TLG Learning

SharePoint Foundation 2010

Level 2

Student Manual

SharePoint Foundation 2010
Level 2

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SharePoint Foundation 2010
Level 2

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Contents

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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.

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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.

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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.

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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	F4 = =E4*C_Rate 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.

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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?

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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:

- Add library, list, and page components to a Team Web site.
- Change the look and feel of a Team site.
- Customize a Team site.
- Control the display and dissemination of site content.
- Create workflows on a Team site.
- Add columns and content types to the site galleries on a Team site.

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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.

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Unit 1

Adding components

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

A Add libraries to a Team Web site.

B Add lists to a Team Web site.

C Add pages to a Team Web site.

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Topic A: SharePoint libraries

Explanation

If you have Design or Full Control permissions on a SharePoint Foundation site, you can add library components to your site. The types of libraries you can add to the site include:

- Document
- Form
- Picture
- Wiki Page

Document libraries

A *document library* is a SharePoint container that holds files that you want to share with other users. You use document libraries to organize files. For example, you can create a document library to hold files pertaining to a particular project. Users can open, collaborate on, and work on the files from this common location. By default, a SharePoint Team Web site contains a document library called Shared Documents. A user with Design or Full Control permissions can create additional document libraries.

A feature of libraries in SharePoint is versioning. You use *versioning* to store, track, and restore files in a library as users change them. Versioning is useful for keeping track of modifications made in a file that multiple users are collaborating on, or when a file goes through several stages of development or review. With versioning, you can "roll back" a file to a previous state.

Creating a document library

To create a document library:

1. Go to the site where you want to add the library component.
2. Open the Create dialog box for a document library, shown in Exhibit 1-1.
   - From the Site Actions menu, choose New Document Library.
   - In the Quick Launch bar, click All Site Content. Click Create. Click Library and then click Document Library.
3. In the Name box, type a name for your library.
4. If you used the Quick Launch bar to open the dialog box, click More Options.
5. (Optional) In the Description box, type a brief description explaining the purpose of the library. This description will be displayed on the document library's home page, as shown in Exhibit 1-2.
6. Specify whether to display a link to this library in the site's Quick Launch bar.
7. Specify whether to enable versioning on the files in this library.
8. From the Document Template list, shown in Exhibit 1-3, select the desired default template for this document library. This template will be used when users click the Add Document link on the document library home page or click the New Document button on the Library Tools | Documents tab.
9. Click Create.

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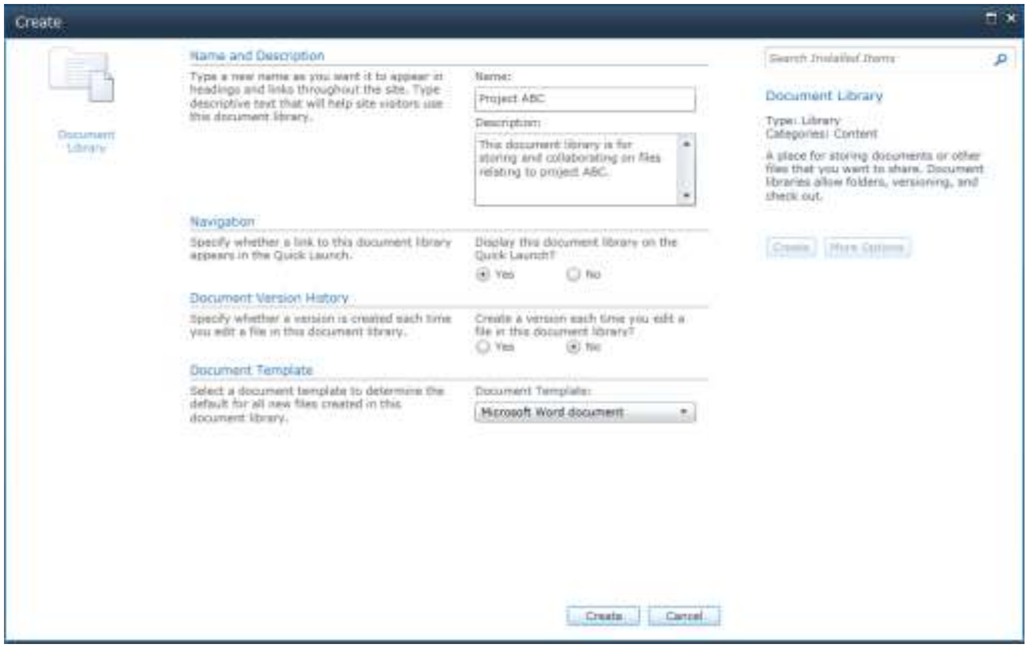

Exhibit 1-1: The Create Document Library dialog box

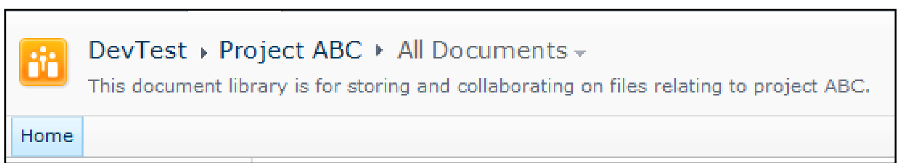

Exhibit 1-2: The description for a document library

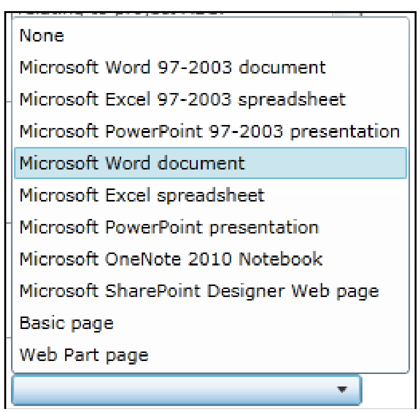

Exhibit 1-3: The Document Template list

Users with Contribute permissions or higher can add documents or upload files to the document library.

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Do it!

A-1: Creating a document library

The files for this activity are in Student Data folder **Unit 1\Topic A**.

Here's how	Here's why
1 Log in to Windows 7: Username: **spfadv.class\Student##** Password: **!pass1234**	Where ## is your assigned student number.
2 Open Internet Explorer	
3 In the Set Up Windows Internet Explorer 8 dialog box, click **Next**	
Select **No, don't turn on** and click **Next**	
Select **Use express settings**	
Click **Finish**	
4 In the Address bar, type **http://spfadvsql-spf/site##**	Where ## is your assigned student number.
5 Choose **Tools**, **Internet Options**	
Click **Use current**	To make this site your home page.
Click **OK**	This is the site you'll use for activities in this course. It is a default Team Web site created during class setup. You've been assigned Design permissions on the site.
6 Choose **Site Actions**, **New Document Library**	
7 In the Name box, type **Sales Documents**	
8 In the Description box, type **This library contains documents for the Outlander Spices Sales Team**	
9 Observe the Navigation setting	By default, a link to the Sales Documents library will be placed in the Quick Launch bar.

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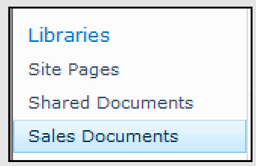
10	Observe the Document Version History setting	By default, versioning is not enabled. You can enable or disable versioning later by changing the library's settings.
11	Open and observe the **Document Template** list	By default, SharePoint uses a blank Microsoft Word document for all new documents created in the library. You can change this to meet your needs. For example, in a document library for holding financial information, you might want to make the default template type a Microsoft Excel spreadsheet.
12	Close the list, leaving **Microsoft Word document** selected	
13	Click **Create**	Any user with Contribute or greater permissions can now create, upload, and edit documents in this library.
14	Observe the Quick Launch bar	 Under Libraries, it has a link for the new Sales Documents library.
15	Click the **Browse** tab	
16	Click **Add document**	To open the Shared Documents - Upload Document dialog box. You'll add documents to this library. (You learned how to add, edit, and manage documents in a library in the *Microsoft SharePoint Foundation: Basic* course.)
	Click **Upload Multiple Files…**	To open the Shared Documents - Upload Multiple Documents dialog box.
	Click **Browse for files instead**	
17	From the current topic folder, select the following three files: **Business Letter** **Fax Cover Page** **Sales Letter**	Student Data folder Unit 1\Topic A.
	Click **Open.** Then click **OK**	
	Click **Done**	To close the dialog box.
18	Return to the Site ## home page	Use breadcrumbs or click the Home tab.

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Form libraries

Explanation

You use SharePoint *form libraries* to share and track XML-based forms. A form is simply a template. For example, a standard expense report is a form.

Form libraries are useful for organizing the company forms you want users to fill out. For example, you can create an HR form library that holds such items as your employment form, health insurance application, absence request form, and so on. Users download a form to their computers, fill it out, and submit it. The data entered in a form is saved as an .xml file. Because the data is stored in an .xml file, you can merge the data from multiple users and use it for analysis.

As with document libraries, you can enable versioning on your form libraries to track changes in your forms. Although form libraries are designed to hold XML-based forms, you can store forms in other types of libraries, such as document libraries.

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

Creating form libraries

To create a form library:

1. Go to the site where you want to add the form library component.
2. Go to the All Site Content page.
   - From the Site Actions menu, choose View All Site Content.
   - In the Quick Launch bar, click All Site Content.
3. Click Create.

   (Instead of following steps 2–3, you can choose More Options from the Site Actions menu to open the Create dialog box.)
4. Click Form Library.
5. In the Name box, type a name for your form library.
6. Click More Options.
7. (Optional) In the Description box, type a brief description explaining the purpose of the library. This description will be shown on the form library's home page.
8. Specify whether to display a link to this library in the site's Quick Launch bar.
9. Specify whether to enable versioning on the forms in this library.
10. From the Document Template list, select the desired default template for this form library.
11. Click Create.

Users with Contribute permissions or higher can upload forms to the form library.

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Do it!

A-2: Creating a form library

The files for this activity are in Student Data folder **Unit 1\Topic A**.

Here's how	Here's why
1 In the Quick Launch bar, click **All Site Content**	
2 Click **Create**	
3 Click **Form Library**	
4 In the Name box, type **Human Resources Forms**	
5 Click **More Options**	
6 In the Description box, type **This library contains all HR forms needed by our employees.**	
7 Observe the Navigation, Document Version History, and Document Template sections	By default, a link to the library will be displayed in the Quick Launch bar, versioning is disabled, and the Document Template type is the Microsoft InfoPath form.
8 Click **Create**	Users with Contribute permissions or higher can use the Library Tools | Documents tab to upload forms or to create forms in Microsoft InfoPath and publish them to the library.
9 Click the **Documents** tab	
10 From the Upload Document menu, choose **Upload Multiple Documents**	You'll upload forms to this library. (You learned how to work with forms in a forms library in the *Microsoft SharePoint Foundation: Basic* course.)
Click **Browse for files instead**	
From the current topic folder, select the following three files: **Absence Request Form** **Invoice Request Form** **Travel Request Form**	Student Data folder Unit 1\Topic A.
Click **Open**	
Click **OK** and then click **Done**	

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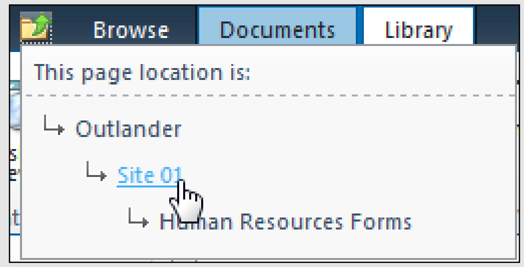
11 Return to the Site ## home page	 Use the Navigate Up button.

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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.

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

To create a picture library:

1. Go to the site where you want to add the picture library.
2. Either go to the All Site Content page and click Create, or choose More Options from the Site Actions menu.
3. Click Picture Library.
4. In the Name box, type a name for your form library.
5. Click More Options.
6. (Optional) In the Description box, type a brief description explaining the purpose of the library. This description will be shown on the picture library's home page.
7. Specify whether to display a link to this library in the site's Quick Launch bar.
8. Specify whether to enable versioning on the pictures in this library.
9. Click Create.

Users with Contribute permissions or higher can upload image files to the picture library.

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Do it!

A-3: Creating a picture library

The files for this activity are in Student Data folder **Unit 1\Topic A**.

Here's how	Here's why
1 From the Site Actions menu, choose **More Options…**	
2 Click **Picture Library**	
3 In the Name box, type **Potential Company Logos**	
4 Click **More Options**	
5 In the Description box, type **Upload your submissions for the new company logo.**	
6 Click **Create**	Users with Contribute permissions or higher can upload image files to the picture library.
7 From the Upload menu, choose **Upload Multiple Pictures**	You'll upload picture files to this library. (You learned how to work with pictures in a picture library in the *Microsoft SharePoint Foundation: Basic* course.)
8 Click **Add Picture Shortcut…**	
Browse to the current topic folder	Student Data folder Unit 1\Topic A.
Click **Add**	
Select **logo01** and **logo02**	
Click **Upload and Close**	
9 Click **Go back to "Potential Company Logos"**	
10 Return to the Site ## home page	

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Wiki page libraries

Explanation

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

To create a wiki page library:

1. Go to the site where you want to add the wiki page library.
2. Either go to the All Site Content page and click Create, or choose More Options from the Site Actions menu.
3. Click Wiki Page Library.
4. In the Name box, type a name for your wiki library.
5. Click More Options.
6. (Optional) In the Description box, type a brief description explaining the purpose of the library. This description will be shown on the wiki library's home page.
7. Specify whether to display a link to this library in the site's Quick Launch bar.
8. Click Create.

When you create a wiki library, SharePoint includes a Welcome page that explains what a wiki library is and includes a link for users to get help on using the library. This page is shown in Exhibit 1-4.

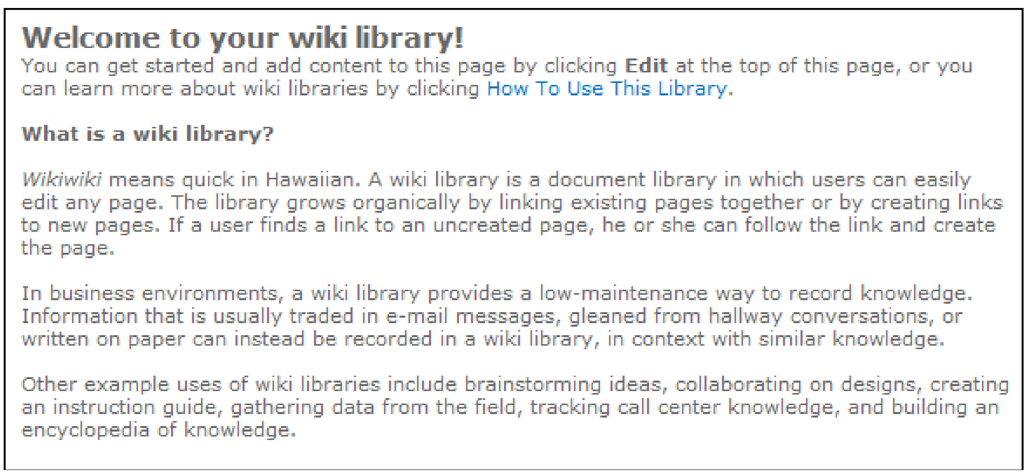

Exhibit 1-4: The description page for a new wiki library

Users with Contribute permissions or higher can create wiki pages in the wiki library.

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Do it!

A-4: Creating a wiki page library

The files for this activity are in Student Data folder **Unit 1\Topic A**.

Here's how	Here's why
1 From the Site Actions menu, choose **More Options…**	
2 Click **Wiki Page Library**	You can either scroll the list or apply the Library filter to find the Wiki Page Library option.
3 In the Name box, type **Sales Team**	
4 Click **More Options**	
5 In the Description box, type **The dynamic Web pages in this library will be used by the Sales team to communicate information and updates.**	
6 Observe the Navigation section	A link to the wiki library can be placed in the Quick Launch bar, but you can't enable versioning, as you can with other libraries.
7 Click **Create**	
8 On the Page tab, click **View All Pages**	
9 Click **Add new page**	You'll add a wiki page to this library. (You learned how to create and manage wiki pages in the *Microsoft SharePoint Foundation: Basic* course.)
10 In the "New page name" box, type **Outside Sales**	
11 Click **Create**	The new wiki page opens for editing.

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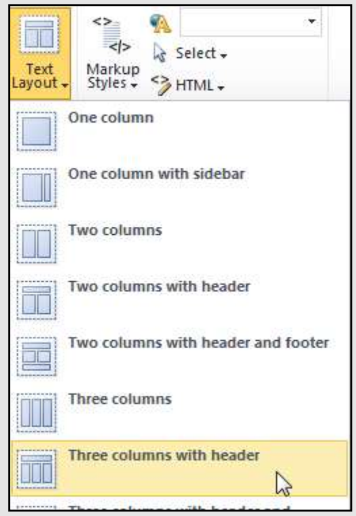
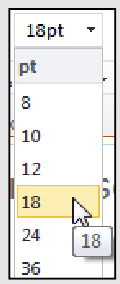
12 On the Editing Tools | Format Text tab, click **Text Layout**

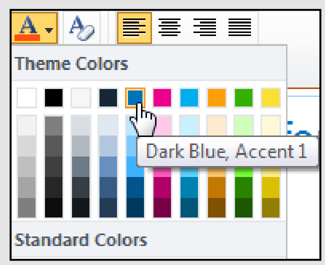
Select **Three columns with header**



13 In the Header box, type **This page contains useful materials for the Outlander Spices outside sales team**

14 Select the Header text and change the font to **18** pt and Dark Blue, Accent 1



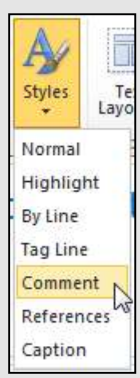


15 In the first column, type the following Normal-style text: **We have different logos for the United States and International products**

Press ENTER

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

Press ENTER



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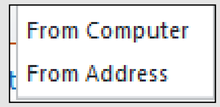
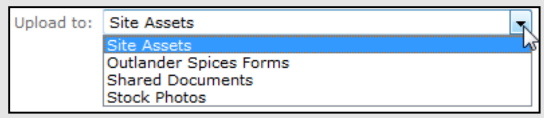
17	On the Editing Tools | Insert tab, click  Select **From Computer**	 You can insert a picture from your computer or from a Web address.
18	Browse to select **logo01** in the current topic folder Click **Open**	Student Data folder Unit 1\Topic A.
19	Open and observe the **Upload to** list	 By default, 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.
20	In the Title box, type **Outlander Logo US**	
21	Click **Save**	The picture is displayed. To download or use the file, users will need to open the Site Assets library.
22	Below the logo, enter **International logo:** and apply the **Comment** style	
23	Below the International Logo text, insert the **logo02** file Title the file **International Logo**	
24	On the Editing Tools | Format Text tab, click **Save & Close**	 You'll leave the other two columns blank for now.
25	Return to the Site ## home page	

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Topic B: SharePoint lists

Explanation

If you have Design or Full Control permissions on a SharePoint Foundation site, you can add list components to your site. The types of lists you can add to the site include:

- Announcements
- Calendar
- Contacts
- Custom List
- Custom List in Datasheet View
- Discussion Board
- External List
- Import Spreadsheet
- Issue Tracking
- Links
- Project Tasks
- Survey
- Tasks

A default Team Web site includes Calendar, Tasks, and Team Discussions lists.

Creating lists

Creating a list on a SharePoint Foundation Team Web site is similar to creating a library. Most list types are created as follows:

1 Open the Create dialog box.
   - From the All Site Content page, click Create.
   - From the Site Actions menu, choose More Options.

2 In the Filter By list, click List if you want to limit the items in the dialog box to only list types.

3 Click the desired list type.

4 In the Name box, type a name for your list.

5 Click More Options.

6 Enter a description for the list.

7 Specify whether to display a link to the list in the Quick Launch bar.

8 For Calendar lists, specify whether the calendar will be a group calendar.

   For Survey lists, choose whether to show user names with responses and whether to allow a user to take the survey more than once.

9 Click Create.

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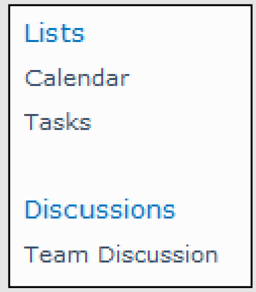
Do it!

B-1: Creating a list

Here's how	Here's why
1 Observe the Quick Launch bar	 By default, a Team site includes a Calendar list, a Tasks list, and a discussion list called Team Discussion.
2 From the Site Actions menu, choose **More Options…**	
3 Under Filter By, click **List**	To display only list content types in the Create dialog box.
4 Click **Contacts**	
5 In the Name box, type **Regional Sales Team**	
6 Click **More Options**	These options are the same ones available for the following list types: • Announcements • Contacts • Custom List • Custom List in Datasheet View • Discussion Board • Issue Tracking • Links • Project Tasks • Tasks
7 Observe the options available	You can enter a description for your list and specify whether a link to the list should appear in the Quick Launch bar.
8 Click **Create**	

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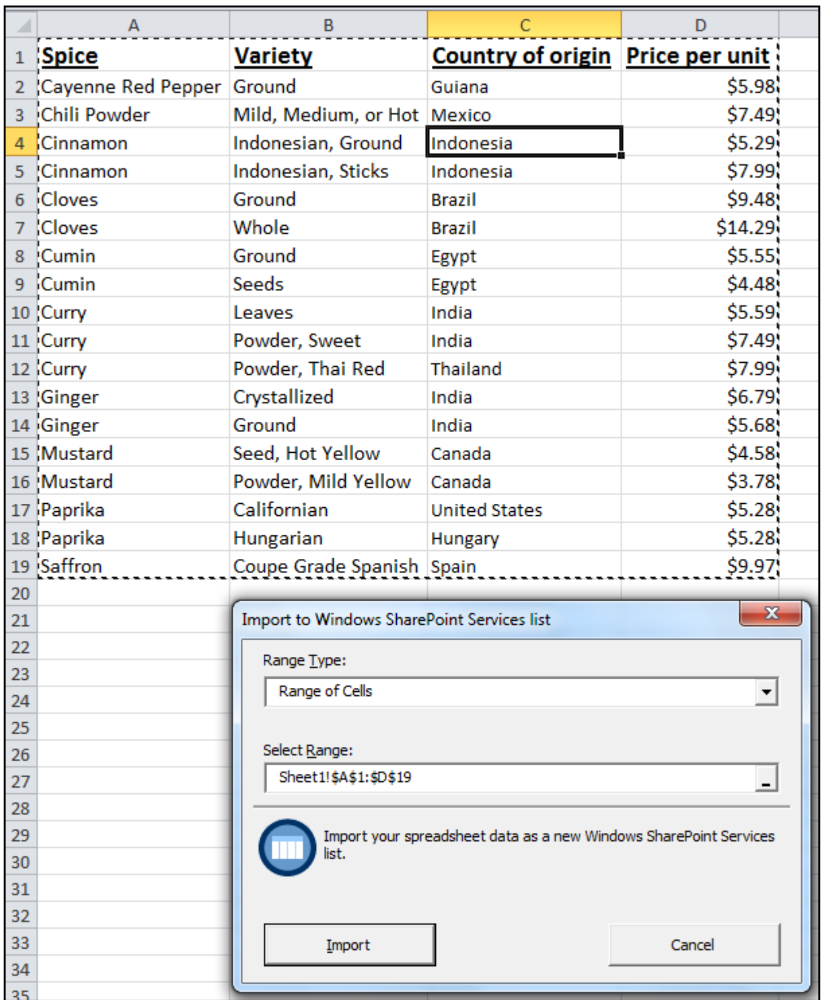
Importing spreadsheet data into lists

Explanation

If you have data in a spreadsheet that you'd like to add to your Team site, you can import the data into a list by using the *Import Spreadsheet* list type. For example, the spreadsheet shown in Exhibit 1-5 contains data regarding the price of spices. When imported into a list, as shown in Exhibit 1-6, the column headings of the spreadsheet become the column headings in the list, and each row in the spreadsheet becomes one list item. Once the list is created, users with Contribute permissions or higher can add, edit, and delete items in the list.



	A	B	C	D
1	Spice	Variety	Country of origin	Price per unit
2	Cayenne Red Pepper	Ground	Guiana	$5.98
3	Chili Powder	Mild, Medium, or Hot	Mexico	$7.49
4	Cinnamon	Indonesian, Ground	Indonesia	$5.29
5	Cinnamon	Indonesian, Sticks	Indonesia	$7.99
6	Cloves	Ground	Brazil	$9.48
7	Cloves	Whole	Brazil	$14.29
8	Cumin	Ground	Egypt	$5.55
9	Cumin	Seeds	Egypt	$4.48
10	Curry	Leaves	India	$5.59
11	Curry	Powder, Sweet	India	$7.49
12	Curry	Powder, Thai Red	Thailand	$7.99
13	Ginger	Crystallized	India	$6.79
14	Ginger	Ground	India	$5.68
15	Mustard	Seed, Hot Yellow	Canada	$4.58
16	Mustard	Powder, Mild Yellow	Canada	$3.78
17	Paprika	Californian	United States	$5.28
18	Paprika	Hungarian	Hungary	$5.28
19	Saffron	Coupe Grade Spanish	Spain	$9.97

Exhibit 1-5: A spreadsheet used as the basis for a list

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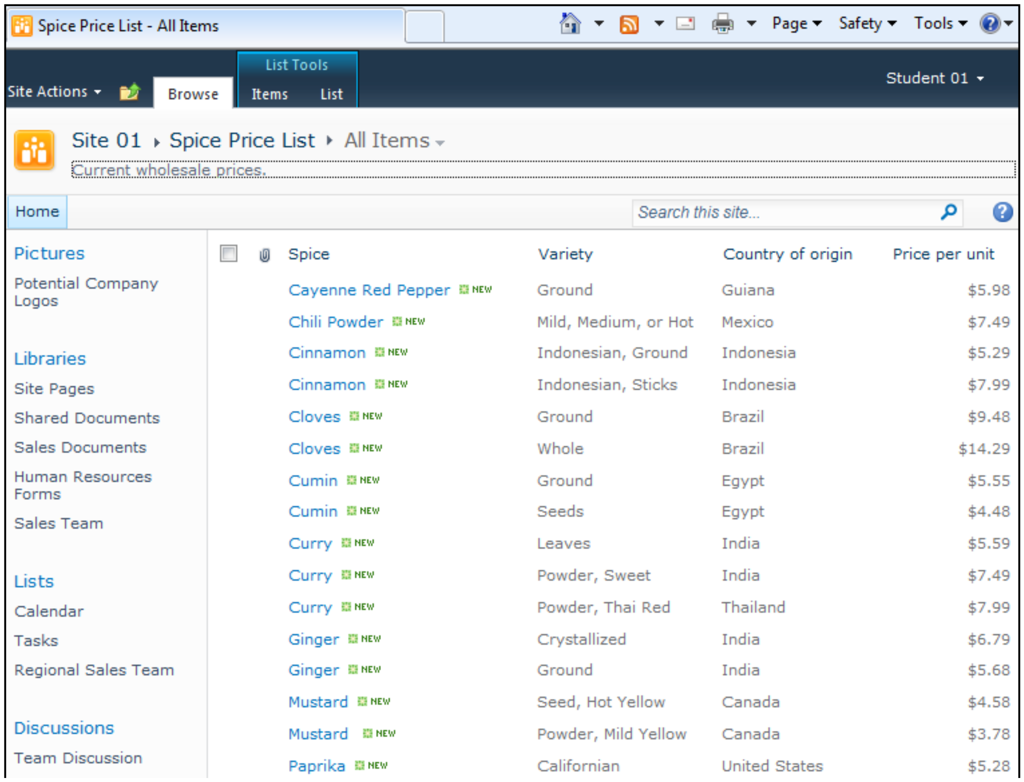

Exhibit 1-6: A list created from a spreadsheet

To create a list from a spreadsheet:

1 Open the Create dialog box.
   - From the All Site Content page, click Create.
   - From the Site Actions menu, choose More Options.

