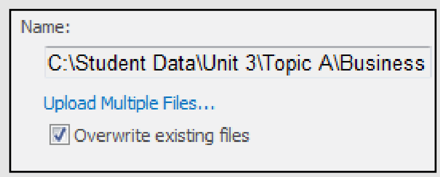
If you have Contribute or higher permissions, you can add documents to a document library. To do this:

1. Open the document library you want to add a document to.
2. Open the <*Document Library*> - Upload Document dialog box:
   - On the Library Tools | Documents tab, click the Upload Document button.
   - Under the document list, click Add document.
3. Browse to the folder where the document file is located, select the file, and click Open.
4. Click OK.

Do it!

A-1: Adding a document to a library

The files for this activity are in Student Data folder **Unit 3\Topic A**.

Here's how	Here's why
1 Open Internet Explorer	Your home page should be set to http://spfbasicsql-sp/site##, where ## is your assigned student number.
2 In the Quick Launch bar, click **Libraries**	A default Team site has three document libraries.
3 Click **Shared Documents**	To display the Shared Documents list.
4 Click **Add document**	(Below the list of shared documents.) To open the Shared Documents - Upload Document dialog box.
5 Click **Browse**	
6 In the current topic folder, select **Business letter** Click **Open**	Student Data folder Unit 3\Topic A.
7 Observe the "Overwrite existing files" checkbox	 By default, uploading a file with the same name as one already in the library will overwrite the original document with the new one.
8 Click **OK**	To close the Shared Documents - Upload Document dialog box. The Business letter document is now in the library.

Uploading multiple documents

Explanation

You can upload multiple files at a time. Here's how:

1. Open the <*Document Library*> - Upload Multiple Documents dialog box:
   - In the <*Document Library*> - Upload Document dialog box, click the Upload Multiple Files link.
   - On the Library Tools | Documents tab, click the arrow on the Upload Document button and choose Upload Multiple Documents.
2. Specify which files to upload:
   - Drag and drop files from Windows Explorer, as shown in Exhibit 3-2.
   - Click "Browse for files instead" and select the files from the Open dialog box.
3. Click OK.

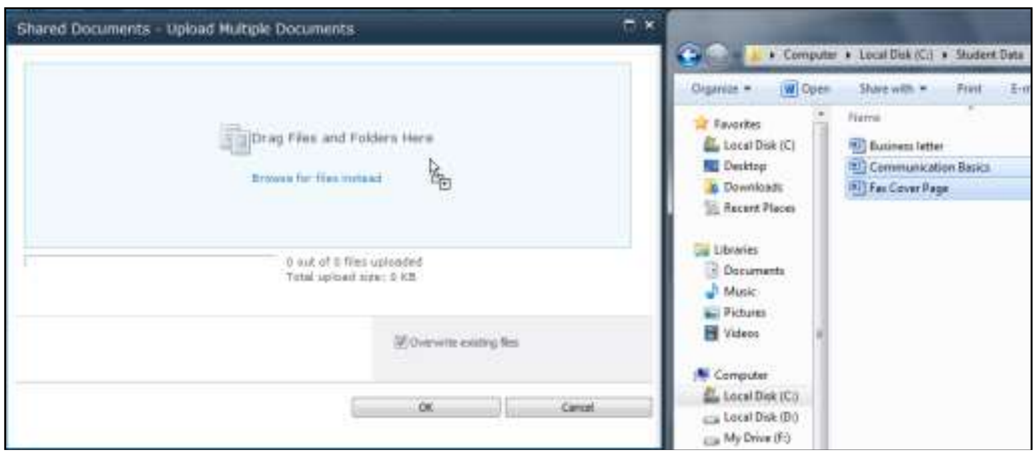


Exhibit 3-2: Dragging multiple files from Windows Explorer to SharePoint

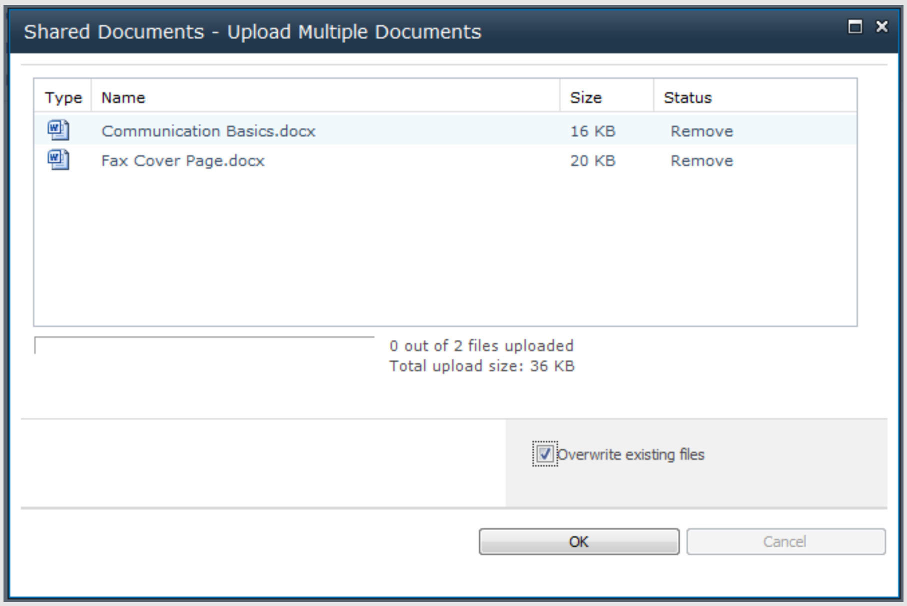
Do it!

A-2: Adding multiple documents to a library

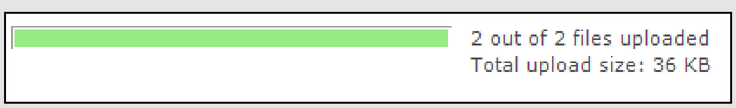
The files for this activity are in Student Data folder **Unit 3\Topic A**.

Here's how	Here's why
1 Click **Add document**	To open the Shared Documents - Upload Document dialog box:
2 Click **Upload Multiple Files…**	To open the Shared Documents - Upload Multiple Documents dialog box.
3 On the Windows taskbar, click 	To open Windows Explorer.
4 Navigate to the current topic folder	Student Data folder Unit 3\Topic A.

5 Arrange your windows so that you can see the Windows Explorer window and the Shared Documents - Upload Multiple Documents dialog box	
6 Select **Communication Basics** and **Fax Cover Page**	In the Windows Explorer window.
7 Drag the files to the Shared Documents - Upload Multiple Documents dialog box	
8 Close Windows Explorer	



9 Click **OK**	The message shown below appears.



10 Click **Done**	To close the dialog box.

Working with documents in a library

Explanation

The tasks you can complete on each document in a document library depend on the permissions you've been granted in the library and the applications installed on your computer.

To open a document, click its link in the document library list. If you have permissions to edit the file, you are prompted to open the file as "Read Only" or in Edit mode, as shown in Exhibit 3-3. Depending on your computer's configuration, the document opens either in the associated application (such as Word for .doc files) or in a new Web browser window.

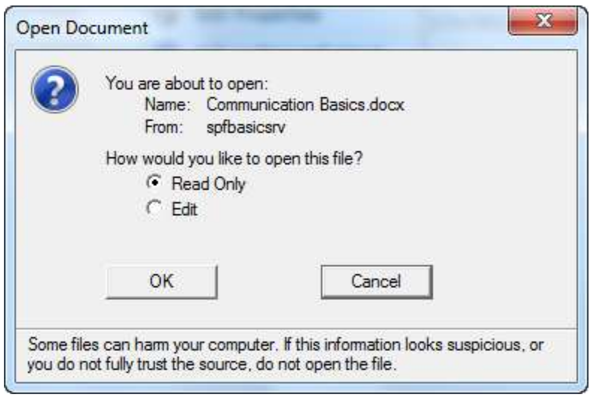


Exhibit 3-3: Opening a document

To see what you can do with a particular document, either select the document in the document library and note the buttons on the Library Tools | Documents tab, or open the document menu, shown in Exhibit 3-4. (To display the menu, click the down-arrow next to the document's name.)

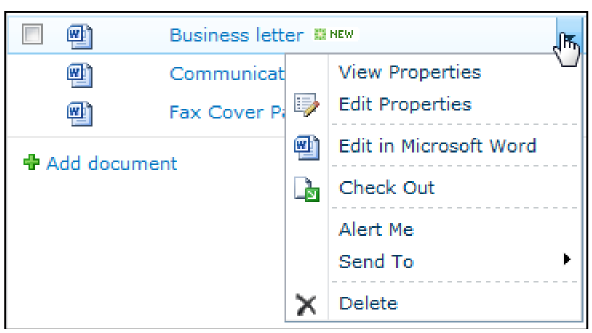


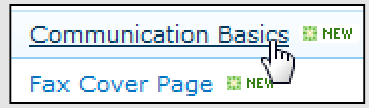
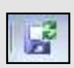
Exhibit 3-4: A menu of tasks for the Business letter document

If you've been assigned Contribute permissions, you can perform a variety of tasks related to documents. Some of the more common tasks are described in the following table.

Task	Description
View Properties	View the details about the document. Depending on the type of document, this might include who created it, its name, and metadata such as the date it expires.
Edit Properties	Modify the document's properties, such as Name (file name) and Title. You can change the document's file name but not the type.
Edit in <*Application*>	If you have an appropriate application installed for the document file type, you can open the file for editing in that application.
Check Out	Choose this command to edit a document in a library that keeps track of versions. Checking out a document prevents other users from editing it at the same time and causing potential conflicts in data. After the document is checked back in, another user can edit it.
Alert Me	Be notified when changes have been made in the selected document. You can specify the types of changes that trigger an alert, and when and how you'll receive alerts.
Send To	Specify a location by choosing one of the following: • **Other Location** — Used to send a document in one SharePoint library to another SharePoint library. • **E-mail a Link** — Used to send a link to a document in the document library to another user via e-mail. • **Create Document Workspace** — Used to create a document workspace based on a document residing in a SharePoint library. • **Download a Copy** — Used to download a copy of the file to your computer.
Delete	Send the document to the SharePoint Recycle Bin.

Do it!

A-3: Working with a document

Here's how	Here's why
1 Click the **Communication Basics** link	 (In the Shared Documents library.) The Open Document dialog box, shown in Exhibit 3-3, appears. You can open the document in Read Only mode or Edit mode.
2 Click **OK**	To open the file in Read Only mode (the default).
3 Close Word	
4 Check **Communication Basics**	The Library Tools | Documents tab is displayed on the Ribbon.
5 Observe the buttons on the Ribbon	
6 Open the Communication Basics drop-down menu	(Shown in Exhibit 3-4.) The options match the buttons on the Library Tools | Documents tab. However, the tab provides more options than the menu does.
7 Choose **Edit in Microsoft Word**	
Click **OK**	
8 Apply the **Title** style to the Communication Basics heading	
9 Click 	On the Quick Access toolbar.
Observe the Word status bar	It briefly displays the message that the file is uploading to the server.
10 Close Word	
11 Observe the Modified column	It's been updated to indicate that the Communication Basics document has just been modified.

Creating documents

Explanation

A document library has a default template that's used to create documents. When you click the New Document button on the Library Tools | Documents tab, SharePoint presents a message box, shown in Exhibit 3-5, which displays the name and location of the template file. You can cancel the operation if the file name looks suspicious or you don't trust the source. A user with Design or Full Control permissions can change the default template used for new documents.

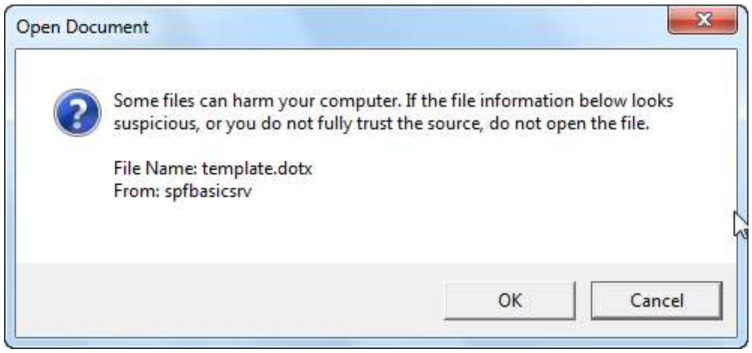
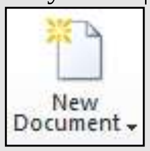


Exhibit 3-5: The Open Document message box

After you've completed your new document, click the Save button. By default, the Save As location is the document library where you clicked the New Document button.

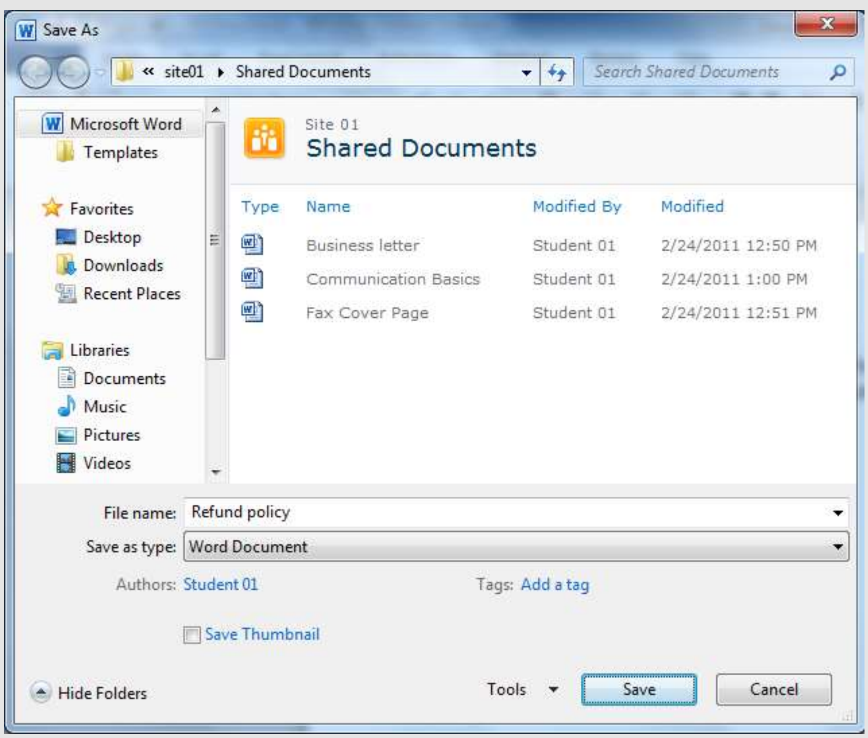
Do it!

A-4: Creating a document from within a document library

Here's how	Here's why
1 On the Library Tools | Documents tab, click 	A security warning appears.
2 Click **OK**	Word 2010 opens.
3 Type the following information in the document:	

Outlander Spices is known for the outstanding quality of its spices. We provide a full refund to any customer who is not satisfied with the product. Simply email us at returns@outlanderspices.com for a postage-paid return envelope.

4 Click 	On the Quick Access toolbar in Word.
5 In the File name box, type **Refund policy**	The default save location is your Site## Shared Documents document library.



6 Click **Save**

7 Close Word

The new document, Refund policy, is displayed in the document library in SharePoint.

Deleting documents from a library

Explanation

If you no longer require a document that you created, you can move it to the SharePoint Recycle Bin. To delete a document:

1. Open the document library containing the document you want to delete.
2. Do one of the following:
   - Open the document's menu and choose Delete.
   - Select the document. On the Library Tools | Documents tab, click Delete Document.
3. Click OK.

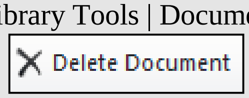
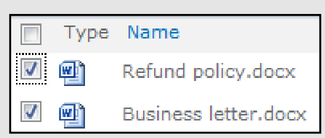
Restoring documents

If you deleted a document, you can restore it from the SharePoint Recycle Bin.

1. In the Quick Launch bar, click Recycle Bin.
2. Check the box next to the document you want to restore.
3. Click Restore Selection.
4. Click OK.

Do it!

A-5: Deleting and restoring a document

Here's how	Here's why
1 Open the Business letter menu	Click the document's arrow.
2 Choose **Delete**	
3 Click **OK**	To confirm the deletion.
4 Check **Refund policy**	In the list of documents in the library.
5 On the Library Tools | Documents tab, click 	
6 Click **OK**	
7 In the Quick Launch bar, click **Recycle Bin**	
8 Check **Refund policy.docx** and **Business letter.docx**	
9 Click **Restore Selection**	
10 Click **OK**	

11 In the Quick Launch bar, click **Shared Documents**	Business letter and Refund policy are back in the list of documents in this library.

Topic B: Picture libraries

Explanation

A *picture library* is a document library that is used to store and share image files. The default view for a picture library displays thumbnails of each picture file so that users can identify the picture they need.

A Ribbon is not displayed for picture libraries. Instead, above the picture thumbnails in the library, you'll see four buttons: New, Upload, Actions, and Settings. Each button displays a menu.

By default, a Team site doesn't include a picture library. A user with Design or Full Control permissions must create it.

Working with a picture library

A user with Contribute permissions in a picture library can do a variety of tasks, including the following:

- Create folders to organize pictures in the library
- Upload pictures to the library
- View the pictures in the library as a slide show
- Delete pictures from the library

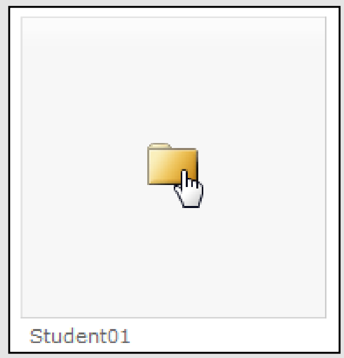
Creating folders

You can create folders to organize the pictures in a picture library. To create a folder:

1. Open the picture library.
2. Click New and choose New Folder.
3. Enter a name for the new folder.
4. Click Save.
5. Click the folder's icon to open the folder.

Do it!

B-1: Creating a folder in a picture library

Here's how	Here's why
1 Go to the Sales and Marketing site	http://spfbasicsql-sp/salesandmarketing
2 In the Quick Launch bar, under Pictures, click **Stock Photos**	This picture library was created during class setup. It contains two photo files.
3 Click **New** and choose **New Folder**	You're creating a folder to hold the picture files you will upload.
4 In the Name box, enter **Student##**	Where ## is your assigned student number.
5 Click **Save**	
6 Click your **Student##** folder	 To open the folder.

Uploading pictures

Explanation

You can upload pictures to a picture library one at a time or as a group. To upload a single picture to a picture library:

1. Open the picture library.
2. Click Upload, or click the arrow on the Upload button and choose Upload Picture, to open a dialog box you can use to select pictures.
3. Browse to select the picture file you want, and click Open.
4. Click OK.
5. Enter properties for the picture. As shown in Exhibit 3-6, Name is the only required property.
6. Click Save.

