

# Chapter 16 – Tutorials

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## Terms

This Windows SharePoint Services Operations Guide (WSSOPS) from the Computer Information Agency is provided as is. Every effort has been made by the author to ensure that information provided is correct however this cannot be guaranteed.

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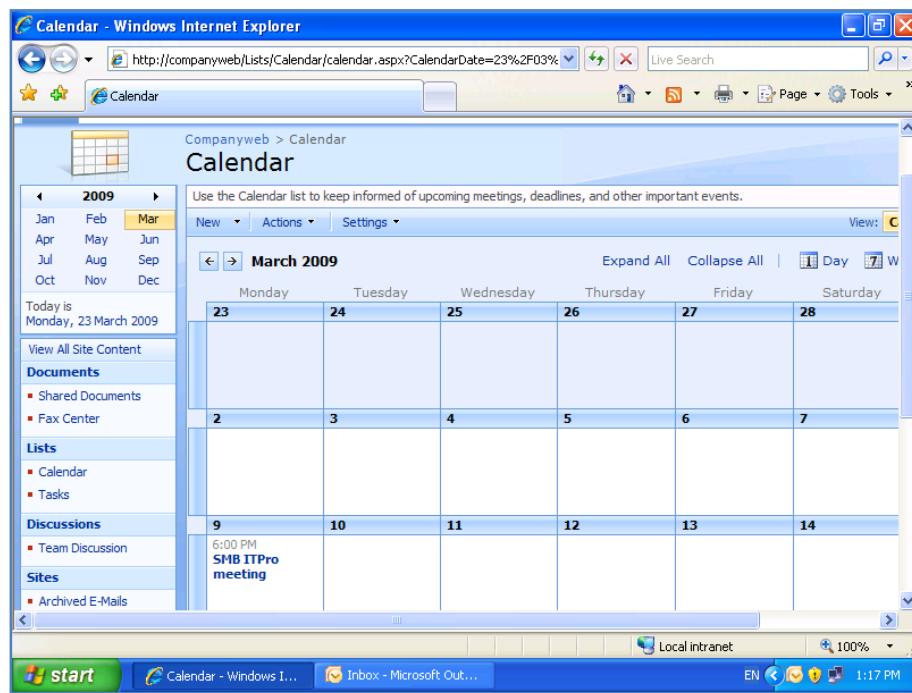
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## 16.1 Scope

This chapter will show you how to complete a number of tasks when using WSS v3.

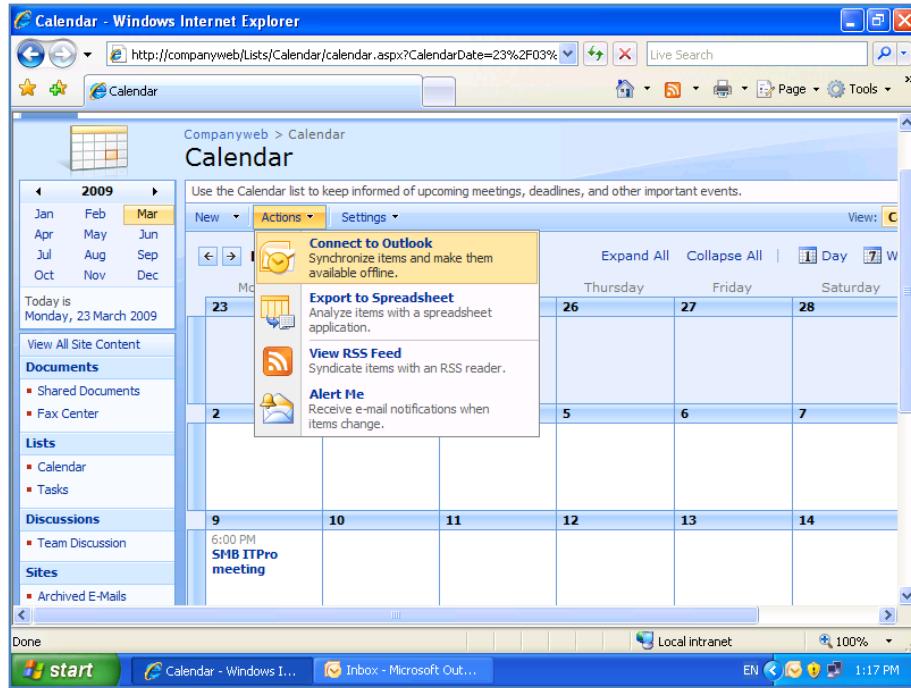
## 16.2 Connecting to Outlook

This tutorial will show you the steps required to link Outlook 2007 to a WSS v3 calendar. This will allow you to create appointments in either WSS v3 or Outlook 2007 and have them automatically sync with all other linked calendars. Only using Outlook 2007 it is possible to achieve two way synchronization between the calendars. It is possible to follow the same steps with Outlook 2003 but you can only synchronize from WSS v3 to Outlook 2003 and the not the reverse.

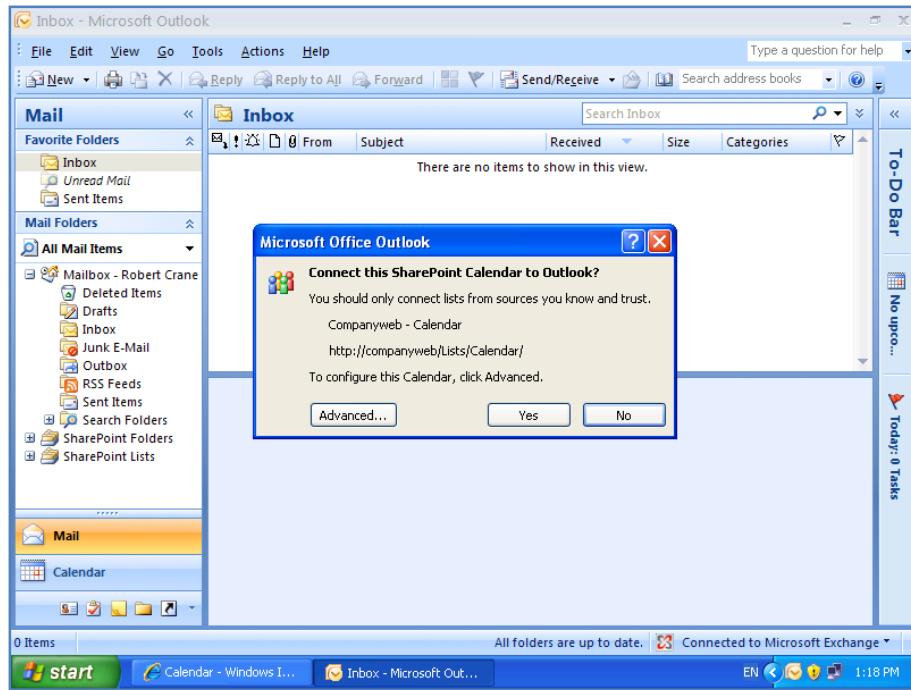


The first step in the process is to locate the WSS v3 calendar you wish to synchronize with Outlook 2007. It is also recommended that you have Outlook 2007 already running before you commence this process.

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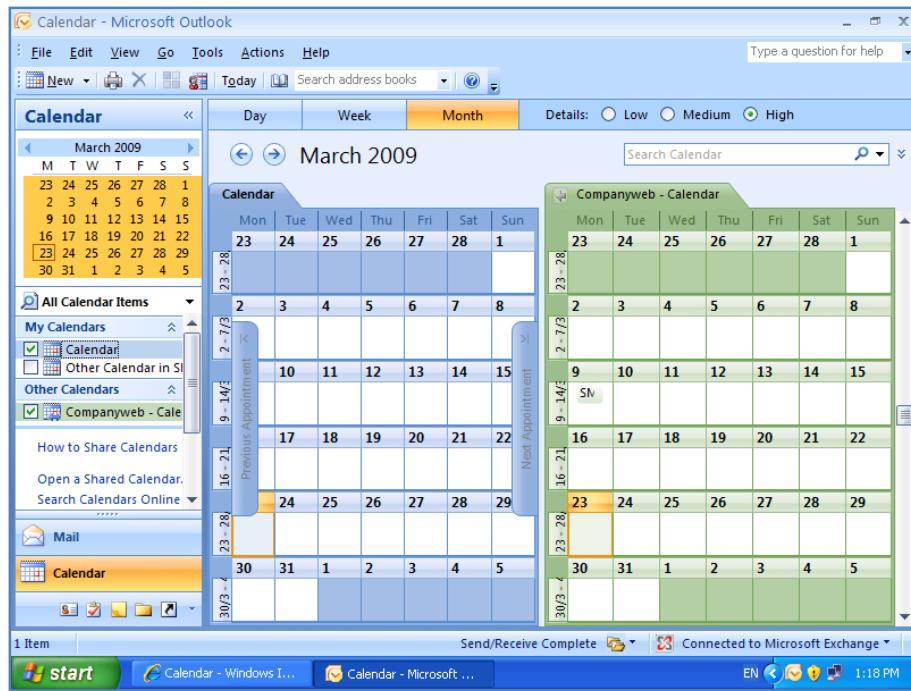
From then menu bar select **Actions | Connect to Outlook**.