2 In the Filter By list, click List if you want to limit the items in the dialog box to only list types.

3 Click Import Spreadsheet and then click Create.

4 Enter a name and description for the list.

5 Browse to select the spreadsheet file containing the data you want to import. Click Open.

6 Click Import.

7 Switch to the spreadsheet program.

8 From the Range Type list, select one of the following:
   - Range of Cells — To manually select a range in the spreadsheet.
   - Table Range — To import a named table.
   - Named Range — To import a named range.

9 If you selected Range of Cells, click the Select Range button and select the desired range. Click the button next to the range to return to the Import dialog box.

   If you selected Table Range or Named Range, select the desired range name from the Select Range list.

10 Click Import.

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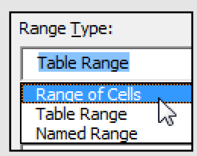
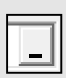
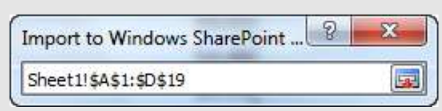
Do it!

B-2: Creating a list from Excel spreadsheet data

The files for this activity are in Student Data folder **Unit 1\Topic B**.

Here's how	Here's why
1 From the Site Actions menu, choose **More Options…**	
2 Click **Import Spreadsheet**	
3 Click **Create**	
4 In the Name box, type **Spice Price List**	
5 In the Description box, type **Current wholesale prices.**	
6 Click **Browse**	
7 Navigate to the current topic folder and select **Spice price list.xlsx** Click **Open**	Student Data folder Unit 1\Topic B.
8 Click **Import**	
9 On the taskbar, click the Excel icon	
10 From the Range Type list, select **Range of Cells**	
11 Click 	
12 Select the range A1 to D19	
13 Click 	To return to the Import to Windows SharePoint Services list dialog box.
14 Click **Import**	
15 Observe the list	SharePoint used the column headings from the spreadsheet as the column headings for the list. Each row of data in the spreadsheet is a list item.

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16 Observe the Quick Launch bar	By default, a link to the new Import Spreadsheet list is not displayed here.

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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 learn about a team's views and opinions on a specific subject. Users with Contribute or higher permissions can respond to a survey.

Creating surveys

As shown in Exhibit 1-7, when you create a survey, in addition to entering a name and description and specifying whether to display a link in the Quick Launch bar, you have two more decisions to make about the list, compared to other list types:

- Decide whether responses to the survey will be anonymous or the user name of each respondent will be displayed. By default, surveys are not anonymous.
- Decide whether a user can respond to a survey more than once. By default, surveys don't allow multiple responses.

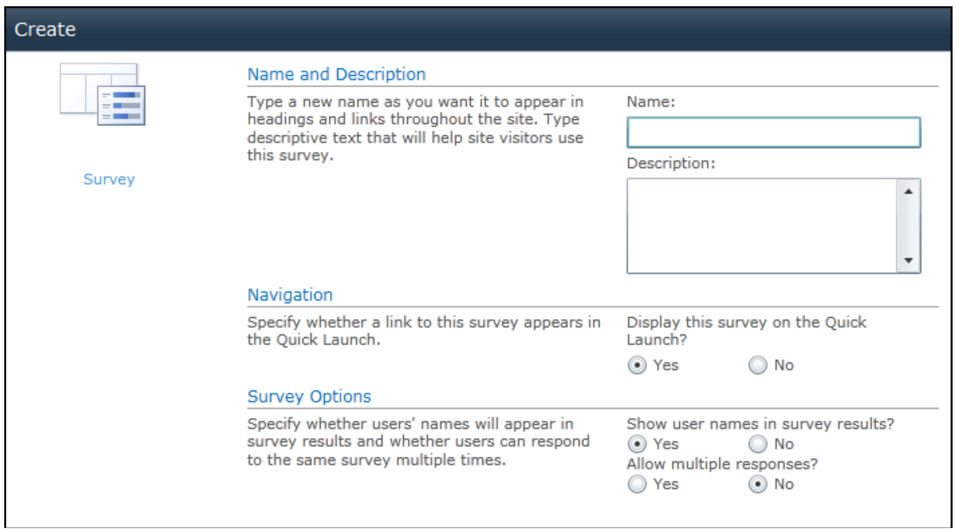

Exhibit 1-7: Creating a survey

With lists and libraries, you create an empty list or library and then add items to it. When you create a survey, however, SharePoint starts the New Question Wizard. You use the wizard to compose questions for your survey.

To add a question to your survey:

1. In the Question and Type section, shown in Exhibit 1-8, type your question and select the type of answer you want users to give. (See the table following these steps.)
2. In the Additional Question Settings section, specify whether to require a response to this question.
3. In the Additional Question Settings section, set the other values. The settings available change, depending on the response type you selected for the question.
4. Click Next Question to enter another question in the survey.
   Click Finish if you're done entering questions.

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Following are the options for specifying a response type for a question.

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 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.

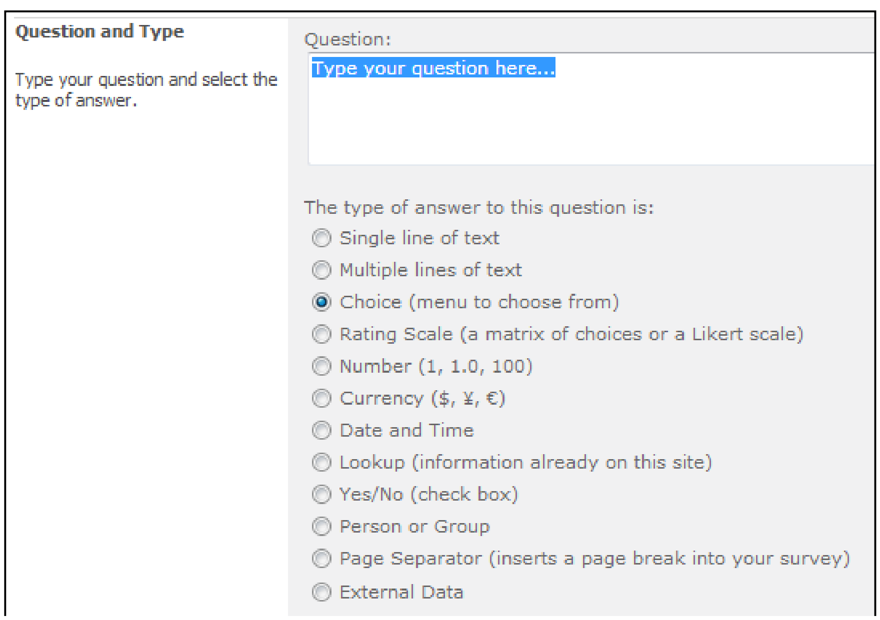

Exhibit 1-8: The Question and Type section

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Branching logic

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

Do it!

B-3: Creating a survey

Here's how	Here's why
1 From the Site Actions menu, choose **More Options…**	
2 Click **Survey**	
3 In the Name box, type **Employee Satisfaction Survey**	
4 Click **More Options**	
5 In the Survey Options section, under "Show user names in survey results," select **No**	This setting makes users' responses anonymous.
6 Observe the "Allow multiple responses?" setting	It is set to allow each user to respond to the survey only one time.
7 Click **Create**	
8 In the Question box, type **How would you rate your satisfaction with your job at this time?**	
9 Verify that **Choice** is selected under "The type of answer to this question is"	
10 Under "Require a response to this question," select **Yes**	

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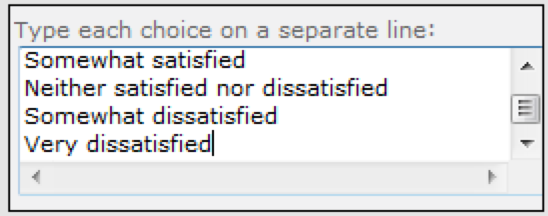
11 In the "Type each choice on a separate line" box, type the following items on separate lines, as shown:

Very satisfied
Somewhat satisfied
Neither satisfied nor dissatisfied
Somewhat dissatisfied
Very dissatisfied



12 Under "Display choices using," select **Drop-Down Menu**

13 In the "Default value: Choice" box, type **Neither satisfied nor dissatisfied**

14 Click **Next Question**

15 Create the following question:

Question: **What is your overall opinion of Outlander Spices?**

Multiple lines of text

Required response: Yes

Number of lines for editing: 15

Rich text

16 Click **Finish**

You've created two questions for this survey.

17 In the Quick Launch bar, click **Employee Satisfaction Survey**

Or click in breadcrumbs.

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Custom lists

Explanation

You can create custom lists if you find that the default lists in Windows SharePoint Services don't meet your needs. A custom list lets you specify your own columns. For example, if you need to store information about specific products and services offered by your organization, you can create a custom list and add items to it.

To create a custom list:

1. Open the Create dialog box.
   - From the All Site Content page, click Create.
   - From the Site Actions menu, choose More Options.
2. In the Filter By list, click List if you want to limit the items in the dialog box to only list types.
3. Click Custom List or Custom List in Datasheet View.
4. In the Name box, type a name for your list.
5. Click More Options.
6. Enter a description for the list.
7. Specify whether to display a link to the list in the Quick Launch bar.
8. Click Create.

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Do it!

B-4: Creating a custom list

Here's how	Here's why
1 From the Site Actions menu, choose **More Options…**	
2 Click **Custom List**	
3 In the Name box, type **Products**	
4 Click **More Options**	
5 In the Description box, type **This list contains information about the available products.**	
6 With Yes selected under "Display this list on the Quick Launch," click **Create**	This action creates an empty list. So far, only the default Title column is part of the new list.

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Custom list columns

Explanation

When you create a custom list that uses either Regular or Datasheet view, the only field that appears in the list is Title. You can customize this list by:

- Adding columns
- Specifying whether this list requires content approval
- Specifying whether attachments are allowed
- Assigning read and edit permissions to the items

To add a column to the custom list:

1 On the List Tools | List tab, click List Settings.

2 Under Columns, click Create Column to open the <*Custom_list_title*> - List Settings - Create Columns page, as shown in Exhibit 1-9.

3 In the Name and Type section, specify a title for the column and select the type of information you want to store in the column. Options are:

   - Single line of text
   - Multiple lines of text
   - Choice (menu to choose from)
   - Number (1, 1.0, 100)
   - Currency ($, €, ¥)
   - Date and Time
   - Lookup (information already on this site)
   - Yes/No (check box)
   - Person or Group
   - Hyperlink or Picture
   - Calculated (calculation based on other columns)
   - External Data

4 In the Additional Column Settings section, you can:

   - Enter a description for the column.
   - Enable or disable the feature that forces a user to enter a value in this field.
   - Add or remove the column in the default list view.

   Other column settings are available based on the type of information you selected in the previous section.

5 Click OK.

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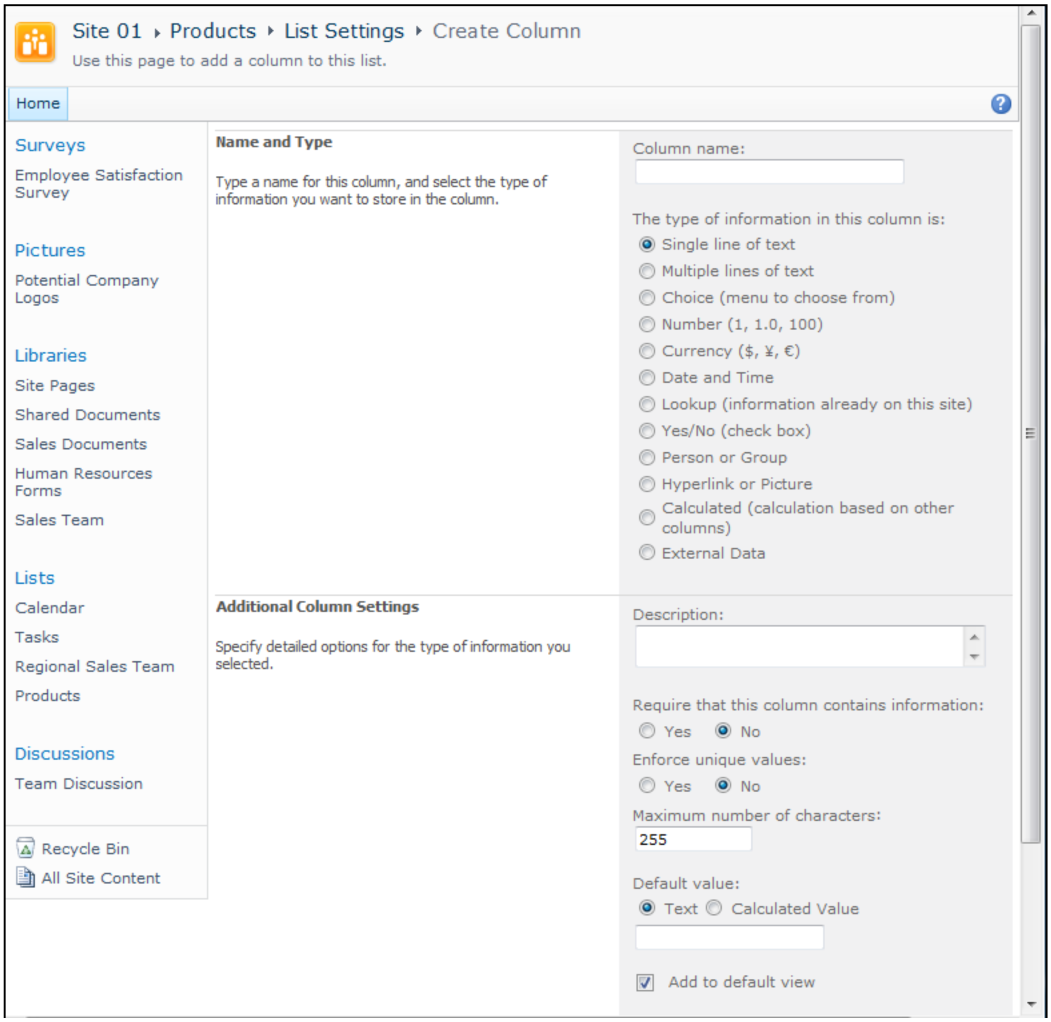

Exhibit 1-9: An example of the Create Column page

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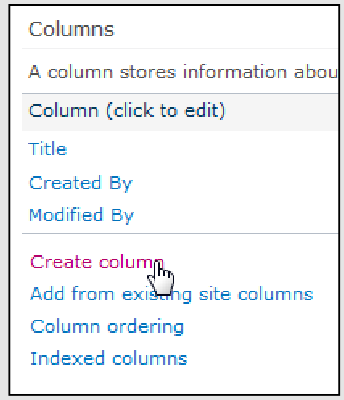
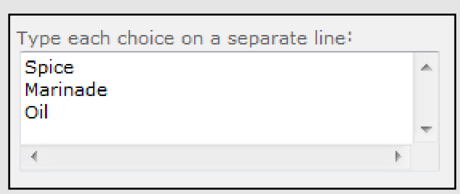
Do it!

B-5: Creating columns in a custom list

Here's how	Here's why
1 On the Library Tools | List tab, click **List Settings**	
Click **Create column**	
2 In the Column name box, type **Description**	
3 Under "The type of information in this column is," select **Multiple lines of text**	The Additional Column Settings section changes to include different settings based on the "Multiple lines of text" selection.
4 Click **OK**	To accept the default values for the additional column settings.
5 Click **Create column**	
6 In the Column name box, type **Product type**	
7 Under "The type of information in this column is," select **Choice (menu to choose from)**	
8 Under "Require that this column contains information," select **Yes**	To make this field required.
9 In the "Type each choice on a separate line" box, type **Spice** **Marinade** **Oil**	

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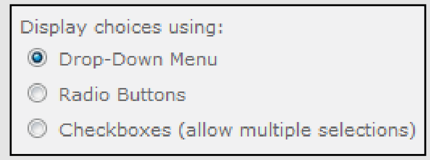
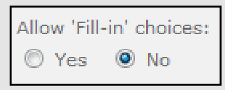
10	Observe the "Display choices using" section	 Drop-down menus and radio buttons allow users to select only one option in a group. Checkboxes allow users to select more than one option.
11	Observe the "Allow 'Fill-in' choices" section	 If you want users to be able to type in an entry that doesn't appear in your list, select Yes. To force users to chose from only those options you entered in the "Type each choice on a separate line" section, choose No.
12	Under Default value, click in the **Choice** box	(If necessary.) The default value changes to the first option in your list—Spice.
13	Click **OK**	
14	Go to the Products home page	(Click Products in breadcrumbs.) After Title, the list has Description and Product type as column headings.

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Adding items to a custom list

Explanation

Users with Contribute or higher permissions can add items to a custom list in the same way that they add an item to one of the default lists. To add an item to a custom list:

1 Go to the custom list page.
2 Click Add new item.
3 Enter the required information.
4 Click Save.

Datasheet view enables users with Contribute or higher permissions to add items directly in the view, as they would enter data in a spreadsheet. **Note:** In order for SharePoint to display information in Datasheet view, a compatible spreadsheet program, such as Microsoft Excel 2010, must be installed.

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Do it!

B-6: Adding items to a custom list

Here's how	Here's why
1 On the Products list page, click **Add new item**	Notice that the Title and Product type fields are required.
2 In the Title box, type **Pepper**	
3 In the Description box, type **This product is available year-round.**	Spice is selected automatically.
4 Click **OK**	To add Pepper to the Products list.
5 Add a second item, using the following variables: Title: **Cardamom** Description: **This product has a limited availability. Call for more details.** Product type: **Spice**	
6 Add a third item, using the following variables: Title: **Rosemary Balsamic** Description: **For meats and vegetables.** Product type: **Marinade**	

Title	Description	Product type
Pepper NEW	This product is available year-round.	Spice
Cardamom NEW	This product has a limited availability. Call for more details.	Spice
Rosemary Balsamic NEW	For meats and vegetables.	Marinade

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Topic C: SharePoint pages

Explanation

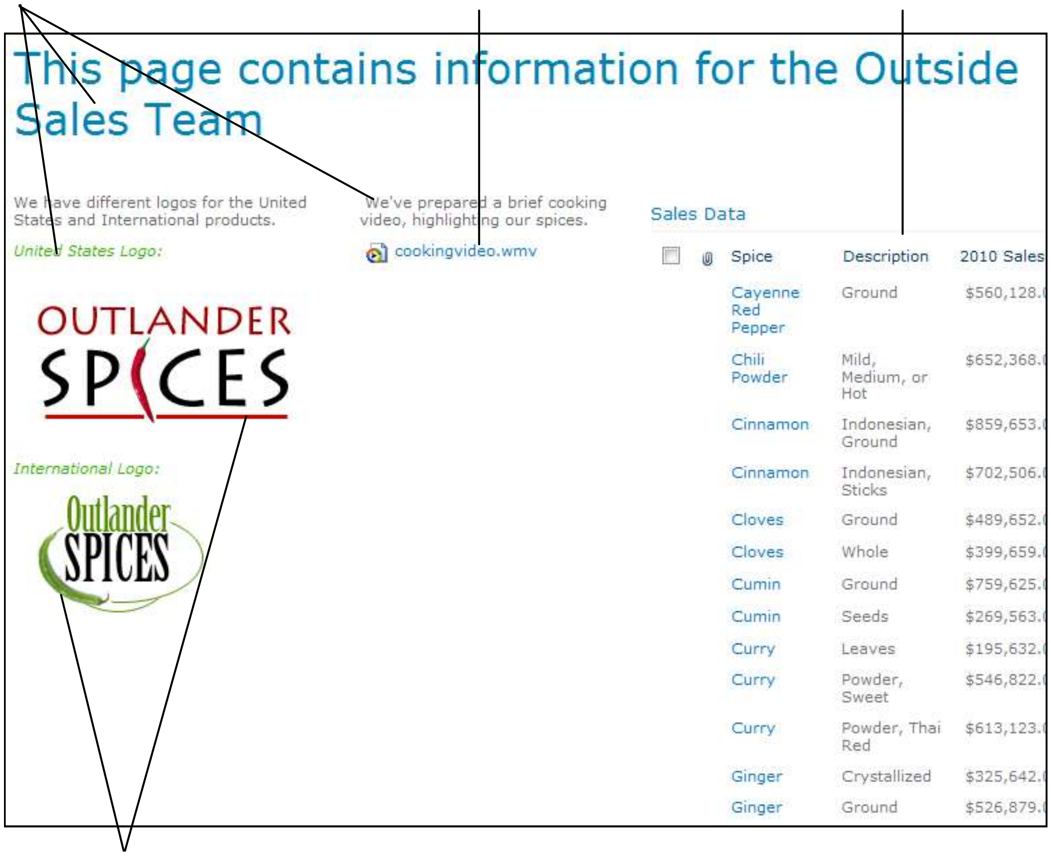
If you have Design or Full Control permissions on a SharePoint Foundation site, you can add page components to your site. The types of pages you can add to the site include:

- Page
- Web Part page

Pages

In SharePoint Foundation 2010, when you create pages by using the Create dialog box, those pages are actually wiki pages. A *wiki page* is an empty 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 1-10. If you have Design or higher permissions, you can add wiki pages to your site without having a wiki library.

Text　　Video　　SharePoint list



Photos

Exhibit 1-10: A SharePoint wiki page

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Creating pages

To create a page:

1 Open the Create dialog box.
   - From the All Site Content page, click Create.
   - From the Site Actions menu, choose More Options.

2 In the Filter By list, click Page if you want to limit the items in the dialog box to only page types.

3 Click Page.

4 In the Name box, type a name for the page.

6 Click Create. Although the More Options button is available, clicking it will display only one option, “New page name.”

A new page displays the Editing Tools tabs on the Ribbon, giving you the ability to add and format text, images, videos, and other items. (Creating and managing wiki pages was covered in the *Microsoft SharePoint Foundation 2010: Basic* course.)

Web Part pages

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

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

Creating Web Part pages

To create a Web Part page:

1 Open the Create dialog box.
   - From the All Site Content page, click Create.
   - From the Site Actions menu, choose More Options.

2 In the Filter By list, click Page if you want to limit the items in the dialog box to only page types.

3 Click Web Part Page.

4 Click Create to display the New Web Part page, shown in Exhibit 1-11.

5 In the Name box, type a name for your Web Part page.

6 Check “Overwrite if file already exists?” if you want to overwrite the Web Part page each time you create a Web Part page with the same name.

7 In the Choose a Layout Template list box, select a layout template for the page. The layout you select determines how the zones are arranged on page.

8 Specify the document library where you want to save the Web Part page. By default, Web Part pages are saved in Site Assets.

9 Click Create.

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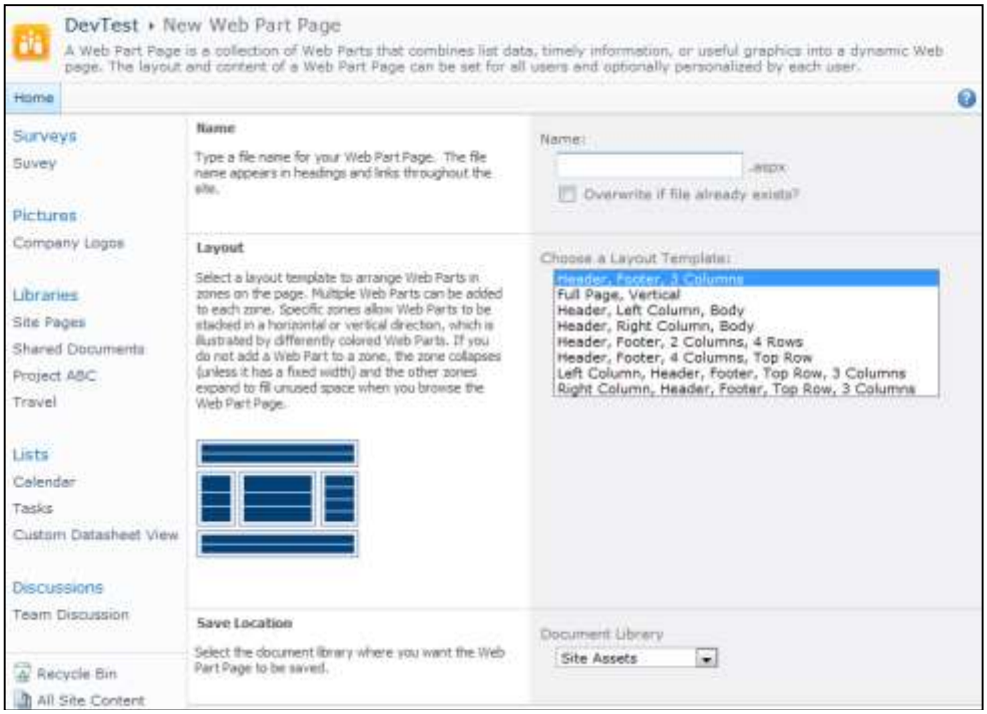

Exhibit 1-11: Creating a Web Part page

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Do it!