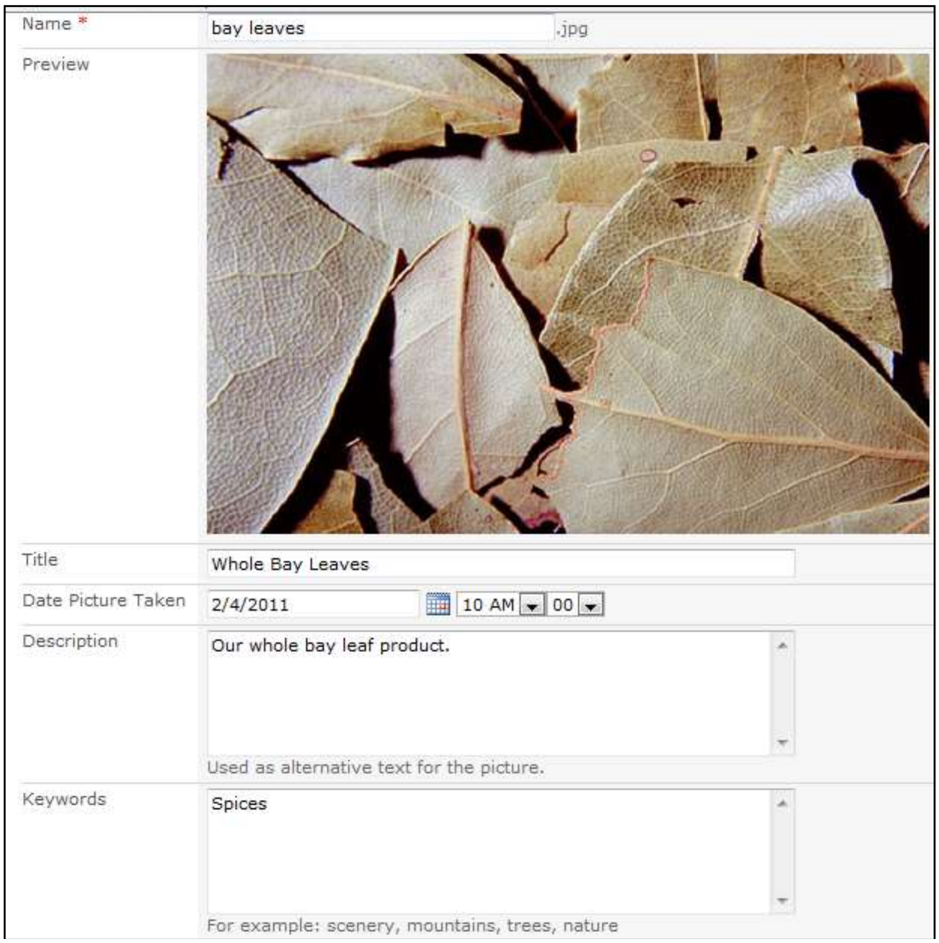


Exhibit 3-6: Picture properties

To upload multiple pictures to a picture library:

1 Open the picture library.

2 Click Upload and click the Upload Multiple Files link, or open the Upload menu and choose Upload Multiple Pictures.

3 If necessary, add a picture shortcut to the location of the picture files.

4 Select the files you want to upload, as shown in Exhibit 3-7.

5 Click Upload and Close.

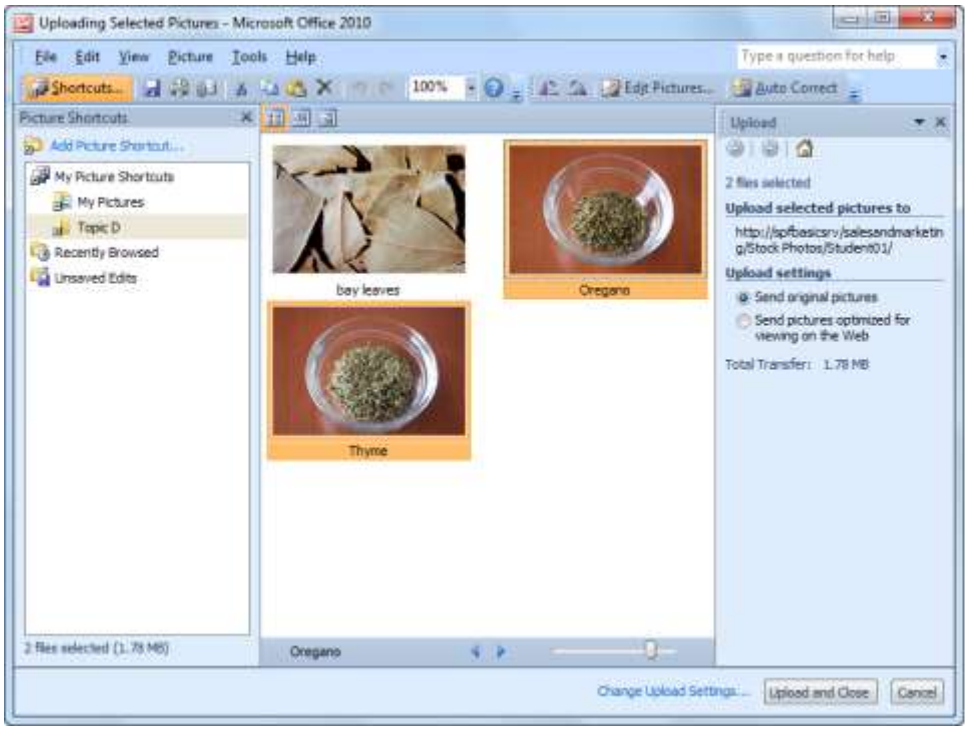


Exhibit 3-7: Selecting multiple picture files to upload

Do it!

B-2: Uploading pictures to a picture library

The files for this activity are in Student Data folder **Unit 3\Topic B**.

Here's how		Here's why
1	Click **Upload**	 To open a dialog box you can use to select pictures.
2	Browse to select **bay leaves** in the current topic folder	Student Data folder Unit 3\Topic B.
	Click **Open**	
	Click **OK**	
3	Enter the following properties: Title: **Whole Bay Leaves** Date Picture Taken: **Today's date 10 AM** Description: **Our whole bay leaf product** Keywords: **Spices**	
4	Click **Save**	
5	Click the arrow on the Upload button	To display the Upload menu.
	Choose **Upload Multiple Pictures**	To open a dialog box you can use to select multiple pictures.
6	Click **Add Picture Shortcut…**	
7	Navigate to the current topic folder	Student Data folder Unit 3\Topic B.
8	Click **Add**	
9	Select **Oregano**	
	Hold down the CTRL key and select **Thyme**	
10	Click **Upload and Close**	When you upload multiple files at one time, you aren't prompted to enter picture properties.

11 Click **Go back to "Stock Photos"**	To return to the Stock Photos picture library.

Viewing pictures as a slide show

Explanation

You can view the pictures in a picture library in slide show format, as shown in Exhibit 3-8. This allows you to see a larger version of each photo, along with the picture's properties.

To view the pictures in a picture library as a slide show:

1. Open the picture library.
2. From the Actions menu, choose View Slide Show.
3. Use the slide show controls to navigate through the slides.

Exhibit 3-8: Picture library slide show

Do it!

B-3: Viewing pictures as a slide show

Here's how	Here's why
1 On your Student## - All Pictures page, display the **Actions** menu and choose **View Slide Show**	
2 Click ▶	The slide changes about every four seconds.
3 When the slide show is done, close the Slide show view window	

Working with picture files

Explanation

A user with Contribute permissions in a picture library can complete a variety of tasks on pictures in the library. These tasks include:

- Editing pictures in a picture editor
- Downloading picture files to the user's computer
- Sending a picture file through e-mail
- Inserting a picture into a document

To work with a picture in a picture library:

1. Open the picture library.
2. Check the picture or pictures you want to work with.
3. From the Actions menu, choose one of the following:
   - **Edit** — Opens the picture in a picture editing program on your computer. When Microsoft Office 2010 is installed, SharePoint opens Microsoft Office 2010 Picture Manager for editing photos.
   - **Download** — Downloads a copy of the selected picture(s) to your computer. You can choose to download a full-size copy, a preview copy, or a thumbnail.

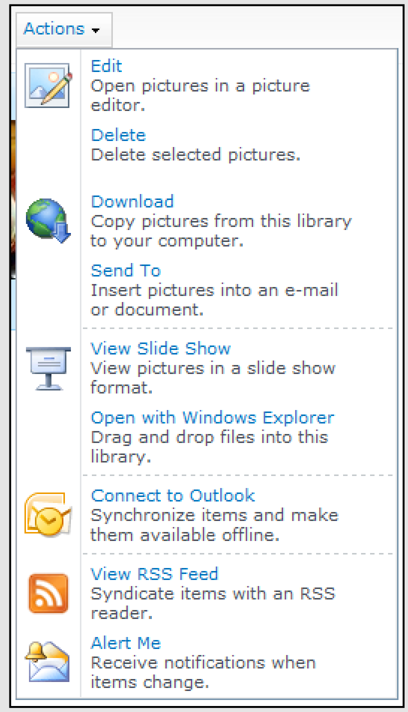
     Using the Advanced Download Options, you can create a custom size.

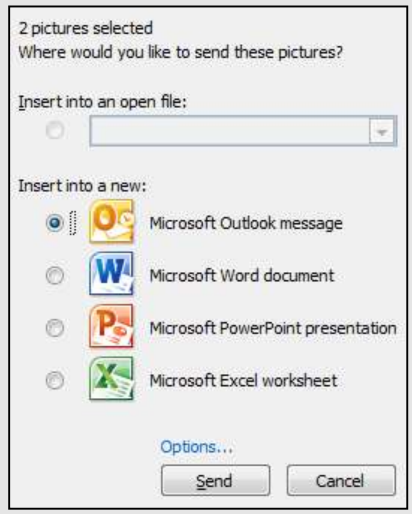
     Using the "Send pictures to" option, you can insert the picture(s) into a new Outlook message, Word document, PowerPoint presentation, or Excel worksheet. You can also insert the picture(s) into an open file.
   - **Send To —** Provides the same options as the Download command's "Send pictures to" option. You can insert the picture(s) into a new Outlook message, Word document, PowerPoint presentation, or Excel worksheet. You can also insert the picture(s) into an open file.

Do it!

B-4: Working with pictures in a picture library

The files for this activity are in Student Data folder **Unit 3\Topic B**.

Here's how	Here's why
1 Check **bay leaves**	In the Stock Photos picture library.
2 Open the **Actions** menu	 You can open the file for editing, download a copy of the file, send the file in an e-mail message, or place the file in an Office document.
3 Choose **Edit**	To open the bay leaves image for editing.
4 Click **Auto Correct**	To automatically correct the color and brightness of the photo.
5 Click **Save and Close**	
6 Click **Go back to "Stock Photos"**	To return to the picture library.
7 With the bay leaves image selected, choose **Actions**, **Download**	You can download a full-size copy, a preview size (640×480), or a thumbnail (160×120).
8 Click **Download**	
9 Browse to select your **My Pictures** folder Click **Save**	

10	Open Windows Explorer Verify that the bay leaves file has been downloaded Close Windows Explorer	
11	With the bay leaves picture selected, use breadcrumbs to navigate up to **Stock Photos**	To return to the picture library.
12	Check **cakes**	
13	From the Actions menu, choose **Send To**	 To open a dialog box where you specify the destination.
14	Select **Microsoft PowerPoint presentation** Click **Send**	 Microsoft PowerPoint opens. A new presentation is created, containing two slides. One has the cake picture from Stock Photos. The other has the bay leaves picture from your Student## folder.
15	On the File tab, click **Save As**	
16	Save the file as **My Presentation** in your Documents library	
17	Close PowerPoint	

Deleting files and folders

Explanation

If a picture is no longer needed, you can delete it, sending it to the SharePoint Recycle Bin. To delete a picture or pictures:

1. Open the picture library containing the pictures you want to delete.
2. Check the picture or pictures you want to delete.
3. From the Actions menu, choose Delete.
4. Click OK to confirm the deletion.

It's not as simple to delete a folder in a picture library. There isn't a checkbox to select the folder, as there is to select pictures. To delete a folder in a picture library:

1. Open the picture library containing the folder you want to delete.
2. Using the breadcrumbs, click the All Pictures arrow and choose All Pictures, Details, as shown in Exhibit 3-9.
3. From the folder-name menu, choose Delete.
4. Click OK to confirm the deletion.

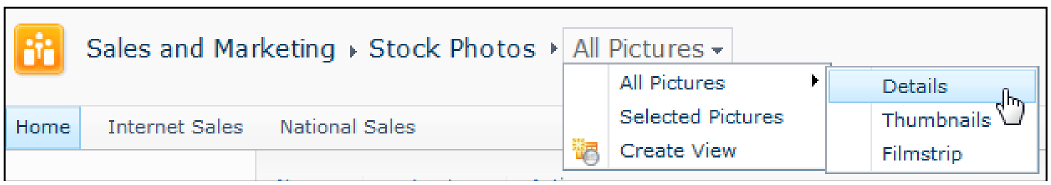
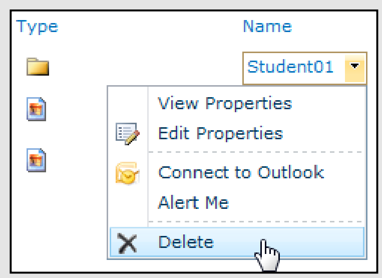


Exhibit 3-9: Switching to Details view for a picture library

Do it!

B-5: Deleting a picture file and a folder

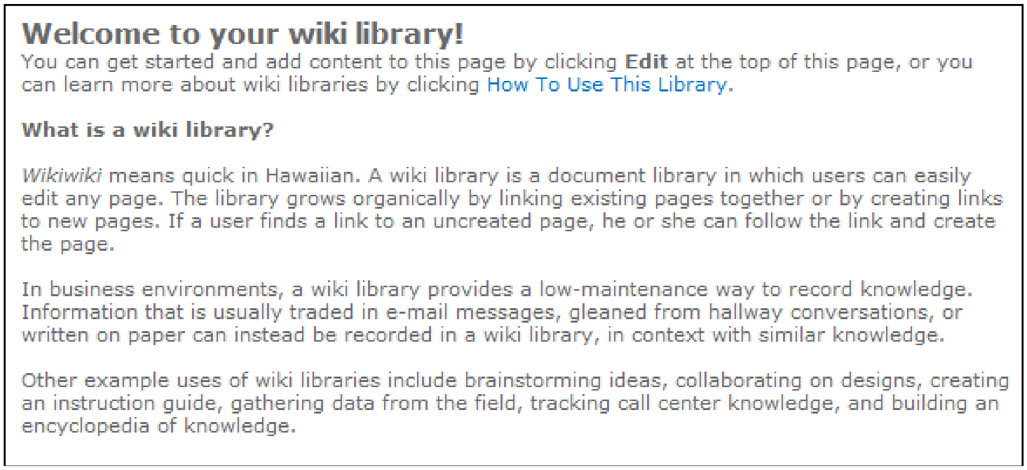
Here's how	Here's why
1 Clear **cakes**	In the Stock Photos picture library.
2 On your Student## - All Pictures page, clear **bay leaves** and check **Thyme**	
3 From the Actions menu, choose **Delete**	
4 Click **OK**	
5 Using breadcrumbs, move up to **Stock Photos**	
6 In the breadcrumbs, click the arrow next to All Pictures	To display a menu.
7 Choose **All Pictures**, **Details**	As shown in Exhibit 3-9.
8 From the Student## menu, choose **Delete**, as shown	 Where ## is your assigned student number.
9 Click **OK**	The folder and its contents are deleted from the picture library and moved to the Recycle Bin.
10 In the breadcrumbs, choose **All Pictures**, **Thumbnails**	

Topic C: Wiki pages

Explanation

A *wiki library* stores Web pages instead of documents. A wiki library is not created automatically for a default Team site. Someone with Design or Full Control permissions needs to add it to the site.

When you open a wiki library, SharePoint displays a page that explains what a wiki library is and includes a link to get help on using the library. This page is shown in Exhibit 3-10.


Welcome to your wiki library!
You can get started and add content to this page by clicking **Edit** at the top of this page, or you can learn more about wiki libraries by clicking How To Use This Library.

What is a wiki library?

Wikiwiki means quick in Hawaiian. A wiki library is a document library in which users can easily edit any page. The library grows organically by linking existing pages together or by creating links to new pages. If a user finds a link to an uncreated page, he or she can follow the link and create the page.

In business environments, a wiki library provides a low-maintenance way to record knowledge. Information that is usually traded in e-mail messages, gleaned from hallway conversations, or written on paper can instead be recorded in a wiki library, in context with similar knowledge.

Other example uses of wiki libraries include brainstorming ideas, collaborating on designs, creating an instruction guide, gathering data from the field, tracking call center knowledge, and building an encyclopedia of knowledge.

Exhibit 3-10: The description page for a new wiki library

To display a list of the pages in a wiki library:

1. Open the wiki library.
2. On the Ribbon, click the Page tab.
3. On the Page tab, click View All Pages.

Do it!

C-1: Viewing a wiki library and its pages

Here's how	Here's why
1 In the Quick Launch bar, observe the links under Libraries	The designer of the Sales and Marketing Team site added a wiki library called Sales Materials to the site.
2 Click **Sales Materials**	To open the wiki library.
3 Read the description of a wiki library	
4 Click the **Page** tab	
5 Click 	There are currently two pages in the wiki library: Home and How To Use This Library.

Creating a wiki page

Explanation

A new *wiki page* is a blank page on which you can enter text and add a mixture of components, such as images, videos, and files. In SharePoint, a wiki page can display different types of content, such as text, images, videos, and Web parts. A wiki page with text, pictures, a video, and a SharePoint list is shown in Exhibit 3-11.

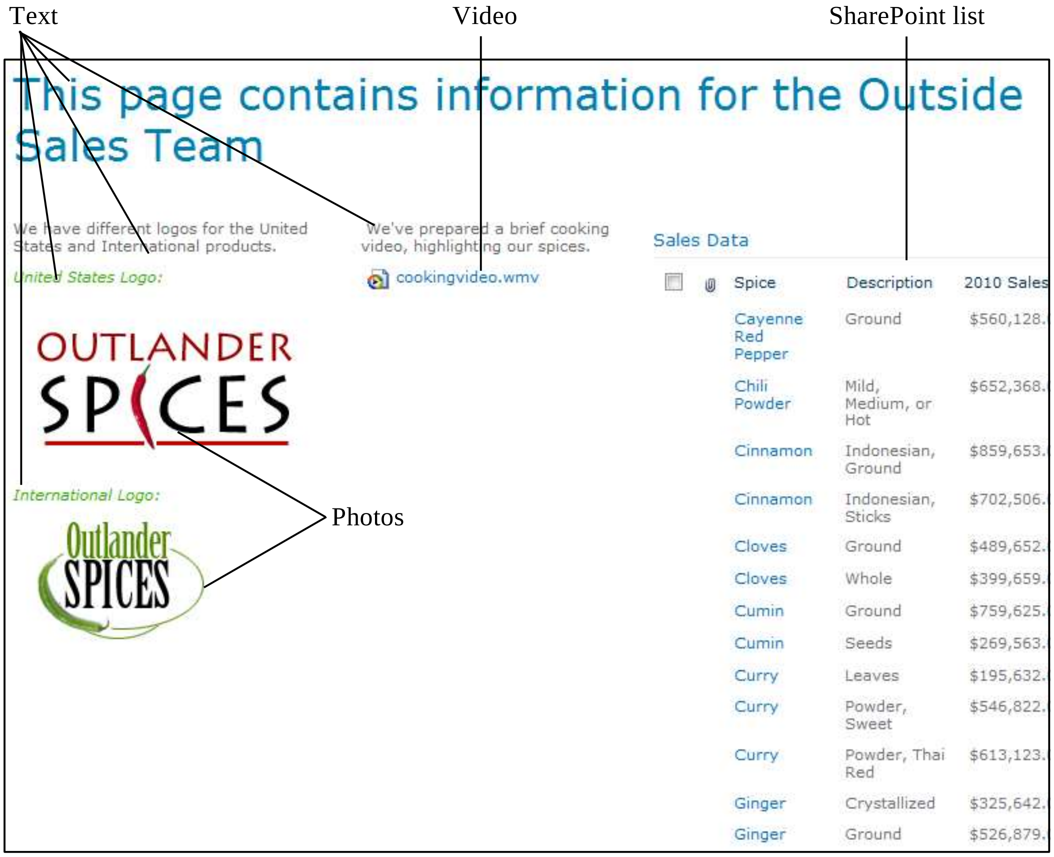


Exhibit 3-11: A SharePoint wiki page

To create a wiki page in a wiki library:

1. Open the wiki library.
2. Click the Page tab.
3. Click the View All Pages button.
4. Click "Add new page" to open a dialog box.
5. In the New page name box, type a name for the page. The page's name is important because users will enter it in their browser's Address bar to open the page.
6. Click Create.

Do it!

C-2: Creating a wiki page

Here's how	Here's why
1 Click **Add new page**	
2 In the New page name box, type **## Outside Sales**	Where ## is your assigned student number.
3 Click **Create**	The new wiki page opens for editing.