You will now be taken to Outlook 2007 where you will see the above message asking for permission to connect Outlook 2007 to your WSS v3 calendar.

Select **Yes** to continue.

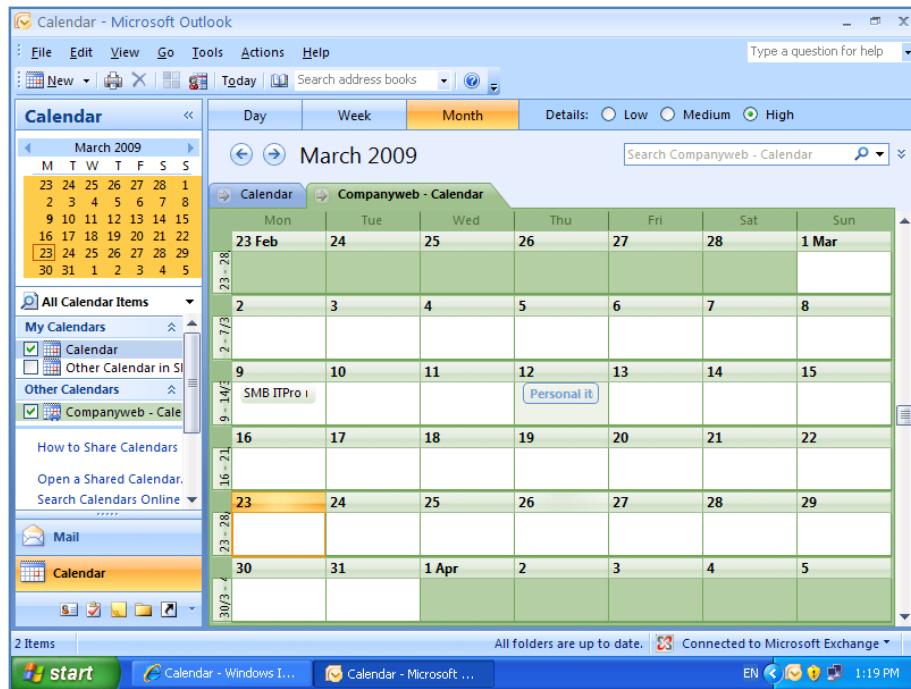
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When you select *Calendar* in Outlook 2007 you should now see you have an additional calendar from which you can select to view.

As you can see in the above screen shot above there is the normal (private) Outlook calendar on the left (in blue) and the new linked WSS v3 calendar on the right (in green). Under the *All Calendar Items* on the left hand side of the screen you can see that making a selection of which calendar to view is as simple as clicking the selection box for that calendar. Likewise, to remove any calendar from the view, simply uncheck the box that corresponds to that calendar.

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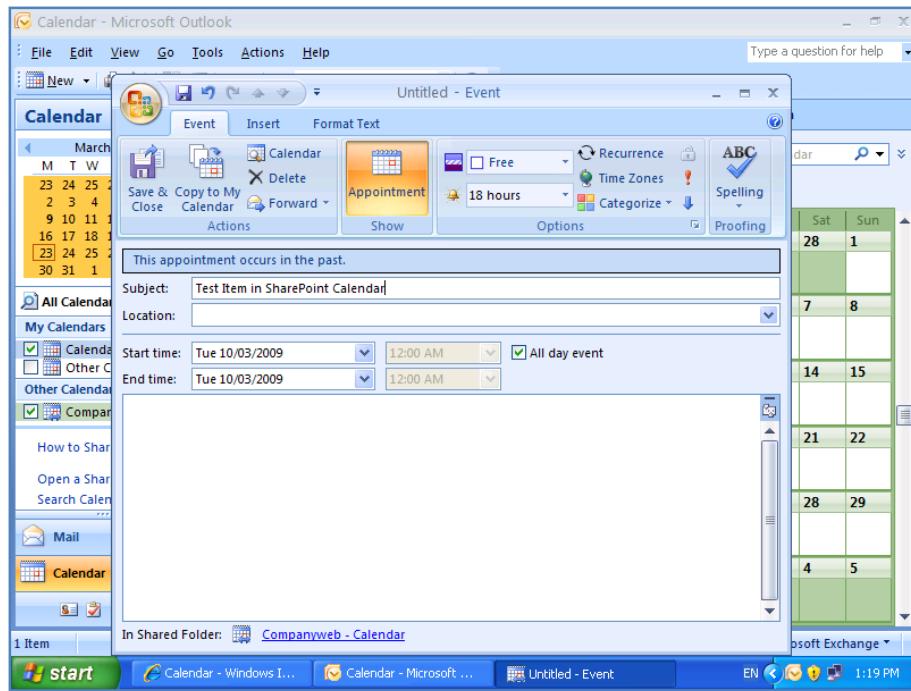


You will also notice on the left of the tab, at the top of the calendar, that contains the name of the calendar there is an arrow. If you press this arrow that calendar will overlay the other one.

In the above case, the Companyweb calendar (green) that was on the right of the screen has been overlaid on the private Outlook 2007 calendar (blue). You will notice that although the calendars are overlaid you can still see the appointments in both. If you look closely at the appointment on the 12<sup>th</sup> you will see that it is coloured blue. This indicates that this appointment belongs in the private Outlook 2007 calendar (blue).

This overlay ability is unique to Outlook 2007 and provides an easy way to view two calendars to determine whether appointments clash. This could prove to be very handy if the WSS v3 calendar represented common company-wide appointments, because it could be quickly linked and then overlaid on private calendars to determine business scheduling.

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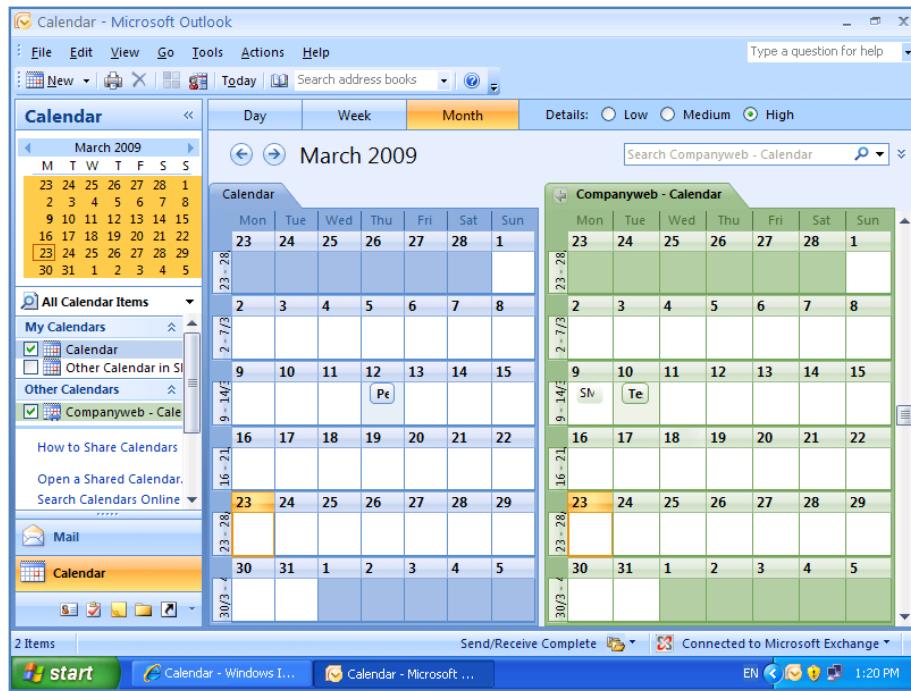


To demonstrate the bi-direction synchronization ability of WSS v3 calendars and Outlook 2007 a new appointment is created in the WSS v3 calendar from Outlook 2007.