C-1: Creating a Web Part page

Here's how	Here's why
1 From the Site Actions menu, choose **More Options…**	
Click **Page**	To filter the list to show only the Page content types.
2 Click **Web Part Page**	
Click **Create**	To display the "New Web Part Page" page.
3 In the Name box, type **Marketing**	
4 Check **Overwrite if file already exists?**	If you don't check this option, you will get an error message if another Web Part page with the same name exists.
5 Verify that **Header, Footer, 3 Columns** is selected under "Choose a Layout Template"	You'll use this layout template for the Web Part page. This layout has a header, a footer, and three zones: left, right, and middle.
6 In the Save Location section, from the Document Library list, select **Shared Documents**	To specify that the shared Web Part page will be saved in the Shared Documents library. You'll be able to open this Web Part page by clicking Shared Documents in the Quick Launch bar.
7 Click **Create**	To create the Web Part page. You can add Web Parts to this page by using the Add a Web Part link in any of the zones.

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Adding Web Parts

Explanation

After you create a Web Part page, as shown in Exhibit 1-12, you can add Web Parts to it. A new Web Part page has a title bar and zones. The empty sections on the Web Part page are the zones. Each zone has a name, such as Header, Footer, Left Column, or Right Column. The number and placement of the zones vary, depending on the layout template you selected when you created the Web Part page.

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

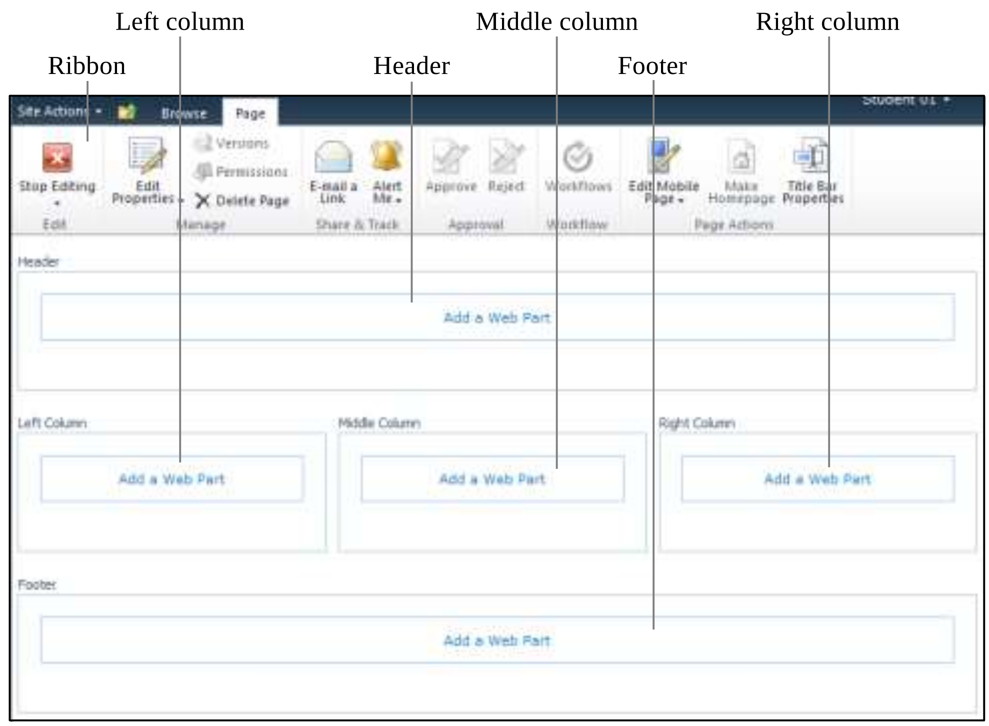

Exhibit 1-12: The new Web Part page named Marketing

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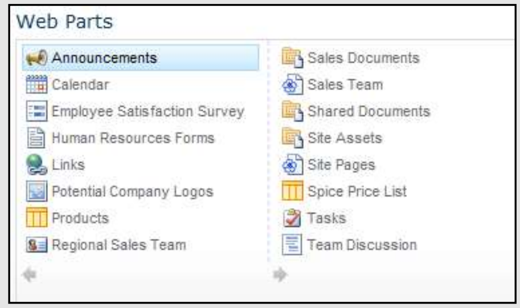
Do it!

C-2: Adding Web Parts to a Web Part page

Here's how	Here's why
1 In the Header zone, click **Add a Web Part**	You'll add the Announcements Web Part to the Header zone.
2 Under Web Parts, verify that **Announcements** is selected	
3 Click **Add**	
4 In the Left Column zone, click **Add a Web Part**	You'll add the Calendar Web Part to the Left Column zone.
5 Under Web Parts, select **Calendar**	
6 Click **Add**	
7 In the Middle Column zone, click **Add a Web Part**	You'll add the Links Web Part to the Middle Column zone.
8 Under Web Parts, select **Links**	
9 Click **Add**	
10 In the Right Column zone, click **Add a Web Part**	
11 Under Web Parts, select **Team Discussion** Click **Add**	
12 Navigate up to Shared Documents	The new Marketing Web Part page is displayed in the list.
13 Click **Marketing**	To open the Web Part page. Users with Contribute permissions or higher can add announcement, event, and link items. They can also begin a discussion or reply to one.
14 Close Internet Explorer	

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Unit summary: Adding components

Topic A In this topic, you learned how to add libraries to a Team Web site. You created a document library, a form library, a picture library, and a wiki page library. You added content to all of the libraries.

Topic B In this topic, you learned how to add lists to a Team site. You created a contact list and a list with data from an Excel spreadsheet. You created a survey and added questions to the survey. You created a custom list, added columns to the custom list, and then added data to the custom list.

Topic C In this topic, you learned how to add pages to a Team site. You learned how to create a wiki page. You created a Web Part page and added Web Parts to it.

Independent practice activity

In this activity you'll practice adding library, list and page components to a Team site.

The files for this activity are in Student Data folder **Unit 1\Unit summary**.

1. Open Internet Explorer.
2. Go to **http://spfadvsql-spf/admin##**, where ## is your assigned student number.
3. Create a document library called **Templates**.
4. Upload Fax Cover Page and Proposal to the document library.
5. Create a form library called **Travel Forms**.
6. Upload Travel Request Form to the form library.
7. Create a picture library called **Teas**.
8. Upload White Tea to the picture library.
9. Create a custom list called **Teas from India**.
10. Add the following two columns to the custom list:
    - Title: State/Union Territory; single line of text; required column
    - Title: Price per ounce; currency; required column.
11. Add the following two items to the custom list:
    - Title: Black tea; Assam; $1.40
    - Title: Nilgiri tea; Tamil Nadu; $1.45
12. Create a wiki page library called **Tea Sales**.
13. Add a new wiki page called **India** to the wiki page library.
14. Choose "Two columns with header" for the text layout.
15. In the header, add the text **Outlander Teas from India**.
16. Format the text to:
    - Comic Sans
    - 48 pt
    - Dark Purple
    - Centered across the section

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17 In the first column, insert IndiaMap.jpg.

18 In the second column, add the list Teas from India.

19 Create a list called **Spice Sales Data** from the Spices sales spreadsheet. Use the named range called Sales.

20 Create a brief survey called **New Year's Gathering**. Add the following two questions:

- What type of gathering do you prefer?

  Choice (menu to choose from)

  Require a response: Yes

  Choices:

    Catered lunch at the office

    Dinner at a restaurant

    Family outing at the local museum

    Allow 'Fill-in' choices

- Would you be willing to pay for your spouse/significant other?

  Yes/No (check box)

21 Create a Web Part page called **Admin**. Use the Header, Left Column, Body layout.

22 Add the Announcements Web Part to the Header.

Add the Links Web Part to the Left Column.

Add the New Year's Gathering Survey to the Body.

23 Close Internet Explorer.

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Unit 2

Changing the look and feel

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

A Modify navigation settings.

B Change your site theme.

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Topic A: Navigation

Explanation

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

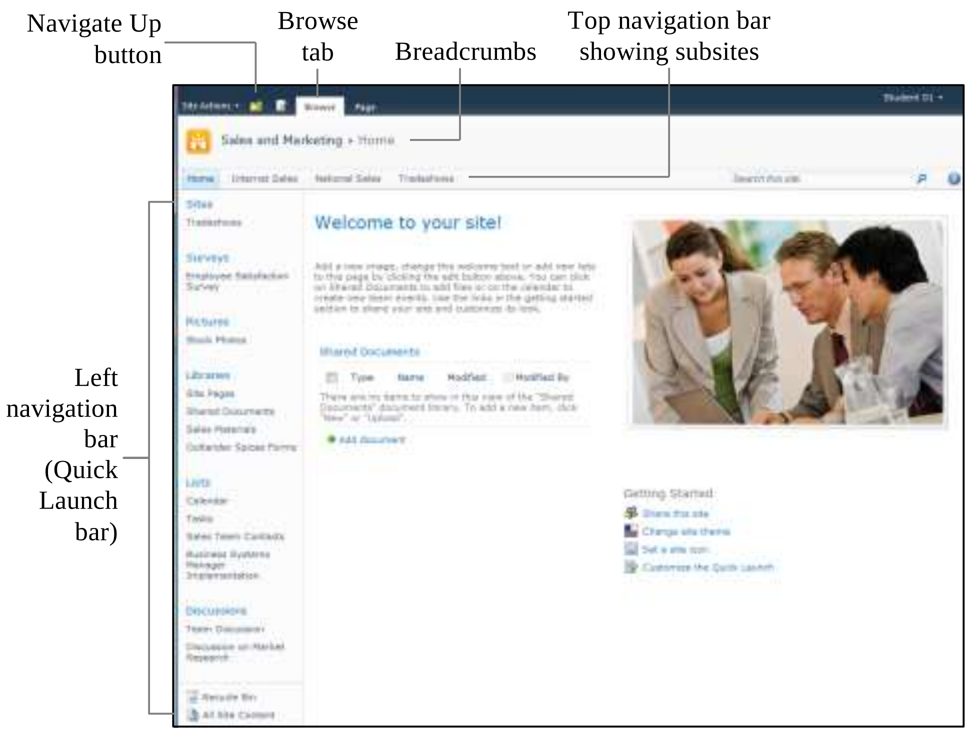

Exhibit 2-1: Navigation tools in the SharePoint window

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

- *Breadcrumbs* are a series of links that show users where they are in the current site's hierarchy. Using the breadcrumb links, users 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* or the *top link bar*.

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, users can click the Navigate Up button to display the hierarchy of the page they are viewing. The Navigate Up button shows the hierarchy all the way up to the root site in the site collection. Users click a link in the hierarchy to navigate up. Whereas breadcrumbs show users the hierarchy of the current site, the Navigate Up button displays the hierarchy of the entire site collection.

If you have Design or Full Control permissions, you can change the links displayed in the Quick Launch bar and the top link bar.

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Rearranging links in the Quick Launch bar

Users with Design or Full Control permissions on a site can change the order in which the headings appear in the Quick Launch bar, as well as the order in which the items under each heading are displayed. To rearrange the items in the Quick Launch bar:

1. From the Site Actions menu, choose Site Settings.
2. Under Look and Feel, click Quick launch.
3. Click Change Order.
4. To change the order of the headings, use the order numbers in the first column, as shown in Exhibit 2-2.

   To change the order of the items underneath a particular heading, use the numbers in the second column, as shown in Exhibit 2-2.
5. Click OK.

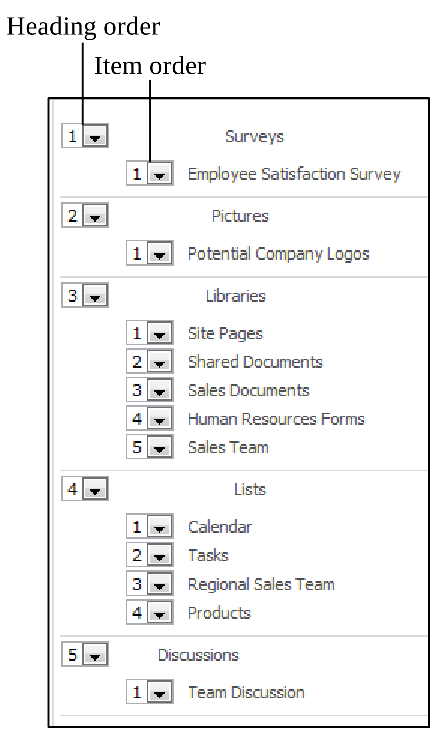

Exhibit 2-2: Changing the order of Quick Launch items

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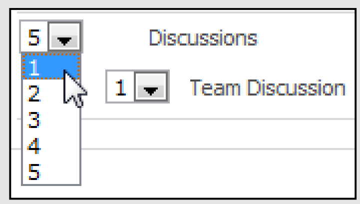
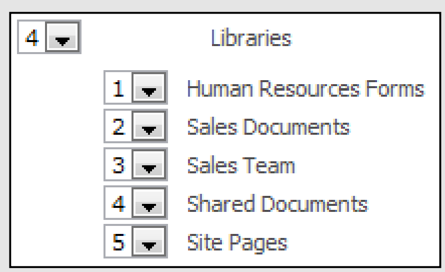
Do it!

A-1: Changing the order of items in the Quick Launch bar

Here's how	Here's why
1 Open Internet Explorer	Your home page is set to the home page of your Site ## Team site.
2 From the Site Actions menu, choose **Site Settings**	
3 Under Look and Feel, click **Quick launch**	
	
4 Click **Change Order**	
5 From the list next to Discussions, select **1**	
6 Click **OK**	
7 Observe the Quick Launch bar	The Discussion heading and its items moved to the first spot, and all the other headings moved down one spot.
8 Click **Change Order**	
9 Under the Libraries heading, move **Human Resources Forms** to the first position Move **Site Pages** to the fifth position Move **Shared Documents** to the fourth position	
10 Click **OK**	
11 Observe the Quick Launch bar	The order of the links under Libraries is now Human Resources Forms, Sales Documents, Sales Team, Shared Documents, and then Site Pages.

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Adding headings to the Quick Launch bar

Explanation

Users with Design or Full Control permissions on a site can create new headings to serve as links to content that isn't currently represented in the Quick Launch bar. These links can take users to pages on the current site, to other SharePoint sites or pages, or to non-SharePoint internal or external sites.

To add a heading to the Quick Launch bar:

1. From the Site Actions menu, choose Site Settings.
2. Under Look and Feel, click Quick launch.
3. Click New Heading.
4. In the "Type the Web address" box, enter the URL of the page to which the heading will link.
5. In the "Type the description" box, enter a description. This will be the text displayed in the Quick Launch bar.
6. Click OK.

Do it!

A-2: Adding a heading to the Quick Launch bar

Here's how	Here's why
1 On the Site Settings - Quick Launch page, click **New Heading**	You'll add a heading that will take users to your Admin## site.
2 In the "Type the Web address" box, type **http://spfadvsql-spf/admin##/sitepages/home.aspx**	
3 In the "Type the description" box, type **Admins Web site**	
4 Click **OK**	A heading link to your Admin## site has been added to the Quick Launch bar.
5 In the Quick Launch bar, click **Admins Web site**	It takes you to the home page of your Admin## site.

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Adding link items to a heading

Explanation

If you have Design or Full Control permissions on a site, you can add links under headings in the Quick Launch bar. Here's how:

1. From the Site Actions menu, choose Site Settings.
2. Under Look and Feel, click Quick launch.
3. Click New Navigation Link.
4. In the "Type the Web address" box, enter the URL of the page you want to link to.
5. In the "Type the description" box, enter a description. This will be the text displayed in the Quick Launch bar.
6. From the Heading list, select the heading you want this link to be displayed under.
7. Click OK.

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Do it!

A-3: Adding a link to the Quick Launch bar

Here's how	Here's why
1 On the Admin## site, in the Quick Launch bar, click **Shared Documents**	
2 Select the URL in the address box	
3 Copy the URL to the clipboard	
4 Go to your Site ## site	
5 From the Site Actions menu, choose **Site Settings**	
6 Under Look and Feel, click **Quick launch**	
7 Click **New Navigation Link**	
8 In the "Type the Web address" box, paste the URL you copied to the clipboard	
9 In the "Type the description" box, type **Admin Shared Docs**	
10 From the Heading list, select **Admins Web site**	
11 Click **OK**	
12 Observe the Quick Launch bar	 The direct link to the Shared Documents page on your Admin ## site is displayed under the heading link to the Admin ## site home page.
13 In the Quick Launch bar, click **Admin Shared Docs**	You are taken directly to the Shared Documents page on your Admin ## site.
14 Click the IE Home button	To return to your Site ## site.

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Modifying and deleting headings and links in the Quick Launch bar

Explanation

To modify or delete a heading or link in the Quick Launch bar:

1. From the Site Actions menu, choose Site Settings.
2. Under Look and Feel, click Quick launch.
3. Click the Edit button next to the heading or link you want to modify or delete.
4. To change an item: Change the Web address, the description, or the heading under which a link is displayed. Click OK.

   To delete an item: Click Delete to delete the heading and its sub-links, or the individual link. Click OK.

Do it!

A-4: Deleting a link from the Quick Launch bar

Here's how	Here's why
1 From the Site Actions menu, choose **Site Settings**	
2 Under Look and Feel, click **Quick launch**	
3 Next to Regional Sales Team, click 	The Edit button.
4 Click **Delete**	
5 Click **OK**	

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Adding links to the top link bar

Explanation

By default, SharePoint Foundation places a link to a site's home page and any subsites on the top link bar, as shown in Exhibit 2-3. If you have Design or Full Control permissions on a site, you can add additional links to the top link bar. These links can take users to pages on the current site, to other SharePoint sites or pages, or to non-SharePoint internal or external sites.

Exhibit 2-3: The top link bar with subsite links

To add a link to the top link bar:

1. From the Site Actions menu, choose Site Settings.
2. Under Look and Feel, click Top link bar.
3. Click New Navigation Link.
4. In the "Type the Web address" box, enter the URL of the site or page you want to link to.
5. In the "Type the description" box, enter a description. This will be the text displayed in the top link bar.
6. Click OK.

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Do it!

A-5: Adding links to the top link bar

Here's how	Here's why
1 From the Site Actions menu, choose **Site Settings**	
2 Under Look and Feel, click **Top link bar**	
3 Click **New Navigation Link**	
4 In the "Type the Web address" box, type **http://spfadvsql-spf/admin##/sitepages/home.aspx**	
5 In the "Type the description" box, type **Admins Web site**	
6 Click **OK**	A heading link to your Admin## site has been added to the top link bar.
7 In the top link bar, click **Admins Web site**	It takes you to the home page of your Admin## site.
8 Click the IE Home button	
9 From the Site Actions menu, choose **Site Settings**	
10 Under Look and Feel, click **Top link bar**	
11 Observe the page links	You now have a Change Order option. You can change the order in which the links appear in the top link bar.
12 Click **New Navigation Link**	
13 In the "Type the Web address" box, type **http://spfadvsql-spf/site##/siteassets**	
14 In the "Type the description" box, type **Site assets**	
15 Click **OK**	A heading link to your Admin## site has been added to the top link bar.
16 In the top link bar, click **Site assets**	It takes you to your Site ##'s Site Assets library.
17 From the Site Actions menu, choose **Site Settings**	

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18	Under Look and Feel, click **Top link bar**	
19	Click **New Navigation Link**	
20	In the “Type the Web address” box, type **http://www.google.com**	
21	In the “Type the description” box, type **Search**	
22	Click **OK**	A heading link to the Google search engine has been added to the top link bar.
23	In the top link bar, click **Search**	It takes you to the Google search page.
24	Click the IE Home button	

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Changing the order of links in the top link bar

Explanation

You can change the order in which the links in the top link bar are displayed. To do so:

1. From the Site Actions menu, choose Site Settings.
2. Under Look and Feel, click "Top link bar."
3. Click Change Order.
4. Use the Link Order drop-down lists, shown in Exhibit 2-4, to place each link in the order you want.
5. Click OK.

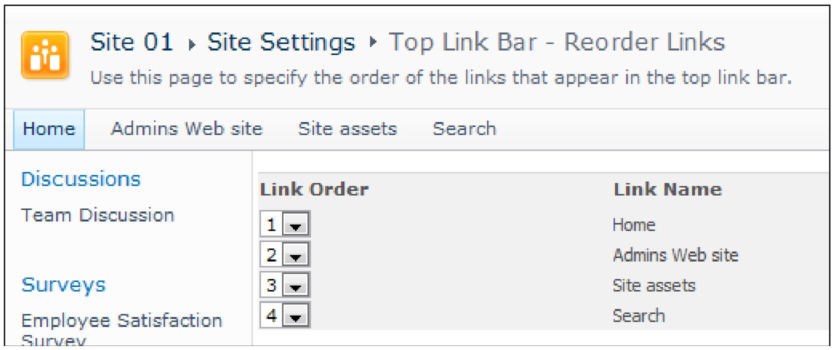
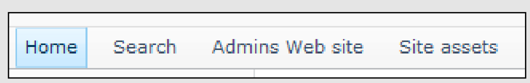


Exhibit 2-4: Changing the order of links in the top link bar

Do it!

A-6: Changing the order of links in the top link bar

Here's how	Here's why
1 From the Site Actions menu, choose **Site Settings**	
2 Under Look and Feel, click **Top link bar**	
3 Click **Change Order**	
4 Using the Link Order lists, place the **Search** link in the second position	
5 Click **OK**	

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Inheriting links

Explanation

You can also import the links from the top link bar of your site's parent site. Instead of clicking New Navigation Link, click "Use Links from Parent." You must click OK to verify that you want to delete any current links and replace them with links from the parent site's top link bar. Remember that if your users don't have permissions to those sites, they will receive an error message when they click the inherited links.

To remove the inherited links from the parent site and return to only the default Home link, click Stop Inheriting Links.

Do it!

A-7: Inheriting links in the top link bar

Here's how	Here's why
1 Click **Use Links from Parent**	
2 Click **OK**	The links on the parent site, Outlander, are now displayed in the top link bar of your site.
3 Click **Site ##**	(Where ## is the assigned student number of another student in class.) You receive an error message.
4 Click the IE Home button	
5 Click **Home**	The Home link now takes you to the parent site's home page, instead of to your Site ##'s home page. You receive an error message because you don't have permissions on the parent site.
6 Click the IE Home button	
7 Click **Admin ##**	Where ## is your assigned student number.
8 Click the IE Home button	
9 From the Site Actions menu, choose **Site Settings**	
10 Under Look and Feel, click **Top link bar**	
11 Click **Stop Inheriting Links**	To remove the top bar links from the parent site.
12 Click **Home**	The Home link once again takes you to the home page of your Site ## site.

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Topic B: Site themes

Explanation

A *site theme* is a font and color scheme combination that can be applied across all pages in your site. When you apply a theme to a site, SharePoint changes the color of most page elements, such as text, links, and background images. Themes don't affect physical layouts.

In SharePoint Foundation 2010, you can use a built-in theme. In SharePoint Server 2010, you can use a built-in theme. If you have permissions on the site collection, you can also create a custom theme. To do so, you modify the styles in an Office 2010 application, such as PowerPoint, save and upload the theme file to your site collection's Theme Gallery, and then enable theme inheritance in the site collection.

To apply a predefined site theme across all pages of your site:

1. From the Site Actions menu, choose Site Settings.
2. Under Look and Feel, click Site theme.
3. From the list of site themes, select the desired theme. The site themes that are installed with SharePoint Foundation 2010 are shown in Exhibit 2-5. A site administrator can create additional themes and upload them to the Theme Gallery, so you might see additional themes in the list.
4. After you've selected a theme, you can view the sample color scheme and font selections to the left of the list.
5. If you like the theme you selected, click Apply.

Exhibit 2-5: SharePoint Foundation 2010 site themes

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Do it!

B-1: Applying a site theme

Here's how	Here's why
1 From the Site Actions menu, choose **Site Settings**	
2 Under Look and Feel, click **Site theme**	
3 Observe the list of site themes	Your site is currently set to Default (no theme).
4 Select **Azure**	
Observe the preview	
5 Select **Berry**	
Observe the preview	
6 Select **Mission**	
Click **Apply**	
7 Observe the changes in colors and fonts	
8 Go to your Site ## home page	
9 Observe the color and font changes on your site's home page	
10 Close Internet Explorer	

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Unit summary: Changing the look and feel

Topic A In this topic, you learned how to modify the **navigation settings** of your SharePoint site. You added headings and links to the Quick Launch bar and changed the order of links. You also added links to the top link bar and changed the order of those links. Finally, you learned how to set links in the top link bar to be inherited from the parent site.

Topic B In this topic, you learned how to change your **site theme**. You changed the theme to a predefined theme. You also learned that when working with SharePoint Server 2010, you can create custom themes by using Microsoft PowerPoint 2010.

Independent practice activity

In this activity, you'll practice modifying the navigation settings of your site and applying a different theme.

1 Open Internet Explorer.

2 Go to your Admin ## site.

3 On your Admin ## site, add a new heading that points to your Site ## site.

4 Add two new links under the Site ## heading that point to:

- Site ## — Human Resources Forms. Name the link **HR Forms**.
- Site ## — Products. Name the link **Products**.

5 On your Admin ## site, set links for the top link bar so they are inherited from the parent site.

6 On your Site ## site, remove the Admins Web site heading from the Quick Launch bar.

7 On your Admin ## site, stop inheriting links from the parent site.

8 On your Admin ## site, add a link to Travel Forms to the top link bar. Call the link **Travel**.

9 On your Admin ## site, apply the municipal site theme to your Admin ## site.

10 Close Internet Explorer.

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Unit 3

Customizing a site

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

A Modify your site's components.

B Manage item controls.

C Edit pages in your SharePoint site.