Adding content to a new wiki page

Explanation

Wiki pages can contain many different types of content. You can add plain text to your wiki pages, and then use the Editing Tools | Format Text tab to apply formatting. You can alter the page layout by using the Text Layout button on the Editing Tools | Format Text tab. Text layout options are shown in Exhibit 3-12.

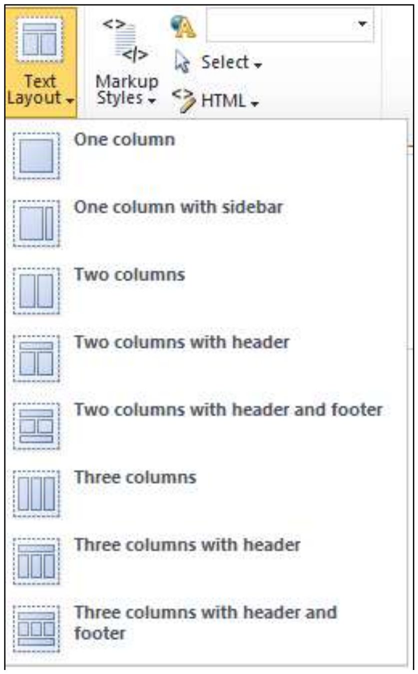


Exhibit 3-12: Text layout options

To add additional content types to your wiki page, you use the buttons on the Editing Tools | Insert tab, shown in Exhibit 3-13.

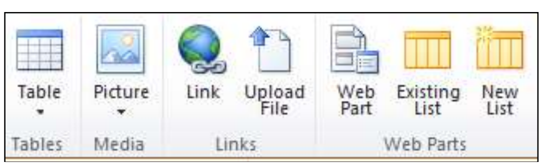


Exhibit 3-13: The Editing Tools | Insert tab

To insert a table, you specify the size of the table you want. Exhibit 3-14 shows how you'd insert a six-column by six-row table on the wiki page.

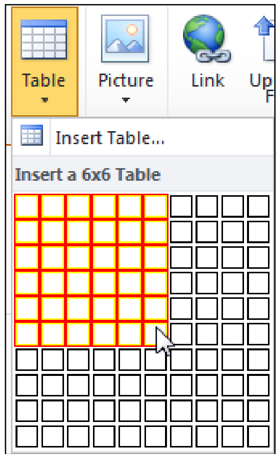


Exhibit 3-14: Inserting a six-column and six-row table

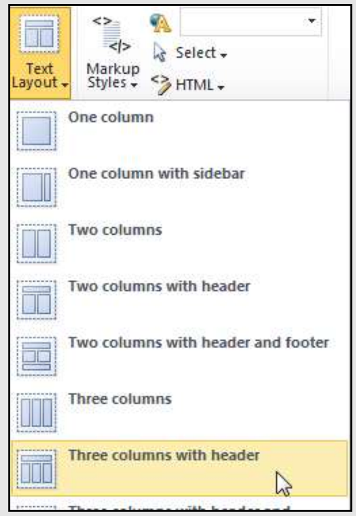
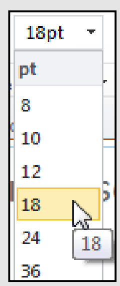
For pictures and other files you upload, they will be uploaded to the Site Assets library by default. You can choose to upload files to another library on your site. You can also add Web parts, including lists, to your wiki page. When you add a Web part to a wiki page, changes you make in the Web part on the wiki page are reflected in the original Web part and vice versa.

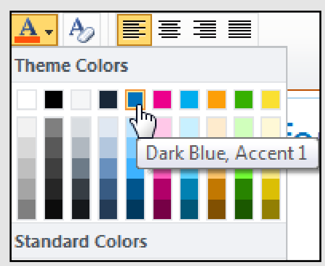
Do it!

C-3: Adding content to a wiki page

The files for this activity are in Student Data folder **Unit 3\Topic C**.

<table>
<tr><th>Here's how</th><th>Here's why</th></tr>
<tr><td>1 Observe the two Editing Tools tabs</td><td>You can add formatted text to the page. You can also insert a table, picture, link, file, Web part, or list.</td></tr>
<tr><td>2 On the Editing Tools | Format Text tab, click Text Layout

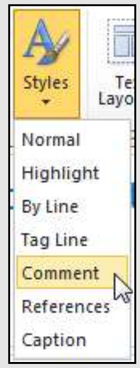
Select Three columns with header</td><td>
</td></tr>
<tr><td>3 In the Header box, type This page contains useful materials for the Outlander Spices outside sales team</td><td></td></tr>
<tr><td>4 Select the Header text and change the font to 18pt and Dark Blue, Accent 1</td><td>


</td></tr>
<tr><td>5 In the first column, type the following Normal-style text: We have different logos for the United States and International products

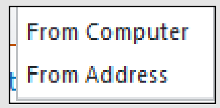
Press ENTER</td><td></td></tr>
</table>

6 Type **United States logo:**, select the text and apply the **Comment** style

Press ↵ ENTER



7 On the Editing Tools | Insert tab, click



You can insert a picture from your computer or from a Web address.

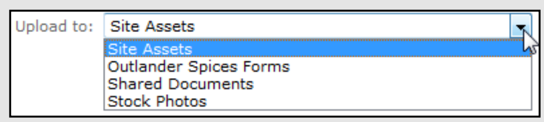
Choose **From Computer**

8 Browse to select **logo01** in the current topic folder

Student Data folder Unit 3\Topic C.

Click **Open**

9 Open and observe the **Upload to** list



By default, SharePoint saves the picture file in the Site Assets library. You can choose to save the file in another library.

With Site Assets selected, click **OK**

To upload the picture to the Site Assets library.

10 In the Title box, type **Outlander Logo US:**

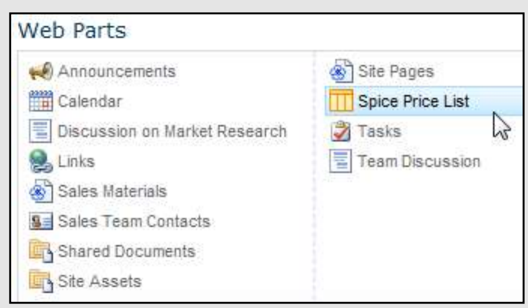
11 Click **Save**

The picture is displayed. To download or use the file, users will need to open the Site Assets library.

12 Below the logo, enter **International logo** and apply the **Comment** style

13 Below the International Logo text, insert the **logo02** file

The file is in Student Data folder Unit 3\Topic C.

	Title the file **International Logo**	
14	In the middle column, type **We've prepared a brief cooking video, highlighting our spices.** Press ENTER	
15	On the Editing Tools | Insert tab, click 	
16	Browse to select **cookingvideo** in the current topic folder Click **Open** With Site Assets selected, click **OK**	To upload the video file to the Site Assets library.
17	In the Title box, type **Cooking demonstration video**	
18	Click **Save**	
19	Place your cursor in the third column	
20	Click 	On the Editing Tools | Insert tab.
21	Select **Spice Price List**	
22	Click **Add**	

23 On the Editing Tools | Format Text tab, click **Save & Close**

24 Go to the Sales and Marketing home page

Navigating to wiki pages

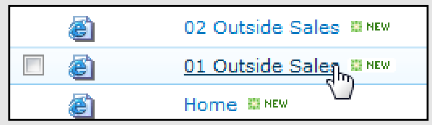
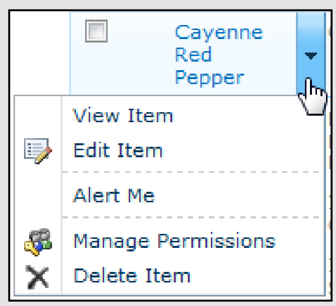
Explanation

To go to a wiki page on your site:

1. In the Quick Launch bar, do one of the following:
   - Under Libraries, click the title of the wiki library that contains the page you want to go to.
   - Click All Site Content. Under Document Libraries, click the wiki library that contains the page you want to go to.
2. On the Ribbon, click the Page tab.
3. Click View All Pages.
4. Click the title link for the desired wiki page.

Do it!

C-4: Using a wiki page

Here's how	Here's why
1 In the Quick Launch bar, click **Sales Materials**	To open the wiki library.
2 Click the **Page** tab	
Click **View All Pages**	
3 Click the title link for your **## Outside Sales**	 To go to the wiki page you just created.
4 Observe the Outlander Spices logos	These are pictures, not links to the files. The files are in the Site Assets library.
5 Click **cookingvideo.wmv**	
Use the recommended settings for Windows Media Player	The video plays.
Close Windows Media Player	
6 In the Spice Price List, open the menu for the list item that corresponds with your assigned student number	 For example, Student01 would open Cayenne Red Pepper; Student02 would open Chili Powder; and so on.
Choose **Edit Item**	

7	Increase the price per unit by 10 cents	
8	Click **Save**	The new price is updated on the wiki page.
9	In the Quick Launch bar, click **Lists**	
10	Click **Spice Price List**	The change you made on the wiki page is reflected in this view of Spice Price List.
11	In the Quick Launch bar, click **All Site Content**	

Topic D: Asset libraries

Explanation

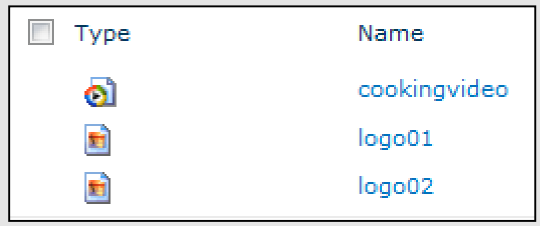
An *asset library* stores image, video, and audio files. It is similar to a picture library, but there are some important differences for users:

- An asset library uses the Ribbon. A picture library does not.
- When you upload multiple documents to an asset library, it uses the standard Office document uploader, which allows you to browse your entire network. A picture library uses the Microsoft Office Picture Manager, which requires you to add Picture Shortcuts to navigate to locations other than My Pictures.
- An asset library uses the image content type. A picture library uses the picture content type.
  - The image content type doesn't have a preview image URL field. The picture content type does.
  - Both content types have Name, Title, Preview, Keywords, Comments, Date Picture Taken, and Picture Size properties. The image content type also has Author and Copyright properties.
- An asset library doesn't display thumbnails of pictures in searches. A picture library does.

If you have Design or Full Control permissions, you can create asset libraries if you are running SharePoint Server 2010. SharePoint Foundation 2010 doesn't include asset libraries as content you can create. However, wiki pages use asset libraries to store their content. If you create a wiki library in SharePoint Foundation 2010, SPF will create an asset library to store the content of your wiki pages.

Do it!

D-1: Viewing the asset library for a wiki library

Here's how	Here's why
1 In the Quick Launch bar, click **Libraries**	
2 Click **Site Assets**	
3 Click **Sales Materials**	To open the Sales Materials wiki library.
4 Click **## Outside Sales**	Where ## is your assigned student number.  The video and two picture files you used on your wiki page are stored in this asset library. The asset library does not show thumbnail previews of the picture files.
5 Click the **Documents** tab	(Under Library Tools.) When an asset library is open, the Ribbon includes the Library Tools | Documents tab. You can work with the files in the asset library in ways similar to the ways you work with files in a document library.
6 Check **logo02**	The Download a Copy button becomes available. You can download a copy of this file from the Site Assets library.
7 Go to the Sales and Marketing home page	

Topic E: Form libraries

Explanation

A *form library* is a document library that holds Microsoft InfoPath forms. You can use forms to collect and display data in a structured format. For example, if team members want to go on a vacation, they need to fill out a Leave Application form and specify such information as the start and end dates for the leave, the type of leave (sick or privilege), and the reason for the leave. These forms are stored as XML files in form libraries.

Form libraries aren't created on a new Team site by default. A user with Design or Full Control permissions must create the library and add forms to it.

Filling out a form

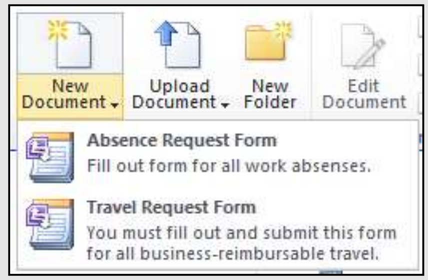
If you are running SharePoint Foundation 2010, clients need Microsoft InfoPath installed in order to fill out forms in a form library; otherwise, the form downloads to their computers. If you are running SharePoint Server 2010, users can load many InfoPath forms in their Web browsers without needing the Microsoft InfoPath application installed.

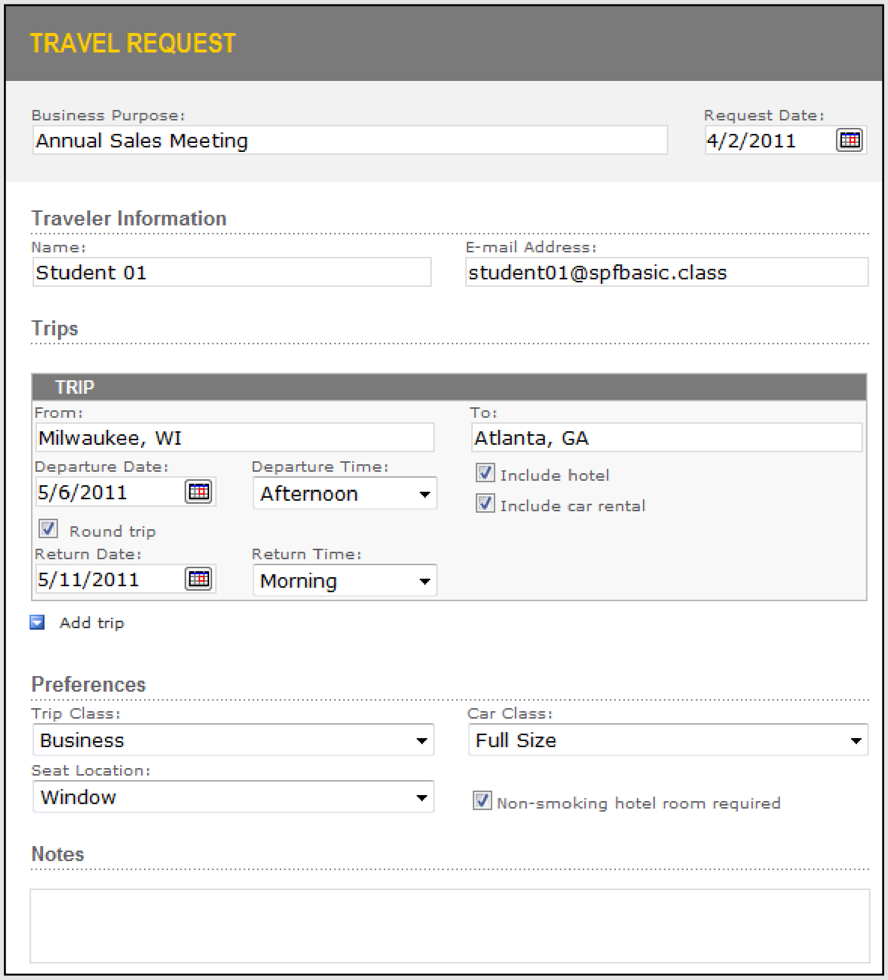
To fill out a published form:

1. Open the form library.
2. On the Library Tools | Documents tab, click the arrow on the New Document button. The forms that have been published and set as content types for the library are listed. Select the desired form.
3. Next to the title of the form you want to fill out, click the down-arrow and choose Edit in Microsoft InfoPath.
4. Fill out the form.
5. Choose File, Save. Specify a location and name for the file, and click Save.

Do it!

E-1: Filling out and saving a form

Here's how	Here's why
1 In the Quick Launch bar, under Libraries, click **Outlander Spices Forms**	This form library was created during class setup, and it contains two forms. During class setup, the forms were published to the SharePoint site and set as content types for the library.
2 On the Library Tools | Documents tab, click the **New Document** arrow	 There are two forms available in this library.
3 Choose **Travel Request Form**	The form opens in Microsoft InfoPath.
4 Fill out the form similar to the following graphic	Use your assigned student## information, and a request date and departure date in the future. Check Round trip to get the return information.


TRAVEL REQUEST

Business Purpose: Annual Sales Meeting
Request Date: 4/2/2011

Traveler Information
Name: Student 01
E-mail Address: student01@spfbasic.class

Trips

TRIP
From: Milwaukee, WI
To: Atlanta, GA
Departure Date: 5/6/2011
Departure Time: Afternoon
☑ Include hotel
☑ Include car rental
☑ Round trip
Return Date: 5/11/2011
Return Time: Morning

Add trip

Preferences
Trip Class: Business
Car Class: Full Size
Seat Location: Window
☑ Non-smoking hotel room required

Notes

5 On the File tab, click **Save**	By default, InfoPath saves completed forms in the form library.
6 In the File Name box, type **Student## Sales Meeting** Click **Save**	
7 On the File tab, click **Save As**	You can also save a copy of the form on your hard disk.
8 Navigate to your Documents library In the File name box, enter **Annual Sales Meeting Travel Request**	
9 Click **Save**	You can now print or send a copy of the completed form to others.

Working with forms

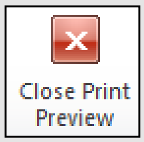
Explanation

In addition to saving the completed form to your computer, you can do the following tasks:

- Print the form.
- Send the form through e-mail.
- Create a file from the form.
- Export the form.

Do it!

E-2: Working with a completed form

Here's how	Here's why
1 Choose **File**	In Microsoft InfoPath.
Observe the Form Information page	You can change the permissions on the document and save a snapshot for your records.
2 Choose **Print**	(On the File tab.)
Click **Print Preview**	To view your travel request as it would look like printed.
Click 	
3 Choose **Save & Send**	(On the File tab.) To view the options you have for the form.
4 Under Send, click **Send Using E-Mail**	
Click **Read-Only Snapshot**	
5 Select a partner	
6 In the To box, type **student##@spfbasic.class**	Where ## is your partner's assigned student number.
In the Subject box, type **My travel request**	
In the Introduction box, type **This is the travel request I submitted for the annual sales meeting.**	
7 Click **Send**	

8 Close InfoPath	
9 Open Outlook	
On the Send/Receive tab, click **Send/Receive All Folders**	The travel request message your partner sent you is displayed in your Inbox.
10 Close Outlook	
11 From the title menu of your Student## Sales Meeting form, choose **Edit in Microsoft InfoPath**	
12 Change the first Departure Time from Afternoon to **Anytime**	
13 Click 	To save your changes to the copy in the form library.
Close InfoPath	
14 Close Internet Explorer	

Unit summary: Libraries

Topic G In this topic, you learned how to manage documents in **document libraries**. You uploaded single and multiple documents to the library. You created a document and worked with documents in a document library. You also deleted a document from a document library and then **restored** it to the library from the SharePoint Recycle Bin.

Topic H In this topic, you learned how to work with **picture libraries**. You created a folder in a picture library and then uploaded picture files to it. You viewed the pictures in a picture library as a **slide show**. You also edited a picture file. Finally, you deleted a picture file and a folder for storing pictures.

Topic I In this topic, you created a page in a **wiki library**. You changed the default text layout of a wiki page. You added content to a wiki page, including text, pictures, video, and a SharePoint list.

Topic J In this topic, you examined the contents of an **asset library** that stores content from the pages of a wiki library.

Topic K In this topic, you worked with forms in a **form library**. You filled out and saved a form, using Microsoft InfoPath. You also learned that you can print, e-mail, export, and create a file from a completed form.

Independent practice activity

In this activity, you'll practice working with the contents of SharePoint Foundation 2010 libraries.

The files for this activity are in Student Data folder **Unit 3\Unit summary**.

1 Open Internet Explorer.

2 Go to the Administration Team site at **http://spfbasicsql-sp/administration**.

3 In the Unit summary folder for this unit, create a copy of the Sales Letter.docx file called **Team ## Sales Letter**.

4 Upload the Team ## Sales Letter document to the Approved Customer Correspondence document library.

5 From within the Approved Customer Correspondence document library, open your Team ## Sales Letter document. Change "Chris Carr" to **Christopher Carr**. Save and close the file.