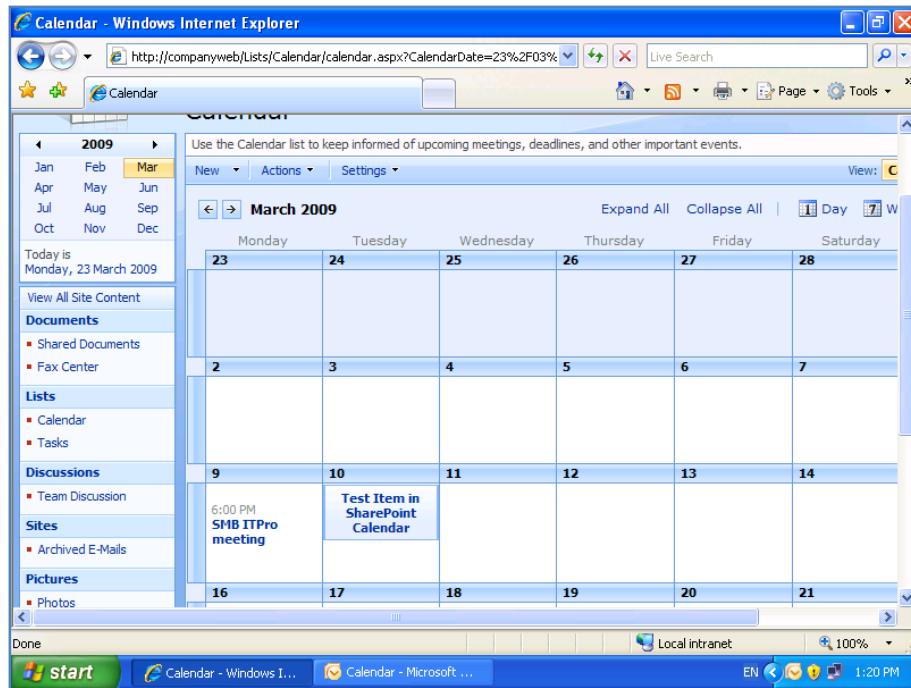
To create a new appointment, simply locate the WSS v3 calendar (in this case green) and double click on any day. This will launch the event window like shown above. You will note that this new appointment will reside in the WS v3 calendar by examining the lower left corner of this window. Here it says *In Shared Folder: Companyweb – Calendar* confirming we are actually creating this new event in our WSS v3 calendar.

Complete the remaining details for the event and press **Save and Close** in the upper left of the window when complete.

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When you are returned to your calendar view you should now see the new appointment you just created. In the above example we can see the new appointment on the right hand side, in the green calendar on the 10<sup>th</sup>.



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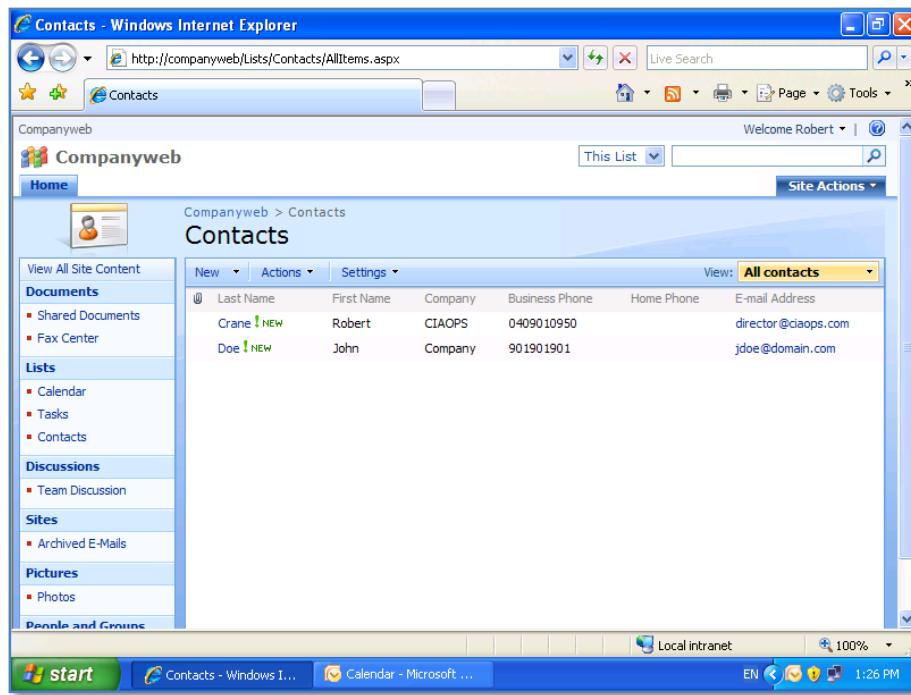
If we now return to our calendar in WSS v3 and refresh the page, we can see that the new appointment we just created in Outlook 2007 now appears in the WSS v3 calendar (on the 10<sup>th</sup> as expected).

To create calendar events in WSS v3 you must have the appropriate rights to do so, these same rights apply when creating events from linked Outlook 2007 as well.

## 16.3 Creating linked fields

Good database design allows you to create fields which are linked between database tables. This is known as relational databases and improves the performance of databases by avoiding redundancy and data errors.

It is possible to create something similar within WSS v3 via the use of linked fields. In this case we are going to create a new list that records telephone calls from an existing list of customers. Here our WSS v3 site already has a list of the customer details so we will link our new list to this.

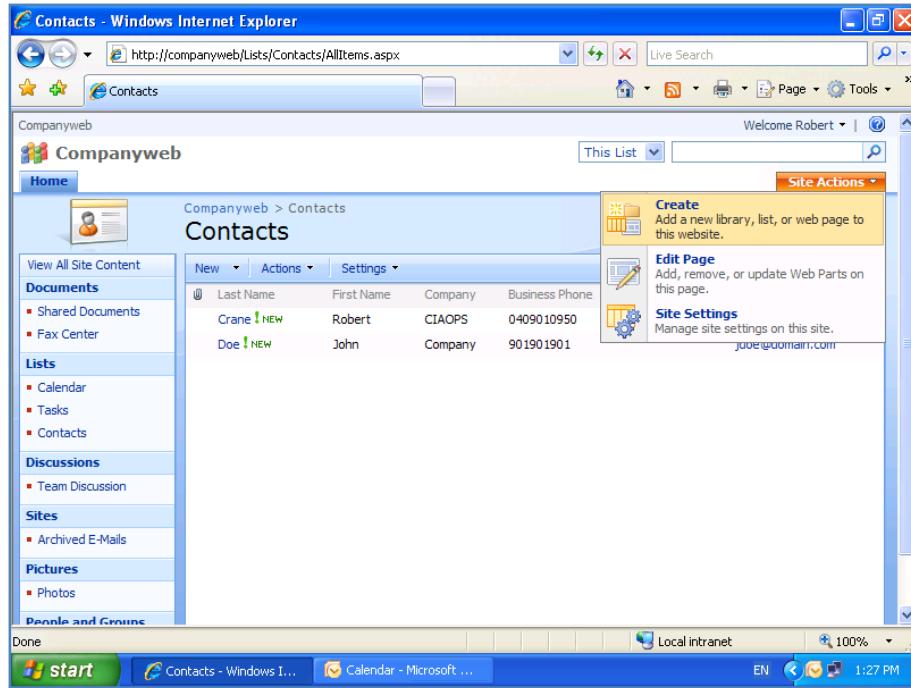


The screenshot shows a Windows Internet Explorer window displaying a SharePoint contacts list. The URL in the address bar is <http://companyweb/Lists/Contacts/AllItems.aspx>. The page title is "Contacts - Windows Internet Explorer". The SharePoint navigation bar on the left includes links for "View All Site Content", "Documents", "Lists" (which is selected), "Discussions", "Sites", and "Pictures". The main content area shows a table of contacts with columns: Last Name, First Name, Company, Business Phone, Home Phone, and E-mail Address. Two entries are visible: "Crane" (Last Name: Robert, First Name: CIAOPS, Business Phone: 0409010950, E-mail: director@ciaops.com) and "Doe" (Last Name: John, First Name: Company, Business Phone: 901901901, E-mail: jdoe@domain.com). The status bar at the bottom shows "Local intranet" and the time "1:26 PM".