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Topic A: Changing site components

Explanation

Once you've created your libraries, lists, and pages, you can change their settings as needed. At the most basic level, you can change the title, description, and navigation settings. More advanced settings include such items as adding a content type, granting or denying the ability to add attachments, and enabling searchable content.

Changing the title, description, or navigation settings

To change your site's title, description, or navigation settings:

1. Go to the page you want to change.
2. Click the <*Page type*> Tools | <*Page type*> tab. For example, on a page that is a library, you will see the Library Tools | Library tab.

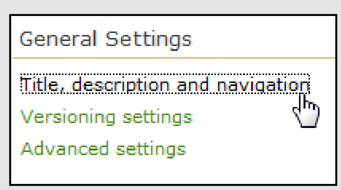
   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click <*Page type*> Settings.
4. Under General Settings, click "Title, description and navigation."
5. In the Name box, edit the page title.

   In the Description box, edit the page description.

   In the Navigation box, select Yes to place a link to the page in the Quick Launch bar, or select No to remove the link from the Quick Launch bar.
6. Click Save.

Do it!

A-1: Changing the title, description, and navigation settings

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 **Sales Team**	This is a link to a wiki library.
3 Click the **Page** tab	
4 Click 	
5 Under General Settings, click **Title, description and navigation**	
6 Edit the Name box to read **Sales Team Wiki**	

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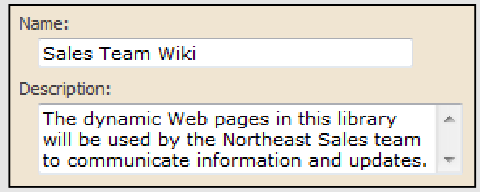
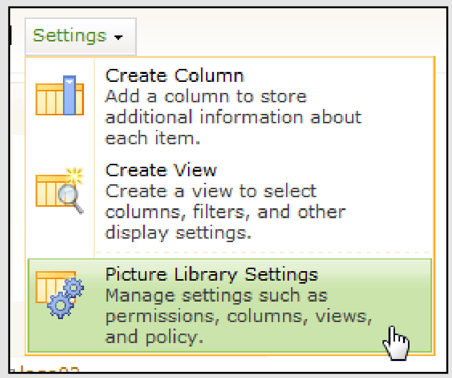
7 Edit the Description box to read **Northeast Sales team**	
8 Under Navigation, select **No**	To remove the link to the wiki library from the Quick Launch bar.
9 Click **Save**	
10 Without the link in the Quick Launch bar, how will users navigate to the wiki library?	
11 In the Quick Launch bar, click **Potential Company Logos**	Picture libraries don't use the Ribbon.
12 From the Settings menu, choose **Picture Library Settings**	
13 Under General Settings, click **Title, description and navigation**	
14 Edit the title to read **New Company Logo Submissions**	
15 Click **Save**	

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Modifying columns

Explanation

If a default library or list is close to what you need, but not quite a perfect fit for your organization, you can create the library or list from the default templates and then edit columns and add or delete custom columns. You can also change the order of the columns. For surveys, you work with questions instead of columns.

Editing column titles and descriptions

To edit the title or description of a column:

1. Go to the page you want to change.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click <*Page type*> Settings.
4. Under Columns, click the link for the column you want to edit. You can change the column name and description, but you can't change the type of information in the column.
5. Make the desired changes in the Column name and Description boxes.
6. Click OK.

Creating custom columns

To create a custom column:

1. Go to the page you want to change.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click <*Page type*> Settings.
4. Under Columns, click Create column.
5. In the Name and Type section, enter a column name and select the type of information the column will hold.
6. In the Additional Column Settings section, enter a description for the column. Specify:
   - Whether data in the column is required
   - Whether values must be unique
   - Specific settings for the type of information you selected
   - Whether the column will be added to the default view
7. (Optional) Expand the Column Validation section. Enter a formula to validate the data against. In the User message box, enter a description of what is needed for data in this column to be valid.
8. Click OK.

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Deleting custom columns

You can delete any custom columns added to your library or list. To delete a custom column:

1 Go to the page you want to change.

2 Click the <*Page type*> Tools | <*Page type*> tab.

If the page you've selected doesn't have a Ribbon, click Settings.

3 Click <*Page type*> Settings.

4 Under Columns, click the link for the column you want to delete.

5 Click Delete.

6 Click OK to verify that you want the column and any data stored in it to be permanently deleted.

Rearranging columns

To change the order of columns:

1 Go to the page you want to change.

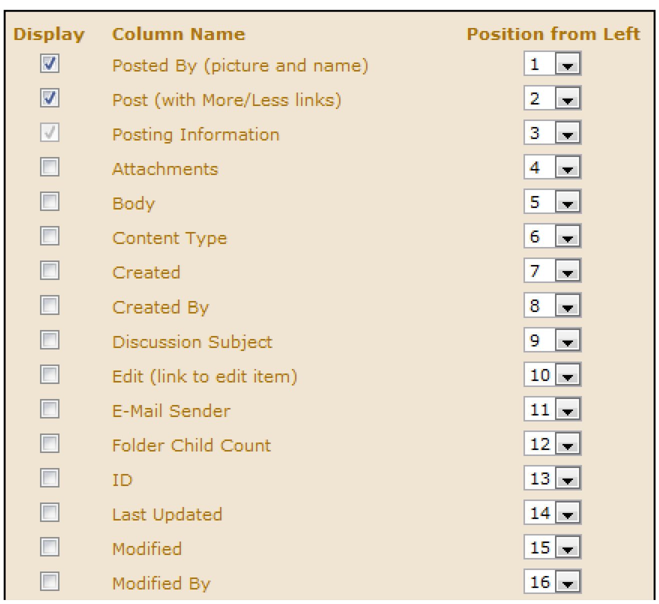
2 Click the <*Page type*> Tools | <*Page type*> tab.

If the page you've selected doesn't have a Ribbon, click Settings.

3 Click <*Page type*> Settings.

4 In the Columns box, use the "Position from Left" lists to specify the order of the columns. As shown in Exhibit 3-1, you can also enable and disable the display of a column by checking or clearing the box next to its name.

5 Click OK.



Display	Column Name	Position from Left
☑	Posted By (picture and name)	1
☑	Post (with More/Less links)	2
☑	Posting Information	3
☐	Attachments	4
☐	Body	5
☐	Content Type	6
☐	Created	7
☐	Created By	8
☐	Discussion Subject	9
☐	Edit (link to edit item)	10
☐	E-Mail Sender	11
☐	Folder Child Count	12
☐	ID	13
☐	Last Updated	14
☐	Modified	15
☐	Modified By	16

Exhibit 3-1: Setting the order of list columns

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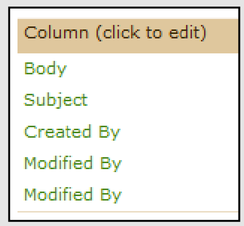
Do it!

A-2: Modifying columns

Here's how	Here's why
1 In the Quick Launch bar, under Discussions, click **Team Discussion**	
2 Observe the columns displayed in the default view	They are Subject, Created By, Replies, and Last Updated.
3 Click the **List** tab	Under List Tools.
4 Click 	
5 Observe the columns There are five columns listed.	
6 Click **Subject**	
7 Change the information to the following: Column name: **Topic** Description: **Describe the main focus of this discussion.** Maximum number of characters: **75**	
8 Click **OK**	
9 Click **Create column**	
10 Enter the following information for the column: Column name: **Project** The type of information in this column is: **Choice (menu to choose from)** Description: **What project does this discussion pertain to?** Require that this column contains information: **Yes** Type each option on a separate line: **Smith-Klein** **Johnson** **Cartwright**	
11 Click **OK**	

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12	Return to the Team Discussion page	Use the Navigate button, breadcrumbs, or the Quick Launch bar.
13	Observe the column headings	Subject has been changed to Topic. Project has been added.
14	Click the **List** tab	Under List Tools.
15	Click 	
16	Click **Subject**	
17	From the “Position from Left” list next to Project, select **2**	
18	Click **OK**	
19	Return to the Team Discussion page	Use the Navigate button, breadcrumbs, or the Quick Launch bar.
20	Observe the column headings	The Project column now follows Topic.
21	Click the **List** tab	
22	Click 	
23	Click **Topic**	
	Observe the options	This is a default column. You don’t have the option to delete it.
24	Click **Cancel**	
25	Click **Project**	
26	At the bottom of the page, click **Delete**	To delete your custom column.
	Click **OK**	To verify that you want to delete the column. If users have entered any items with data in this column, the items remain in the list, but the data in that column is deleted.
27	Return to the Team Discussion page	

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Advanced settings

Explanation

If you have Design or Full Control permissions on a library or list, you can use Advanced Settings to configure the features described in the following table.

Setting	Description
Content Types	Allow or disallow additional content types to be added to the library or list. A content type is similar to a template, which allows you to assign metadata properties and sample content to a document. You can then use that content type across your site collection.
Search	Enable or disable the inclusion of content from the library or list in search results.
Offline Client Availability	Specify whether the content of the library or list will be available to clients when they are offline.
Dialogs	Specify whether to open forms in a dialog box or a full Web page. For example, when you click New Event on the Calendar, it opens the Calendar - New Item form in a dialog box, as shown in Exhibit 3-2.

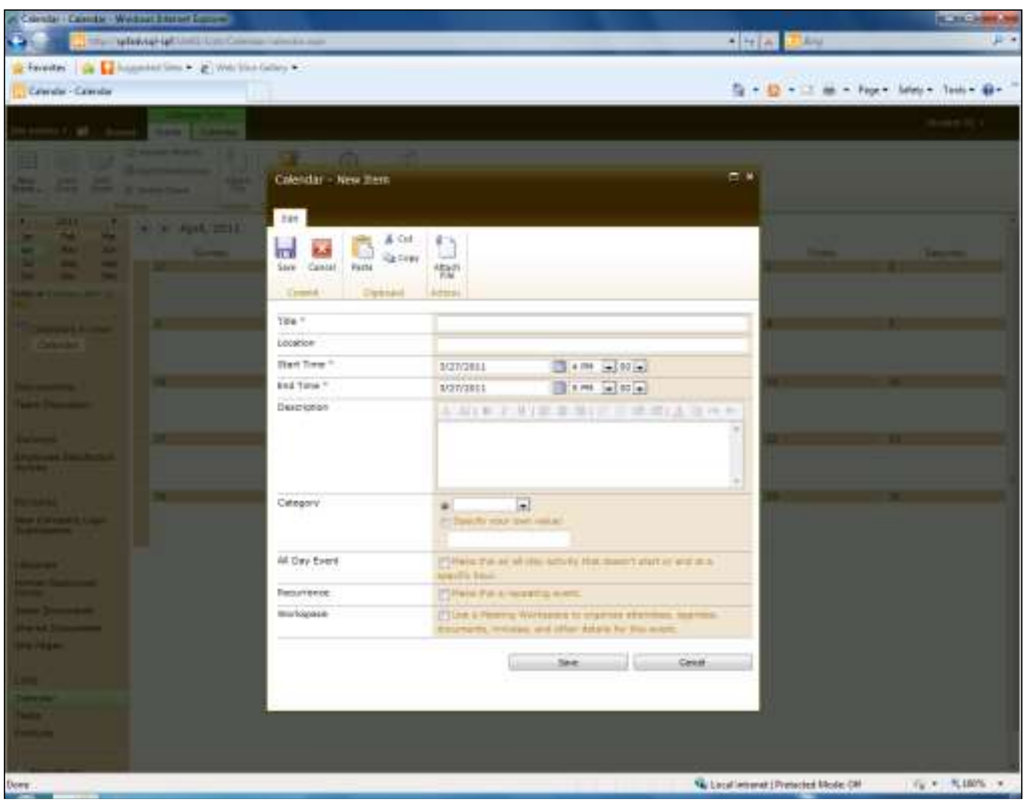

Exhibit 3-2: The Calendar - New Item form launched in a dialog box

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Additional advanced settings are available depending on the type of library or list selected. For example, you can edit the document template for a document library, and you can set item-level permissions on a list.

To change advanced settings:

1. Go to the page you want to change.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click <*Page type*> Settings.
4. Under General Settings, click Advanced settings.
5. The options will vary, depending on the library or list selected. Make the desired selections for the options available.
6. Click OK.

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Do it!

A-3: Configuring advanced settings

Here's how	Here's why
1 Click **Shared Documents**	
2 Click the **Library** tab	Under Library Tools.
3 Click 	
4 Under General Settings, click **Advanced settings**	
5 Observe the settings for this library	Management of content types isn't allowed. The document library is using a blank Word template called template.dot. Users with Full Control permissions can alter the template. The default open behavior for browser-enabled documents is set to "Use the server default (Open in the browser)." Custom Send To Destination is empty. The default options are to manually enter a location, e-mail a link, or download a copy. Users with Contribute permissions or higher are allowed to create folders in this library. The items in this document library are included in site search results. Documents in this library can be downloaded so users can work with them offline. This library is not the default location for site assets. Datasheet view can be used to edit items in this library. Forms are opened in dialog boxes (not in new Web pages).
6 Under Content Types, click **Yes**	To allow the management of content types in this library.
7 Under Folders, click **No**	The New Folder option won't be available to users.
8 Under Offline Client Availability, click **No**	Users won't be able to work with the documents in this library offline.
9 Under Datasheet, click **No**	To disable the ability to edit in Datasheet view.
10 Click **OK**	

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Topic B: Managing item controls

Explanation

One of the benefits of SharePoint is that it allows multiple users to collaborate on projects, with each person editing library or list items. Unfortunately, sometimes this practice can cause conflicting versions or inaccurate data to be posted on your site. In SharePoint Foundation, there are features you can use to control changes in your libraries or lists. These features include:

- Content approval
- Versioning
- Require Check Out (libraries only)

You can use these features individually or in combination, based on the needs of your organization.

Content approval

There are times when you don't want changes to be published for other users to read or use until those changes have been reviewed and approved. *Content approval* is a feature that allows users to change library and list items but delays the display of those changes on the site until a moderator has approved them. If you have Design or Full Control permissions, you can enable the content approval feature for your site's libraries and lists.

To enable content approval for a library or list:

1. Go to the page you want to change.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click <*Page type*> Settings.
4. Under General Settings, click Versioning settings.
5. In the Content Approval section, under "Require content approval for submitted items," select Yes.
6. In the Draft Item Security section, specify which users you want to be able to see non-approved items. The default option is "Only users who can approve items (and the author of the item.)"
7. Click OK.

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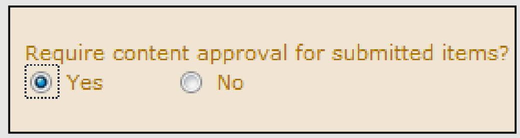
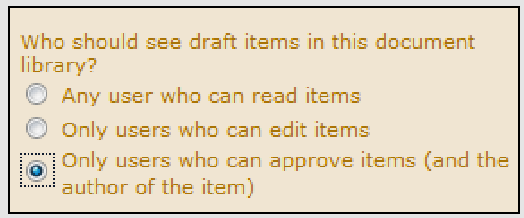
Do it!

B-1: Enabling content approval for a library

Here's how	Here's why
1 On the Shared Documents page, click the **Library** tab	Under Library Tools.
2 Click 	
Click **Versioning settings**	Under General Settings.
3 In the Content Approval section, under "Require content approval for submitted items," select **Yes**	
4 In the Draft Item Security section, under "Who should see draft items in this document library," verify that **Only users who can approve items (and the author of the item)** is selected	
5 Click **OK**	
6 Go to the Shared Documents home page	

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Approving or rejecting items

Explanation

When a user submits a new item or edits an item in a library or list with content approval enabled, the item is held with a Pending status until a moderator approves or rejects it by using the Approve/Reject dialog box shown in Exhibit 3-3. *Moderators* are any users who have Design or Full Control permissions on the library or list. While an item is pending, the author of the item can continue to change it. Rejected items remain in the library or list with a status of Rejected, unseen by normal users, until a moderator or the author deletes them.

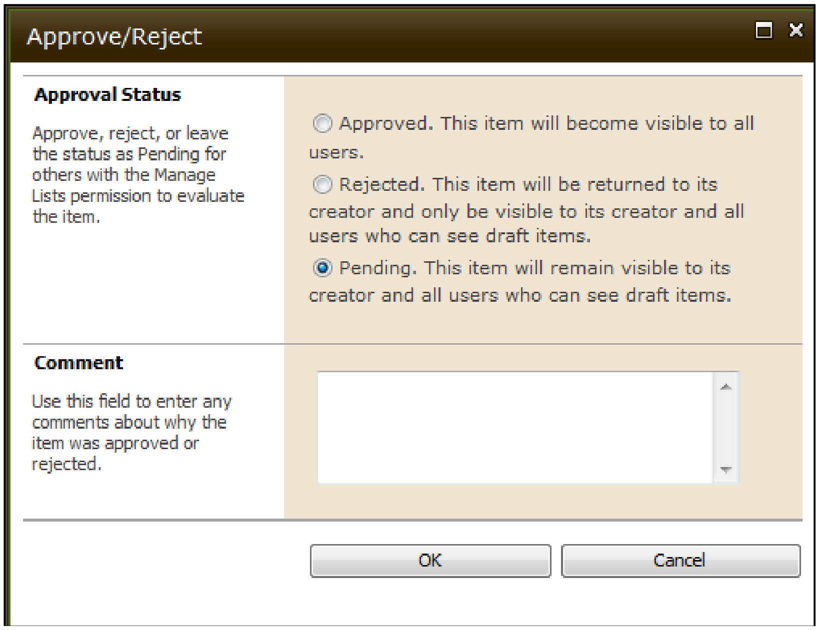

Exhibit 3-3: The Approve/Reject dialog box

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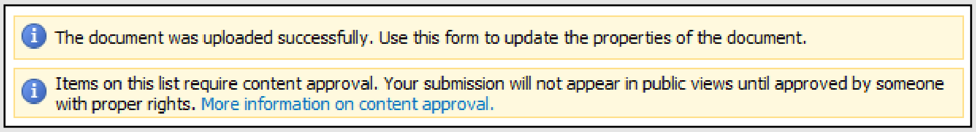
Do it!

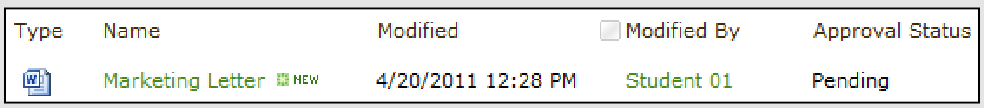
B-2: Approving items in a library

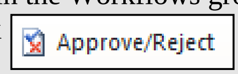
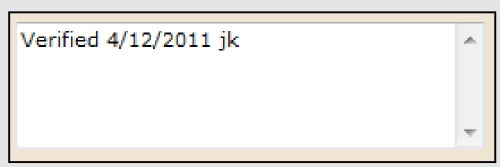
The files for this activity are in Student Data folder **Unit 3\Topic B**.

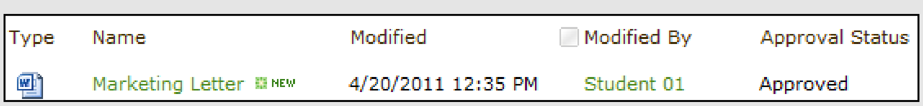
Here's how	Here's why
1 On the Shared Library home page, click **Add document**	
2 Browse to open **Marketing Letter** in the current topic folder	Student Data folder Unit 3\Topic B.
3 Observe the new item's Properties dialog box	It displays a message about content approval.



Here's how	Here's why
4 Click **OK**	
5 Click **Save**	The Marketing Letter is displayed in the list as Pending.



Here's how	Here's why
6 Select **Marketing Letter**	
7 On the Library Tools | Documents tab, in the Workflows group, click 	
8 In the Approval Status section, select **Approved**	
9 In the Comment box, type **Verified** followed by today's date and your initials	
10 Click **OK**	The Approval Status changes to Approved.



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Versioning

Explanation

The *versioning* feature in SharePoint enables you to manage content changes in your SharePoint lists and libraries. If you have Design or Full Control permissions on a list, library, or page, you can enable the versioning feature. You can use versioning to:

- Keep track of changes in files when several people are modifying the content independently of one another. Versioning records when an item or file was changed and which user made the changes.
- Revert to previous content when unwanted changes or deletions are made in an item or file.
- View previous versions without overwriting the current version.

You can track major and minor versions in libraries. *Major versions* (also referred to as *simple versioning*) record large changes, such as additions or deletions. Major versions are designated by a whole number, such as 1, 2, or 3. *Minor versions* record small changes, such as spelling corrections, and are designated by a decimal value after the major version number, as in 1.1, 1.2, and 1.3. In lists, you can track only major versions.

A new version is created when any of the following triggers occurs:

- An item or file is first created, or a file is first uploaded.
- A file is uploaded with the same name as an existing file, and the "Add as a new version to existing files" checkbox is checked.
- The properties of an item or file are changed.
- A file is opened, edited, and saved.
- A user checks out a file, edits it, and then checks it back in.

You can add the Version column to the view of a library or list so that users can see the version number of the item or file they are working with.

Enabling versioning

To enable versioning for a library or list:

1. Go to the page you want to change.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click <*Page type*> Settings.
4. Under General Settings, click Versioning settings.
5. For a library: In the Document Version History section, under "Create a version each time you edit a file in this document library," select "Create major versions" or "Create major and minor (draft) versions," as shown in Exhibit 3-4.

   For a list: In the Item Version History section, under "Create a version each time you edit an item in this list," select Yes, as shown in Exhibit 3-5.

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6 (Optional) For libraries, under “Optionally limit the number of versions to retain,” check “Keep the following number of major versions.” Enter the number of major versions you want to retain. You can enter a number between 1 and 50,000.

(Optional) For libraries with major and minor versions enabled, you can also check “Keep drafts for the following number of major versions.” Enter the number of minor versions (drafts) you want to retain. You can enter a number between 1 and 50,000.

(Optional) For lists, under “Optionally limit the number of versions to retain,” check “Keep the following number of versions.” Enter the number of versions you would like to retain. You can enter a number between 1 and 50,000.

7 For libraries with major and minor versions selected, specify who should see the draft items in the document library. Select “Any user who can read items” or “Any user who can edit items.”

8 Click OK.

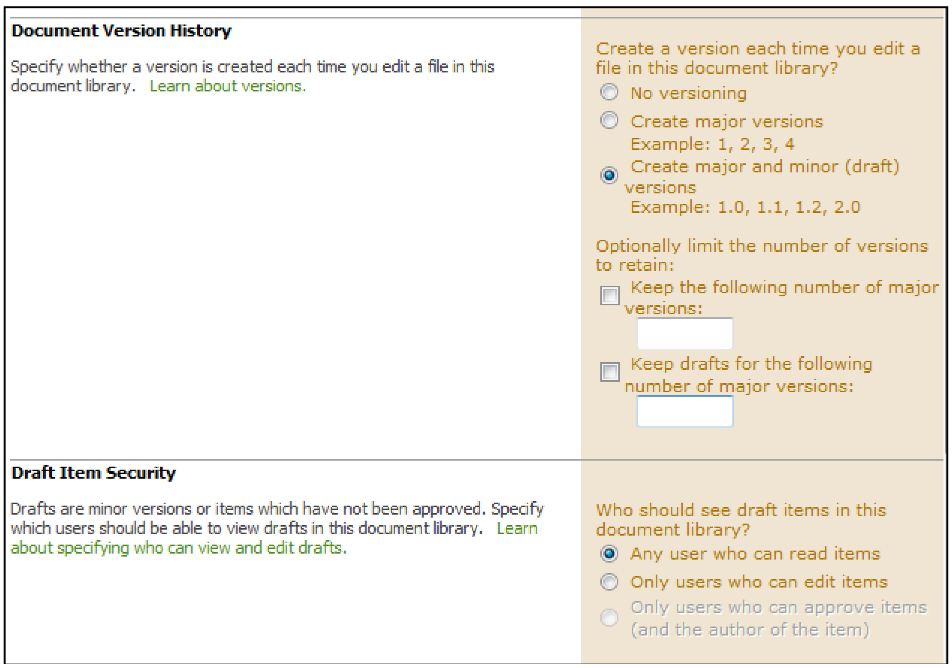

Exhibit 3-4: Enabling versioning for a library

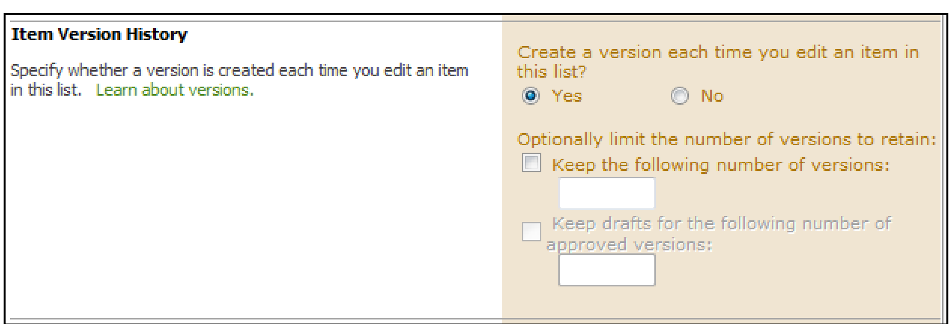

Exhibit 3-5: Enabling versioning for a list

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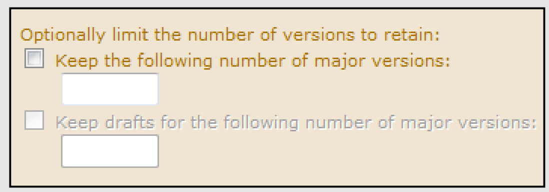
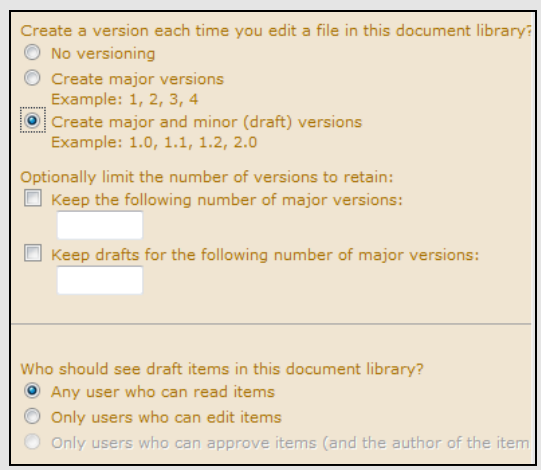
Do it!