6 In the Unit summary folder for this unit, create a copy of the Outlander Logo file called **Team ## Logo**.

7 Upload the Team ## Logo file to the Company Logos picture library. Set the following properties:

- Title: Team ## Logo
- Date Picture Taken: *Today's date* 9 AM
- Description: This is the approved logo for the Team ## Sales group.
- Keywords: Team ##, logo

8 Add a new wiki page called **Team ## Admin** to the Outlander Admin wiki library.

9 Create the wiki page shown in Exhibit 3-15.

- Title text: Lucida Console, 36 pt, dark red, centered
- Title logo: Team ## Logo
- Calendar and Useful links text: Verdana, 12 pt, dark red
- Useful links URLs:

  SharePoint Workspace Help:
  http://office.microsoft.com/en-us/sharepoint-workspace
  Switching to the Office Ribbon:
  http://office.microsoft.com/en-us/excel-help/office-20101-migration-guides-HA101982272.aspx

Exhibit 3-15: The Team ## Admin wiki page

10 What components of the wiki page have been added to the Site Assets library for your Team ## Admin wiki page?

11 From the Invoice Requests form library, fill out an Invoice Request as shown in Exhibit 3-16.

- For the first two digits of the PO Number, use your assigned student number.
- For the Job Number, enter your assigned student number.
- Select yesterday's date for Work Completed.
- In the Requested By section, use your name, student##@spfbasic.class, STU##, and 414-555-12##.

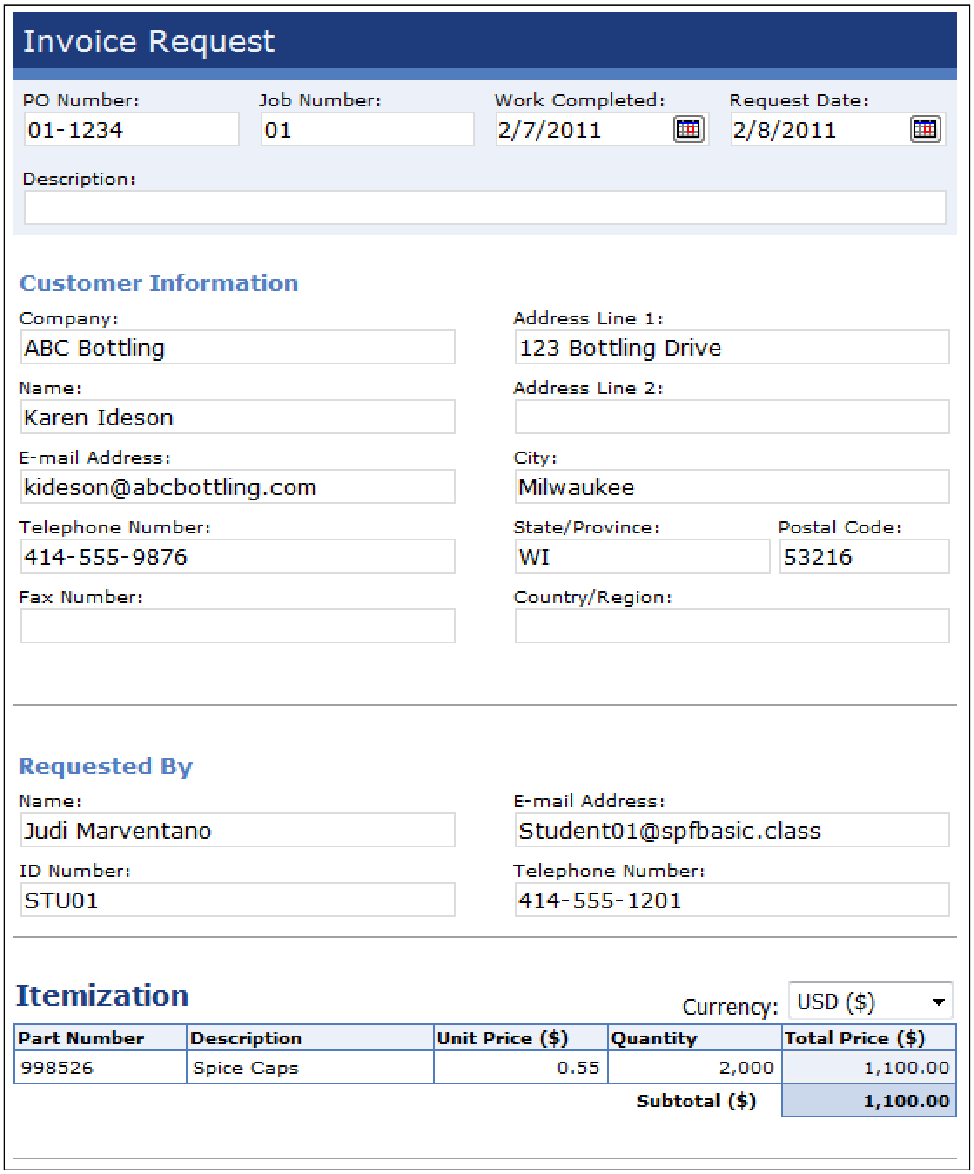


Exhibit 3-16: The Invoice Request form

12 Save the file in the Invoice Requests library as **Student## Request** and close InfoPath.

13 Close Internet Explorer.

Unit 4

Team communication

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

A Participate in a discussion.

B Respond to a survey.

C Contribute to a blog.

Topic A: Discussion boards

Explanation

A *discussion board* is a forum where the members of a team can discuss topics relevant to them. Discussion boards are *threaded*, which means that the original message and all of its replies are linked together. The benefit of a threaded discussion is that it is easier to follow the conversation.

By default, when you create a Team site, SharePoint creates a discussion board called *Team Discussion*. A user with Design or Full Control permissions can create additional discussion boards. Users with Contribute permissions can add a new discussion to an existing discussion board or reply to a discussion.

Starting discussions

If you have at least Contribute permissions, you can start a discussion. To start a discussion:

1. Go to the discussion board to which you want to add a discussion topic.
2. Open the <*Discussion Board*> - New Item dialog box, shown in Exhibit 4-1:
   - Click the “Add new discussion” link under the discussion list.
   - On the List Tools | Items tab, click New Item and choose Discussion.
3. Enter a subject (required) and a body (optional) for the new discussion.
4. Click Save.

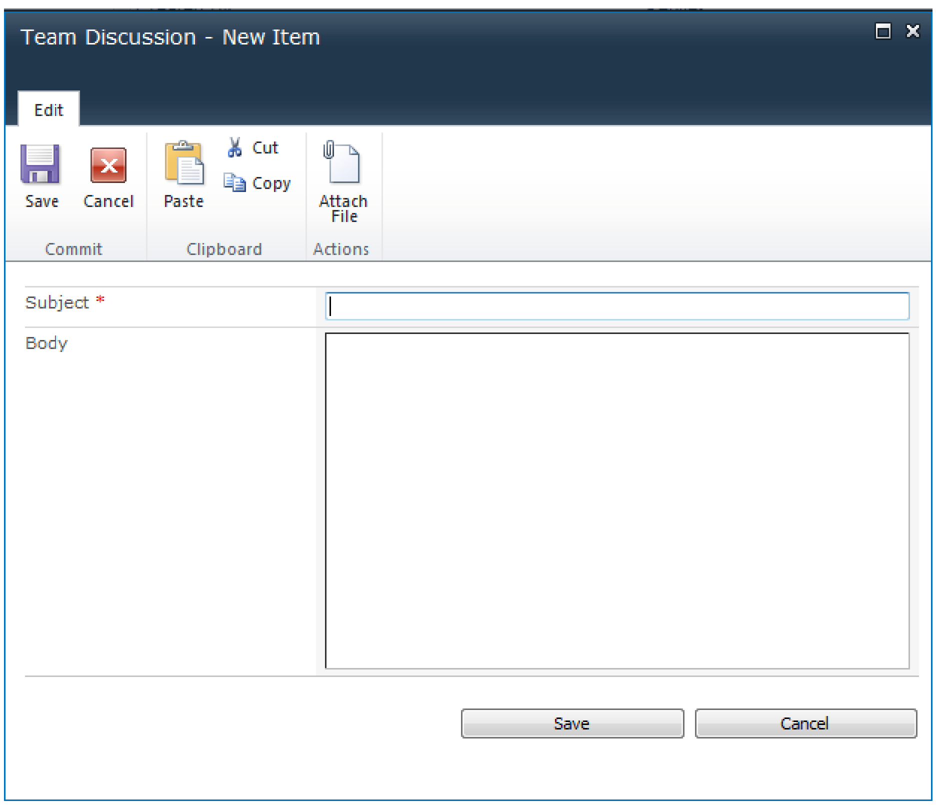


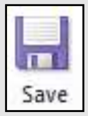
Exhibit 4-1: The Team Discussion - New Item dialog box

Do it!

A-1: Starting a discussion

The files for this activity are in Student Data folder **Unit 4\Topic A**.

Here's how	Here's why
1 Open Internet Explorer	Your home page is set to your site## Team site.
2 In the Quick Launch bar, click **Team Discussion**	
3 Click **Add new discussion**	To open the Team Discussion - New Item dialog box, shown in Exhibit 4-1.You'll a start a new discussion.
4 In the Subject box, enter **Strategy for the European market**	
5 In the Body box, enter **Comment on the social, economic, legal, and political analysis of Western Europe.**	This is your starting comment for the discussion. Users who participate in the discussion will reply to your comment and the comments of others.
6 Select the text you just entered in the Body box	Body is a Rich Text field. You can apply formatting by using the Editing Tools | Format Text tab on the Ribbon in the dialog box. (This tab doesn't appear on the Ribbon until you click in the Body box.)
7 Click 	The Text Color button is on the Editing Tools | Format Text tab.
Select **Blue**	
Insert a line return after the text	
8 Click the **Insert** tab	Under Editing Tools. You can insert tables, pictures, and links in the body of the discussion. You can also attach a file.
9 Click 	On the Editing Tools | Insert tab in the Team Discussion - New Item dialog box.
In the current topic folder, select **Western Europe**	(Student Data folder Unit 4\Topic A.) By default, the picture file will be saved in the Site Assets library.
Click **Open** and click **OK**	To insert the picture into the discussion item.
10 In the Title box, type **Map of Western Europe**	In the Team Discussion - New Item dialog box.
Click **Save**	

11 Using the Picture Tools | Design tab, change the Horizontal Size to **500 px**	The Picture Tools | Design tab appeared in the dialog box after you inserted a picture in the discussion item.
12 Click the **Edit** tab	On the Ribbon in the dialog box.
13 Click 	To save and close the discussion item.

Discussion threads

Explanation

When you save a new discussion, the discussion topic item appears on the discussion board page. When someone enters the first discussion reply, SharePoint starts a discussion thread. A discussion *thread* is a discussion topic item and the replies to it, as shown in Exhibit 4-2. On the discussion board, you click the title of a discussion topic to display its discussion thread.

Exhibit 4-2: A discussion page

Do it!

A-2: Viewing a discussion thread

Here's how	Here's why
1 Go to the Sales and Marketing Team site	http://spfbasicsql-sp/salesandmarketing
2 In the Quick Launch bar, click **Discussion on Market Research**	
3 Click **Objectives**	
4 Observe the discussion thread	You can reply to the original discussion topic item or to another user's reply.
5 Return to your site## Team site	Click the Home button.

Responding to discussion topics or replies

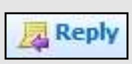
Explanation

To respond to a discussion topic or another user's reply to a discussion topic:

1. Go to the discussion board.
2. Click the title of the discussion to which you want to respond.
3. Next to the item you want to respond to, click Reply.
4. In the dialog box that opens, enter and save your reply.

Do it!

A-3: Responding to a discussion item

Here's how	Here's why
1 On the Quick Launch bar, click **Team Discussion**	On your site## Team site.
2 Click **Strategy for the European Market**	
3 Click 	
4 In the Body, type **Please post links to pertinent and current online articles.**	
5 Click 	
6 Scroll down	Your reply is posted under the item you replied to.

Editing discussion replies

Explanation

After you reply to a discussion item, you might want to edit your reply. You can edit the text, attach a file, and insert tables, pictures, and links.

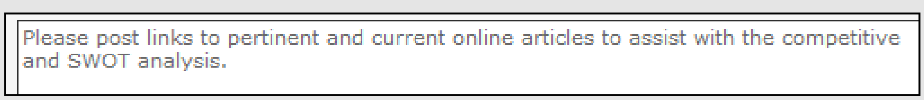
To edit a discussion reply:

1. On the discussion board, click the title of the discussion topic to open it.
2. Locate the reply you want to edit.
3. Click the View Properties link for the reply, as shown in Exhibit 4-3.
4. Make the desired changes.
5. Click Save to save the changes.

Exhibit 4-3: Editing a discussion reply

Do it!

A-4: Editing a discussion reply

Here's how	Here's why
1 Next to your response, click **View Properties**	
2 Click 	You'll modify the comment you added.
3 Edit the comment to include **to assist with the competitive and SWOT analysis.**	SWOT stands for Strengths, Weaknesses, Opportunities, and Threats.
	
4 Click 	

Deleting discussion topic replies

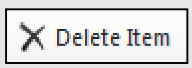
Explanation

You can delete a reply to a discussion topic if it's no longer relevant to the discussion. When you delete a reply, any replies to that reply are also deleted. To delete a discussion reply:

1. On the discussion board, click the title of the discussion topic to open it.
2. Locate the reply you want to delete.
3. Next to the reply you want to delete, click View Properties.
4. Click Delete Item on the View tab.

Do it!

A-5: Deleting a discussion reply

Here's how	Here's why
1 On the "Strategies for European market" discussion board, next to your reply, click **View Properties**	
2 Click 	A message box appears, prompting you to confirm the deletion.
3 Click **OK**	To move the discussion reply to the SharePoint Recycle Bin. If you delete a discussion reply, all the replies to it are also deleted. As with other deleted items on the SharePoint site, you can restore the reply and its replies from the Recycle Bin if you need to.

Deleting discussion topics

Explanation

You can delete an entire discussion topic if it's no longer relevant to the team. When you delete a discussion topic, any replies to it are also deleted. To delete a discussion topic:

1 On the discussion board, click the arrow next to the title of the discussion topic you want to delete, as shown in Exhibit 4-4.

2 Choose Delete Item.

3 Click OK.

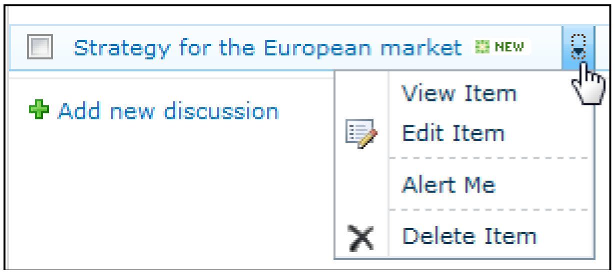


Exhibit 4-4: Deleting a discussion topic

Do it!

A-6: Deleting a discussion topic

Here's how	Here's why
1 On the Team Discussion board, open the menu for "Strategy for the European market"	
2 Choose **Delete Item**	
3 Click **OK**	The discussion topic is placed in the SharePoint Recycle Bin. You can restore it if you need to.
4 Return to your site## home page	

Topic B: Surveys

Explanation

A *survey* is a questionnaire that you can use to collect standard information from a group of people. In SharePoint Foundation, the default Team site doesn't have a survey configured. A user with Design or Full Control permissions can create and publish a survey to know about the views and opinions of your team on a specific subject. If you have Contribute permissions, you can respond to a survey.

Responding to surveys

To respond to a survey:

1 Open the survey:
   - In the Quick Launch bar, under Surveys, click the link to the survey.
   - In the Quick Launch bar, click All Site Content. Under Surveys, click the link to the survey.

2 Click "Respond to this Survey."

3 Answer to the questions listed in the survey.

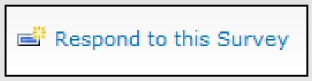
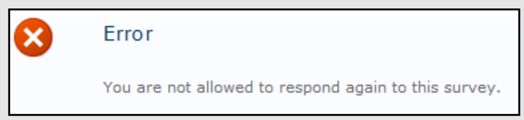
4 Click Finish.

When the designer of a survey creates each question, he or she selects the type of response for the question. The following table describes the types of responses you might encounter when responding to a survey. The designer also decides whether a user can respond to a survey more than once.

Response type	Used when you want team members to…
Single line of text	Respond to the survey in a few words.
Multiple lines of text	Respond to the survey in one or more sentences.
Choice (menu to choose from)	Select from a list of options.
Rating Scale (a matrix of choices or a Likert scale)	Choose a response from a numeric scale. For example, you can ask the team members to choose a response from a scale of 1 to 10.
Number (1, 1.0, 100)	Specify a numerical value.
Currency ($, ¥, £)	Specify a monetary value.
Date and Time	Specify a date or time value.
Lookup (information already on the site)	Choose responses from a list on the site.
Yes/No (checkbox)	Specify whether the information is true or false.

Do it!

B-1: Responding to a survey

Here's how	Here's why
1 Go to the Sales and Marketing Team site	http://spfbasicsrv/salesandmarketing
2 In the Quick Launch bar, under Surveys, click **Employee Satisfaction Survey**	This survey was created during class setup.
3 Click 	
4 Observe the Employee Satisfaction Survey - New Item dialog box	There are three questions in this survey. Each question requires an answer. The first and third questions provide a drop-down list of options. The second question requires you to enter your opinion in the form of text.
5 Provide answers to the survey	
6 Click **Finish**	
7 Attempt to respond to the survey a second time	 You receive an error message. This survey was designed to allow each user a single response.
8 Click **Go back to site**	

View survey responses

Explanation

After users have responded to a survey, you can display a graphical summary of the responses or display all survey responses.

To display the graphical summary, click the “Show a graphical summary of responses” link on the survey page or choose Graphical Summary from the View menu. An example of a graphical summary is shown in Exhibit 4-5.