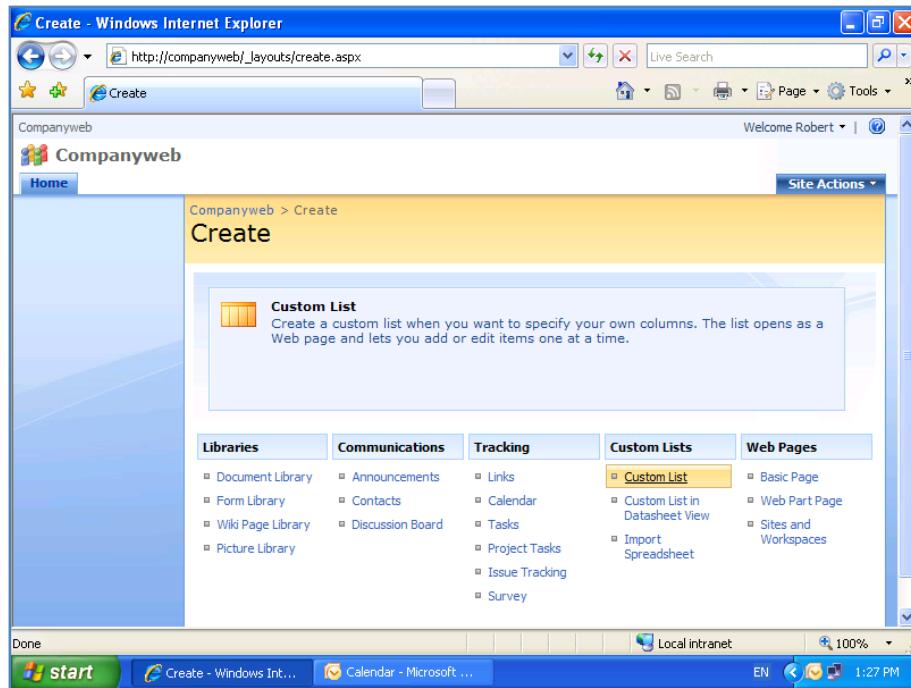
Last Name	First Name	Company	Business Phone	Home Phone	E-mail Address
Crane	Robert	CIAOPS	0409010950		director@ciaops.com
Doe	John	Company	901901901		jdoe@domain.com

As you can see from the above screen shot a list of contact details already exists in our WSS v3 site. Note here that this list contains a field called *Last Name* which we will be using to link to in our new list.

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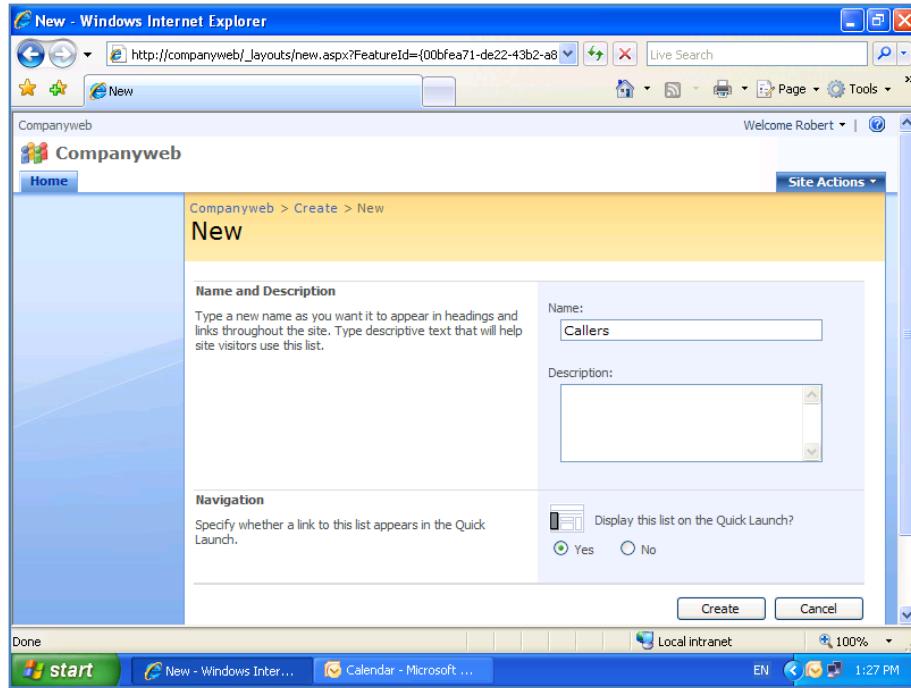


The first step in the process is to create our new list. To do this we select **Site Actions | Create** from the upper right of the screen. Remember, that you do not see the *Site Actions* tab unless you have the appropriate design rights on the WSS v3 site.

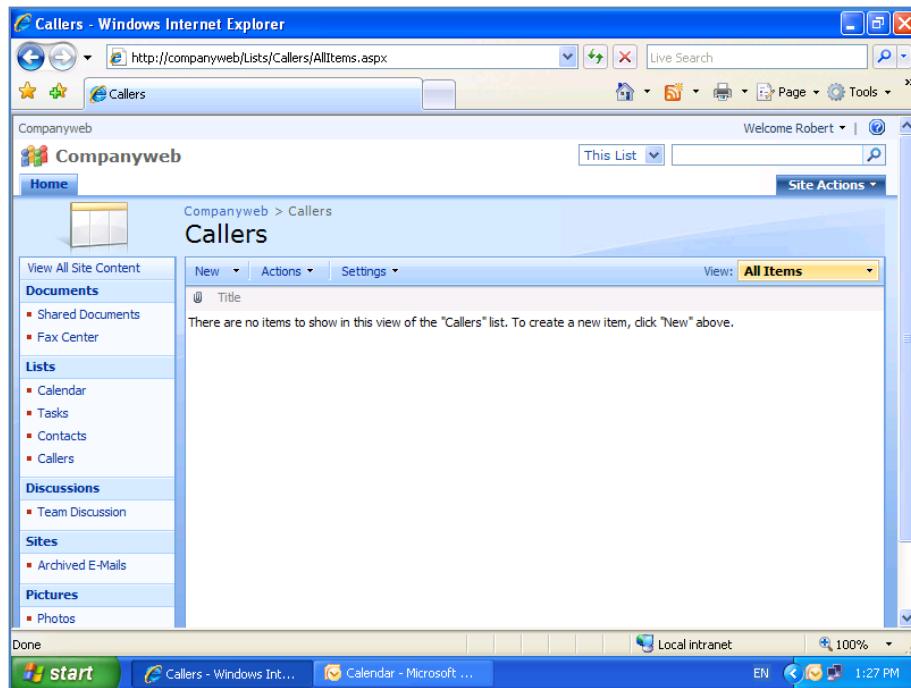


Next, select **Custom List** from under the *Custom Lists* heading.

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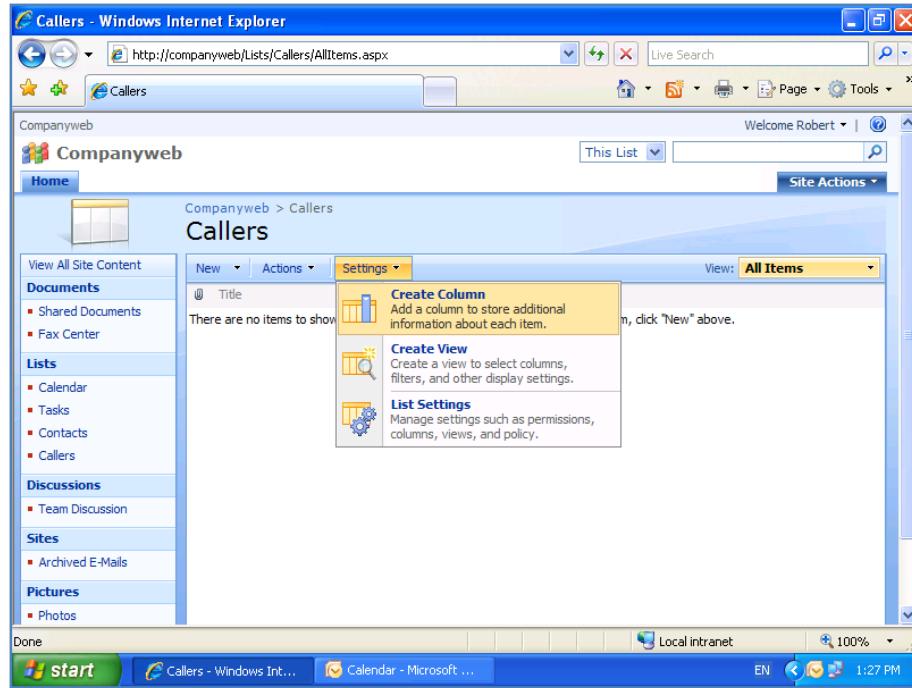


Give the new list a name. In this case it is *Callers*. Add a description if desired, set the navigation option and press the **Create** button to create a new list.