B-3: Enabling versioning for a document library

Here's how	Here's why
1 On the Shared Documents page, click the **Documents** tab	Under Library Tools.
2 Click 	
3 Disable Content Approval and click **OK**	You'll work with versioning by itself.
4 Under General Settings, click **Versioning settings**	
5 Observe the options in the Document Version History section	You can choose to create major versions or major and minor (draft) versions.
6 Select **Create major versions**	
7 Observe the options under "Optionally limit the number of versions to retain"	 When you selected "Create major versions," the "Keep the following number of major versions" box became available.
8 Select **Create major and minor (draft) versions**	 When you selected "Create major and minor (draft) versions," the "Keep the following number of major versions" box and "Keep drafts for the following number of major versions" box became available. You are also able to specify which users can see the draft items.
9 Observe the options under "Optionally limit the number of versions to retain" and the Draft Item Security section	

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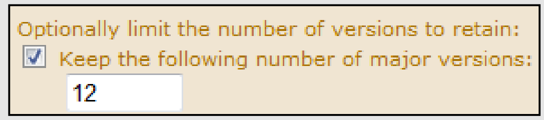
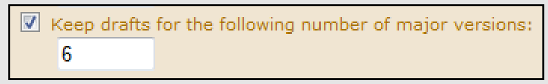
10 Check **Keep the following number of major versions**

Enter **12**



11 Check **Keep drafts for the following number of major versions**

Enter **6**



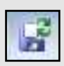
12 In the Draft Item Security section, select **Only users who can edit items**

13 Click **OK**

14 Go to the Shared Documents home page

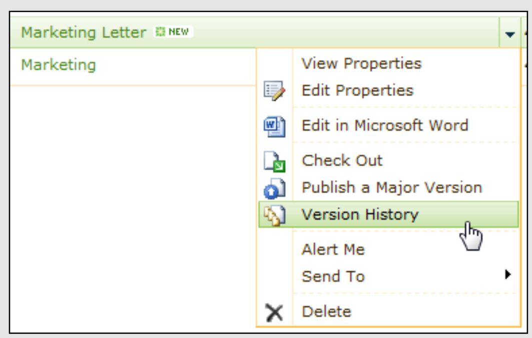
15 Open Marketing Letter for editing in Microsoft Word

16 Change “Chris Carr” to **Christopher Carr**

17 Click 

18 Close Word

19 Click the arrow next to Marketing Letter and choose **Version History**



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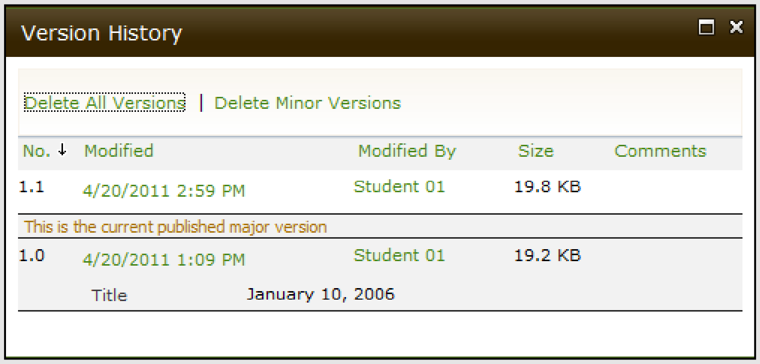
20 Observe the version history

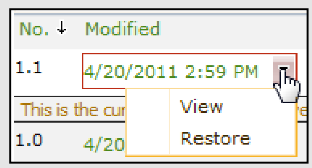


You have one major version (the original document) and one minor version (the one you just edited).

21 Observe the Delete options

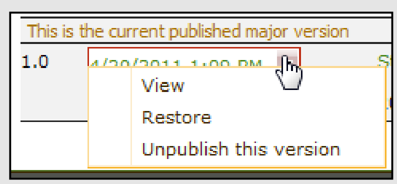
You can delete all versions of the document or just minor versions.

22 Open the menu next to the minor version, as shown



You can view the document in server read-only mode or you can restore it. You would choose Restore if a subsequent minor version included changes you didn't want.

23 Open the menu next to the major version



With major versions, you have an additional option: you can unpublish the version. This removes the version and any minor versions related to it.

24 Close the dialog box

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Require Check Out

Explanation

When you require that documents be checked out of a library, a user must check out a file in order to change it. This feature prevents other users from working on the file at the same time, potentially overwriting each other's changes. If you have Design or Full Control permissions on a library, you can enable the Require Check Out feature.

To enable the Require Check Out feature for a library:

1. Go to the library you want to change.
2. Click the Library Tools | Library tab.
3. Click Library Settings.
4. Under General Settings, click Versioning settings.
5. In the Require Check Out section, under "Require documents to be checked out before they can be edited," select Yes.
6. Click OK.

Do it!

B-4: Requiring that documents be checked out of a library

Here's how	Here's why
1 From Shared Documents, click the **Library** tab	Under Library Tools.
2 Click 	
3 Under General Settings, click **Versioning settings**	
4 In the Require Check Out section, under "Require documents to be checked out before they can be edited," click **Yes**	
5 Click **OK**	

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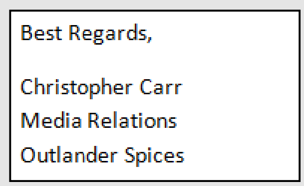
Checking out a file

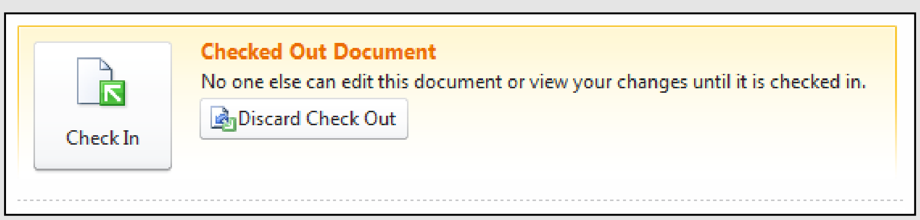
Explanation

When a user with Contribute permissions or higher checks out a file from the library, no one else can work on that file until the user either checks the file back in or discards the check-out. While the user has the file checked out, he can save it locally and work with it offline. When he’s finished editing the file, he checks the file back in.

Do it!

B-5: Checking out a file

Here’s how	Here’s why
1 Return to the Shared Documents home page	
2 From the Marketing Letter menu, choose **Edit in Microsoft Word**	 You’re presented with a dialog box stating that you are about to check out and edit the Marketing Letter document.
3 Click **OK**	
4 Remove the comma after “Christopher Carr” and place “Media Relations” on its own line	
5 Click the **File** tab	



	You can check the document (with your changes) back in by clicking the Check In button, or you can discard the check-out. This button is available while you are working with the document from the site. If you save the file locally but keep it checked out, you will need to check the file back in from the SharePoint site.
6 Choose **Save As**	

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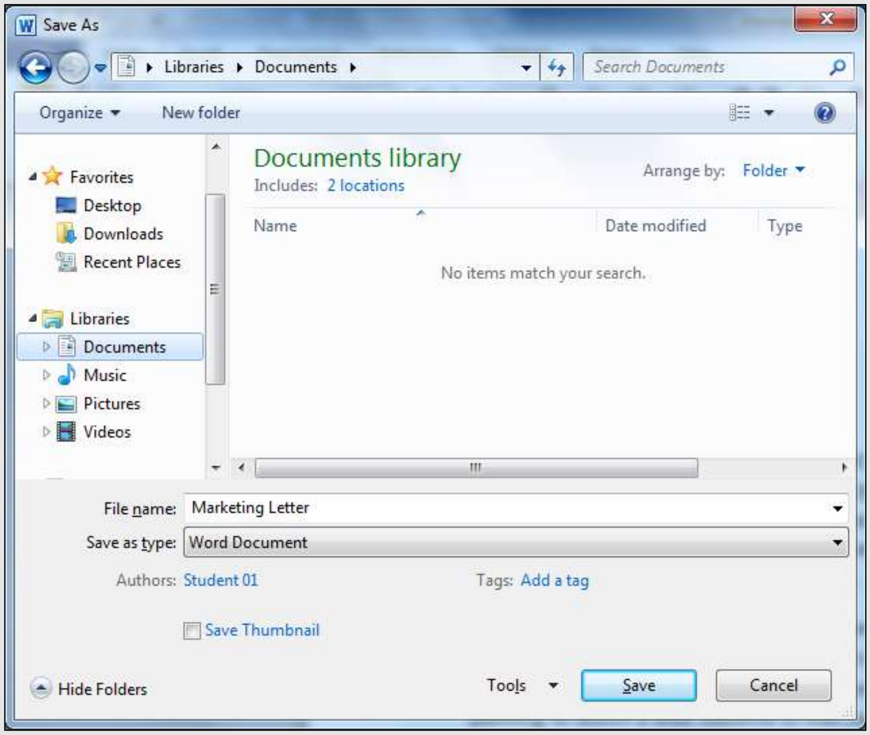
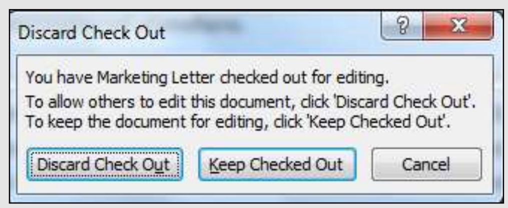
7 Select your local **Documents** library



8 Click **Save**



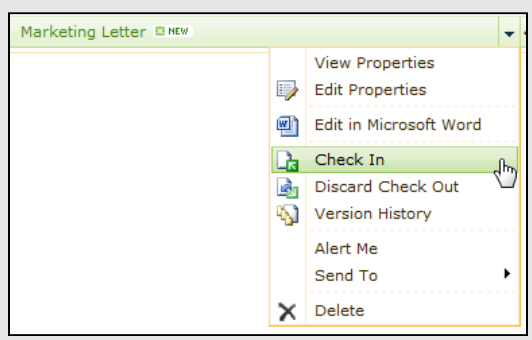
You can either discard the check-out or keep the file checked out.

9 Click **Keep Checked Out**

10 Close Word

11 Return to SharePoint

12 From the Marketing Letter menu, choose **Check In**



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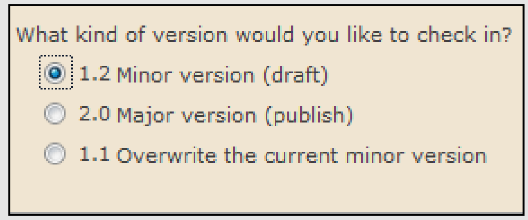
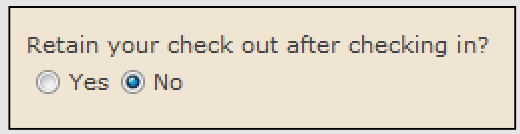
	No one else can work with this file until you check it back in.
13 Observe the Version section of the Check in dialog box	 Because versioning is enabled, you can check your document in as a major or minor version or overwrite the existing minor version.
14 Observe the Retain Check Out section	 You can choose to keep the file checked out but post what you currently have, or you can check the file back in so others can work with it.
15 Observe the Comments section	Because versioning is enabled, you can enter information about the version you are checking in.
16 Click **OK**	

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Topic C: Editing pages

Explanation

If you have Design or Full Control permissions, you can use the editing tools in SharePoint Foundation 2010 to edit the content of your SharePoint pages. You can also edit your pages by using SharePoint Designer 2010, a free HTML editor and Web design program.

SharePoint Foundation 2010's editing tools

When you enter edit mode in SharePoint Foundation 2010, the Editing Tools tabs (Format Text and Insert) are displayed on the Ribbon. You can use these tabs to format text and insert elements. If you select a specific type of item on the page, such as a picture or a Web Part, the corresponding tab is displayed so that you can make changes that are specific to that type of item.

To edit a page in SharePoint Foundation:

1 Go to the page you want to edit.

2 Click the Page tab and then click the Edit button.

The page goes into editing mode, and SharePoint Foundation displays the Editing Tools | Format Text and Insert tabs.

3 On the Editing Tools | Format Text tab, use tools in the Font, Paragraph, Styles, and Layout groups to change the appearance of the text.

4 On the Editing Tools | Insert tab, use tools in the Tables, Media, Links, and Web Parts groups to add content to the page.

5 If you want to change a Web Part, select it and then use the tools on the Library Tools | Documents and Library Tools | Library tabs or the Web Part Tools | Options tab.

7 If you want to change a picture, select it; then, on the Picture Tools | Design tab, use the tools in the Select, Properties, Styles, Arrange, and Size groups.

8 To change a table—such as the Getting Started table on the home page of the default Team site—click within the table and then use the Table Tools | Layout and Table Tools | Design tabs.

9 When you're done changing the page, click the Editing Tools | Format Text tab and then click Save & Close.

You can also save changes as you go by opening the Save & Close menu and choosing Save and Keep Editing.

To discard any changes you've made on the page, open the Save & Close menu and choose Stop Editing. Then click No in the Save Changes dialog box.

You can also edit SharePoint pages that don't include the Page tab, such as lists and libraries. To edit a list or library page:

1 Go to the list or library you want to edit.

2 From the Site Actions menu, choose Edit Page.

3 Use the Page, Page Tools | Insert, and Web Part Tools | Options tabs to make the desired changes.

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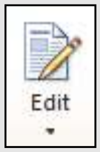
Do it!

C-1: Editing a page in SharePoint Foundation 2010

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

Here's how	Here's why
1 Return to your home page	
2 Click the **Page** tab	
3 Click 	If the menu opens, choose Edit.
4 Select **your site** Type **Outlander Spices**	
5 Select the text from **Add a new image,** to **customize its look.** Type **This site is for employees of Outlander Spices. If you can't find what you need here, please let us know and we'll add it!**	

Here's how	Here's why
6 Click below the Shared Documents Web part	
7 Click the **Insert** tab	Under Editing Tools.
Click 	
8 Select **Calendar** Click **Add**	

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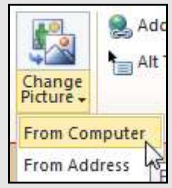
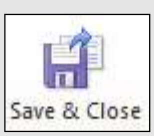
9	Select the picture	
	Click the **Design** tab	Under Picture Tools.
	Click **Change Picture** and choose **From Computer**	
10	Browse to select **Outlander Logo** in the current topic folder	Student Data folder Unit 3\Topic C.
	Click **OK**	
11	In the Title box, type **Logo**	
	Click **Save**	
12	Click under the OUTLANDER SPICES logo	
13	Click the **Insert** tab	Under Editing Tools.
	Click 	
14	Under Web Parts, select **Links**	
	Click **Add**	
15	Select **Getting Started** and the table of links underneath	
	Press DELETE	
16	Click the **Page** tab	
17	Click 	If you open the menu, choose Save & Close.

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SharePoint Designer 2010

Explanation

Microsoft SharePoint Designer is an HTML editor and Web design program that can be used to create and modify SharePoint sites and Web pages. Thirty-two-bit and 64-bit versions of the software are available to download for free from the Microsoft Download Center.

If you haven't yet downloaded and installed the software, and you try to use the Edit in SharePoint Designer command to edit a page on your SharePoint site, you'll be prompted to download and install the application first. Here's how you do that:

1. Go to the SharePoint page you want to edit in SharePoint Designer 2010.
2. Click the Page tab.
3. Open the Edit menu and choose Edit in SharePoint Designer.
4. Select your language and select 32-bit or 64-bit.
5. Click Free Download.
6. Click Run to immediately run the setup program, or click Save to save the file to your computer first. If you save the file to your computer, double-click the .exe file to begin the installation.
7. If you're prompted by the User Account Control dialog box, enter administrative credentials and click Yes.
8. Check "I accept the terms of this agreement" and click Continue.
9. Click Install Now.
10. Click Close.
11. Close the Microsoft SharePoint Designer 2010 download dialog box.

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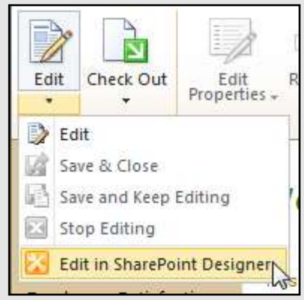
Do it!

C-2: Downloading and installing SharePoint Designer 2010

	Here's how	Here's why
1	On your Site ## home page, click the **Page** tab	
2	Open the **Edit** menu and choose **Edit in SharePoint Designer**	
3	Select your language	
	Choose **32-bit** or **64-bit**	If you are unsure of whether your system is 32-bit or 64-bit, then open the Start menu, right-click Computer, and choose Properties. The System type line will indicate whether you are running 32-bit or 64-bit Windows.
4	Click **Free Download**	
5	Click **Run**	
6	In the User Account Control dialog box, enter **administrator** with a password of **!pass1234**	
	Click **Yes**	
7	Check **I accept the terms of this agreement**	
	Click **Continue**	
8	Click **Install Now**	
9	Click **Close**	
10	Close the Microsoft SharePoint Designer 2010 download dialog box	Click the Close box.

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Editing in SharePoint Designer 2010

Explanation

SharePoint Designer 2010 provides a single location where you can build and customize sites, lists, libraries, pages, data sources, and workflows without needing to know a Web coding language. The application scales, so you can create basic, small project management sites or complex dashboard-driven portal solutions. Using the SharePoint Designer 2010 authoring tools, you can:

- Create a site.
- Customize the components that make up a site.
- Design the logic of the site around a business process.
- Brand a site.
- Deploy the site.

Just as with the internal SharePoint Foundation editing tools, if you have Design permissions, you can use SharePoint Designer 2010 to customize only existing components of the SharePoint site. It's important to note that your site administrator can restrict or disable the ability to edit the site by using SharePoint Designer 2010. If you have Design permissions and are unable to access the Edit in SharePoint Designer command, this might be why.

To open a page for editing in SharePoint Designer 2010:

1 Go to the page you want to edit.
2 Click the Page tab.
3 From the Edit menu, choose Edit in SharePoint Designer.
4 Click OK to open the page's .aspx file.

The SharePoint Designer 2010 interface

The SharePoint Designer interface has three main areas, as shown in Exhibit 3-6:

- **Ribbon** — You use the tools here to perform actions on selected components.
- **Navigation pane** — Use this pane to move between the components of the site.
- **Gallery pane** — What is displayed in this area changes depending on the component you have selected. The gallery can display a summary of the contents of a page or display the page itself for editing.

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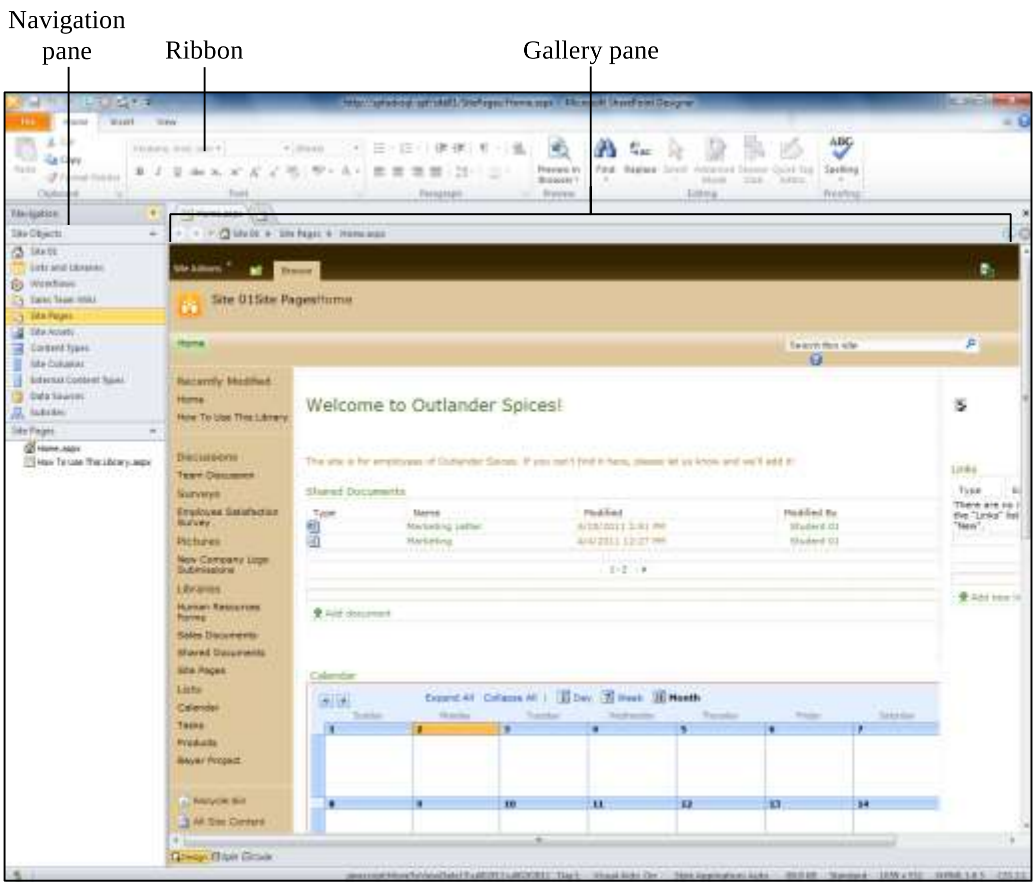

Exhibit 3-6: The SharePoint Designer interface

When you've finished editing, you can use the Back button or the breadcrumbs, shown in Exhibit 3-7, to move off the page.

Exhibit 3-7: Navigating in the Gallery pane

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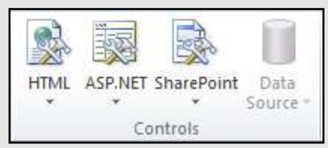
Do it!

C-3: Editing a page in SharePoint Designer

Here's how	Here's why
1 On your Site ## home page, click the **Page** tab	
2 From the Edit menu, choose **Edit in SharePoint Designer**	
3 Click **OK**	SharePoint Designer 2010 opens your site with the home page ready for editing.
4 Observe the Home tab	With Design permissions, you can use SharePoint Designer 2010 to complete tasks similar to those that are available when you're using the SharePoint Foundation editing tools. Click the Preview in Browser button to view your changes before saving them.
5 Click the **Insert** tab and observe it	 SharePoint Designer 2010 includes controls to use HTML and ASP.NET code. You can also work with SharePoint controls.
6 Click the **View** tab and observe it	You can change the view of the gallery pane.
Click 	The code that makes up the page is shown in the top pane. Design view is shown in the bottom pane. You can edit the code in the top pane.
7 Scroll to line 75	
In the Code pane, select the word **employees**	
Observe the Design pane	The word "employees" is selected there as well.
8 Type **team members**	
Click 	In the upper-right corner of the Code pane.
Observe the Design pane	The description text for the home page has changed.

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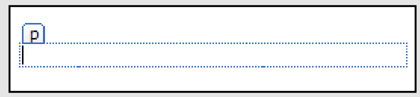
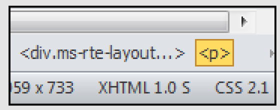
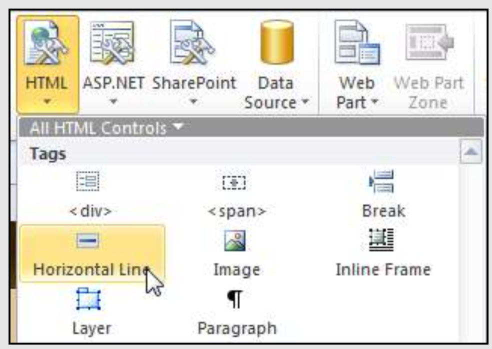
9 Click 	To switch to Code view.
10 At the bottom of the Code pane, click 	You can use the buttons at the bottom of the Gallery pane to change views. This is helpful if you are working with the tools on a tab other than the View tab.
11 Place your cursor between the Outlander Spices graphic and the Links Web Part	
Observe the status bar	 (At the bottom of the Design pane.) It shows that you have selected a paragraph element, <p>.
12 Click the **Insert** tab	
13 From the HTML menu, choose **Horizontal Line**	 To place a horizontal line between the two page components.
14 Select the OUTLANDER SPICES graphic	
15 Click the **Format** tab	Under Picture Tools.
Click 	To place a bevel around the graphic.
16 Place your cursor under the Links Web Part	
On the Insert tab, click **New Item Form** and choose **Tasks**	

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17	On the Data View Tools | Options tab, click 	
18	Add the **Assigned To**, **Description**, and **Due Date** columns to the Displayed Columns list Remove the **Modified By** and **Modified** columns from the Displayed Columns list	
19	Click **OK**	
20	On the File tab, click **Save** Click **OK**	To save embedded files.
21	Click **Yes**	
22	On the Home tab, click **Preview in Browser** Click **Yes** twice	Your graphic appears with a bevel around it. There is a horizontal line separating the graphic from the Links Web Part. Users can create tasks from the home page.
23	Close all open windows	

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Unit summary: Customizing a site

Topic A In this topic, you learned how to **modify site components**. You changed the title, description, and navigation settings for a library, and you changed the columns in a list. You also configured advanced settings for a library.

Topic B In this topic, you learned how to **manage item controls**. You enabled content approval and approved an item. You enabled versioning for a document library. You also enabled the Require Check Out feature for a library and checked out a file.

Topic C In this topic, you learned how to **edit pages** in your SharePoint site. You used the editing tools in SharePoint Foundation 2010 to change a page. You also downloaded and installed SharePoint Designer 2010 and used it to edit a SharePoint Team site page.

Independent practice activity

In this activity, you'll practice customizing your Admin ## site. You'll practice editing SharePoint Foundation 2010 pages with the built-in editing tools and with SharePoint Designer 2010.