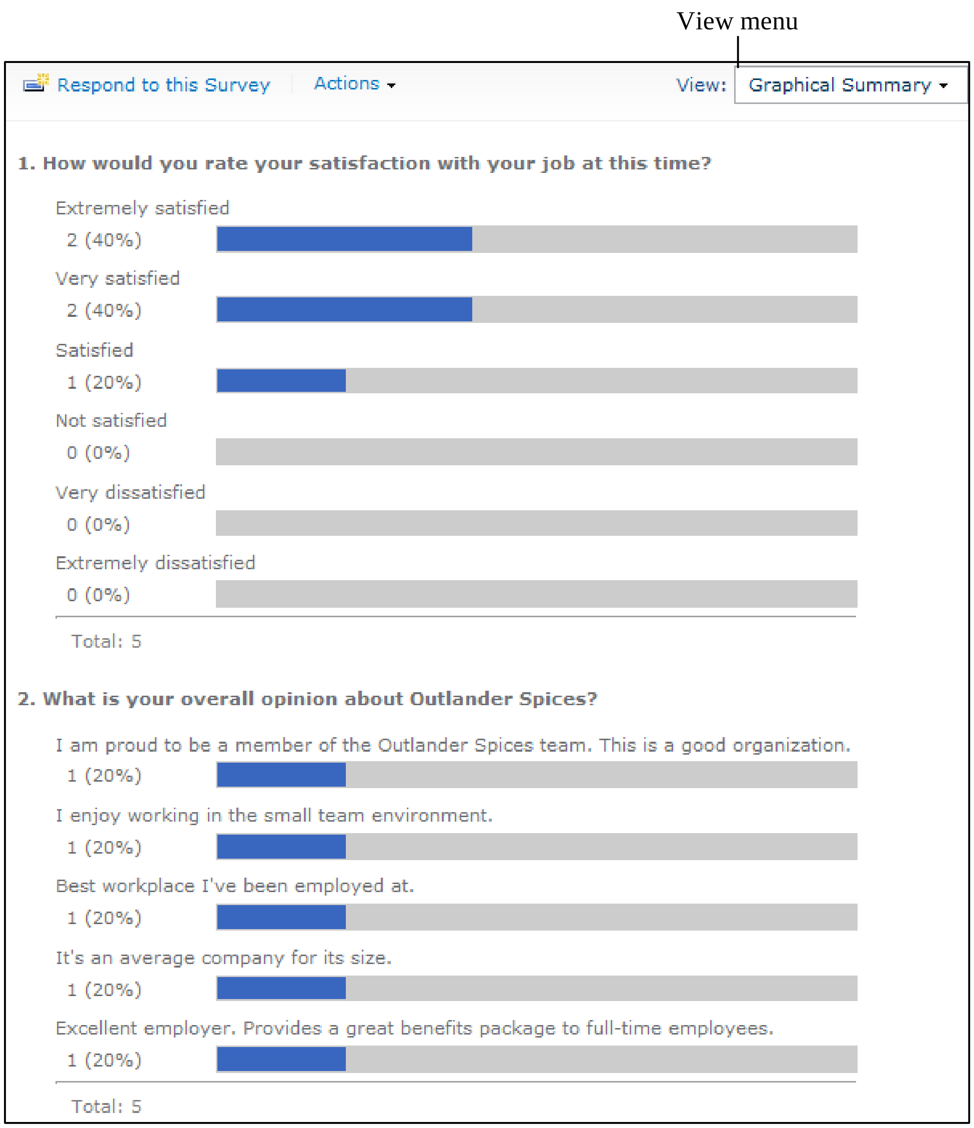
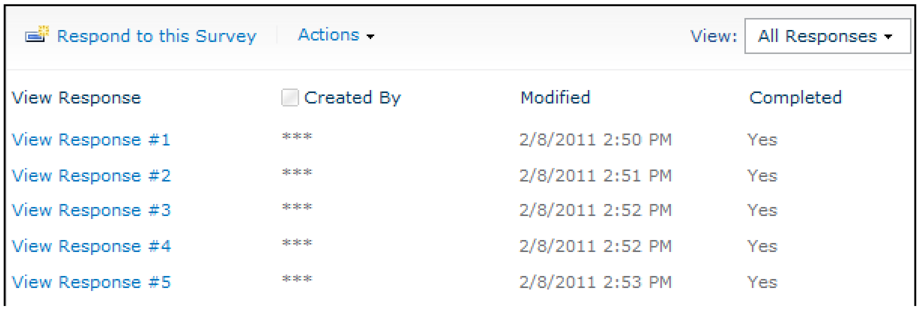


Exhibit 4-5: Graphical summary of a survey

To display all responses to a survey, click the “Show all responses” link on the survey page or choose All Responses from the View menu. The responses are listed in the order in which they were received, as shown in Exhibit 4-6. You can display each individual response by clicking its title link.



View Response	Created By	Modified	Completed
View Response #1	***	2/8/2011 2:50 PM	Yes
View Response #2	***	2/8/2011 2:51 PM	Yes
View Response #3	***	2/8/2011 2:52 PM	Yes
View Response #4	***	2/8/2011 2:52 PM	Yes
View Response #5	***	2/8/2011 2:53 PM	Yes

Exhibit 4-6: List of survey responses

Surveys can be set up to allow users to read all responses to the survey or just their own. Surveys can also be configured to allow users to edit and delete all responses to the survey, just their own responses, or none. In addition, surveys can be set up to hide the user names of the respondents, as shown in Exhibit 4-6.

Do it!

B-2: Viewing survey responses

Here's how	Here's why
1 On the Employee Satisfaction - Overview page, click **Show a graphical summary of responses**	Observe the summary for questions 1 and 3. You can see how many individual respondents chose each option and what percentage of respondents chose each option. The second question was a text-based answer. You can read each response. It's very unlikely you will have two identical answers.
2 From the View menu, choose **All Responses**	The survey was designed to be anonymous, so the Created By column doesn't show who submitted each response.
3 Click any one of the View Response # title links	There is a button to edit the response. The survey was set up to allow users to edit their own responses. If you attempt to edit another user's response, you'll receive an access-denied error message when you click Finish.
4 Click **Close**	

Topic C: Blog pages

Explanation

A *blog* is a SharePoint feature designed for an individual user or group of users to write material, such as commentaries or descriptions of events, and post images, links, and videos. Blog items are called *posts* and are displayed on the blog page in reverse chronological order—newest to oldest. Blogs allow other users to comment on posts, thereby encouraging discussion and the sharing of thoughts and opinions. SharePoint blogs also include RSS feeds to keep blog subscribers up-to-date on new posts.

By default, there is no blog on a Team site. Users with Design or Full Control permissions can create a blog.

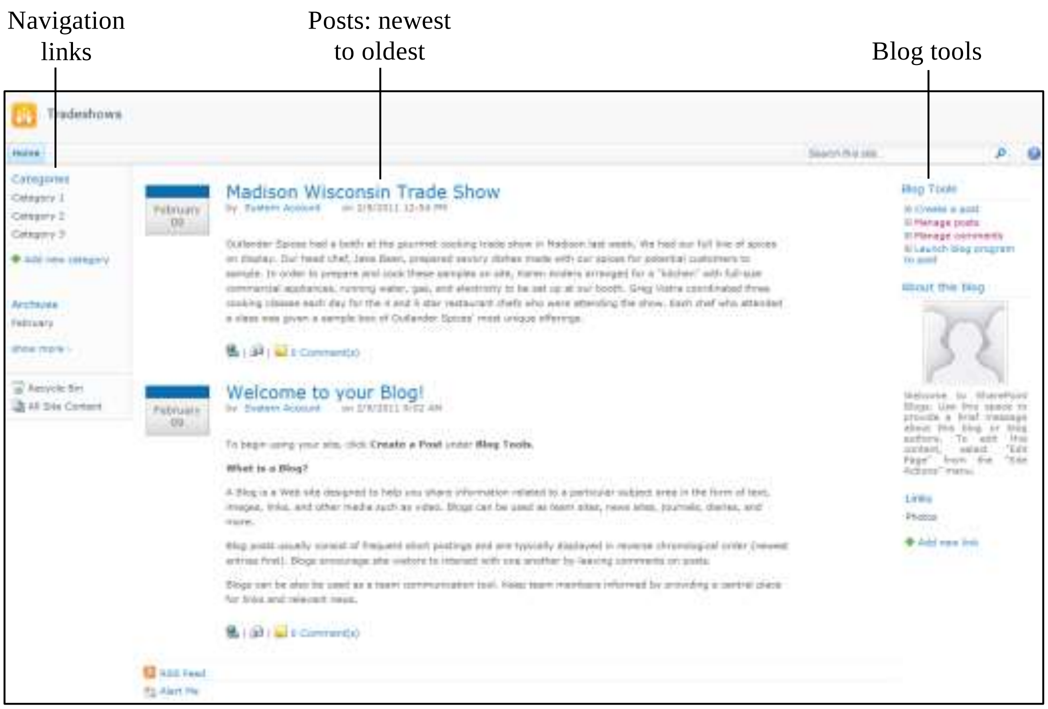


Exhibit 4-7: A SharePoint blog

Users with Contribute permissions can comment on blog posts. Here’s how:

1 Go to the blog site:
   - In the Quick Launch bar, under Sites, click the blog link.
   - On the All Site Content page, under Sites and Workspaces, click the blog link.
   - Enter the blog’s URL in your browser’s Address bar.

2 Under the blog post you want to comment on, click the Comment link.

3 If desired, enter a title for your comment. As shown in Exhibit 4-8, Title is not a required field.

4 In the Body field (required), enter the text of your comment.

5 Click Submit Comment.

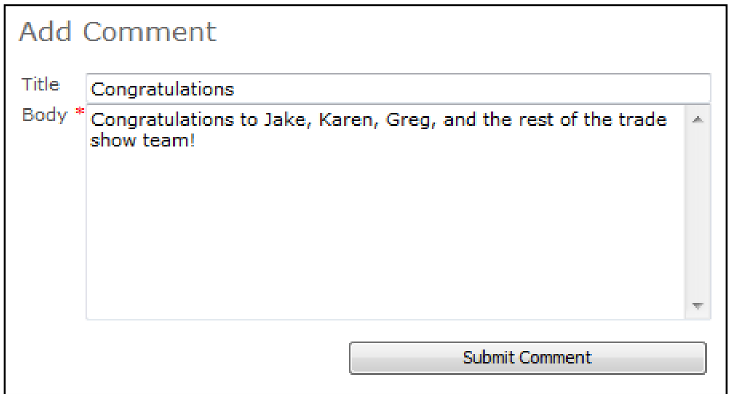


Exhibit 4-8: Adding a comment to a blog post

Do it!

C-1: Commenting on a blog post

Here's how	Here's why
1 In the Quick Launch bar, under Sites, click **Tradeshows**	This blog was created during class setup.
2 Under Madison Wisconsin Trade Show, click **0 Comment(s)**	
3 In the Title field, type **Congratulations**	
4 In the Body field, type **Congratulations to Jake, Karen, Greg, and the rest of the trade show team!**	
5 Click **Submit Comment**	

Editing and deleting comments

Explanation

You can edit or delete the comments you submit to a blog post. To edit or delete a comment:

1. Go to the blog site.
2. Under the blog post where your comment is submitted, click # Comment(s).
3. Next to the comment you want to modify, click Edit.
4. To edit the comment, make any desired changes and click Save.

   To delete the comment, click Delete Item and click OK.

Do it!

C-2: Editing and deleting a comment

Here's how	Here's why
1 Observe the comments	There is an Edit button next to your comment. You can edit the comments you post. If you need to refresh the page to see other students' comments, click Madison Wisconsin Trade Show.
2 Next to your comment, click 	
3 Change the Title to **Kudos!**	
4 Click **Save**	To save the change to your comment.
5 Next to your comment, click 	
6 Click 	
7 Click **OK**	To delete your comment
8 Click **Home**	To return to the Blog home page.

Creating blog posts in SharePoint

Explanation

If you've been assigned Contribute or higher permissions, you can create blog posts. To create a blog post:

1 Under Blog Tools, click "Create a post."
2 Enter a title for your blog post. As shown in Exhibit 4-9, Title is a required field.
3 In the Body field, enter the text of your post. You can use the Editing Tools | Insert tab to add tables, pictures, links, and files to your post.
4 If desired, select a Category for your post and click Add. By default, there are three categories: Category 1, Category 2, and Category 3. The creator of the blog can change these.
5 Select a Published date and time. This is a required field.
6 Click Save or click Save As Draft. By default, blog posts require content approval before being listed on the site. If the blog requires content approval, you will only be able to save your post as a draft.

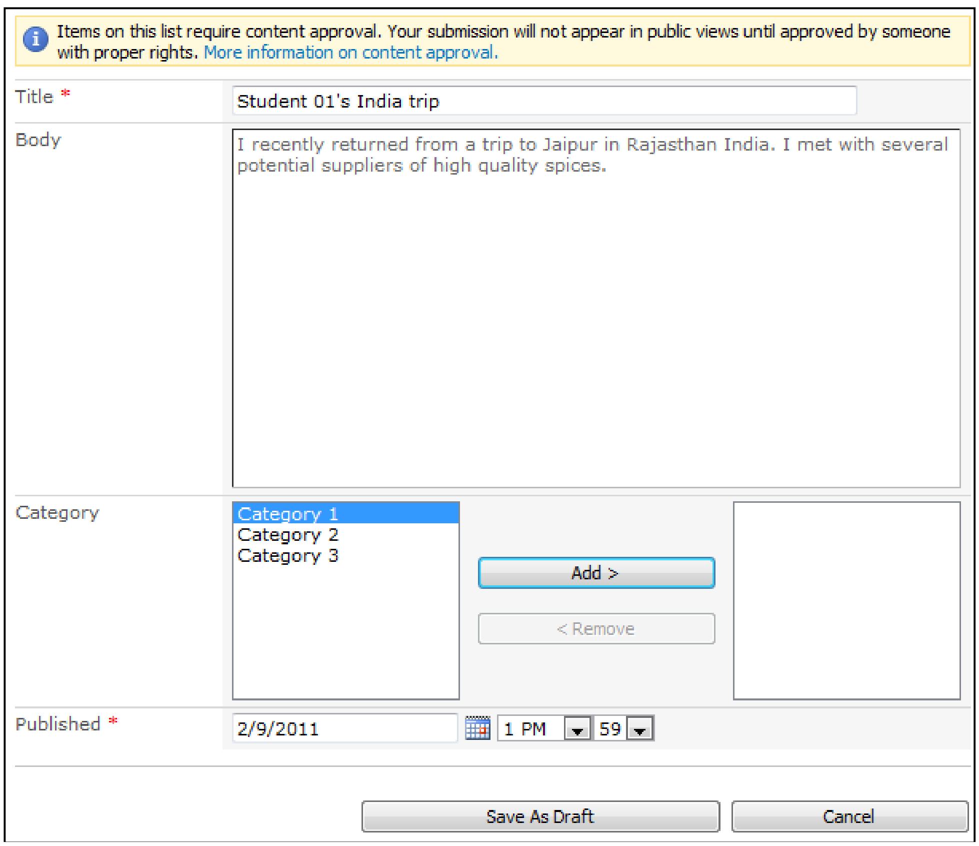
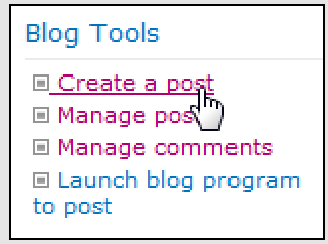


Exhibit 4-9: Creating a blog post

Do it!

C-3: Creating a blog post

The files for this activity are in Student Data folder **Unit 4\Topic C**.

Here's how	Here's why
1 Under Blog Tools, click **Create a post**	
2 In the Title box, type **Student ##'s India trip**	
3 In the Body box, type **I recently returned from a trip to Jaipur in Rajasthan India. I met with several suppliers of high-quality spices.**	
4 On the Editing Tools | Insert tab, click 	
5 Browse to select **IndiaMap.jpg** from the current topic folder	By default, the picture is saved in the Photos library.
6 Click **OK**	
7 In the Title box, type **India Map ##**	
8 Click **Save**	
9 On the Edit tab, click **Save As Draft**	This blog requires administrative approval before new posts are displayed on the blog.

Creating blog posts in Word

Explanation

You can also create a blog post by using a word processing or blogging application such as Microsoft Word:

1 Under Blog Tools, click “Launch blog program to post.”

2 If this is your first time using the blog program, click OK to register your SharePoint account. Click Yes to acknowledge that data you send might be visible to others. Click OK to acknowledge that registration was successful.

3 If desired, click [Enter Post Title Here] and type your title.

4 Below the title line, enter the text of your blog post.

5 Use the Blog Post tab to format your text. You can also use the Blog Post tab to insert a category, open an existing post, and manage registered blog accounts.

6 Use the Insert tab to add tables, pictures, clip art, shapes, SmartArt, charts, screenshots, hyperlinks, WordArt, or symbols to your post.

7 When you’re finished creating your post, click the Blog Post tab. Click Publish and choose Publish or Publish as Draft. A sample of a blog post creating in Microsoft Word is shown in Exhibit 4-10.

8 Close Word.

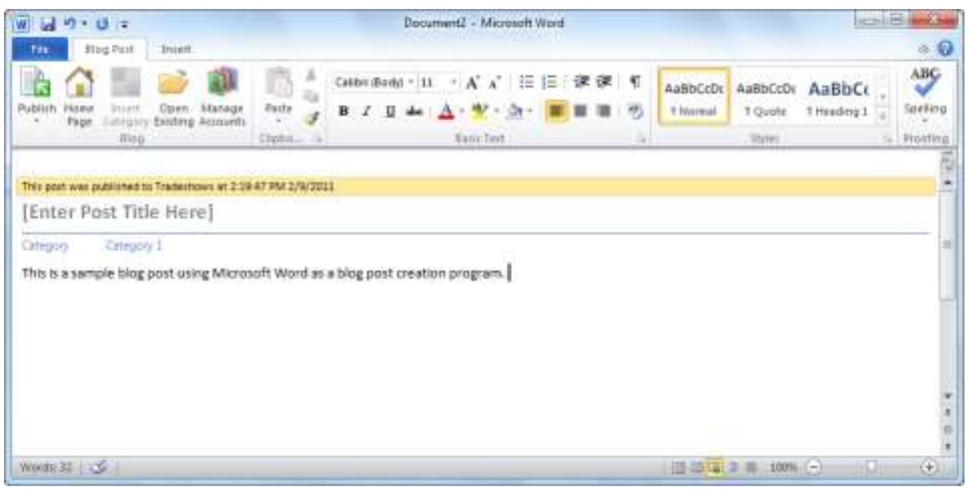


Exhibit 4-10: Creating a blog post in Microsoft Word

Do it!

C-4: Creating a blog post in Microsoft Word

The files for this activity are in Student Data folder **Unit 4\Topic C**.

Here's how	Here's why
1 Under Blog Tools, click **Launch blog program to post**	
2 Switch to Microsoft Word	Click its icon in the Windows taskbar.
3 Click **OK**	To register your SharePoint account.
Click **Yes** twice and then click **OK**	To acknowledge that data Word sends to SharePoint might be visible to others and then acknowledge that your account registration was successful.
4 Click **[Enter Post Title Here]**	
Type **Student ##'s India trip**	
5 Place your cursor below the title	
Type **I recently returned from a trip to Jaipur in Rajasthan India. I met with several suppliers of high-quality spices.**	
Press ↵ ENTER	
6 Click the **Insert** tab	On the Ribbon.
Observe the buttons	You can insert tables, pictures, clip art, shapes, SmartArt, charts, screenshots, hyperlinks, WordArt, and symbols in your post.
7 On the Insert tab, click **Picture**	
Browse to select **IndiaMap.jpg** from the current topic folder	Student Data folder Unit 4\Topic C.

8	On the Blog Post tab, click the **Publish** arrow	 To display a menu.
	Choose **Publish as Draft**	If you choose Publish, you'll receive an error message due to the content approval settings on the blog.
	Click **Yes**	To acknowledge that information you send from Word to the server isn't secure. You receive a message that your post was published.
9	Close Word, and don't save your work	

Managing blog posts

Explanation

With Contribute permissions, you can edit and delete your blog posts, regardless of their approval status. When you delete a blog post, SharePoint also deletes the comments to the post.

To edit a blog post:

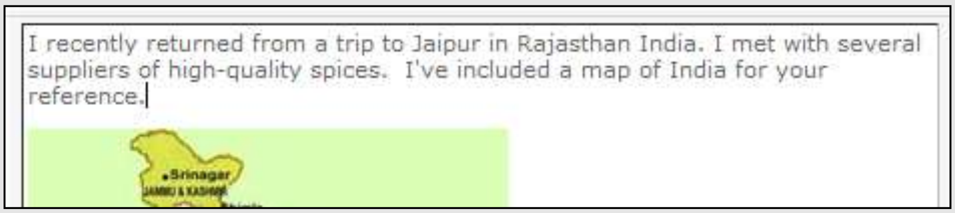
1. Under Blog Tools, click Manage Posts.
2. Click the icon in the Edit column or choose Edit Item from the post-title menu.
3. Make your desired changes.
4. Click Save or Save As Draft.

To delete a blog post:

1. Under Blog Tools, click Manage Posts.
2. Click the icon in the Edit column and click Delete Item, or choose Delete Item from the post-title menu.
3. Click OK.

Do it!

C-5: Editing and deleting a blog post

Here's how	Here's why
1 Under Blog Tools, click **Manage posts**	
2 Next to the newest Student ##'s India trip post, click 	
3 Add the following text to the end of the Body text, as shown: **I've included a map of India for your reference.**	
	
4 On the Edit tab, click **Save As Draft**	
5 Open the title menu for the first Student ## India trip post you submitted	
6 Choose **Delete Item**	
7 Click **OK**	
8 Close Internet Explorer	

Unit summary: Team communication

Topic A In this topic, you participated in a **discussion**. You started a discussion, viewed a discussion, and **responded** to a discussion item. You also learned how to edit and delete discussion replies, as well as delete an entire discussion topic.