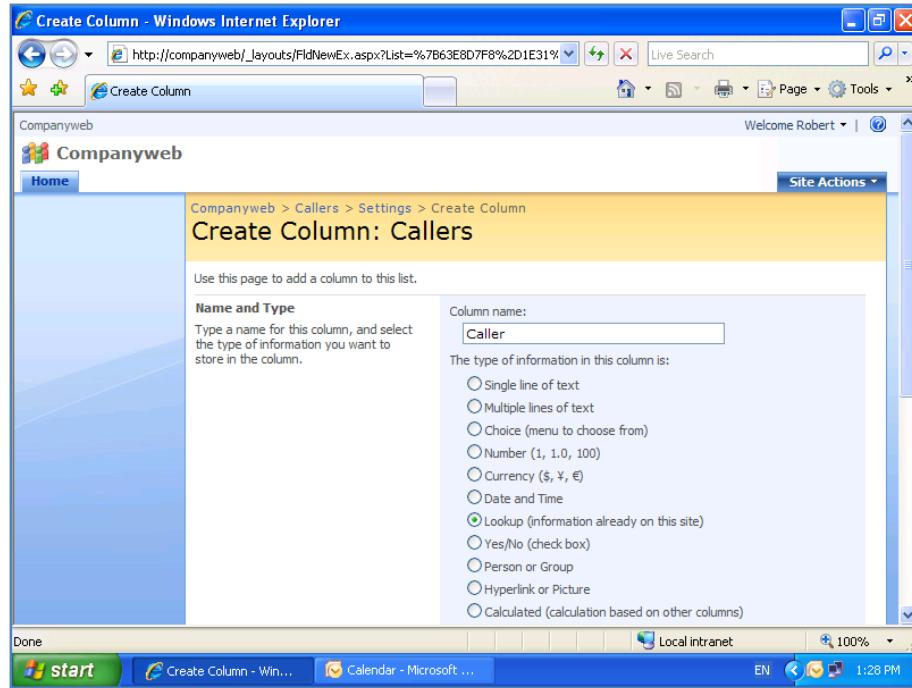


You should now see the new list displayed on the screen as shown above. You will notice that it only has a single field called *Title*.

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To create a new field select **Settings | Create Column** from the menu.

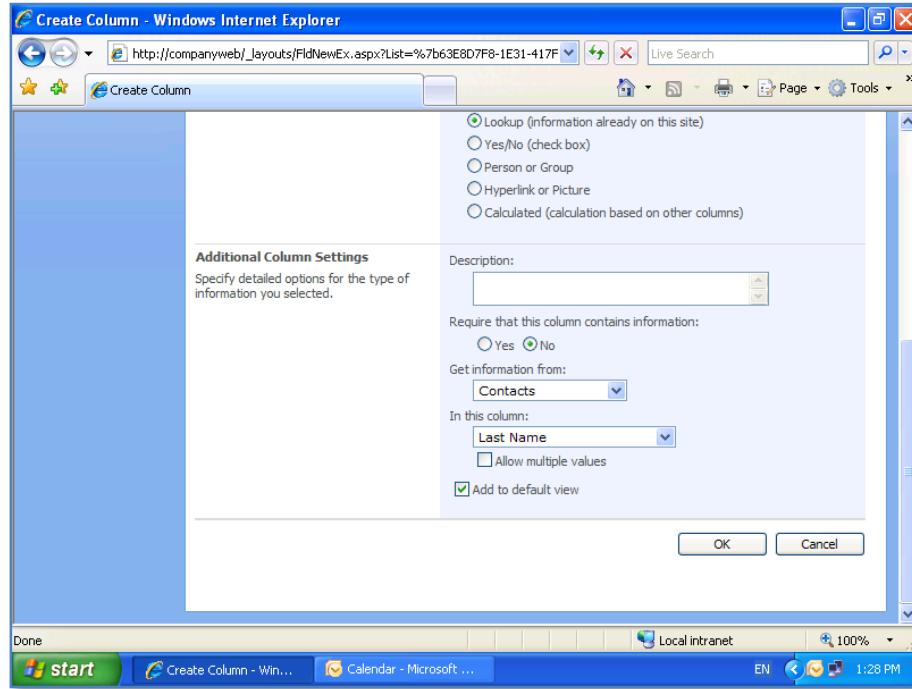


In the *Create Column* screen select a name for the field (in this case *Caller*) and then select the type of field desired.

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In this case we want the *Caller* field to reference another list so we select the **Lookup** option.

Scroll down the screen for further options.



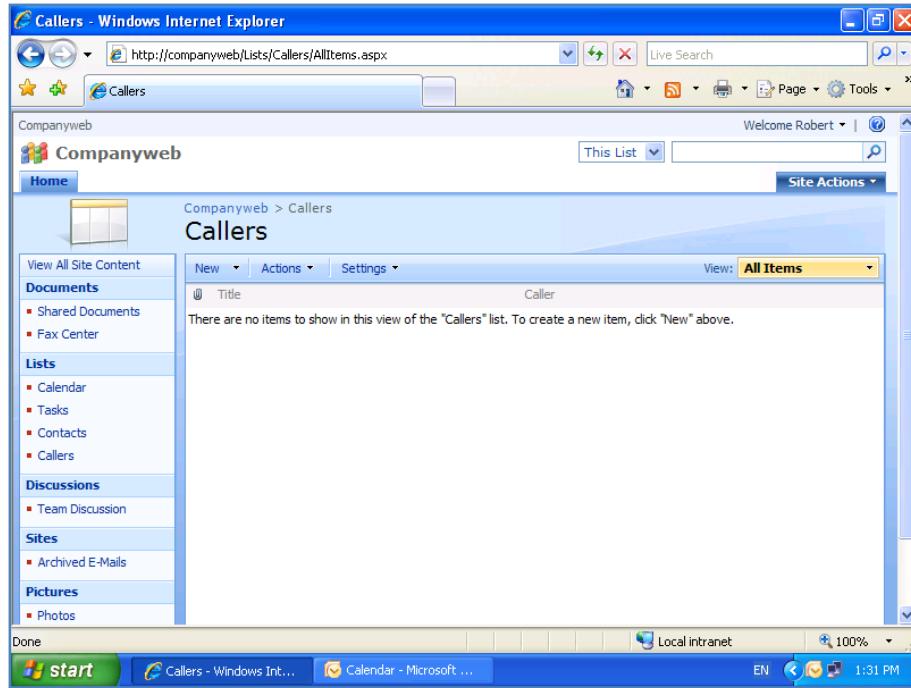
You can enter a description if desired.

In the *Get Information From:* field you will see a drop box, that when selected, will allow to select from any existing list you have on your WSS v3 site. In this case we select our existing list **Contacts**.

Once you have selected the existing list to retrieve information from you then need to select which field in that list the information will come from. To do this, select the drop down for *In this column:*. When selected this will show all the fields (or columns) in the previously selected list (that we are linking to). In this case we wish to select the field **Last Name**.

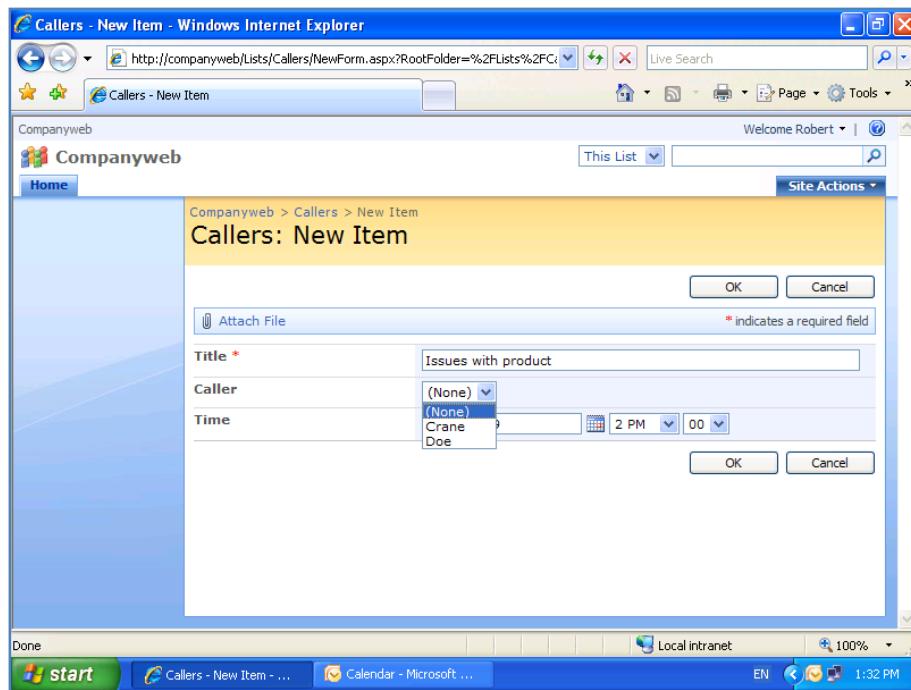
Press the **OK** button to create the new field.