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

1. Open Internet Explorer.
2. Go to your Admin ## site.
3. Display your Tasks list.
4. Edit the Title and Description to read as follows:
   Admin Team Tasks
   Please keep current on the tasks our team needs to complete.
5. Edit the Description column to include 4 lines for editing instead of 6.
6. Using Advanced Settings, configure SharePoint to send e-mail when ownership is assigned in the Task list. Disable attachments and make the New Folder command available so that Task items can be organized into folders.
7. Enable content approval for the Team Discussion list.
8. Enable major and minor versions for the Shared Documents library. Keep 6 major versions and 20 minor versions.
9. Require documents in the Shared Documents library to be checked out before they can be edited.
10. Edit your home page, making the following changes:
    - Change the picture to IPA Logo.jpg.
    - Increase the size of the logo to 248px × 165px.
    - Edit the Welcome text to read **Welcome to the Administration site!**
    - Edit the description text to read **Please contact Joan Brindel with questions or comments regarding the site.**
    - Add a link to the Bing search engine below the site description.
    - Set the link to open in a new tab. (Use the Link Tools | Format tab.)
    - Add the survey for the New Year's Gathering to the home page, below Shared Documents.
11. Save and close.

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Exhibit 3-8: The edited home page after you used SharePoint Foundation editing tools

12 Edit the Admin## home page in SharePoint Designer, making the following changes:

- Change the font of Bing Search to xx-large and white. Add black shading to the cell.
- Place a horizontal line between Bing Search and Shared Documents, and between Shared Documents and New Year's Gathering.
- Change the Getting Started title to **Site Admin Tools**.

13 Save your changes and close SharePoint Designer.

14 Refresh your Admin## home page.

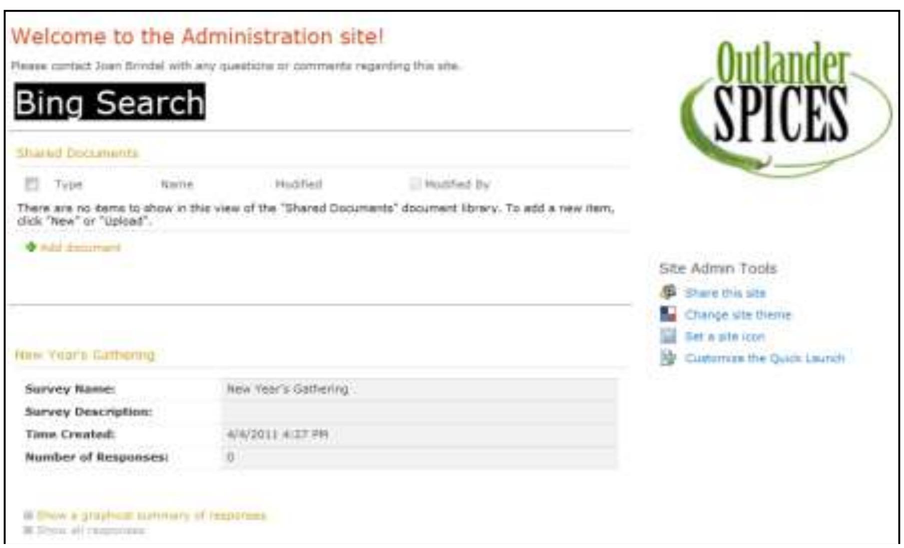

Exhibit 3-9: The edited home page after your editing with SharePoint Designer

15 Close all Internet Explorer windows.

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Unit 4

Controlling information display

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

A Create public views.

B Control RSS settings.

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Topic A: Public 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 created 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.

Creating public views

When you create a public view, you can copy an existing view and change it slightly without changing the original, or you can create a new view, using one of the following formats:

- Standard View
- Calendar View
- Access View
- Datasheet View
- Gantt View
- Custom View in SharePoint Designer

Some content types vary in their view options. The Create View option isn't available for surveys. View options for discussion lists include Standard View, Flat View, Threaded View, Datasheet View, and Custom View in SharePoint Designer.

To modify a view:

1. Go to the page for which you want to create the public view.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click the Create View button.
4. Under "Start from an existing view," select the view you want to alter.
5. Enter a name for the view.
6. If desired, check "Make this the default view."
7. Under View Audience, if necessary, select "Create a Public View."
8. Change the view's settings as needed. The options available vary based on the format. For example, the Calendar View format includes Time Interval options.
9. Click OK.

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To create a new public view for a library or list:

1. Go to the page for which you want to create the public view.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Click the Create View button.
4. Under "Choose a view format," click the type of view you want to create.
5. Enter a name for the view.
6. If desired, check "Make this the default view."
7. Under View Audience, if necessary, select "Create a Public View."
8. Select settings—such as columns, sort order, filter, and mobile settings—for the view.
9. Click OK.

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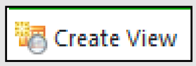
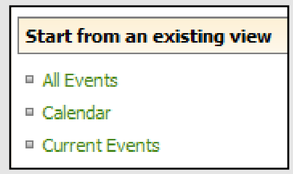
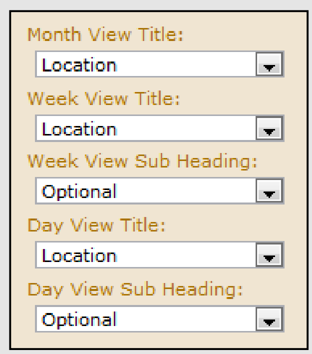
Do it!

A-1: Creating a public view

Here's how	Here's why
1 In the Quick Launch bar, under Lists, click **Calendar**	
2 Click the **Calendar** tab	Under Calendar Tools.
3 Click 	
4 Observe the "Start from an existing view" section	 There are three views that you could modify to create your new view. Doing this is useful if there is a view that meets most of your criteria but you want to make a slight change, such as changing the sort order or applying a filter.
5 Under "Choose a view format," click **Calendar View**	
6 In the View Name box, type **Staten Office**	
7 From the Month View Title, Week View Title, and Day View Title lists, select **Location**	
8 From the Week View Sub Heading and Day View Sub Heading lists, select **Optional**	
9 Under Default scope, select **Week**	
10 In the Filter section, select **Show items only when the following is true:**	
11 From the "Show the items when column" lists, select: **Location** **contains (Not Indexed)**	

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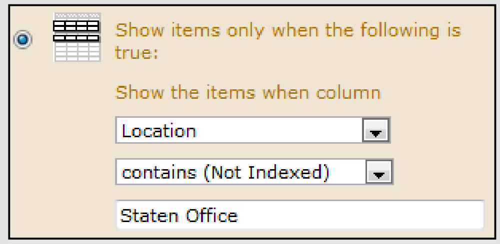
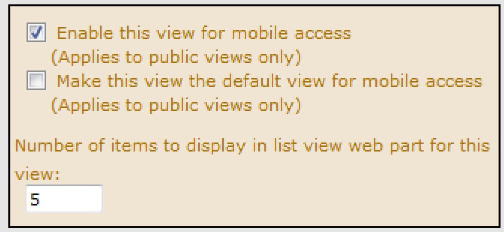
12 In the empty box below “Show the items when column,” type **Staten Office**



13 In the Mobile section, in the “Number of items to display in list view web part for this view” box, type **5**

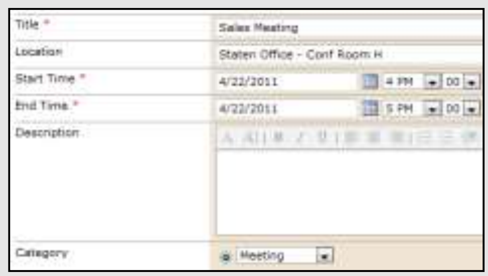


14 Click **OK**

15 In breadcrumbs, click **Calendar**

16 Create a new event from 4 to 5 pm tomorrow

Title the event **Sales Meeting**
Enter a location of **Staten Office - Conf Room H**
Set the Category to **Meeting**



17 Click **Save**

18 On the Calendar Tools | Calendar tab, from the Current View list, select **Staten Office**

The new view, showing just a week’s worth of events with a location of Staten Office, displays your new event.

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Modifying views

Explanation

If you have Design or Full Control permissions on a library or list, you can change both the standard and custom public views. To modify a view:

1. Go to the page for which you want to modify the public view.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Switch to the view you want to edit.
4. Click the Modify View button.
5. If you don't want to modify this view, but you want to create a new view based on it, you can change the View Name and Web address of the view.
6. If desired, check "Make this the default view."
7. Select settings—such as columns, sort order, filter, and mobile settings—for the view.
8. Click OK.

Do it!

A-2: Modifying a view

Here's how	Here's why
1 Open Internet Explorer	Your home page is displayed.
2 On the Calendar Tools | Calendar tab, from the Current View list, select **All Events**	
3 Observe the column headings	They are in this order: Title, Location, Start Time, End Time, and All Day Event.
4 Click the **List** tab	Under List Tools.
5 Click 	
6 In the Columns section, change the "Position from Left" value for Location to **8**	
7 Click **OK**	The Location column is now the final column in this view.

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Deleting views

Explanation

If you have Design or Full Control permissions on a library or list, you can delete public views. To delete a public view:

1. Go to the page for which you want to delete a public view.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Switch to the view you want to delete.
4. Click the Modify View button.
5. Click Delete.
6. Click OK to confirm the deletion.

You can delete the default view for a library or list, but you must first make another view the default.

Do it!

A-3: Deleting a view

Here's how	Here's why
1 In breadcrumbs, click **Calendar**	
2 Click the **Calendar** tab	Under Calendar Tools.
3 From the Current View list, select **Staten Office**	
4 Click the **Calendar** tab	
5 Click 	
6 Click **Delete**	
7 Click **OK**	

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Topic B: RSS feed settings

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.

In SharePoint Foundation 2010, RSS feeds are enabled in Central Administration as part of the Web Application General Settings, as shown in Exhibit 4-1. At the site collection level, as shown in Exhibit 4-2, RSS feeds are enabled by default. Only users with Full Control permissions on the site collection can change the RSS settings.

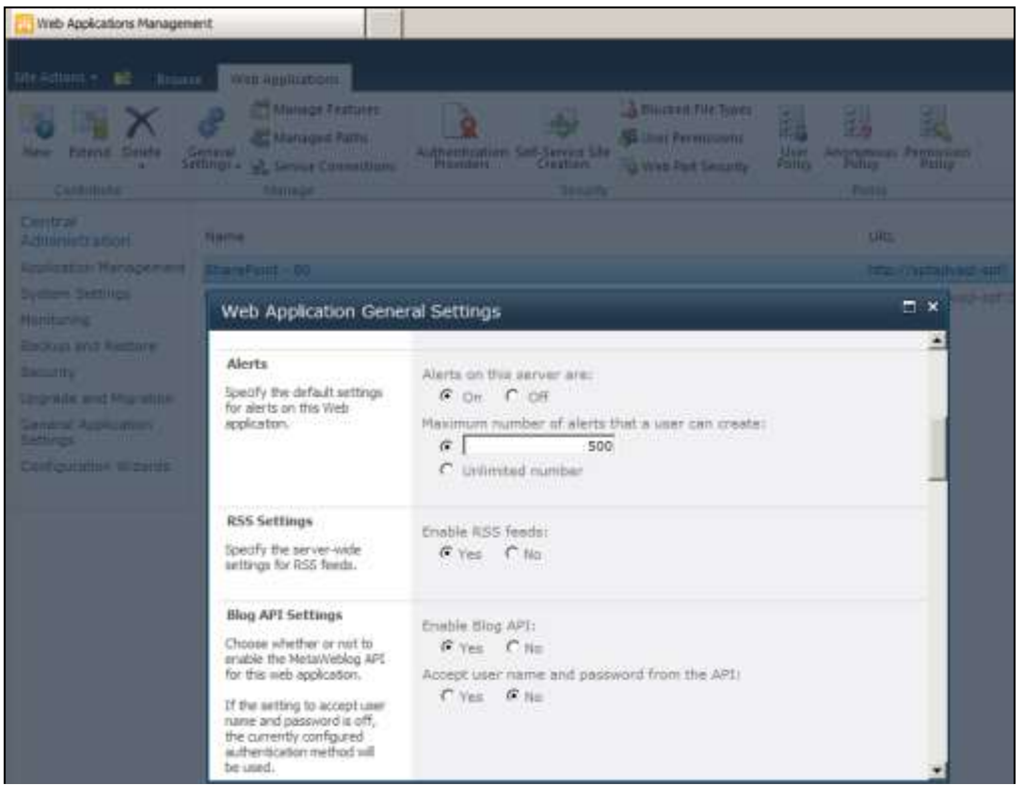

Exhibit 4-1: RSS Settings in the Web Application General Settings

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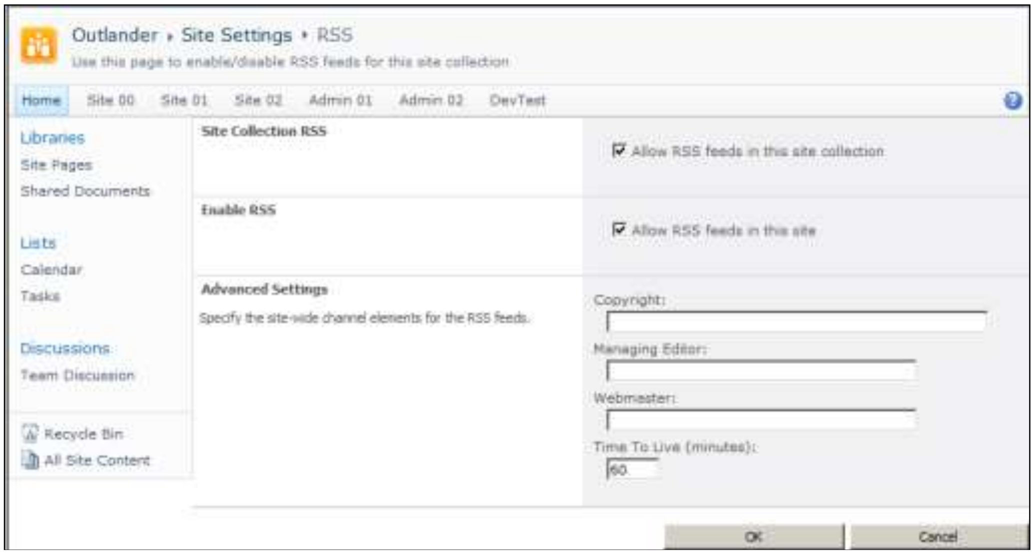

Exhibit 4-2: RSS feed settings for a site collection

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Managing RSS feed settings for libraries and lists

If RSS feeds are enabled in Central Administration and for the site collection, and if you have Design or Full Control permissions, you can change the RSS feed settings for individual libraries and lists.

To manage the RSS feed settings for a library or list:

1. Go to the page for which you want to modify the RSS feed settings.
2. Click the <*Page type*> Tools | <*Page type*> tab.

   If the page you've selected doesn't have a Ribbon, click Settings.
3. Under Communications, click RSS settings.
4. In the List RSS section, under "Allow RSS for this list," select Yes to enable RSS feeds, or select No to disable them.
5. In the RSS Channel Information section, shown in Exhibit 4-3, enter a title, description, and image URL for the feed. You can also specify whether to truncate multi-line text fields to 256 characters.

   The RSS channel element describes the RSS feed. This element has three required child elements:

   - <title> — Specifies the title of the channel.
   - <description> — Describes the channel.
   - <link> — Specifies the hyperlink to the channel.

   The <image> element is optional and is used to display an image when the feed is presented.
6. For a library, you can use the settings in the Document Options section to specify whether to include file enclosures for items in the feed, and whether to link RSS items directly to their files.

   RSS enclosures are used to attach multimedia content to RSS feeds by providing the URL of a file associated with an entry.
7. In the Columns section, specify which columns will be displayed and which will be hidden in the RSS item list.
8. In the Item Limit section, specify the maximum number of items to be included in the RSS feed and how many days to include items.
9. Click OK.

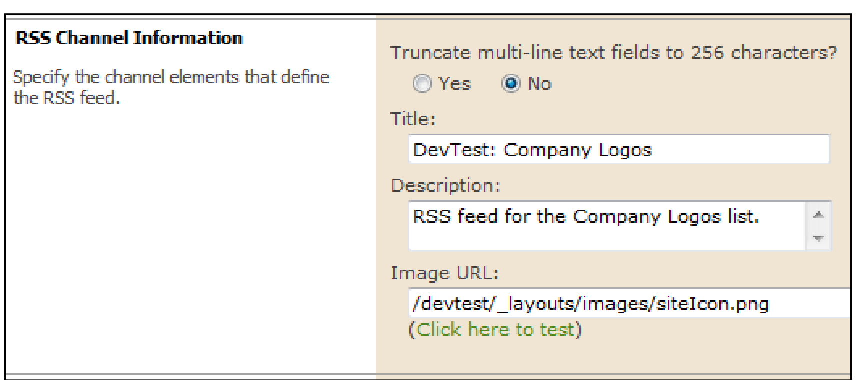

Exhibit 4-3: RSS Channel Information

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Restoring RSS feed defaults

You can restore RSS feed settings for a library or list to their default values.

1 Go to the page for which you want to change the RSS feed settings.

2 Click the <*Page type*> Tools | <*Page type*> tab.

If the page you've selected doesn't have a Ribbon, click Settings.

3 Under Communications, click RSS settings.

4 Click Defaults.

5 Click OK.

For libraries, this procedure doesn't reset the Document Options settings.

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Do it!

B-1: Modifying RSS feed settings

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 	
4 Under Communications, click **RSS settings**	
5 In the RSS Channel Information section, under "Truncate multi-line text fields to 256 characters," select **Yes** Edit the Title box to read **Shared Docs**	
6 In the Document Options section, under "Link RSS items directly to their files," select **Yes**	
7 Click **OK**	
8 In the Quick Launch bar, click **Shared Documents**	
9 Click the **Library** tab	
10 Click 	
11 If the title of the RSS feed doesn't show "Shared Docs," click your browser's Refresh button	
12 Click **Subscribe to this feed**	

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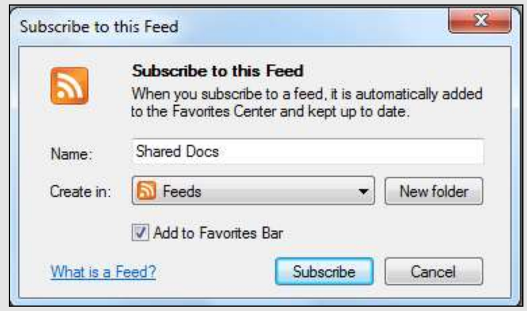
13 Check **Add to Favorites Bar**

14 Click **Subscribe**



15 On the Favorites bar, click **Shared Docs**

16 Click **Marketing Letter**

The browser goes directly to the file instead of to the item in the Shared Documents library.

17 Observe the document in Word

You would need to check the file out to edit it.

Close Word

18 Click **Shared Docs**

To return to the Shared Documents library.

19 Click the **Library** tab

20 Click 

21 Under Communications, click **RSS settings**

22 Click **Defaults**

Note that this step returned the Truncate value and the Title to their original states. It did not reset the Document Options.

23 In the Document Options section, under “Link RSS items directly to their files,” click **No**

24 Click **OK**

25 Close Internet Explorer

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Unit summary: Controlling information display

Topic A In this topic, you learned how to create **public views**. You also learned how to modify and delete views.

Topic B In this topic, you learned how to control **RSS feed settings** for your libraries and lists.

Independent practice activity

In this activity, you'll practice creating public views and setting up RSS feeds to control how users see and receive information from your site.

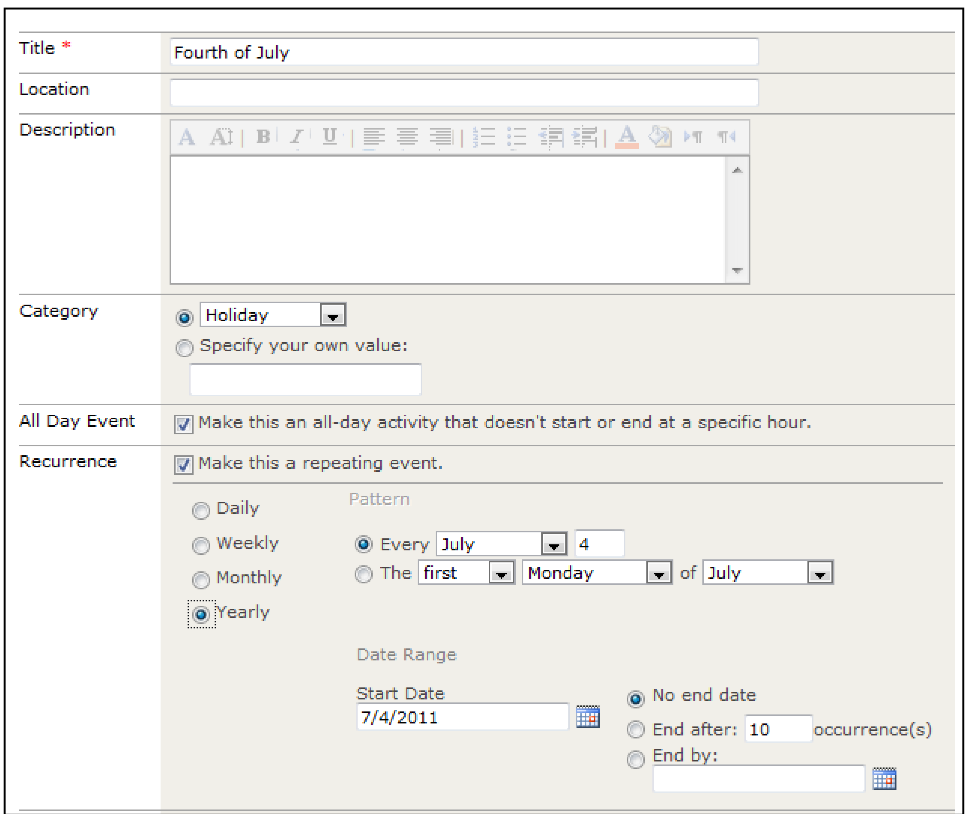
1 Open Internet Explorer.

2 Go to your Admin ## site.

3 Modify the default calendar view to be weekly instead of monthly.

4 Create a new view based on the Calendar view, and name it **Holidays**. Filter the view to show only items where Category is equal to Holiday.

5 Go to July 4th and create an all-day event as follows:



6 Create a meeting in the same week as July 1st. Verify that the meeting is displayed in the default view but not in the Holidays view.

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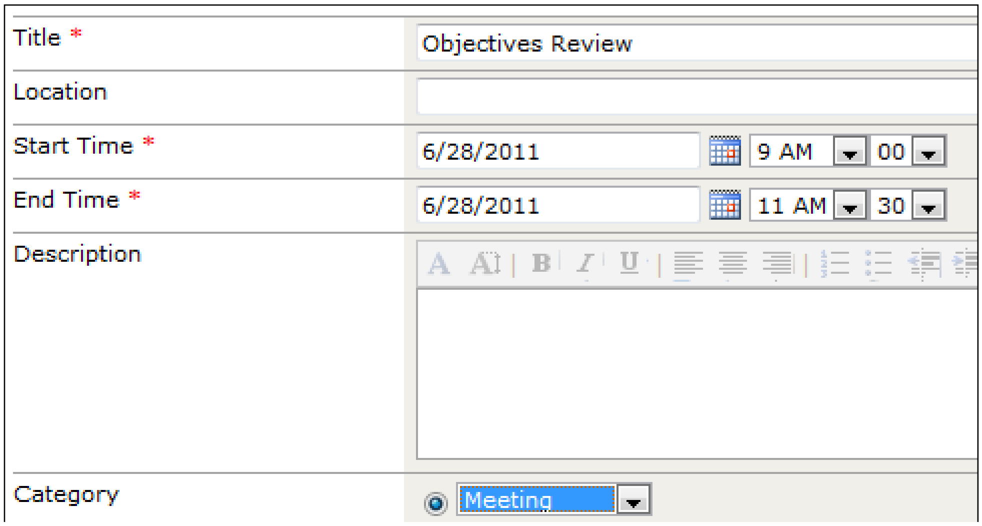

7 Set the default Calendar view back to monthly.

8 Disable the RSS feed for the Calendar.

9 Verify that the RSS Feed button is not available on the Calendar Tools | Calendar tab.

10 Close Internet Explorer

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Unit 5

Creating workflows

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

A Work with a three-state workflow.

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Topic A: Workflows

Explanation

A *workflow* allows you to attach a business process to items in Microsoft SharePoint Foundation 2010. This process can control almost any aspect of an item in SharePoint Foundation 2010, including the life cycle of that item.

Types of workflows

There are three types of workflows in SharePoint 2010:

- **List** — A list workflow is created for a specific list or library. It has access to the values of the custom fields in the list or library. It can't be used with other lists or libraries on the site where it was created or on other sites. Available in both SharePoint Foundation 2010 and SharePoint Server 2010.
- **Reusable List** — This workflow is created at the top-level site in a site collection and can be used globally with any list, library, or content type in the site collection. You can export reusable list workflows from one site collection and import them into another. Reusable list workflows must work across varied lists, libraries, and content types, so they provide columns (such as Created and Created By) that are common across all lists and libraries. Available only in SharePoint Server 2010.
- **Site** — Site workflows are associated with a site, not with a list, library, or content type. You use them to create workflows that don't use the information in a list, library, or content type. For example, you can use a site workflow that allows users to provide site feedback.

SharePoint Foundation 2010 includes a predefined three-state list-type workflow. In a *three-state workflow*, SharePoint tracks the status of an issue or item through three states and two transitions between the states. The three states are Active, Ready for Review, and Complete. SharePoint updates the status of the list as each user completes her assigned task and then creates a new task for the next user. Three-state workflows are designed to work with Issue Tracking lists, but you can use them with any list or library on your site. However, you might find that the email notification system doesn't work exactly like it would for the Issue Tracking list.

SharePoint Server 2010 includes more predefined workflows than SharePoint Foundation 2010. In addition to the three-state workflow, SharePoint Server 2010 includes the following predefined workflows:

- **Approval** — Routes a document or item to a group of people for approval. The routing can be sequential (one person after the other) or in tandem (to all approvers at the same time).
- **Collect Feedback** — Routes a document or item to a group of people for feedback. The feedback is compiled and returned to the user who initiated the workflow.
- **Collect Signatures** — Routes documents created in a Microsoft application to a group of people for their digital signatures. Digital signatures can be collected in SharePoint or in the host document.
- **Publishing** — Works in a similar manner as the Approval workflow, but is designed for Enterprise Content Management sites with publishing features enabled.