Topic B In this topic, you responded to a **survey**. You learned how to view survey responses as a list or in graphical summary format.

Topic C In this topic, you contributed to a **blog**. You **commented** on a blog post and created your own **blog post**, using both the SharePoint Foundation interface and Microsoft Word. You edited and deleted comments you made regarding a blog post. You also learned how to edit and delete blog posts.

Independent practice activity

In this activity, you'll practice working with the Team Communication features of SharePoint Foundation—discussion boards, surveys, and blogs.

The files for this activity are in Student Data folder **Unit 4\Unit summary**.

1. Open Internet Explorer.
2. Go to the Administration Team site at **http://spfbasicsql-sp/administration**.
3. To the Team Discussion board, add a discussion called **Student##'s Group Discussion**. In the Body of the new discussion item, type **I found this blog on Mexican cooking.** Insert a link called **Mexican Flavors**, with this URL: **http://mexicanfood.about.com/od/flavorsofmexico/a/ Mexicanflavors.htm**
4. Pick a partner. Verify that the link in his or her discussion works, and then compose the following reply: **Good blog. Thanks for sharing.**
5. Respond to the Benefits survey.
6. On the "Updates from the Admin Team" blog, read the Software Updates blog post. Comment on the post.
7. Create your own blog post suggesting that the company add White Tea to its line of teas. Insert the White Tea photo. Add a link to the White Tea Guide's "Health Benefits of White Tea" article at **http://www.whiteteaguide.com/whiteteahealthbenefits.htm**.
8. View the graphical summary of the Benefits survey results.
9. Delete your Student##'s Group Discussion item.
10. Delete your blog post.
11. Close Internet Explorer.

Unit 5
Views

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

A Change page views.

B Create personal views.

Topic A: Page views

Explanation

A *view* is a feature of SharePoint used to display information in various types of layouts. There are two types of views—public and personal. A *public view* is available to all site users, whereas a *personal view* is available only to the user who creates it. The default public views available depend on the list or library you are working with. Most lists and libraries contain a Standard view and a Datasheet view. Users with Design or Full Control permissions can create additional public views.

Standard and Datasheet views

A *Standard view* is a tabular view, which presents information in columns and rows, similar to a printed worksheet. The information cannot be edited in this view. A list displayed in Standard view is shown in Exhibit 5-1.

Last Name	First Name	Company	Business Phone	Home Phone	E-mail Address
Kling	Mark	Outlander Spices	877-555-1201		student02@spfbasic.class
Marventano	Judi	Outlander Spices	877-555-1202		student01@spfbasic.class
Reed	Carl	Outlander Spices	877-555-1203		student03@spfbasic.class

Exhibit 5-1: A list in Standard view

A *Datasheet view* presents information in a similar column-and-row format, but the information can be edited directly in the view. A list in Datasheet view is shown in Exhibit 5-2.

Note: In order for SharePoint to display information in Datasheet view, a compatible spreadsheet program, such as Microsoft Excel 2010, must be installed. If a spreadsheet program isn't installed or the installed program isn't compatible with SharePoint, an error message will be displayed when you try to display the list or library in Datasheet view.

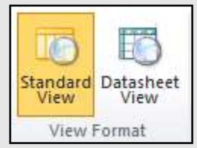
Last Name	First Name	Company	Business Phone	Home Phone	E-mail Address
Kling	Mark	Outlander Spices	877-555-1201		student02@spfbasic.class
Marventano	Judi	Outlander Spices	877-555-1202		student01@spfbasic.class
Reed	Carl	Outlander Spices	877-555-1203		student03@spfbasic.class
*					

Exhibit 5-2: A list in Datasheet view

Each list item might have more property fields than are shown in Datasheet view. If you want to edit those fields, you will need to open the item itself for editing.

Do it!

A-1: Using Standard and Datasheet views

Here's how	Here's why
1 Open Internet Explorer	Your home page should be set to your Site## Team site.
2 In the Quick Launch bar, under List, click **Tasks**	
3 Click the List Tools | **List** tab	 This list provides both Standard view and Datasheet view.
4 Observe Standard view	Items aren't directly editable. To edit an item, you must open it for editing.
5 Click 	The information is displayed in a spreadsheet format and can be edited.
6 For the "Submit expense report" task, change % Complete to **50%**	
7 Click outside the % Complete field	To enter the percentage.
8 Click 	

9	In the new row, enter the following information: Title: **Reserve sales meeting location** Assigned To: **Student ##** (## is your assigned student number) Status: **Not Started** Priority: **(1) High** Due Date: *tomorrow's date* % Complete: **0%** Press ↵ ENTER	(You can press Tab to move between fields.) Some fields have drop-down lists that you can use to make selections.
10	Go back to Standard view	
11	Open the **Reserve sales meeting location** task	
12	Are there any properties that can't be added in Datasheet view? Click **Close**	

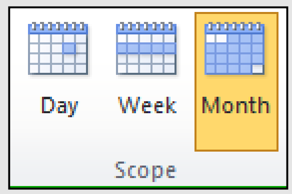
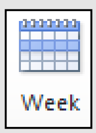
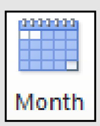
Calendar view

Explanation

Some SharePoint content types include unique views. For example, the Calendar content type includes *Calendar view*, which displays event items as part of a monthly calendar. You can change the scope of Calendar view to display the events of a single day or a week.

Do it!

A-2: Changing the scope of Calendar view

Here's how	Here's why
1 In the Quick Launch bar, under Lists, click **Calendar**	
2 Click the Calendar Tools | **Calendar** tab	 You can change the view's scope by clicking the Day, Week, and Month buttons.
3 Click 	To change the scope of Calendar view to a single day.
4 Click 	To change the scope of Calendar view to a week.
5 Click 	To return the view's scope to a month.

Gantt view

Explanation

Similar to Calendar view, *Gantt view* displays items based on date columns. However, Gantt view displays the items in a Gantt chart. As shown in Exhibit 5-3, a *Gantt chart* is a horizontal bar chart showing the actual and projected amounts of time involved in completing a particular task or project. In SharePoint Foundation, when you create a Gantt view, each item is displayed as if it were a task in a larger project. By default, project task lists use Gantt view.

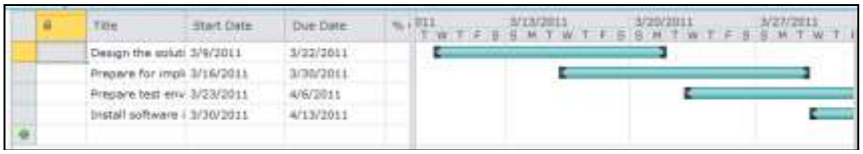
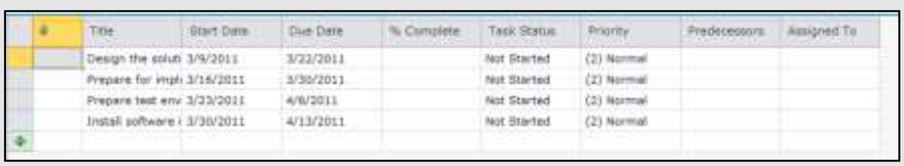


Exhibit 5-3: Gantt view of a project task list

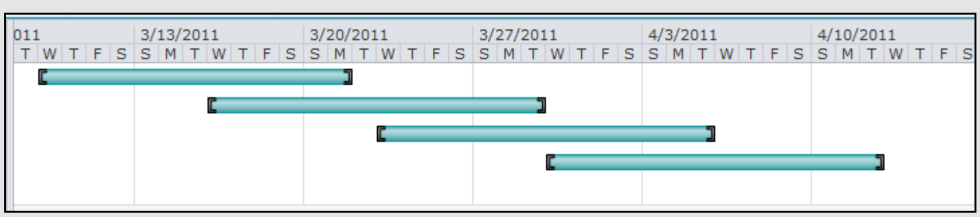
Do it!

A-3: Observing a project task list in Gantt view

Here's how	Here's why
1 Go to the Sales and Marketing site	
2 In the Quick Launch bar, under Lists, click **Business Systems Manager Implementation**	This is a project task list that was created during class setup.
3 Observe the left pane	This is similar to Datasheet view.



	You can modify and add items. You can resize the pane, scroll the pane, and resize the columns.
4 Observe the right pane	



	In this pane, each project task item is shown in a horizontal bar chart organized by start and due date. You can scroll to the pane to view the later dates.

Sorting

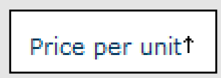
Explanation

Sorting is a feature that you can use to rearrange items in a view. You can sort items in ascending or descending order based on any column. To sort items in a view, click the down-arrow next to the heading of the column you want to sort by. The first two items in the drop-down menu are your sort options. (Below that are the filtering options, if they are available.) The sorting options will vary based on the content of the column. Common option pairs are Ascending and Descending, A on Top and Z on Top, and Smallest on Top and Largest on Top.

When a list or library is sorted by a particular column, the column heading will have an arrow next to it. An up arrow indicates that the list is sorted by that column in ascending order. A down arrow indicates that the list is sorted by that column in descending order.

Do it!

A-4: Sorting items in a view

Here's how	Here's why
1 In the Quick Launch bar, click **Lists**	
2 Click **Spice Price List**	To display the list.
3 Next to the "Price per unit" column heading, click the down-arrow	
4 Choose **Smallest on Top**	 To sort the list of spices from the least expensive to the most expensive. An upward-pointing arrow appears next to the "Price per unit" column heading, indicating that the list is sorted on that column in ascending order.
5 Sort the list by most expensive to least expensive spices	
6 Sort the list by **Country of origin**, **A on Top**	The sorting order of most expensive to least expensive is not maintained.

Filtering

Explanation

You can use *filters* in a view to hide items that you don't want to see. A filtered list displays only the rows that meet the criteria you specify for a column or columns. To apply filters to a view, display a drop-down list by clicking the down-arrow next to the heading of the column you want to filter by. The filter options are the values listed in that column. Select the desired value to show items with only the selected value.

You can apply multiple column filters at the same time. When a list or library has a filter applied, a funnel icon appears next to each column that has a filter applied.

Some lists, such as Tasks, have predefined filters or sorting options you can apply. To select a predefined filter or sort, click the List Tools | List tab; then, from the Current View drop-down list, select the desired option. Exhibit 5-4 shows the options for filtering and sorting the Tasks list.

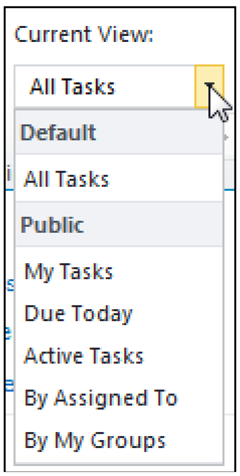


Exhibit 5-4: The default filter views for a Tasks list

Do it!

A-5: Filtering items in a view

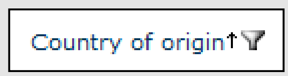
Here's how | **Here's why**

1 Click the down-arrow next to "Country of origin"

To display a list of filter options. You can filter the list to show only items from a particular country.

2 Select **India**

3 Observe the "Country of origin" column heading



It shows that it is sorted in ascending order and has a filter applied.

4 Filter the Variety by **Ground**

Notice that the first filter remains on the list. The second filter is applied to the first filtered list, not to the entire list.

5 Open the "Country of origin" drop-down list

It shows just four countries. These are the four countries that also meet the Variety = Ground filter criterion.

6 Select **Clear Filter from Country of origin**

7 What filter and sort order are applied to the Spice Price List?

Spice	Variety	Country of origin	Price per unit
Cloves	Ground	Brazil	$9.48
Cumin	Ground	Egypt	$5.55
Cayenne Red Pepper	Ground	Guiana	$6.08
Ginger	Ground	India	$5.68

8 Remove the filter and sort the list alphabetically by spice name

9 In the Quick Launch bar, click **Tasks**

10 Click the List Tools | **List** tab

11 Display the **Current View** list

You can apply a filter that shows only the tasks that are public tasks, your tasks, tasks due today, or active tasks. You can also sort the tasks by who they are assigned to or by your groups.

12 Return to the Sales and Marketing home page

Topic B: Personal views

Explanation

Personal views can help you find information in lists or libraries more easily, especially if the list or library contains more than one screen of items. If you have Contribute permissions, you can create personal views that display only the items pertinent to you. When you create a personal view, you base it on a Standard, Datasheet, Calendar, or Gantt view, as shown in Exhibit 5-5.

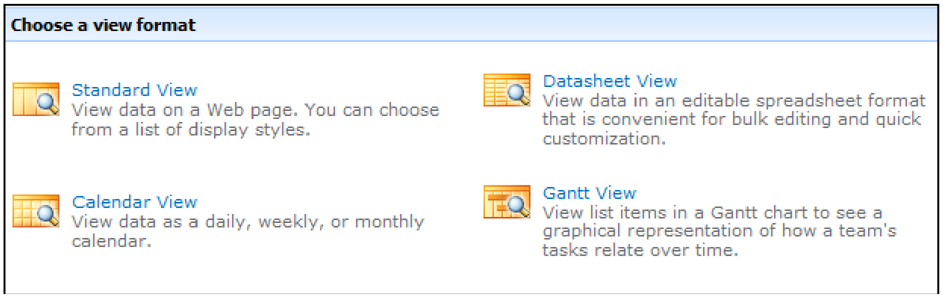


Exhibit 5-5: View formats

To create a personal view:

1. Open the list or library for which you want to create a personal view.
2. On the List Tools | List tab, click the Create View button.
3. Click the view format you want to use for your personal view (Standard, Datasheet, Calendar, or Gantt). A page of options for that view format will be displayed.
4. In the View Name box, enter a name for your view. It should be descriptive, but short.
5. Under View Audience, the Create a Personal View option is selected. For users with Contribute permissions, the Create a Public View option is grayed out.
6. Select the desired view options based on the view type you selected. The options for each view type are described in the following tables.
7. Click OK.

Following are the options available for Standard views.

Standard view option	**Description**
Columns	Select the columns you want to be displayed in the view. Specify the order of the columns, from left to right.
Sort	Select up to two columns by which to sort the list or library items in the view.
Filter	Specify which items will be displayed in your view. You can set multiple criteria.
Inline Editing	Specify whether to display an Edit button next to each item.
Tabular View	Specify whether to display a checkbox next to each item so that you'll be able to perform an operation on multiple selected items.

Standard view option	Description
Group By	Specify how to group and subgroup the items in the list or library.
Totals	Specify whether to include column totals, and which columns to include totals for.
Style	Choose a visual style for your view. Default options are: Basic Table; Boxes, no labels; Boxes; Newsletter; Newsletter, no lines; Shaded; Preview Pane; and Default.
Folders	If the list or library contains folders, choose whether to display the items inside their folders or display all items without the folder structure.
Item Limit	Specify the number of items to include in the view. This value can be the maximum number of items displayed in the view or the number of items to be displayed in batches.
Mobile	Specify whether enable or disable the view on mobile devices. Set the number of items to be displayed in the view on mobile devices, and the field to be displayed as the mobile device's simple view.

Following are the options available for Datasheet views.

Datasheet view option	Description
Columns	Select the columns you want to be displayed in the view. Specify the order of the columns, from left to right.
Sort	Select up to two columns by which to sort the list or library items in the view.
Filter	Select which items will be displayed in your view. You can set multiple criteria.
Totals	Specify whether to include column totals, and which columns to include totals for.
Folders	If the list or library contains folders, choose whether to display the items inside their folders or display all items without the folder structure.
Item Limit	Specify the number of items to include in the view. This value can be the maximum number of items displayed in the view or the number of items to be displayed in batches.

Following are the options available for Calendar views.

Calendar view option	Description
Time Interval	Select the column used to put items on the calendar. For example, this could be the date an item was created or modified, a start date, or a due date.
Calendar Columns	Select the columns that will be used as the title and sub-headings in the view.
Default Scope	Specify whether the calendar should display a month, week, or day by default.
Filter	Specify which items will be displayed in your view. You can set multiple criteria.
Mobile	Enable or disable the view on mobile devices. Set the number of items to be displayed in the view on mobile devices.

Following are the options available for Gantt views.

Gantt view option	Description
Columns	Select the columns you want to be displayed in the view. Specify the order of the columns, from left to right.
Gantt Columns	Select the columns you want to be represented in the Gantt chart.
Sort	Select up to two columns by which to sort the list or library items in the view.
Filter	Specify which items will be displayed in your view. You can set multiple criteria.
Group By	Specify how to group and subgroup the items in the list or library.
Totals	Specify whether to include column totals, and which columns to include totals for.
Style	Choose a visual style for your view. Default options are: Basic Table; Boxes, no labels; Boxes; Newsletter; Newsletter, no lines; Shaded; Preview Pane; and Default.
Folders	If the list or library contains folders, choose whether to display the items inside their folders or display all items without the folder structure.
Item Limit	Specify the number of items to include in the view. This value can be the maximum number of items displayed in the view or the number of items to be displayed in batches.

Do it!

B-1: Creating a personal view

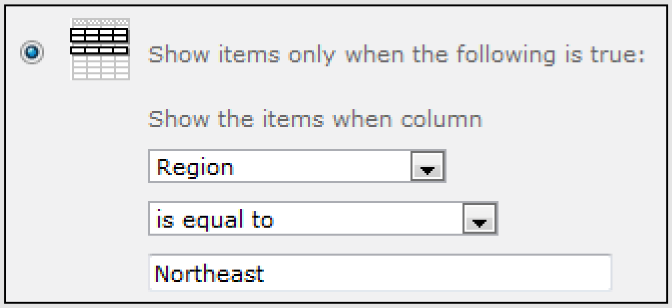
Here's how	Here's why
1 In the Quick Launch bar, click **Lists**	
Click **Customer Contacts**	This list was created during class setup.
2 On the List Tools | List tab, click 	To display the list of view formats available.
3 Click **Standard View**	To display the options for Standard views.
4 In the View Name box, type **Northeast Customers**	
5 Under Display, clear **Attachments**	
6 Set the column order as shown:	

Display	Column Name	Position from Left
☐	Attachments	6
☑	Last (linked to item with edit menu)	2
☑	First	1
☑	Phone	4
☑	Company	3
☑	Region	5

Here's how	Here's why
7 In the Sort section, from the "First sort by column" list, select **Last**	
From the "Then sort by the column" list, select **First**	

8 In the Filter section, select **Show items only when the following is true:**

Under "Show the items when column," specify the settings shown:



9 Expand each of the sections:

Inline Editing

Tabular View

Group By

Totals

Style

Folders

Item Limit

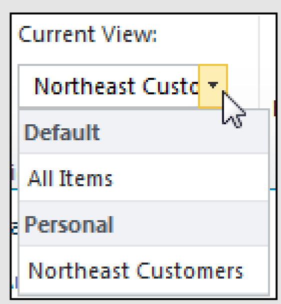
Mobile

Each section has a brief description of the setting.

10 Click **OK**

To save the view settings and return to the list.

11 On the List Tools | List tab, display the **Current View** list



There is one default view, which shows all items in the list. You now have one personal view called Northeast Customers. To use your personal view, simply select it from the Current View list.

12 Close Internet Explorer

Unit summary: Views

Topic A In this topic, you learned about the **default list and library views**—Standard, Datasheet, Calendar, and Gantt. You sorted a list based on a column. You also filtered items in a list to display items based on specified criteria.

Topic B In this topic, you learned how to create a **personal** view. Personal views are available only to you and are based on one of the default view types.

Independent practice activity

In this activity, you'll practice changing views and create a personal view.

1. Open Internet Explorer and go to the Administration site.
2. Open the Calendar.
3. Change the view to Public - All Events.
4. What is the layout of this view?
5. What's the best way to see the events happening this week? How would you display this information?
6. Display the Tasks list.
7. Sort the list by Assigned in Alphabetical order.
8. Display the Business Systems Implementation list.
9. What is the default view?
10. Create a personal view of Business Systems Implementation to show only those tasks assigned to you (your student##).
11. Close Internet Explorer.

Unit 6

Account information and notifications

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

A Set personal and regional settings for your SharePoint account.

B Configure alerts.

C Subscribe to RSS feeds.