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You should now see the new field displayed in the list as shown above.

Continue to add any columns required for the new list.



If you now create a new item in that list you can see the linked field in operation.

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In the above example you can see when a choice is required for the *Caller* field a drop down selection is presented. This drop down is populated with entries from the *Last Name* field of the list *Contacts* that we chose to link to. No option, unless it already appears in the *Contacts* list, will be listed here. This greatly reduces the chance of errors being introduced into your information since data in this new list is now directly linked to information you already have present on your site.

Pres **OK** to save the item when compete.

The screenshot shows a Microsoft SharePoint page titled 'Callers' within the 'Companyweb' site. The URL in the address bar is <http://companyweb/Lists/Callers/AllItems.aspx>. The page displays a single item in the 'All Items' view:

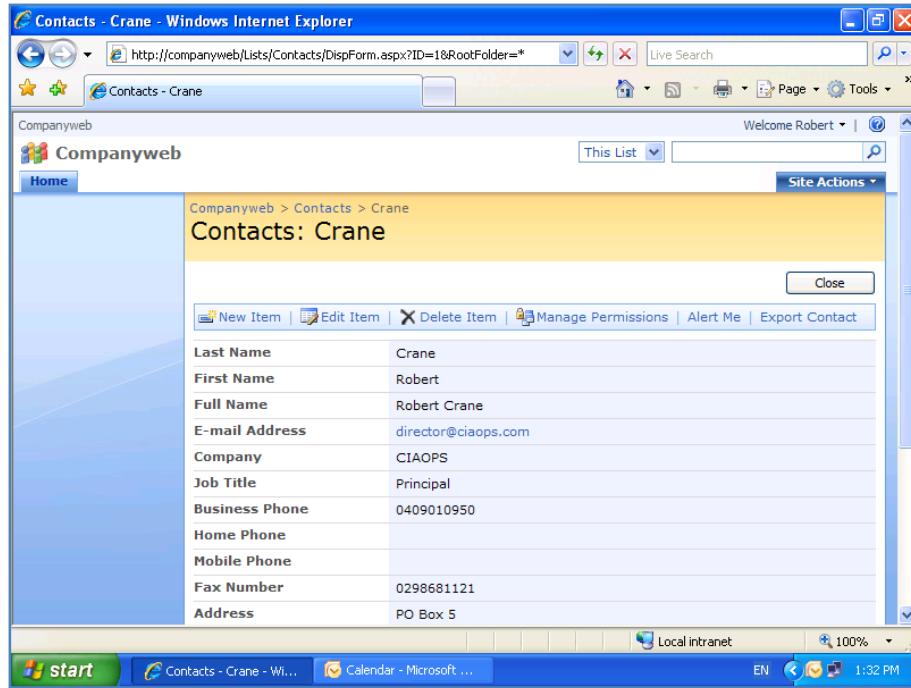
Title	Caller	Time
Issues with product ! NEW	Crane	23/03/2009 2:00 PM

The 'Caller' field contains a blue link labeled 'Crane'. The left sidebar navigation includes links for 'Documents', 'Lists' (with 'Callers' selected), 'Discussions', 'Sites', and 'Pictures'.

Once we have saved this item we can see it displayed as shown above.

If you now click on the value for any entry in the linked field (in this case *CRANE*), you will be taken directly to that entry in the linked list (in this case *Contacts*).

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The display from the original linked list (in this case, *Contacts*) is shown above. To return to the new list simply press the **Back** button on your browser.

The big advantage of using linked or lookup fields in your lists, is that you can reduce the amount of information in each list and you can also improve your data integrity. This means that when others use the WSS v3 site they do not have to remember what values should appear in fields they simply select that from a drop down if that field is already linked.

### 16.4 Configuring a basic workflow

A workflow is a pre-configure set of steps that are followed from beginning to end. WSS v3 comes with what is known as three state workflow built in. It is also possible to create additional workflows via SharePoint designer. In this tutorial we will only cover the basics of using the standard three stage workflow.

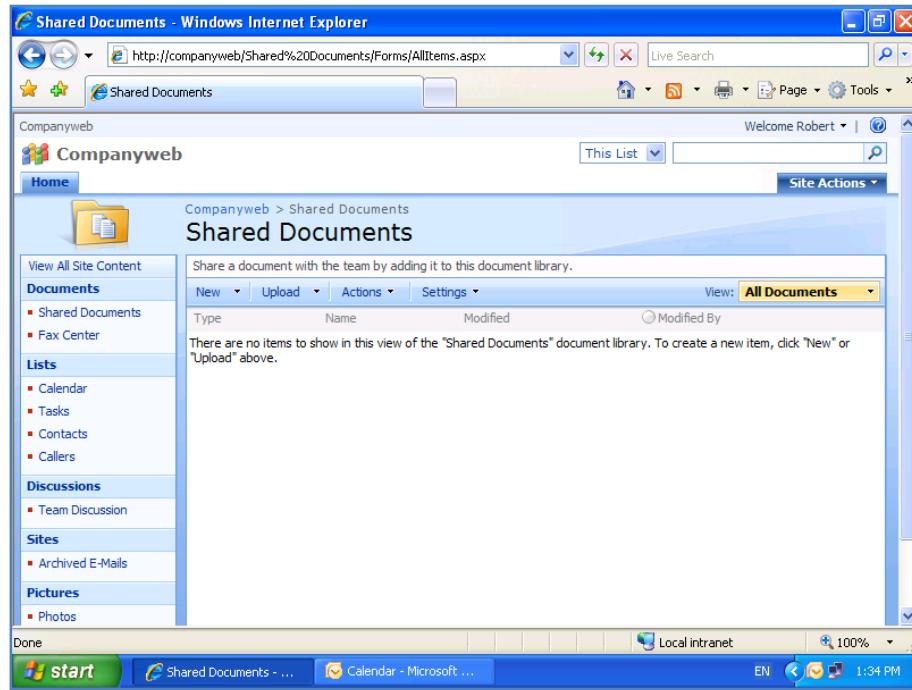
For more information about Windows SharePoint workflows see:

*Introduction to workflows:* <http://office.microsoft.com/en-us/sharepointtechnology/HA101641241033.aspx>

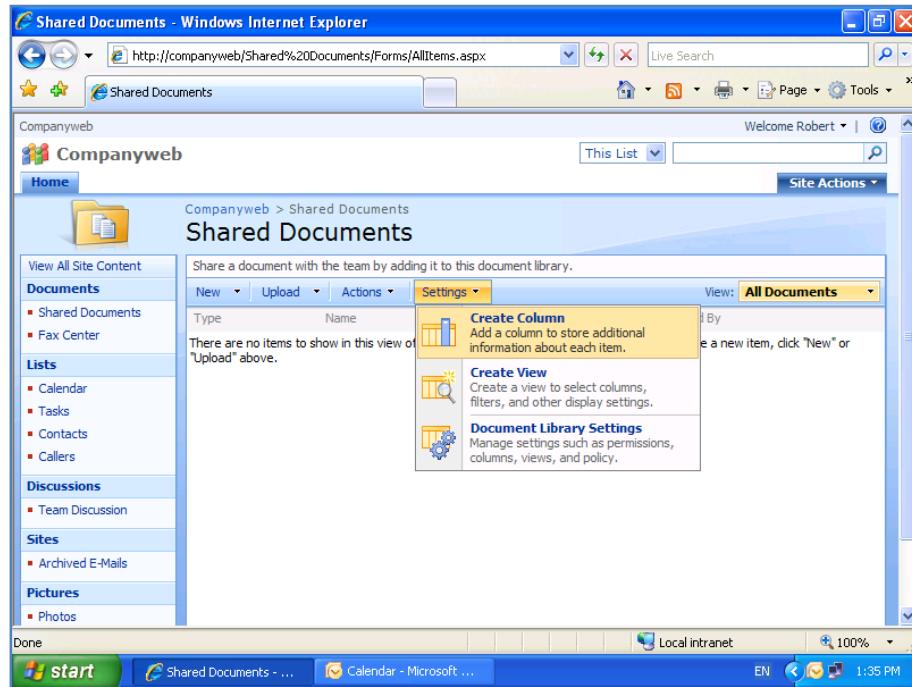
A good example of workflow might be where a new document is uploaded to a WSS v3 document library. Once this document is completed it needs to be reviewed and approved by someone within the organization. You would like this process to be as automatic as possible with the appropriate person being notified at each stage of the

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process, as to what their requirements are. In short, that is exactly the process that this tutorial will take you through.