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- **Disposition Approval** — Tracks content that has expired and needs to be updated or removed. It has a bulk completion feature so that a user can process a large number of deletions in one step.

If you need more than the three-stage workflow, you should consider upgrading to SharePoint Server 2010.

Adding a workflow to a list or library

In SharePoint Foundation 2010, if you have Manage list or library permissions, you can add a three-state workflow to a library or list:

1. Go to the library or list where you want to add the workflow.
2. Click the <*Page type*> Tools | <*Page type*> tab.
3. Click the arrow on the Workflow Settings button and choose Add a Workflow. The page shown in Exhibit 5-1 is displayed.
4. In the Name section, in the “Type a unique name for this workflow” box, type a unique name. More than one workflow can be attached to a single list or library, so this name should be descriptive enough that users can recognize it.
5. In the Task List section, from the “Select a task list” list, select the task list that the workflow will use to create the tasks associated with it.
6. If desired, from the “Select a history list” list, select the list that will hold the workflow history. By default, the history is stored in a hidden list called Workflow History.
7. Select the desired Start Options:
   - “Allow this workflow to be manually started by an authenticated user with Edit Item permissions.”
   - “Require Manage Lists Permissions to start the workflow.” (Available only when “Allow this workflow to be manually started by an authenticated user with Edit Item permissions” is enabled.)
   - “Start this workflow to approve publishing a major version of an item.” (Available only when the list or library has versioning for major and minor versions enabled.)
   - “Start this workflow when a new item is created.”
   - “Start this workflow when an item is changed.” (Available only when the list or library has versioning for major and minor versions enabled.)
8. Click Next to go to the workflow’s association form. The association form varies depending on the type of workflow you’ve chosen.

   For an Issue Tracking list, the three-state workflow association form includes the following sections:
   - Workflow states
   - Specify what you want to happen when a workflow is initiated
   - Specify what you want to happen when a workflow changes to its middle state
9. Click OK.

You can configure a workflow to start automatically or to be started manually by users. If you configure the workflow to start manually, remember that only users with Contribute permissions or higher can start the workflow.

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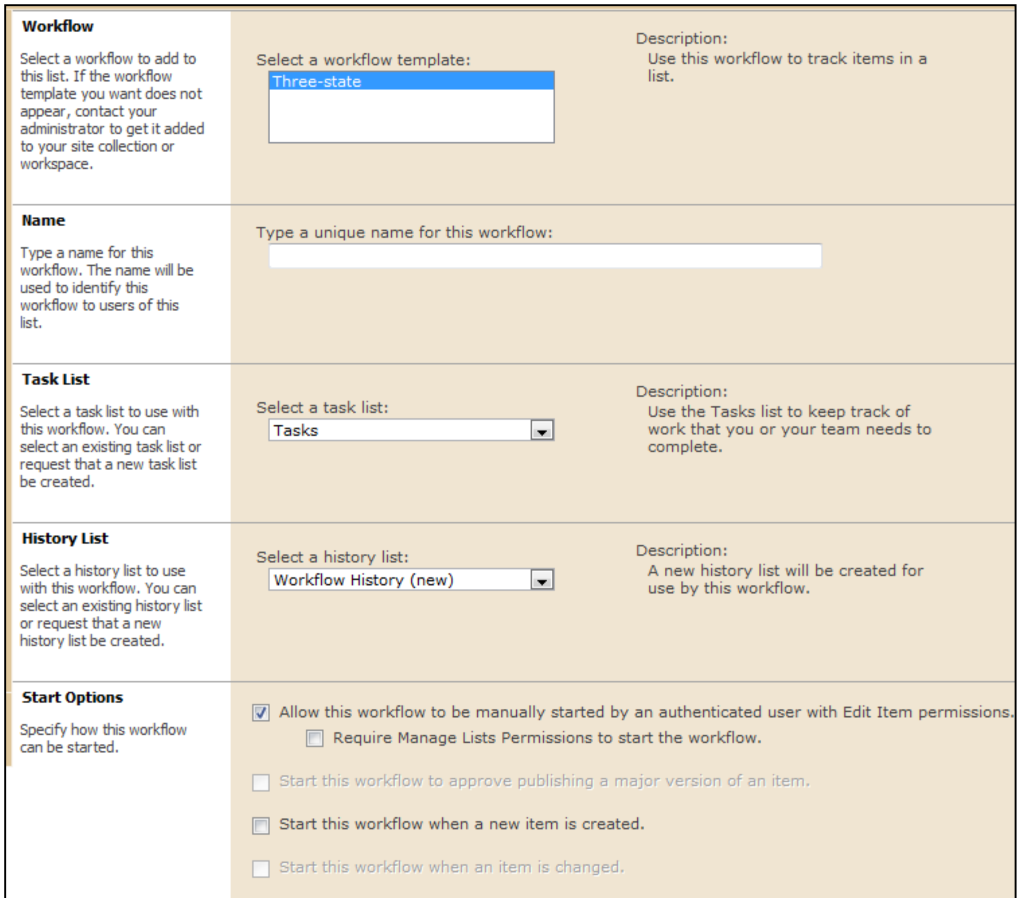

Exhibit 5-1: Adding a three-state workflow

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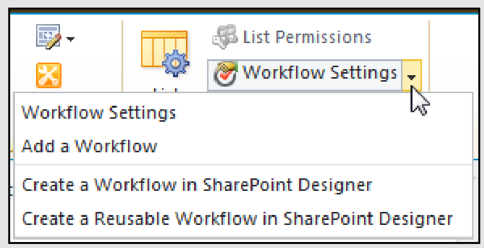
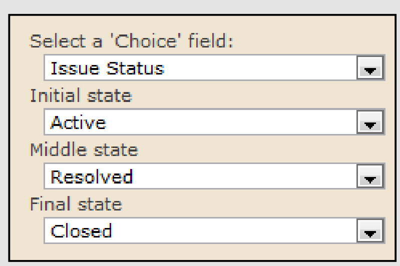
Do it!

A-1: Adding a workflow

Here's how	Here's why
1 Open Internet Explorer	
2 On your Site ## site, in the Quick Launch bar, click **Lists**	You'll create an Issue Tracking list so you can add a workflow to it.
3 Click **Create**	
4 Under Filter By, click **List**	
5 Click **Issue Tracking**	
6 In the Name box, type **Bayer Project**	
7 Click **Create**	
8 On the List Tools | List tab, open the **Workflow Settings** list	
9 Select **Add a Workflow**	
10 In the "Type a unique name for this workflow" box, type **IT Support**	The first step to resolve issues will be assigned to the IT Support department.
11 From the "Select a task list" list, select **New task list**	
12 In the Start Options section, check **Start this workflow when a new item is created**	
13 Click **Next**	The workflow association form is displayed on a new page.
14 Observe the Workflow states section	

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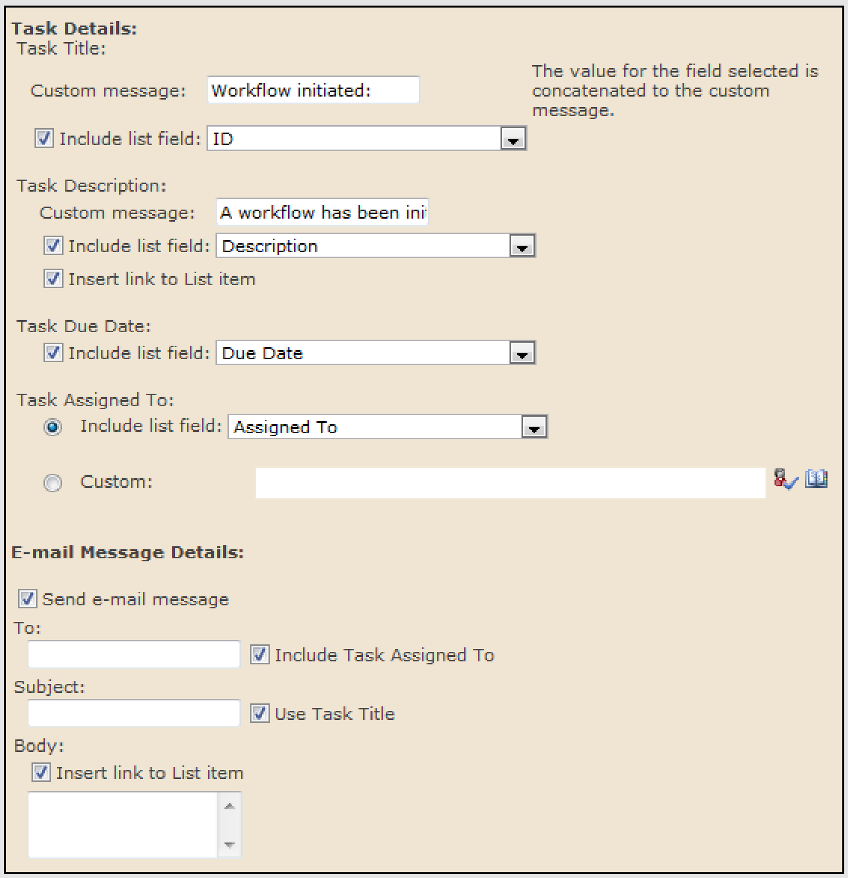
By default, the workflow moves through its various stages based on the data in the Issue Status field. The workflow begins when an Issue Tracking item is created with an Issue Status of Active. The workflow moves to the second stage when the Issue Status is changed to Resolved. The workflow ends when the Issue Status is changed to Closed.

15 Observe the “Specify what you want to happen when a workflow is initiated” section

SharePoint creates a task for the assigned user when an Issue Tracking item is created and the workflow is initiated.



You can choose to send e-mail to the assigned user, notifying him of the task. You can add additional users or groups to the e-mail list.

16 Observe the “Specify what you want to happen when a workflow changes to its middle state” section

This section contains settings similar to the previous section. The settings in this section are triggered when the Issue Status changes from Active to Resolved.

17 Click **OK**

To create the workflow with the default settings.

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Do it!

A-2: Creating an Issue Tracking item and starting a workflow

Here's how	Here's why
1 On the Site ## - Bayer Project - All Issues page, click **Add new item**	
2 In the Title box, type **Ordering Software**	
3 In the Assigned To box, type **Student ##**	Where ## is your assigned student number.
4 Click 	The Check Names button.
5 Change the priority to **(1) High**	
6 In the Description box, type **Ordering software for Bayer project crashing on entry of international spices.**	
7 In the Due Date box, enter tomorrow's date and **5 PM**	
8 Click **Save**	
9 Close Internet Explorer	
10 Using the Start, All Programs menu, open Microsoft Outlook 2010	The workflow has been initiated, and you've received an e-mail message with a link to your task.
11 Select and observe the message titled **Workflow initiated: 1**	This message informs you that a workflow has been initiated on Site ##.

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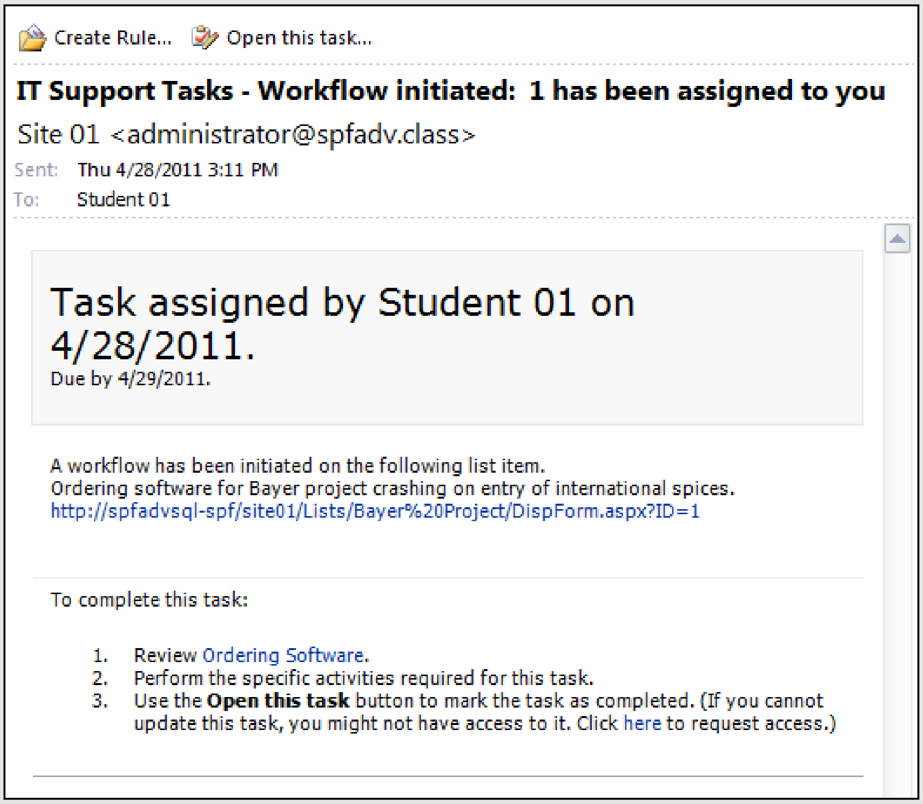
12 Select and observe the message titled **IT Support Tasks - Workflow initiated: 1 has been assigned to you**

This message informs you that you have been assigned a task in the workflow. If the task had been assigned to a different user, that person would have received this e-mail message.



13 Under “To complete this task,” click **Ordering Software**

This link takes you to the task item.

14 Click

15 Change the Status to **Resolved**

To move the task to the next state in the workflow.

16 In the Comments field, type **Corrected error in code - lines 45 through 54.**

17 Click **Save**

18 Close Internet Explorer

Switch to Outlook

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19 Select and observe the message titled **Review task 1**	This message informs you that the review task has been initiated in the workflow.
20 Select and observe the message titled **IT Support Tasks - Review task 1 has been assigned to you**	This message informs you that you have a review task in the workflow. If another user were set to complete the reviews, that person would receive this e-mail message.
21 Under "To complete this task," click **Ordering Software**	This link takes you to the task item.
22 Click 	
23 Change the Status to **Closed**	To move the task to the next state in the workflow.
24 In the Comments field, type **Reviewed new code - approved.**	
25 Click **Save**	
26 Close Internet Explorer	

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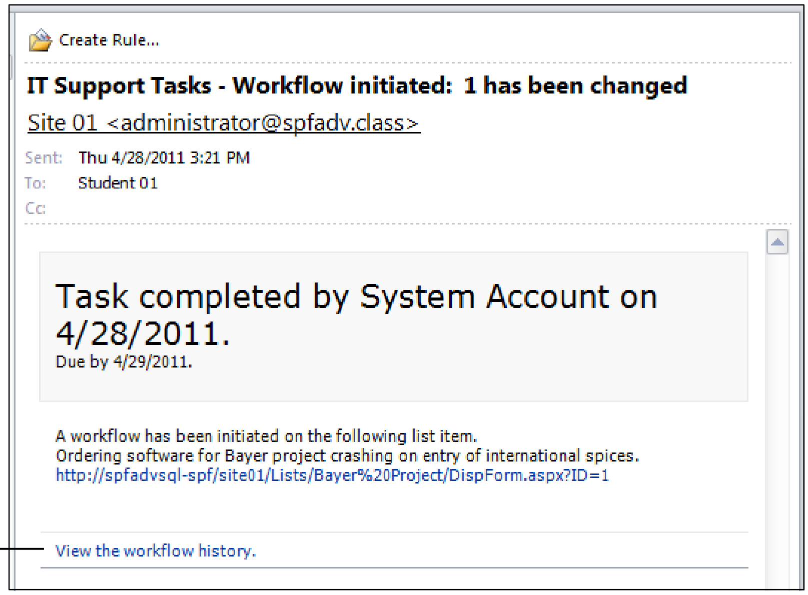
Workflow history

Explanation

You can view a workflow's history by clicking the "View the workflow history" link in a "Task completed" e-mail message, as shown in Exhibit 5-2.



Workflow history link

Exhibit 5-2: The workflow history link in e-mail

You can also view the workflow history from any library or list item where the workflow is configured:

1. Go to the library or list where the workflow is configured.
2. Open the menu for any item in the list and choose Workflows.
3. Click the link for the desired workflow.

As shown in Exhibit 5-3, you can see the tasks that were assigned to participants in the workflow, along with their status. You can also see all the events that were generated in the workflow.

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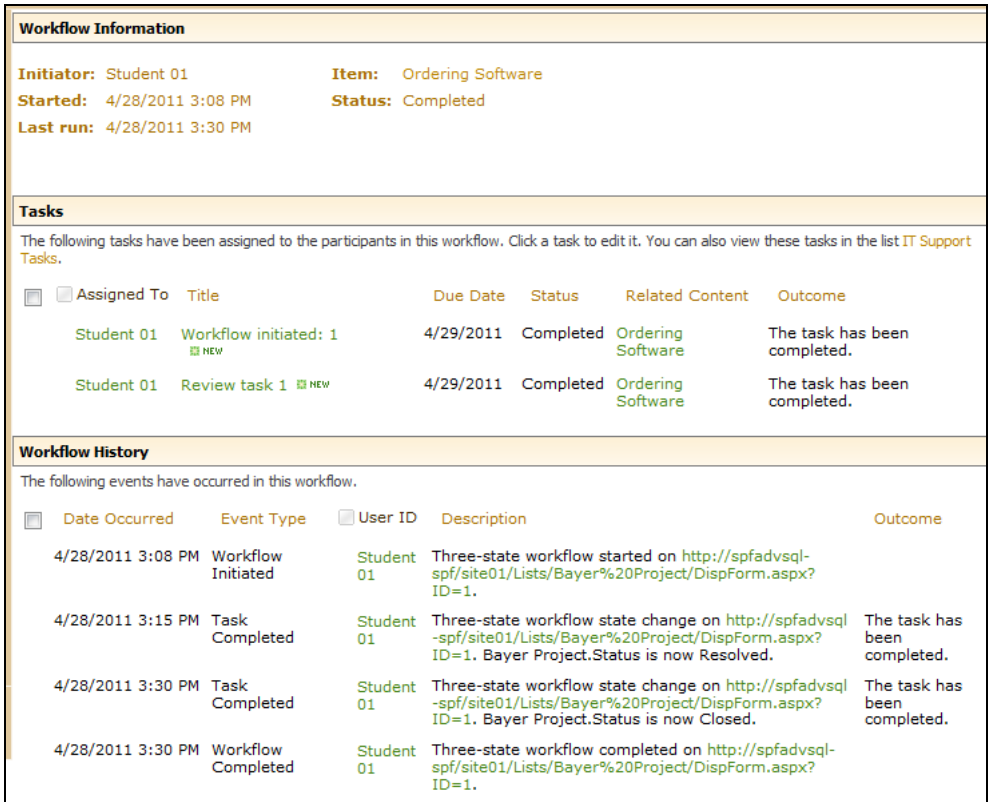

Exhibit 5-3: A workflow history

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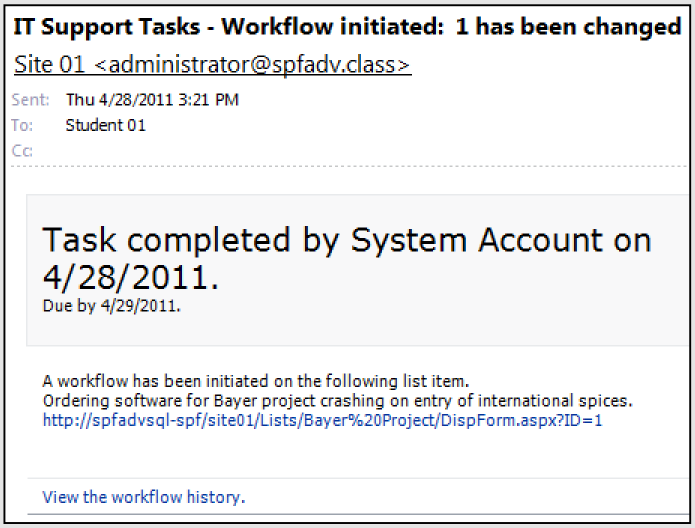
Do it!

A-3: Viewing a workflow's history

Here's how	Here's why
1 Switch to Outlook	
2 Select and observe the message titled **IT Support Tasks - Workflow initiated: 1 has been changed**	



Click **View the workflow history**

Here's how	Here's why
3 Observe the Workflow information section	It shows the user who initiated the workflow, the item the workflow is associated with, and the time the workflow was started, when it was last run, and its current status.
4 Observe the Tasks section	This area displays the tasks that were assigned to participants in the workflow. You can click the title of a workflow task to open it. You can also click the title under Related Content to view the item the workflow is associated with.
5 Observe the Workflow History section	This section displays the events that occurred in the workflow, the user who is associated with the event, a description of the event, and an outcome, where applicable.
6 Switch to and close Outlook	Leave Internet Explorer open.

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Editing workflows

Explanation

If you have Design or Full Control permissions on a list or library in SharePoint, you can modify a workflow. You can modify only declarative workflows in SharePoint Designer. A *declarative workflow* is built from conditions and actions that are assembled into rules and steps, so you can set the parameters for the workflow without writing the code. For example, a workflow created in SharePoint Designer 2010 is a declarative workflow.

Unlike *code-centric workflows*, such as those you create by using Visual Studio, declarative workflows aren't deployed to SharePoint Foundation 2010 as compiled code; instead, they are compiled at runtime. The three-state workflow included in SharePoint Foundation is a *predefined* workflow and isn't editable in SharePoint Designer 2010. You can change it only by using the tools in SharePoint Foundation.

To modify a SharePoint Foundation 2010 three-state workflow, you can navigate to it by using SharePoint Designer 2010 or from within your site.

To navigate to the workflow in SharePoint Designer:

1. Go to the site that contains the workflow.
2. Choose Site Actions, Edit in SharePoint Designer.
3. In the Site Objects list, select Lists and Libraries.
4. In the Gallery pane, select the list or library containing the three-state workflow. The workflows associated with this list or library are listed in the Workflows box, as shown in Exhibit 5-4.
5. Click the link for the workflow you want to edit. It opens in SharePoint Foundation 2010.

You'll notice the New button in the Workflows box, shown in Exhibit 5-4. To create workflows in SharePoint Designer 2010 and associate them with your SharePoint Foundation 2010 site, you must be a member of the Site Owners group.

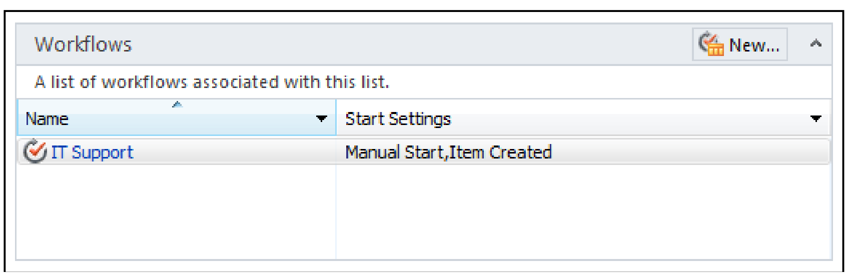

Exhibit 5-4: A workflow associated with an issue tracking list, shown in SharePoint Designer

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To navigate to the workflow in SharePoint Foundation 2010:

1 Go to the list or library with which the workflow is associated.
2 Click the List Tools | List tab.
3 From the Workflow Settings menu, choose Workflow Settings.
4 Click the link for the workflow you want to modify, as shown in Exhibit 5-5.

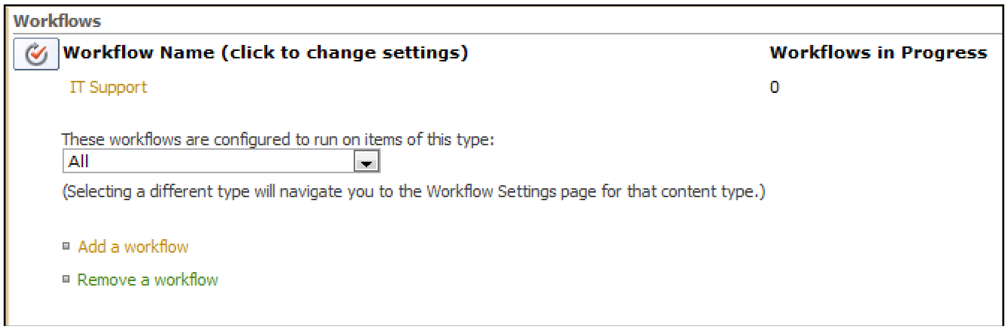

Exhibit 5-5: A workflow associated with an issue tracking list, shown in SharePoint Foundation

Modifying a workflow

On the Change a Workflow page, shown in Exhibit 5-6, if you have Design or Full Control permissions, you can change the Name, Task List, History List, and Start Options settings. Click Next to display the “Customize the Three-state Workflow” page. On this page, you can change the workflow states, change what happens when a workflow is initiated, and change what happens when a workflow switches to its middle state, as shown in Exhibit 5-7. Click OK when you’re done making changes.