Topic A: Personal and regional settings

Explanation

SharePoint Foundation 2010 can store business information about you. The SharePoint administrator creates your user account, but you can then edit the information in it, such as:

- Your name
- Your e-mail address
- Your mobile phone number
- A brief description about you
- A link to a photo of you
- The department you work in
- Your job title
- Your SIP address

SIP stands for *Session Initiation Protocol*. It's an Internet protocol used for live communication between users. It's available when SharePoint is used with Office Communication Server (OCS).

The information in your user account is attached to your account, not to individual SharePoint sites. If you edit your account information while logged onto one SharePoint site, that information will be updated when you use the same account to log on to the next site.

To edit your account's personal information:

1. Log in to any SharePoint site.
2. In the upper-right corner, click the down-arrow next to your account name and choose My Settings to display the User Information page.
3. Click Edit Item to open the Edit Personal Settings dialog box.
4. Enter or modify the data in the fields shown in Exhibit 6-1.
5. Click Save.

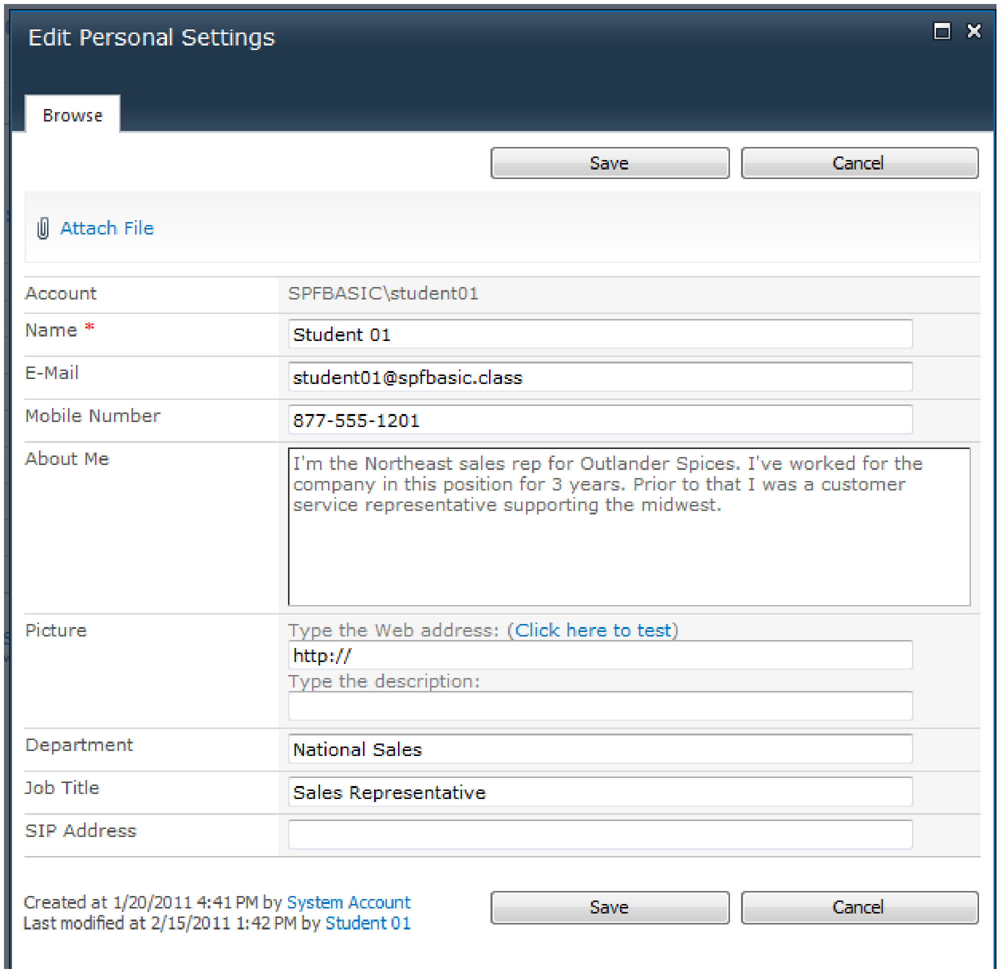
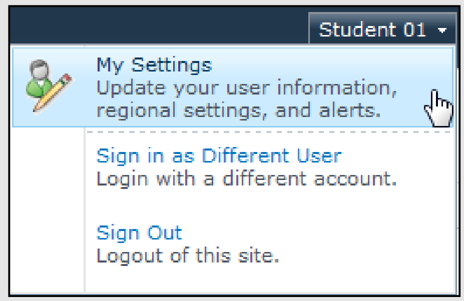


Exhibit 6-1: Personal settings for a user account

Do it!

A-1: Editing your user account's personal settings

Here's how	Here's why
1 Open Internet Explorer	Your personal information is shared between all sites where you log on as a particular user.
2 In the upper-right corner, from your Student ## menu, choose **My Settings**	 To display the User Information page for your account.
3 Click 	To open the Edit Personal Settings dialog box.
4 In the Name box, type your full name	
5 In the Mobile Number box, type **1-877-555-21##**	Where ## is your assigned student number.
6 In the About Me box, type **I am the sales rep for the Northeast region ##. I've been in this position for 3 years.**	
7 In the Department box, type **Sales**	
8 In the Job Title box, type **Northeast Sales Representative**	
9 Click **Save**	To close the dialog box. The name in the upper-right corner of the SharePoint window now displays your name instead of "Student ##."

Regional settings

Explanation

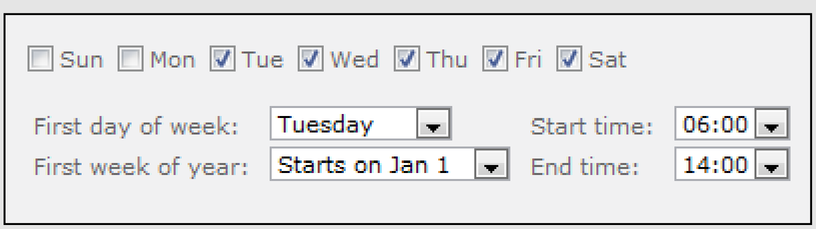
When you work for a company that has offices across a wide geographic area, you might want to define settings specific for your region. You can specify:

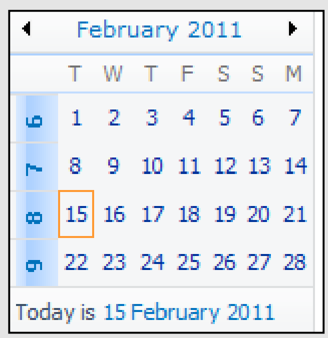
- Your locale, which determines the way the site displays numbers, dates, and the time
- Your time zone
- The type of calendar you want and whether or not week numbers are shown in the Date Navigator
- An alternate calendar
- Your work week
- A 12-hour or 24-hour time format

Do it!

A-2: Specifying regional settings

Here's how	Here's why
1 Click **My Regional Settings**	On the User Information page.
2 Clear **Always follow web settings**	When this option is checked, the regional settings will follow those set by the administrator.
3 Open and observe the **Locale** list	
Select **English (United Kingdom)**	
4 Open and observe the **Time zone** list	
Select **(UTC) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London**	
5 Open and observe the **Calendar** list	
Check **Show week numbers in the Date Navigator**	Leave the Calendar as Gregorian.
6 Open and observe the **Alternate Calendar** list	Your alternate calendar can be the same as or different from your primary calendar.
Close the list	Leave None selected.
7 In the Define Your Work Week section, clear **Mon**	
Check **Sat**	
From the "First day of week" list, select **Tuesday**	
8 Set Start time to **06:00**	
Set End time to **14:00**	



9	Open and observe the **Time format** list	When the Locale was set to English (United States), the time format was 12 Hour. The default time format for English (United Kingdom) is 24 Hour.
	Select **12 Hour**	
10	Click **OK**	To save your settings.
11	In the Quick Launch bar, click **Calendar**	
	Observe the change in the display	The week starts with Tuesday.
12	Change the scope of the calendar to **Week**	The non-gray time slots are from 6AM to 2PM.
13	For any time slot, click **Add**	
	Observe the date format	 The English (United Kingdom) locale changed the format from month/day/year to day/month/year.
14	Click **Cancel**	
15	Observe the Date Navigator	 It displays week numbers next to each week.

Topic B: Alerts

Explanation

Information on an active SharePoint site can change often. It's difficult and time consuming to keep up with changes by simply browsing the site. To ensure that you know of important changes, you can configure an alert, shown in Exhibit 6-2. Once configured, *an alert* notifies you by e-mail of changes in a list or library or changes in a specific item in a list or document in a library. Some SharePoint administrators will also configure the site to allow SMS alerts. If you configure an SMS alert, SharePoint sends a text message to your mobile phone.

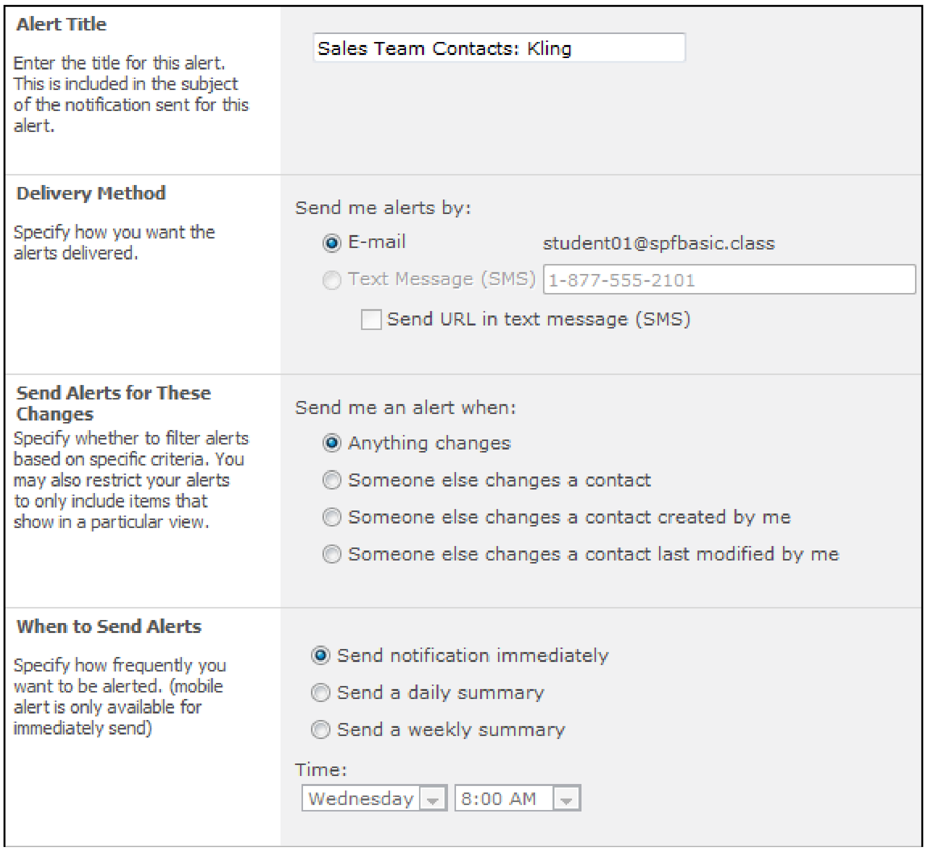


Exhibit 6-2: Item alert options

Setting list item and library item alerts

To configure an alert so you are notified of changes in a specific list item or file:

1 Open the list or library containing the desired list item or file.
2 Open the title menu for the list item or file and choose Alert Me.
3 If desired, edit the default alert title.
4 Select a delivery method. (The SMS option will be grayed out unless your SharePoint site administrator has configured the site to allow SMS alerts.)
5 Select the type of change that will trigger an alert.
6 Select the desired frequency of alerts.
7 Click OK.

Do it!

B-1: Creating an alert on a list item

Here's how	Here's why
1 Go to the Sales and Marketing site	You will work with a partner in this activity.
2 In the Quick Launch bar, click **Sales Team Contacts**	
3 If you don't have a contact for yourself in this list, create one as follows:	

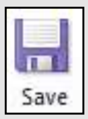
Last Name *	your_last_name
First Name	your_first_name
Full Name	Your name
E-mail Address	student##@spfbasic.class
Company	Outlanders Spices
Job Title	Sales representative
Business Phone	877-555-1220
Home Phone	
Mobile Number	
Fax Number	
Address	123 Outlander Way
City	Oshkosh
State/Province	WI
ZIP/Postal Code	54902
Country/Region	United States

Here's how	Here's why
4 Choose a partner to work with	
Open the menu for your partner's contact	Click the contact-title link.
Choose **Alert Me**	
5 Observe the default Alert Title	You can edit this if it's not descriptive enough for you.
6 Observe the Delivery Method	Your e-mail address is automatically entered from your user account's personal settings. By default, SMS alerts aren't configured on a site. Your administrator must set them up.
7 Under "Send me an alert when," select **Someone else changes a contact**	This prevents SharePoint from sending you an alert when you make a change.

8 Observe the options for When To Send Alerts	By default, you'll be notified immediately whenever a change is made. If you don't want that many e-mail alerts, you can configure daily or weekly summaries instead.
9 Click **OK**	

Do it!

B-2: Triggering an item alert

Here's how	Here's why
1 Open your contact for editing	Your partner set an alert on your contact.
2 Change your Job Title to **Sales and service representative**	
3 Click 	It can take several minutes for the e-mail alerts to arrive in Outlook, so we'll look at them later.

Setting list and library alerts

Explanation

You can also set alerts to notify you of any changes within an entire list or library, not just in specific items in a list or library. The alert options are similar to that of an individual item alert, but list and library alerts include a Change Type option, as shown in Exhibit 6-3.

To configure an alert on a list or library:

1. Open the list or library you want to be notified of changes in.
2. On the Library Tools | Library tab, click Alert Me.
3. If desired, edit the default alert title.
4. Select a delivery method. (The SMS option will be grayed out unless your SharePoint site administrator has configured the site to allow SMS alerts.)
5. Select the Change Type desired. You can be notified of all changes or be notified when items are added, modified, or deleted.
6. Select the type of change that will trigger an alert.
7. Select the desired frequency of alerts.
8. Click OK.

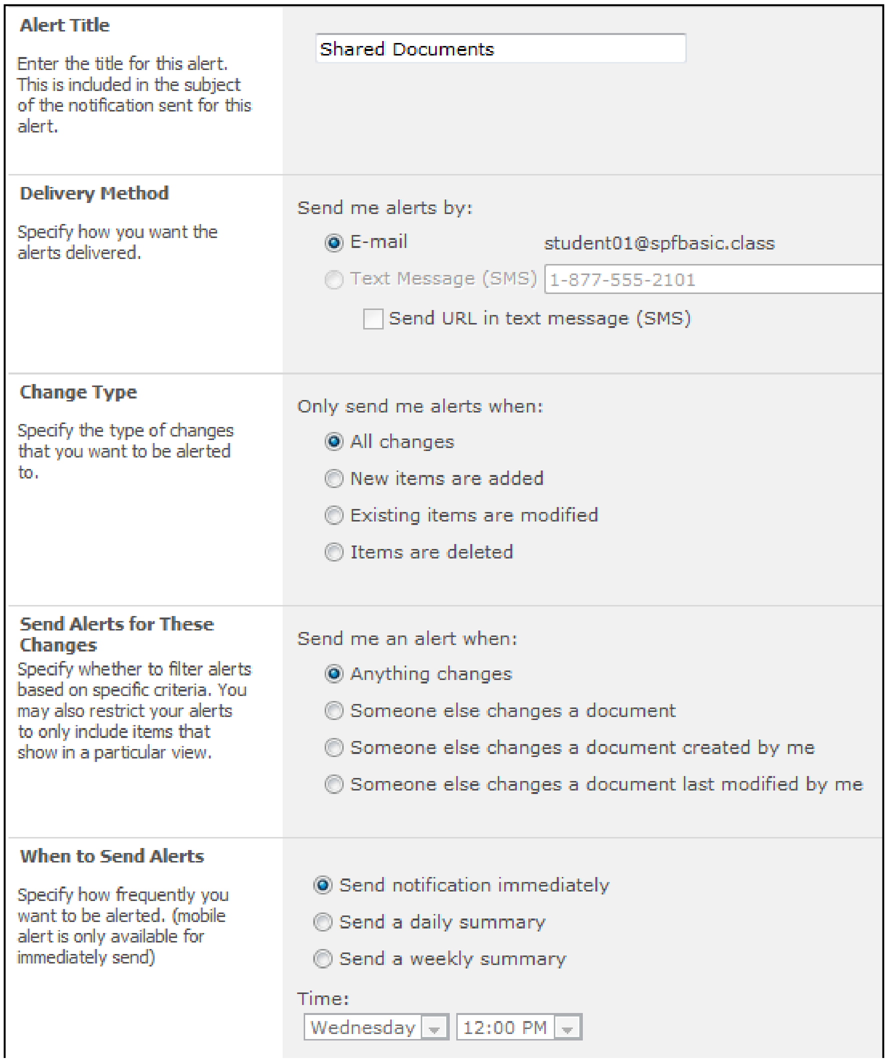


Exhibit 6-3: List and library alert options

Do it!

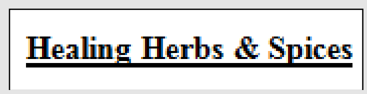
B-3: Creating an alert on a library

Here's how	Here's why
1 In the Quick Launch bar, click **Shared Documents**	
2 Click the **Library** tab	Under Library Tools.
3 Click 	To display a menu.
4 Choose **Set alert on this library**	
5 Observe the default Alert Title	You can edit this if it's not descriptive enough for you.
6 Observe the Delivery Method	Your e-mail address is automatically entered from your user account's personal settings. By default, SMS alerts aren't configured on a site. Your administrator must set them up.
7 Observe the Change Type	By default, an alert is triggered any time a change is made in the library—either in the library as a whole or in individual documents within the library.
8 Under "Send me an alert when," select **Someone else changes a document**	This prevents SharePoint from sending you an alert when you make a change.
9 Observe the options for When To Send Alerts	By default, you'll be notified immediately whenever a change is made. If you don't want that many e-mail alerts, you can configure daily or weekly summaries instead.
10 Click **OK**	

Do it!

B-4: Triggering a library alert

The files for this activity are in Student Data folder **Unit 6\Topic B**.

Here's how	Here's why
1 Use Windows Explorer to create a copy of **Healing herbs** in the current topic folder	
Rename the copy **Student## Healing herbs**	
2 In the Shared Documents library, click **Add document**	
3 Upload your Student## Healing herbs document to the library	
4 Choose a partner	
Open your partner's Student## Healing herbs document for editing	
Change the title to **Healing Herbs & Spices**	
5 Save and close the file	
6 When your partner is done editing your document, open Outlook 2010	By this time, you should have received notice that you successfully created alerts on your partner's contact item and the Shared Documents library. If you haven't already, you will also receive messages informing you that a change has been made in your partner's contact and in your document in Shared Documents. You will also receive messages telling you that documents have been added to the library.
7 Select one of the messages notifying you that you successfully created an alert	The message provides details of your alert and explains how to make changes.
8 Select the message notifying you of the change in your partner's contact	
Observe the Job Title	You can tell that it has been edited; the original is crossed out and the new information is shown next to it.
9 If additional alerts have arrived, select them and view the information they contain	It can take a while for the alerts to be processed. You can come back and look at them during the Independent Practice Activity if they haven't all arrived yet.
10 Close Outlook	

Modifying and deleting alerts

Explanation

You can modify or delete any of the alerts you've created.

1 Go to the "My Alerts on this Site" page:

- On any List Tools or Library Tools tab, click Alert Me and choose Manage My Alerts.
- From your user-account menu, choose My Settings and click My Alerts.

2 To delete an alert or multiple alerts, check their checkboxes and click Delete Selected Alerts. Click OK to verify.

To modify an alert, click the alert's title. Make your desired changes and click OK. You can also delete an individual alert from this page by clicking the Delete button instead of OK, and then clicking OK to verify.

Do it!