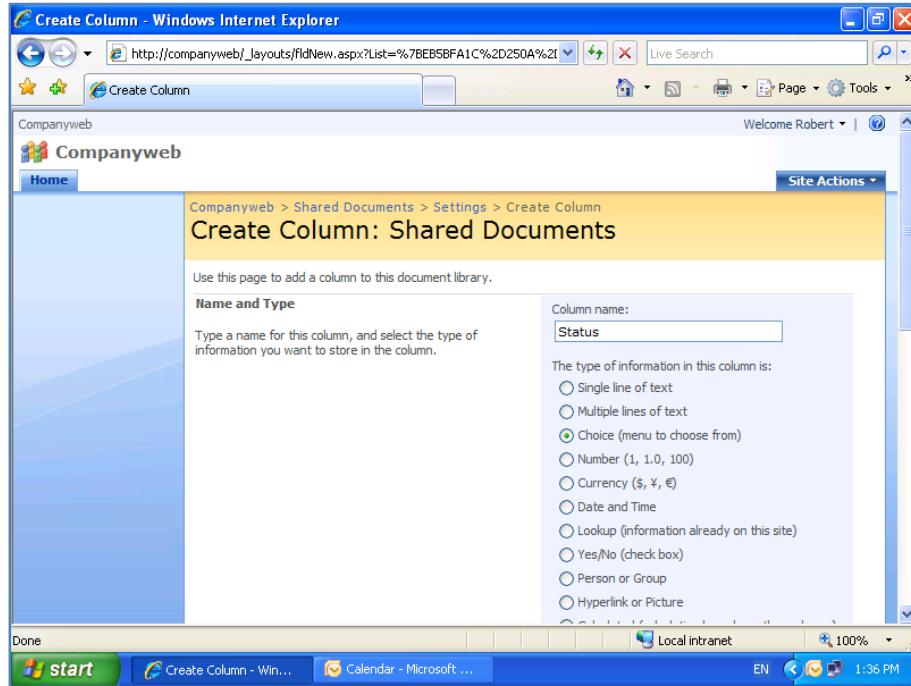


The first step in the process is to locate the document library in your WSS v3 site that you wish the workflow to apply to. Note that you can attach a workflow (or multiple workflows) to many WSS v3 items, but not all.



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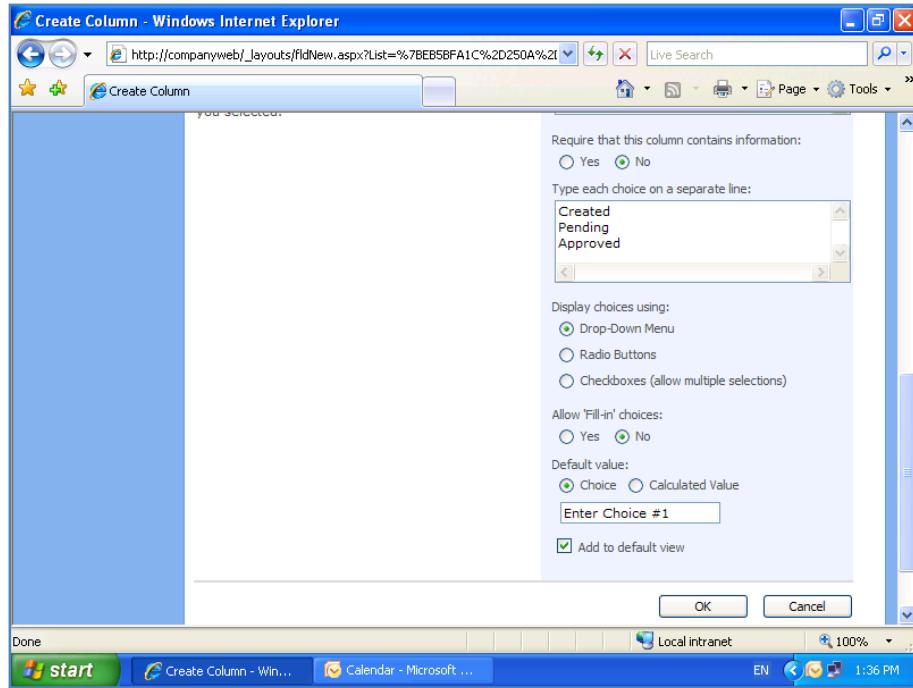
The first step in the process is to create an additional field in our document library that will be used for controlling the stages of our work flow. To add this field, from the menu of the document library, select **Settings | Create Column**.



Give the new column or field a name (in this case *Status*) and select **Choice** for the type of information that this column will hold.

Scroll down the screen for further options.

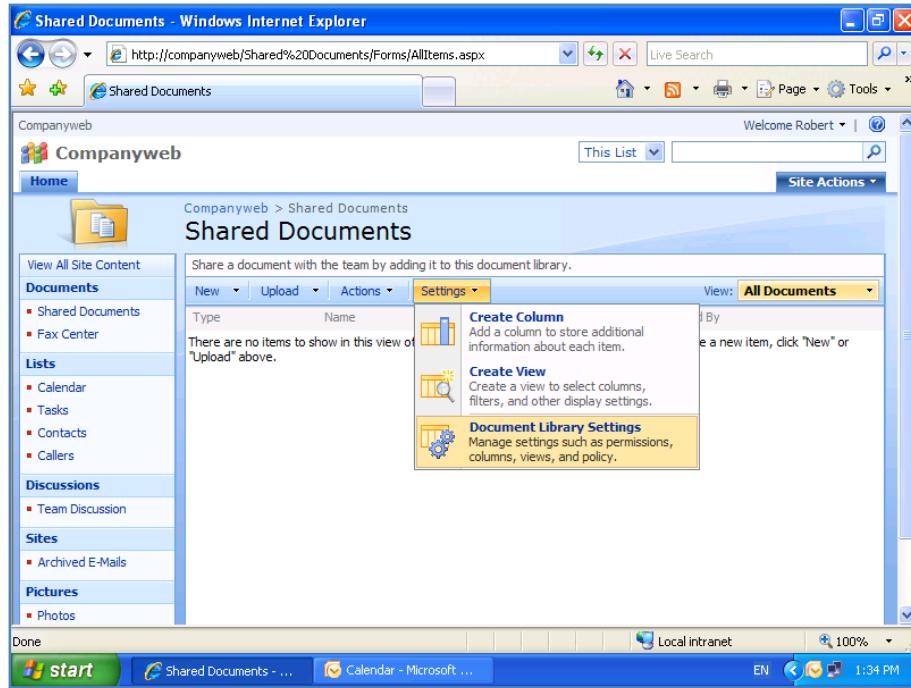
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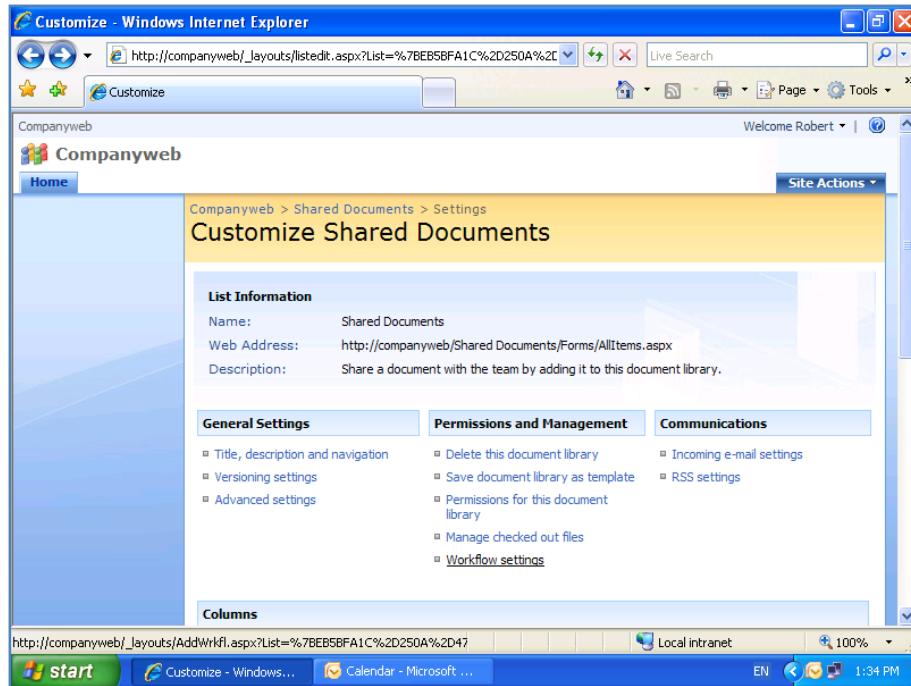
In the *Type each choice on a separate line:* box enter three values to represent the different stages of your workflow (here *created*, *pending* and *approved*). Remember, given that is a three state workflow any additional choices apart from the initial three will have no effect on the workflow, although they could still be used at a later stage if you wanted to have additional states available in this field after the workflow has completed.