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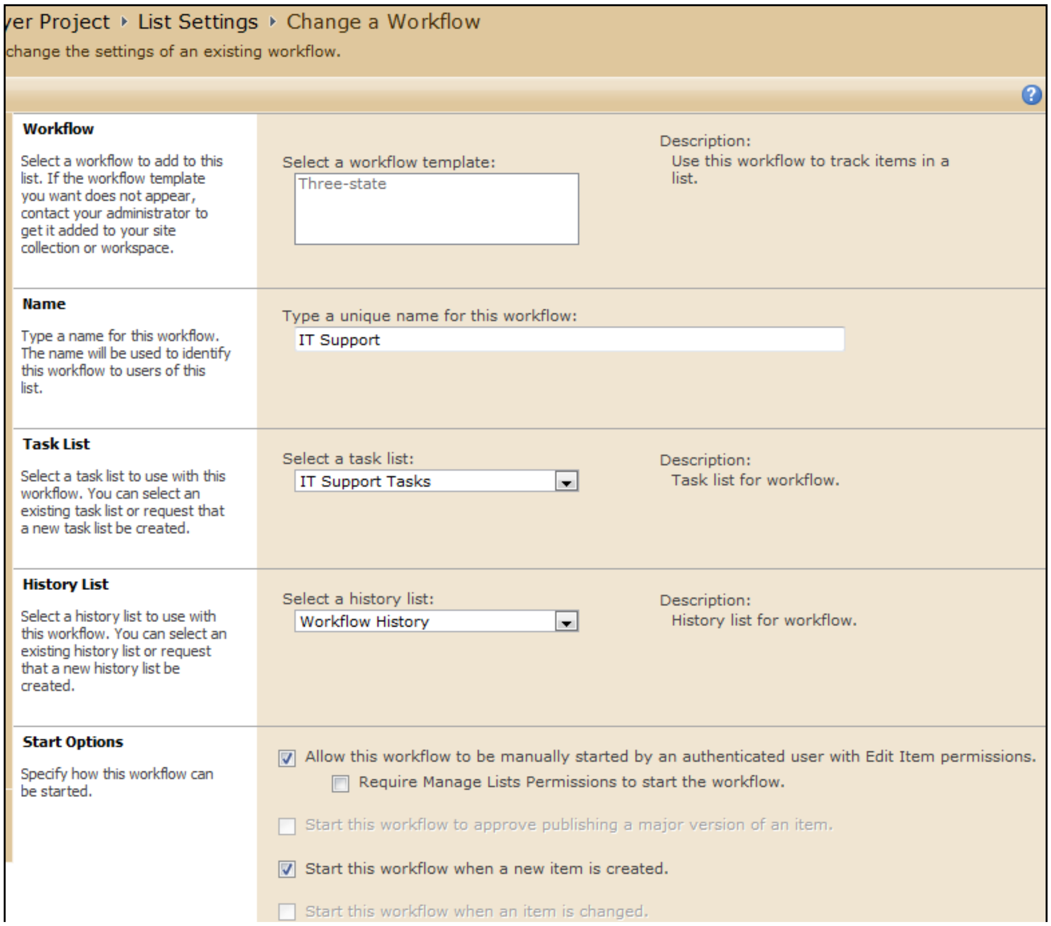

Exhibit 5-6: The Change a Workflow page

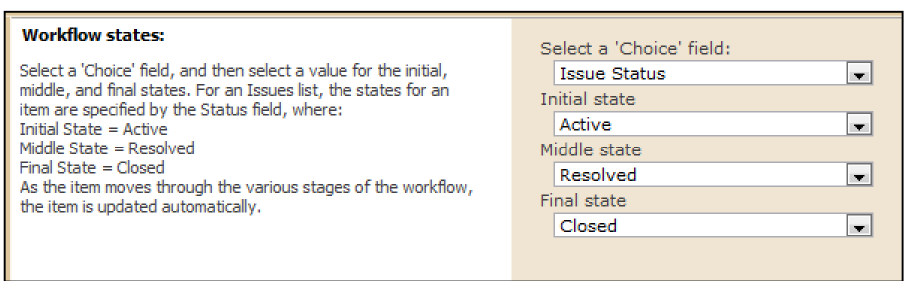

Exhibit 5-7: Part of the "Customize the Three-state Workflow" page

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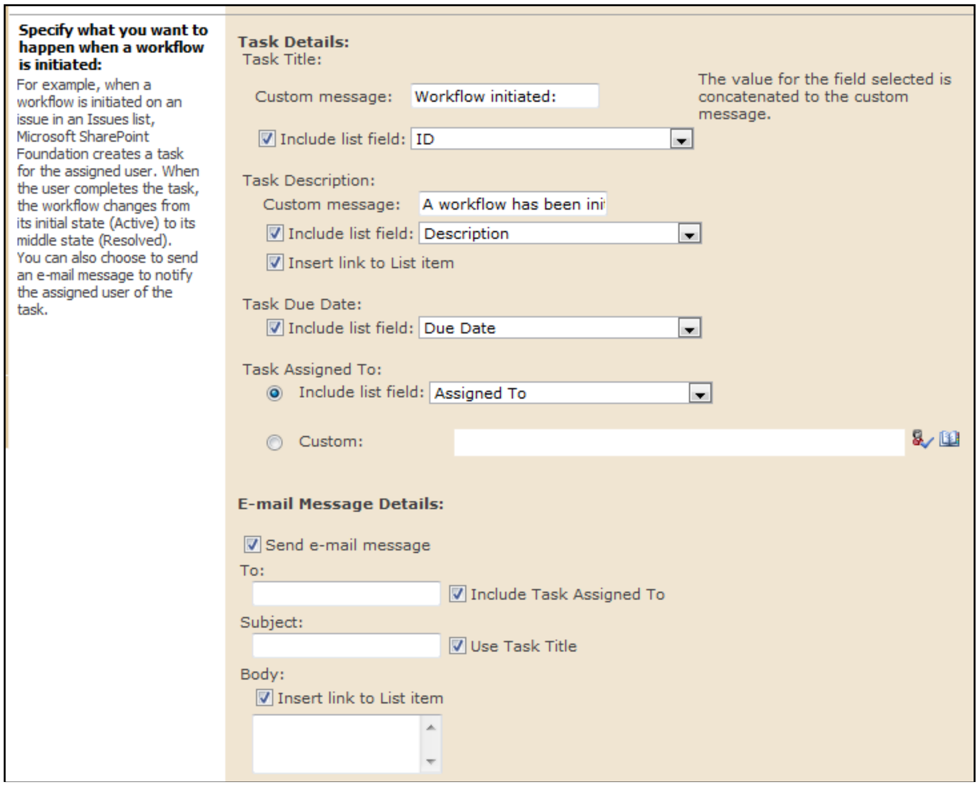

Exhibit 5-8: More of the "Customize the Three-state Workflow" page

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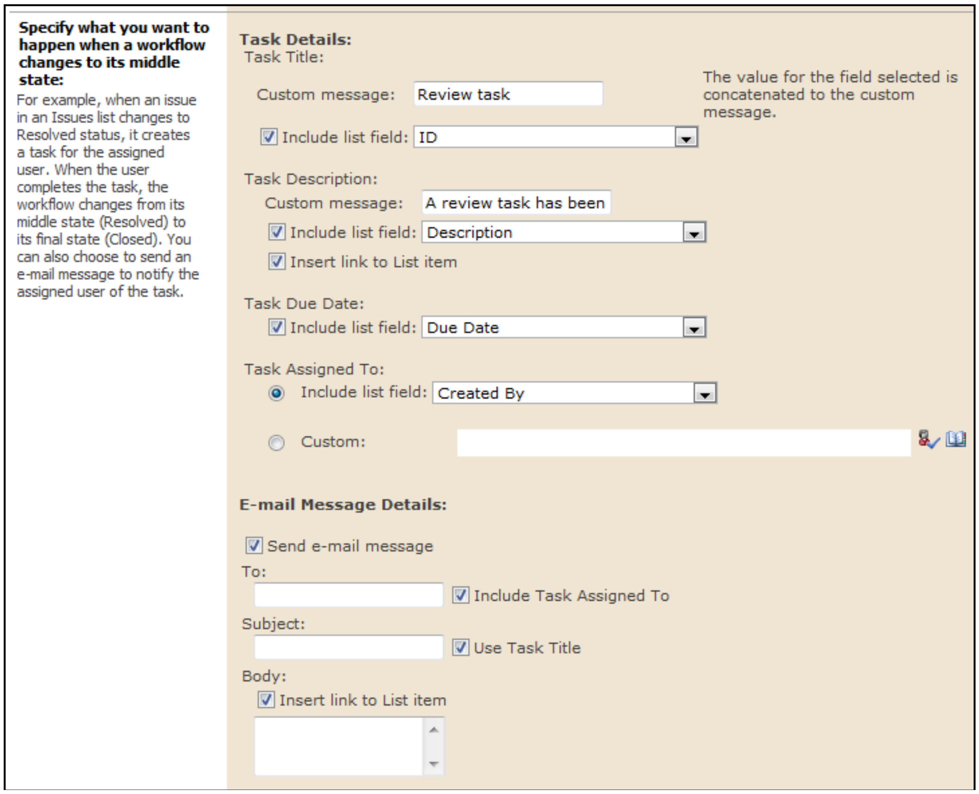

Exhibit 5-9: Another section of the "Customize the Three-state Workflow" page

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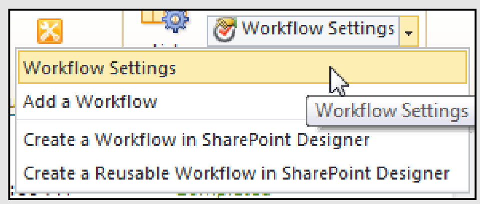
Do it!

A-4: Modifying a three-state workflow

Here's how	Here's why
1 Go to your Site ## home page	
2 From the Site Actions menu, choose **Edit in SharePoint Designer**	
3 In the Site Objects list, select **Lists and Libraries**	
4 In the Gallery pane, click **Bayer Project**	
5 In the Workflows box, click **IT Support**	To open the IT Support workflow from within SharePoint Designer 2010.
6 Edit the Name box to read **Bayer IT Support**	
Click **Next**	
7 Click **OK**	
8 On the Bayer Project - All Issues page, click the **List** tab	Under List Tools.
9 From the Workflow Settings menu, choose **Workflow Settings**	
10 From the Workflow Name list, select **Bayer IT Support**	To open the Bayer IT Support workflow from within SharePoint Foundation 2010.
11 Click **Next**	
12 In the "Specify what you want to happen when a workflow is initiated" section, under E-mail Message Details, in the To box, type **administrator@spfadv.class**	
13 Click **OK**	
14 Close all Internet Explorer windows	
Close SharePoint Designer 2010	

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Unit summary: Creating workflows

Topic A

In this topic, you learned how to work with a **three-state workflow** in SharePoint Foundation 2010. You created a three-state workflow on an Issues Tracking list and tested it. You also modified the workflow.

Independent practice activity

In this activity, you'll practice working with three-state workflows.

1. Open Internet Explorer.
2. Go to your Admin## site.
3. Create an issue tracking list called **Employee Manual**.
4. On the List Tools | List tab, click the arrow next to the Workflow Settings button and choose Add a Workflow.
5. Create a workflow, using the following variables:
   - Name: **Manual creation**
   - Task list: **Admin Team Tasks**
   - Start Options: Start this workflow when a new item is created.
   - Workflow states - Choice field: Issue Status
   - Workflow initiated - Task Title - Include list field: Title
   - Workflow initiated - E-mail Message Details - Body: **Please complete your assigned project task. Thank you.**
   - Workflow changes to middle state - Task Title - Include list field: Title
   - Workflow changes to middle state - E-mail Message Details - Body: **Please review the project task.**
6. Create a project task item, using the following variables:
   - Title: **Create draft table of contents**
   - Start Date: Tomorrow
   - Due Date: 5PM, Day after tomorrow
   - Task Status: Active
   - Priority: (1) High
   - Description: Need a draft table of contents for team approval.
   - Assigned To: Student## where ## is your assigned student number
7. Close Internet Explorer and open Outlook.
8. Verify that you've received an e-mail message informing you that you've been assigned a project task.
9. In the e-mail message, click the link to follow it to the project task. Change the issue's status to Resolved.

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10 Return to Outlook and verify that you've received an e-mail message informing you that the project task is ready for review.

11 In the e-mail message, click the link to follow it to the project task. Change the issue's status to Closed.

12 Close Internet Explorer and Outlook.

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Unit 6

Adding to site galleries

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

A Add site columns and site content types.

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Topic A: Site galleries

Explanation

Site columns and content types are the building blocks of your SharePoint Foundation 2010 data design. SharePoint Foundation 2010 installs with many predefined site columns and content types ready for use across your site. However, if you find that none of the predefined columns or content types meets a particular need of your business, you can create your own custom columns and content types for your site.

Site columns

Site columns define the data that can be entered by users. Similar to creating a custom column for a specific list, when you create a site column, you select the type of data for it. The data type can be any of the following:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 10, 100)
- Currency ($, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)

Once the column is defined in your site gallery, you can use it throughout your site.

Do it!

A-1: Adding a column to the site gallery

Here's how	Here's why
1 Open Internet Explorer	
2 From the Site Actions menu, choose **Site Settings**	
3 Under Galleries, click **Site columns**	The site columns currently used on your site are listed, along with the types of data they hold. They are categorized under Base Columns, Core Contact and Calendar Columns, Core Document Columns, Core Task and Issue Columns, and Extended Columns. The Source column is empty because all site columns in the gallery are predefined.
4 Click **Create**	You'll create a column that holds a unique approval code for each of your administrators.

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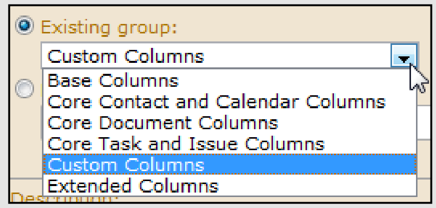
5	In the Name and Type section, in the Column name box, type **Admin Approval Code**	
6	From the "Type of information in this column is" list, select **Number (1, 10, 100)**	
7	In the Group section, open the **Existing group** list	 You can add your new site column to one of the existing categories or create one of your own.
8	With **Custom Columns** selected, close the menu	
9	In the Additional Column Settings section, in the Description box, type **Enter your admin approval code**	
	Under "Require that this column contains information," select **Yes**	With this setting, users can't create a new item without entering an admin approval code.
	Under "Enforce unique values," select **Yes**	This setting requires that each item entered by a user have its own unique admin approval code so that a code can't be reused.
	From the "Number of decimal places" list, select **0**	
10	Click **OK**	
11	Click **OK**	To index the column to enforce unique values.
12	Scroll to view the Custom Columns category	Your Admin Approval Code is listed. The Source column shows Site##. The title of the column is a link.
	Click **Admin Approval Code**	You can edit the settings for the site column or use the Delete button at the bottom of the page to remove it.
	Click **Cancel**	

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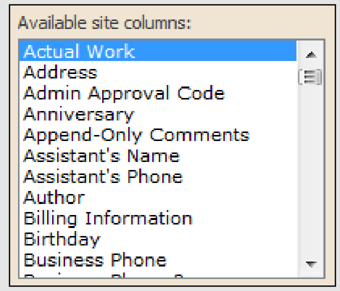
Do it!

A-2: Using a custom site column

Here's how	Here's why
1 Go to your Tasks list	
2 On the List Tools | List tab, click **List Settings**	
3 Under Columns, click **Add from existing site columns**	 Admin Approval Code is listed, along with the other available columns.
Select **Admin Approval Code**	
4 Click **Add**	
Click **OK**	
5 Use breadcrumbs to go to the Tasks page	
6 Click **Add new item**	
7 Observe the Admin Approval Code	 It is a required field. The description you created for the column is displayed under the entry box.
8 Click **Cancel**	

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Site content types

Explanation

A *site content type* is a collection of settings that allow users to organize their SharePoint data in a centralized and meaningful way. A content type includes site columns that define the data that users can enter. For example, the Calendar content type includes the following columns and data types:

Column	Data type
Attendees	Person or Group
Category	Choice
Check Double Booking	Check Double Booking
Description	Multiple lines of text
End Time	Date and Time
Free/Busy	Free/Busy
Location	Single line of text
Resources	Resources
Start Time	Date and Time
Title	Single line of text
Create By	Person or Group
Modified By	Person or Group

Each content type can specify the properties associated with items, the workflows that can be launched, the document templates and conversions, and any custom features.

If you have Design or Full Control permissions on your site, you can define a content type and add it to your site gallery. That content type can then be used, across your site and any child sites, in lists or libraries that allow the management of content types. For example, if your company uses a particular contract template, you can define it as a content type, adding it to the site gallery; then you can associate the content type with any number of document libraries across your site. You can add this new content type so it appears on the New menu. All users will then be able to create consistent contracts based on the template.

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Microsoft Office 2010 templates

To add a Microsoft Office 2010 template as a content type:

1 From the Site Actions menu, choose Site Settings.
2 Under Galleries, click Site content types.
3 Click Create.
4 In the Name box, enter a name for the content type.
5 Select the appropriate Parent Content Type category. Options are:
   - Document Content Types
   - Folder Content Types
   - Group Work Content Types
   - List Content Types
   - Report Server Content Types
   - Special Content Types
6 Select the appropriate Parent Content Type. Options depend on the category selected in the previous step. The following table lists the options for each category.

Category	Parent Content Type	
Document Content Types	Basic Page Document Dublin Core Columns Form Link to a Document	List View Style Master Page Picture Web Part Page Wiki Page
Folder Content Types	Discussion Folder	Summary Task
Group Work Content Types	Circulation Holiday New Word Official Notice Phone Call Memo	Resource Resource Group Timecard Users What's New Notification
List Content Types	Announcement Comment Contact East Asia Contact Event Issue Item	Link Message Post Reservations Schedule Schedule and Reservations Task
Report Server Content Types	Report Builder Model Report Builder Report	Report Data Source
Special Content Types	Unknown Document Type	

7 In the Group box, select an existing group or enter a new group for this content type. Existing groups include the following content types: Custom, Document, Folder, Group Work, List, Report Server, and Special.
8 Click OK.
9 Under Settings, click Advanced Settings.

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10 Enter the URL of an existing document template or upload a new document template.
11 Specify whether the content type should be read-only.
12 Specify whether to update all content types that inherit from this type.
13 Navigate to the library or list where you want to use the content type.
14 On the <*Page type*> Tools | <*Page type*> tab , click <*Page type*> Settings.
15 Under Content Types, click "Add from existing site content types."
16 From the Available Site Content Types list, select the new content type that is associated with your template. You can filter the list by using the "Select site content types from" list.
17 Click Add.
18 Click OK.
19 If desired, you can remove the default blank form from the library or list.
    a On the <*Page type*> Settings page, under Content Type, click the default content type; this might be Document or a type of list.
    b Under Settings, click "Delete this content type." Click OK.

Microsoft InfoPath 2010

If you have Full Control permissions on your site, you can publish Microsoft InfoPath forms to your site. To add a Microsoft InfoPath Form as a content type in a form library:

1 Open Microsoft InfoPath Designer 2010.
2 Open the template you want to publish.
3 Choose File, Publish. Click SharePoint Server. Click OK.
4 Click Save to save the file locally.
5 Enter the location of your SharePoint server as `http://{servername}/` and click Next. If the user account you are logged in with doesn't have the appropriate permissions, you'll be prompted to enter the credentials of a user who can publish to the site.
6 With Site Content Type (advanced) selected, click Next. Click Next again.
7 If necessary, enter a name in the Name box. Enter a description of the form. Click Next.
8 Enter the URL for the form library. Click Next twice.
9 Click Publish. Click Close.
10 Close InfoPath form. Close InfoPath Designer 2010.
11 Add the new content type to the form library.
    a On the Form Library Settings page, under Content Type, click "Add from existing site content types."
    b With your new form selected, click Add. Click OK.
12 If desired, you can remove the default blank form from the form library.
    a On the Form Library Settings page, under Content Type, click Form.
    b Under Settings, click "Delete this content type." Click OK.

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Do it!

A-3: Adding a Word template as a content type

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

Here's how	Here's why
1 From the Site Actions menu, choose **Site Settings**	
2 Under Galleries, click **Site content types**	You'll add a template for users to create new business letters on the site.
3 Click **Create**	
4 In the Name box, type **Business Letter**	
5 In the Description box, type **Use for all external business correspondence**	
6 In the "Select parent content type from" list, verify that **Document Content Types** is selected	
7 From the Parent Content Type list, select **Document**	
8 From the Existing group list, select **Document Content Types**	
9 Click **OK**	The new content type called Business Letter is now available on your site. Next, you need to associate this content type with the Word template.
10 Click **Advanced settings**	
11 Select **Upload a new document template**	
12 Browse to select **Business Letter** in the current topic folder Click **Open**	Student Data folder Unit 6\Topic A.
13 Under "Update all content types inheriting from this type," select **No**	
14 Click **OK**	The new content type called Business Letter is now associated with the Business Letter Word template. Now you can add this content type to your document libraries on your site.

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Do it!

A-4: Using a custom content type

Here's how	Here's why
1 In the Quick Launch bar, click **Shared Documents**	
2 On the Library Tools | Library tab, click **Library Settings**	
3 Under Content Types, click **Add from existing site content types**	
4 From the "Select site content types from" list, select **Document Content Types**	To filter the list to show just those content types stored in Document Content Types.
5 In the Available Site Content Types list, select **Business Letter**	
6 Click **Add**	
7 Click **OK**	
8 Return to the Shared Documents home page	
9 Click the **Documents** tab	Under Library Tools.

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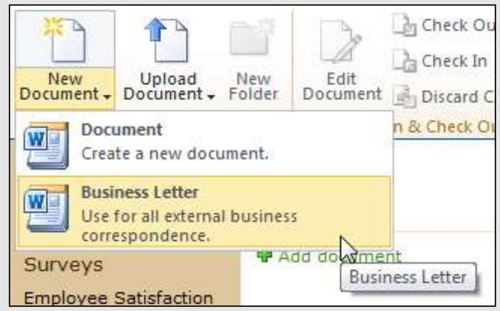
10 Click the arrow next to New Document



To display a menu. Users can now create a blank document or create a document based on the Business Letter template.

11 Close the menu

12 Close Internet Explorer

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Unit summary: Adding to site galleries

Topic A

In this topic, you learned how to add **custom site columns** to your SharePoint Foundation 2010 Team site's site gallery. You then used your custom site column in a list. You also learned how to upload templates to your content type site gallery. You then added the custom content type to a document library.

Independent practice activity

In this topic, you'll practice adding custom site columns and content types to your SharePoint Team site.

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

1 Open Internet Explorer.

2 Go to your Admin## site.

3 Create a contact list called **Sales Team**.

4 Create a custom site column using the following variables:

- Column name: **Hire Date**
- Type of information: Date and Time
- Existing group: Core Contact and Calendar Columns
- Description: **Enter employee hire date.**
- Require that the column contains information: Yes
- Default value: Today's Date

5 Add the Hire Date column to your Sales Team contacts list.

6 Verify the Hire Date addition by creating an item in the Sales Team contacts list.

7 Add the Word template Fax Cover Page to the Shared Documents library as a content type. (Hint: You might need to enable managing content types in library settings.)

8 Verify that Fax Cover Page is available on the New menu.

9 Close Internet Explorer.

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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.

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Topic A: Course summary

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

Unit summaries

Unit 1

In this unit, you learned how to **add components** to a SharePoint Team Web site. You created a document **library**, a form library, a picture library, and a Wiki page library. You also created a **contact list** and a list using data from an Excel spreadsheet. Then you created **surveys** and a **custom list** with custom columns. Finally, you added wiki pages and **Web Part pages**.

Unit 2

In this unit, you learned how to change the look and feel of a SharePoint Team Web site by modifying the **navigation settings** and changing the **site theme**. You added headings and links to the **Quick Launch bar** and changed the order of the links. You also added links to the **top link bar** and changed the order of those links. Finally, you set top-link-bar links so they're **inherited** from the parent site.

Unit 3

In this unit, you learned how to **customize** a SharePoint Team Web site. You learned how to change a site's title, description, navigation settings, and columns. You also learned how to add a **Word template** as a content type to the site. Then you learned how to manage **item controls** by enabling content approval, versioning, and the Require Check Out feature. Finally, you learned how to **edit site pages** by using SharePoint Foundation 2010 editing tools and **SharePoint Designer 2010**.

Unit 4

In this unit, you learned how to control the display of information by creating, modifying, and deleting **public views** and controlling **RSS feed** settings. You learned that Really Simple Syndication (RSS) is a technology used to transmit information across intranets and the Internet. You learned how to use RSS feeds as a mechanism to keep users up-to-date on the latest site information or to deliver digital content, such as pictures, audio, and video.

Unit 5

In this unit, you learned how to create **workflows** in SharePoint Foundation 2010. You added a **predefined three-state** workflow to a list. You tested the workflow and then changed its settings. You also learned that SharePoint Server 2010 includes more predefined workflows than SharePoint Foundation 2010. You learned that you need to be a member of the Site Owners group to create **declarative workflows** in SharePoint Designer 2010 and associate them with your site.

Unit 6

In this unit, you learned how to add custom site columns and content types to the **site galleries** on your SharePoint Foundation 2010 Team sites. You uploaded Microsoft Word documents and Microsoft InfoPath forms as **content types**.

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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.

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Glossary

Branching logic
A technique used to change which survey questions are presented to a user, based on the user's response to specific questions.

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.

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

Content approval
A feature that allows users to change library and list items but does not display them on the site until a moderator has approved the changes.

Current navigation
See *Left navigation bar*.

Custom list
A list for which you specify the columns.

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

Fields
See *Columns*.

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

Global navigation
See *Top navigation bar*.

Import Spreadsheet list
A list that is created from the data in a spreadsheet file, such as Excel.

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 of a certain type, such as documents, images, or 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 workflow
A workflow created for a specific list or library. It has access to the values in the custom fields in the list or library. It can't be used with other lists or libraries on the site where it was created or on other sites.

Major version
A version that records large changes, such as additions or deletions. Major versions are designated by a whole number, such as 1, 2, 3, etc. (Also referred to as simple versioning.)

Metadata
See *Columns*.

Minor version
A version that records small changes, such as spelling corrections, and is designated by a decimal value after the major version number (as in 1.1, 1.2, 1.3, etc.).

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

Properties
See *Columns*.

Public view
A view available to all site users.

Quick Launch bar
See *Left navigation bar*.

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Reusable list workflow
A workflow that is created at the top-level site in a site collection and that can be used globally with any list, library, or content type in the site collection.

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

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 Designer 2010
An HTML editor and Web design program designed for creating and modifying SharePoint sites and Web pages.

Site theme
A font and color scheme combination that can be applied across all pages in your site.

Site workflow
A workflow that is associated with a site, not with a list, library, or content type. A site workflow does not use the information in a list, library, or content type.

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

Three-state workflow
A workflow that tracks the status of an issue or item through three states and two transitions between the states.

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.

Versioning
A feature in SharePoint that enables you to manage content changes in your SharePoint lists and libraries by assigning major and minor version numbers to documents or items that have been changed.

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

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

Web Parts
The modular building blocks of SharePoint pages.

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

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

Zone
A section of a Web Part page.

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Index

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