B-5: Managing alerts

Here's how	Here's why
1 From your user-account menu, choose **My Settings**	
2 Click **My Alerts**	
3 Click **Shared Documents**	
4 Under "Send me an alert when," select **Anything changes**	
5 In the When to Send Alerts section, select **Send a daily summary**	
Choose **4:00 PM**	
6 Click **OK**	
7 Observe the grouping	The Shared Documents alert is now grouped under Frequency: Daily. The Sales Team Contacts: your_partner's_last_name alert is grouped under Frequency: Immediate.
8 Check **Sales Team Contacts: *your_partner's_last_name***	
Click **Delete Selected Alerts**	
Click **OK**	

Topic C: RSS feeds

Explanation

Really Simple Syndication (RSS) is a technology used to transmit information across intranets and the Internet. Many Web sites use *RSS feeds* as a mechanism to keep their users up-to-date on the latest site information or to deliver digital content such as pictures, audio, and video. With an RSS feed, new content is downloaded to your computer and can be viewed in a browser such as Internet Explorer or in other compatible programs. SharePoint uses RSS technology to offer feeds on libraries, lists, and other Web content such as blogs.

Viewing available feeds

You can view the RSS feeds available on any SharePoint page by navigating to the page and then opening Internet Explorer's "View feeds on this page" menu.

Do it!

C-1: Viewing available feeds

Here's how	Here's why
1 In the Quick Launch bar, click **Shared Documents**	
2 Click the arrow on the RSS feed button	 To display the "View feeds on this page" menu.
3 Observe the list	There is one RSS feed available on this SharePoint page.

Subscribing to RSS feeds

Explanation

When you configure an RSS feed to keep yourself up-to-date on Web content, this is called *subscribing* to an RSS feed. To subscribe to a SharePoint list, library, or other content type RSS feed, using Internet Explorer, follow these steps:

1. Go to the Web page you want to subscribe to.
2. On the List or Library tab (under Library Tools), click the RSS Feed button.

   For pages without a tab, there might be an Actions menu, from which you can choose View RSS Feed. You also might find an RSS Feed link on the Web page you want to subscribe to. Another option is to choose the feed from the "View feeds on this page" menu.
3. Click "Subscribe to this feed."
4. In the Subscribe to this Feed dialog box, shown in Exhibit 6-4, do any of the following:
   - Edit the default name.
   - Change the default folder.
   - Check Add to Favorites Bar.
5. Click Subscribe.

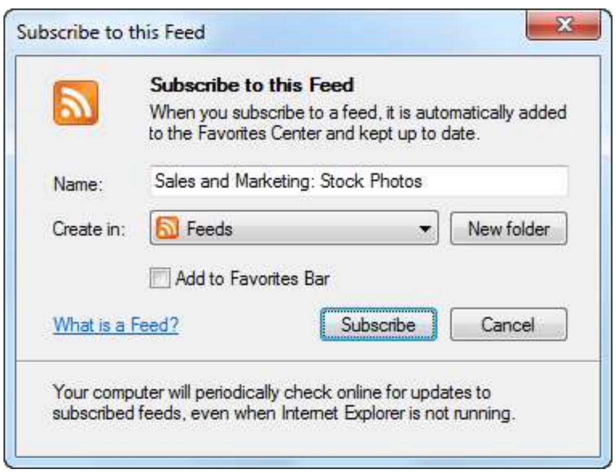
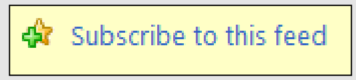
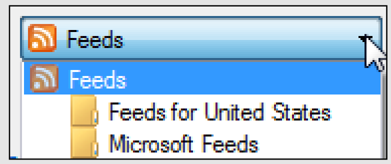
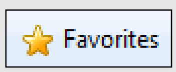
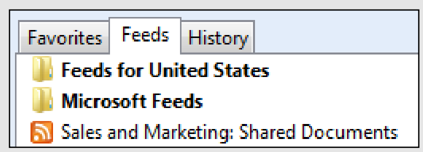
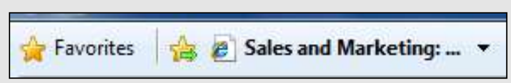


Exhibit 6-4: Subscribing to an RSS feed

Do it!

C-2: Subscribing to an RSS feed in Internet Explorer

Here's how	Here's why
1 From the "View feeds on this page" menu, choose **Shared Documents**	
2 Click **Subscribe to this feed**	
3 Open and observe the **Create in** drop-down list	 By default, Internet Explorer provides two subfolders for RSS feeds.
Close the list	
4 Click **Subscribe**	
5 Return to the Sales and Marketing home page	
6 Click 	
Click the **Feeds** tab	 All your RSS feeds are listed here.
7 Click **Sales and Marketing: Shared Documents**	The link takes you to the RSS feed for the Shared Documents library on the Sales and Marketing SharePoint site.
8 Return to the Sales and Marketing home page	
9 In the Quick Launch bar, click **Shared Documents**	
On the Library Tools | Library tab, observe the RSS Feed button	

10	In the Quick Launch bar, click **Tasks**	
	On the List Tools | List tab, observe the RSS Feed button	It's identical to the one on the Library tab.
11	In the Quick Launch bar, click **Tradeshows**	This is a blog.
	At the bottom of the page, observe the RSS Feed link	 This link is displayed differently than the RSS Feed button for lists and libraries, but it has the same functionality.
12	Navigate up to the Sales and Marketing home page	
13	In the Quick Launch bar, click **Stock Photos**	
14	Open the **Actions** menu	There is a View RSS Feed option that has the same functionality as the buttons and links you just observed.
	Choose **View RSS Feed**	
15	Click **Subscribe to this feed**	To open the Subscribe to this Feed dialog box.
16	Check **Add to Favorites Bar**	
17	Click **Subscribe**	To subscribe to the feed and close the dialog box.
18	Observe the Internet Explorer Favorites bar	 It includes a button for your Sales and Marketing: Stock Photos RSS feed.
19	On the Favorites bar, open **Sales and Marketing**	The RSS feed shows you the two items in the picture library. They are bold, indicating that you haven't viewed them from the RSS feed yet.
20	Choose **Mark all as read**	
21	Click **Sales and Marketing: Stock Photos**	To return to the picture library.

Updating RSS feeds

Explanation

By default, SharePoint publishes RSS feed updates once per day. You can manually refresh an RSS feed:

1. In Internet Explorer, open Favorites.
2. If necessary, click the Feeds tab.
3. Next to the RSS feed you want to refresh, click the “Refresh this feed” button, as shown in Exhibit 6-5.

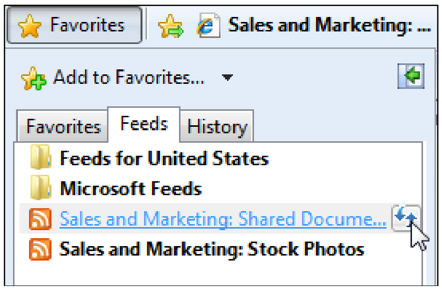
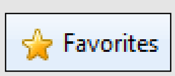


Exhibit 6-5: Manually refreshing an RSS feed

Do it!

C-3: Viewing RSS feed updates

The files for this activity are in Student Data folder **Unit 6\Topic C**.

Here’s how	Here’s why
1 In the Address bar, enter **www.msn.com**	You don’t need to be on a SharePoint site to receive RSS feed updates from it.
2 Watch as your instructor adds a file to the Stock Photos picture library *Instructor Only:* From the current topic folder, upload White Tea.jpg	
3 Click 	
Next to Sales and Marketing: Stock Photos, click 	To refresh the feed manually. By default, RSS feeds are updated every 15 minutes.
4 From the Favorites bar, open **Sales and Marketing: Stock Photos**	The new item is shown in bold text.
5 Choose **White Tea**	The White Tea item in the Stock Photos picture library opens in Internet Explorer.

Changing RSS feed properties

Explanation

You can modify the properties of any SharePoint RSS feed that you subscribe to.

1. On the Feeds tab (in the Favorites bar), click the link to the SharePoint RSS feed you want to modify.
2. On the page that appears, click "View feed properties" to open the Feed Properties dialog box.
3. Modify any of the following properties, as shown in Exhibit 6-6:
   - The name of the feed
   - Your user name and password
   - The default schedule (or create a custom schedule). If you click Settings to modify the default schedule, you can also enable or disable the various Advanced options, shown in Exhibit 6-7. Note: The default schedule and advanced settings apply to Internet Explorer and affect all RSS feeds, not just the one you are modifying.
   - Automatic downloading of files attached to a new item
   - Archive settings
4. Click OK.

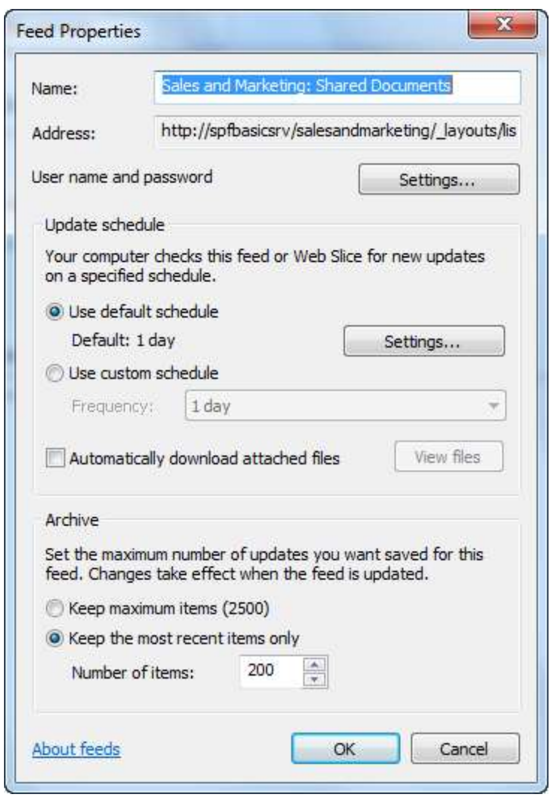


Exhibit 6-6: RSS feed properties

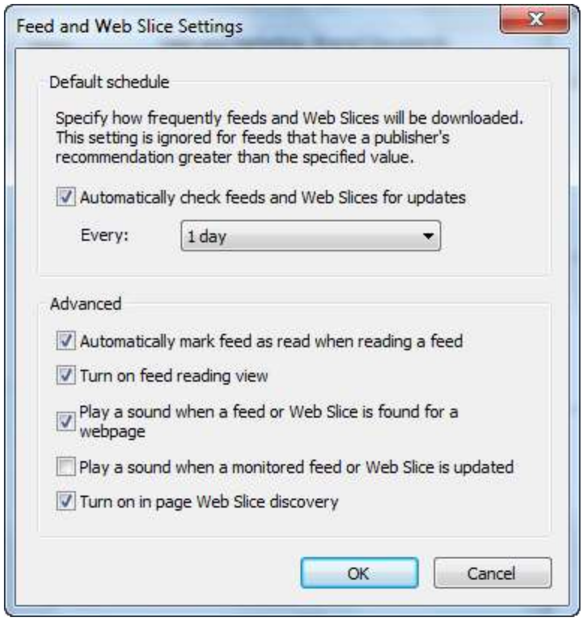
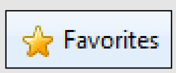


Exhibit 6-7: Feed and Web Slice Settings

Do it!

C-4: Modifying the properties of an RSS feed

Here's how	Here's why
1 Click 	
2 On the Feeds tab, choose **Sales and Marketing: Stock Photos**	
3 Click **View feed properties…**	To open the Feed Properties dialog box.
4 In the Name box, delete **Stock**	
5 Next to "Use default schedule," click **Settings**	To open the Feed and Web Slice Settings dialog box.
6 From the Every list, select **4 hours**	
7 Click **OK** twice	To save your changes and close the two open dialog boxes.
8 Observe the RSS feed on the Favorites bar	The word Stock has been removed.

Unsubscribing from RSS feeds

Explanation

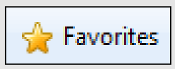
Subscribing to multiple RSS feeds can make Internet Explorer slow and consume unnecessary bandwidth. If you no longer wish to receive RSS feeds from a SharePoint list, library, or other page, you can unsubscribe.

To unsubscribe in Internet Explorer:

1. Click Favorites.
2. On the Feeds tab, right-click the RSS feed you want to unsubscribe from and choose Delete.
3. Click Yes to confirm the deletion.

Do it!

C-5: Unsubscribing from an RSS feed

Here's how	Here's why
1 Click 	
2 On the Feeds tab, right-click **Sales and Marketing: Photos** and choose **Delete**	
3 Click **Yes**	To confirm the deletion.
4 Go to the Sales and Marketing - Stock Photos - All Pictures page	
5 Click the arrow on the RSS Feed button	 To display the "View feeds on this page" menu.
Choose **Stock Photos**	You are no longer subscribed to the RSS feed for this library.
6 Close Internet Explorer	

Unit summary: Account information and notifications

Topic A In this topic, you edited your SharePoint user account's **personal settings**, including name, e-mail address for notifications, job title, and SIP address. You also specified **regional settings**, which specify how SharePoint sites display certain information such as the date and time.

Topic B In this topic, you learned how to create **alerts**. Alerts notify you by e-mail or SMS text message of changes in a list or library, or changes in a specific item in a list or document. You also modified and deleted alerts.

Topic C In this topic, you learned how to subscribe to an **RSS feed**. You can subscribe to RSS feeds to stay up-to-date on content changes in libraries, lists, and other Web content, such as blogs. You configured RSS feed properties and **unsubscribed** from an RSS feed.

Independent practice activity

In this activity, you'll practice updating your SharePoint user account information. You'll also practice setting up content change notifications by using alerts and RSS feeds.

1 Open Internet Explorer.

2 Go to the Administration site.

3 Modify your personal settings as shown in the following graphic. Use your Student##. Apply bold red formatting to "Midwest region."

Account	SPFBASIC\student01
Name	Student01
E-Mail	student01@spfbasic.class
Mobile Number	1-800-555-0110
About Me	I am the customer service rep for **Midwest region**. I've been in this position for 3 years.
Picture	
Department	Sales
Job Title	Midwest Customer Service Representative
SIP Address	

4 Modify your regional settings to always follow Web settings.

5 Create a 5:00 PM daily summary alert for new items added to the Invoice Requests library.

6 Create an immediate alert if anyone changes your Team ## Logo.jpg file in the Company Logos picture library.

7 Subscribe to the Outlander Admin wiki library.

8 Edit the Invoice Request alert so you're sent a weekly summary at 5:00 PM on Fridays.

9. View the RSS feed for the Outlander Admin wiki library.
10. Unsubscribe from the RSS feed for the Outlander Admin wiki library.
11. Delete your alerts.
12. Close Internet Explorer.

Course summary

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

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

B Determine other resources that might help you continue to learn.

Topic A: Course summary

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

Unit summaries

Unit 1

In this unit, you learned that SharePoint Foundation 2010 sites are set up in a **hierarchical structure**. You navigated a SharePoint Foundation 2010 Team site by using the top-level bar, the Quick Launch bar, and breadcrumbs. You also used All Site Content to display content that isn't listed in the Quick Launch bar.

Unit 2

In this unit, you worked with SharePoint Foundation **lists**—Announcements, Calendar, Links, Tasks, and Contacts. You learned how to add, modify, delete, and restore list items. You also learned how to **export** a contact from SharePoint to Outlook.

Unit 3

In this unit, you worked with document, picture, wiki page, asset, and form **libraries**. You learned how to add, edit, delete, and restore library items. You also created a page in a wiki library. You then used **Microsoft InfoPath 2010** to fill out a form and save it to a SharePoint site.

Unit 4

In this unit, you learned how to **communicate** and share opinions with other team members. You contributed to **discussion boards** by creating topics and replying to other users' topics. You also responded to **surveys**. You then contributed to a **blog** by adding a comment to a post and creating a post of your own.

Unit 5

In this unit, you learned how to change **views** and create **personal views** to display the information in a list or library in ways that better meet your needs. You also learned how to **sort** and **filter** the items in a SharePoint list or library so that it is easier to find the information you need.

Unit 6

In this unit, you learned how to modify your **personal SharePoint user information**. You also learned how to customize SharePoint for your geographic location by configuring **regional settings**. You then learned how to monitor content on a SharePoint site by setting **alerts** and subscribing to **RSS feeds**.

Topic B: Continued learning after class

To get the most out of this class, you should begin applying your new skills and knowledge as soon as possible. Axzo Press also offers resources for continued learning. For more information, visit www.axzopress.com.

Glossary

Alerts
Notifications of changes in a list or library or changes in a specific item in a list or document in a library. You can receive alerts by e-mail or SMS text messages.

Announcements
A type of SharePoint list used to inform team members about news or the status of an event.

Asset library
A type of SharePoint library used to store image, video, and audio files.

Blog
A SharePoint feature designed for an individual user or group of users to write material, such as commentaries or descriptions of events, and to post images, links, and videos.

Breadcrumbs
The series of links at the top of a SharePoint page that show you where you are in the site hierarchy and allow you to navigate.

Calendar
A SharePoint list used to post information about important meetings and events your team needs to attend.

Calendar view
A view that displays event items as part of a monthly calendar.

Columns
The various types of data for a list item. Also referred to as properties, fields, or metadata.

Contacts
A SharePoint list used to store information about people.

Current navigation
See *Left navigation bar*.

Datasheet view
A view that presents information in a column-and-row format and allows the information to be edited directly in the view. Requires a SharePoint-compatible spreadsheet program such as Microsoft Excel.

Discussion board
A threaded forum in which the members of a team can discuss topics relevant to them.

Document library
A type of SharePoint library used to store and share document files.

Event
A Calendar list item.

Fields
See *Columns*.

Filtering
A feature you can use to hide items that you don't want to see in a particular view.

Form library
A type of SharePoint library that holds Microsoft InfoPath forms.

Gantt chart
A horizontal bar chart showing the actual and projected amounts of time involved in completing a particular task or project.

Gantt view
A view that displays items based on date columns in a Gantt chart.

Global navigation
See *Top navigation bar*.

Left navigation bar
A pane that contains links used to display content on the site. Also referred to as the Quick Launch bar or current navigation.

Library
A central repository used to store and share files, images, and forms.

Links
A SharePoint list used to post hyperlinks to Web pages on the Internet or an intranet.

List
A container for collecting and organizing information on a SharePoint site.

List item
A row of data in a list.

Metadata
See *Columns*.

Personal view
A view available to only the user who created it.

Picture library
A type of SharePoint library used to store and share image files.

Post
A blog item.

Properties
See *Columns*.

Public view
A view available to all site users.

Quick Launch bar
See *Left navigation bar*.

Recycle Bin
A container that holds deleted SharePoint objects for a set number of days so that they can be restored if necessary.

Ribbon
An interface feature used in Microsoft Office products to display menus and buttons used to accomplish tasks.

Row
A list item.

RSS (Really Simple Syndication)
A technology used to transmit information across intranets and the Internet.

RSS feed
A mechanism used by many Web sites to keep their visitors up-to-date on the latest site information or to deliver digital content such as pictures, audio, and video.

SharePoint Foundation
A team collaboration system used to organize, manage, and share information.

SharePoint site
A collection of related Web pages.

SIP (Session Initiation Protocol)
An Internet protocol used for live communication between users.

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

Sorting
A feature you can use to rearrange the items in a view.

Standard view
A view that presents information in column-and-row format, similar to a printed worksheet. Information cannot be edited directly in Standard view.

Survey
A questionnaire you can use to collect information from a group of people.

Tasks
A SharePoint list used to organize and track work that your team needs to complete.

Top navigation bar
A series of links used to navigate up to the Home page of the current site or to subsites. Also referred to as global navigation.

Top-level site
A SharePoint site that does not have a parent site.

Views
A feature used to display information in various types of layouts.

Web parts
The modular building blocks of SharePoint pages.

Wiki library
A type of SharePoint library used to store and share wiki pages.

Wiki page
A page on which you can enter text and add a mixture of components, such as images, videos, and files.

Index

P

Q

R

S

T

U

V

W