Select any additional choices that you require and press the **OK** button to save your changes.

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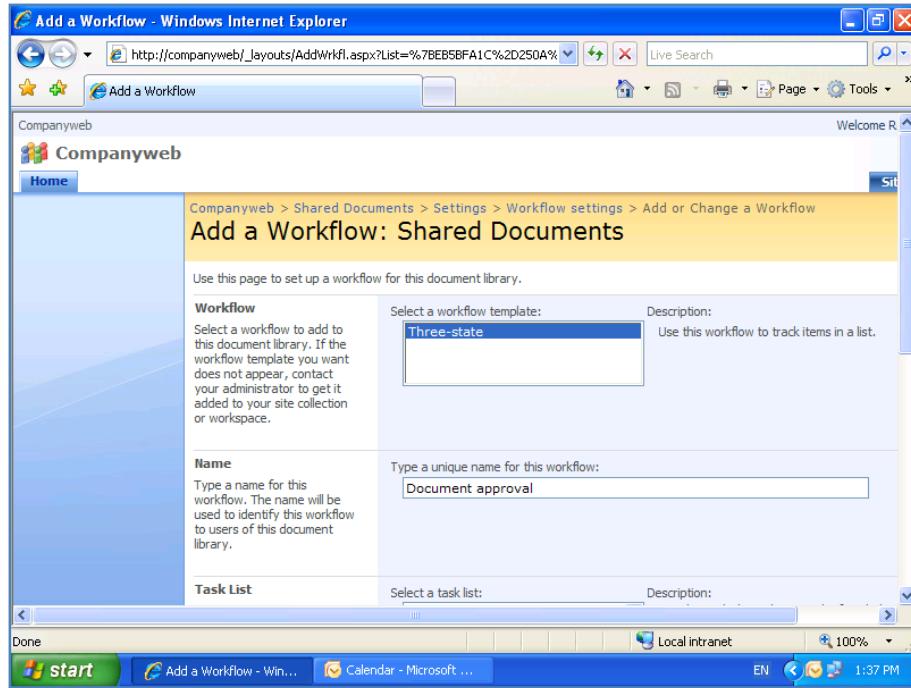


After you have been return to the document library, now select **Settings | Document Library Settings** from the document library menu to commence configuring a workflow.



In the **Customize Document Library** window select **Workflow settings** from under the **Permissions and Management** section in the middle of the window.

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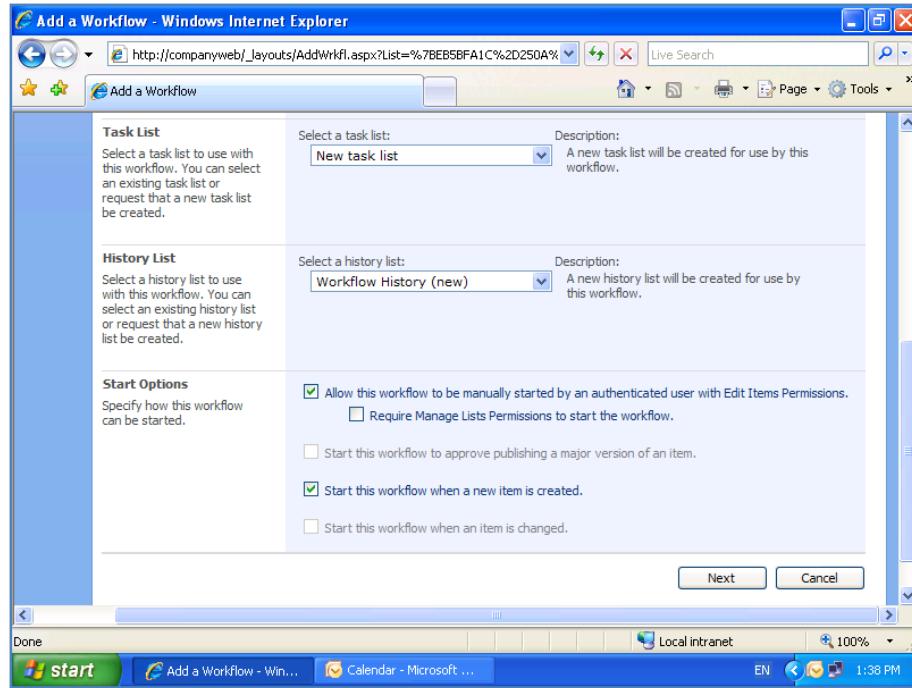


In the *Workflow* section, at the top of the page, you should see the only option available is *Three-State*.

In the *Name* section, give your workflow a unique descriptive name because, remember, it is possible to have multiple workflows attached to different elements of a WSS v3 element like this document.

Scroll down the screen for further options.

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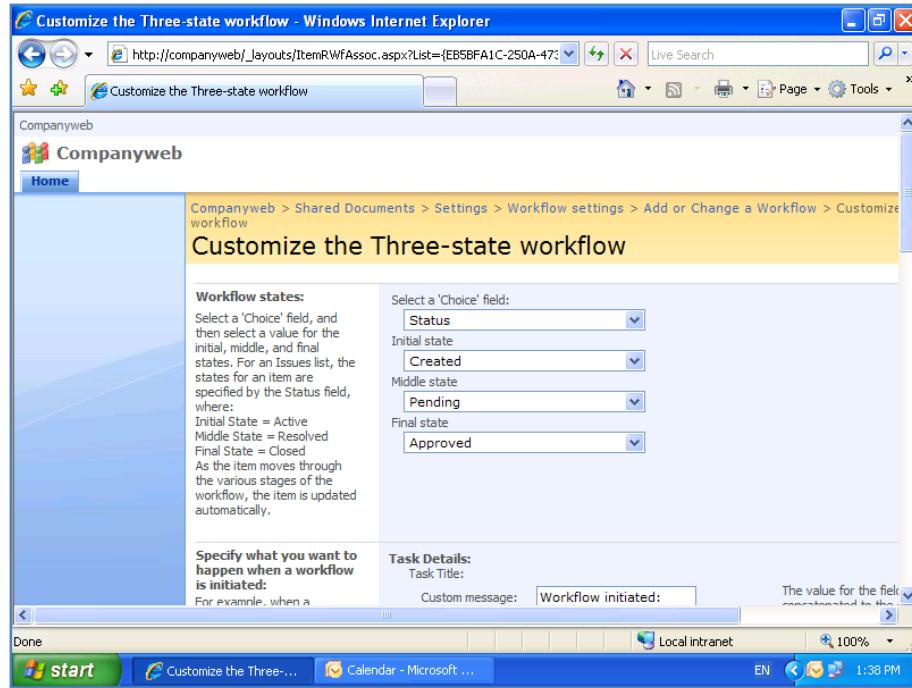
You now need to select a *Task list* to use with the workflow. You can use an existing task list on your WSS v3 site but it is generally recommended that you select the option *New task list* in order to have the workflow information separate from any other task lists you may have on your site.

Additionally, you will require a *History list* to keep track of the operations of the workflow. For reasons of separation again it is recommended that you select the option *Workflow History (new)* from the drop down list to create a new history list.

In the *Start Options* section you specify how the workflow will be started. In this case we require the options that the workflow be able to be started manually as well as commencing automatically when a new item is created or uploaded.

When you have made the desired options press the **Next** button to continue.

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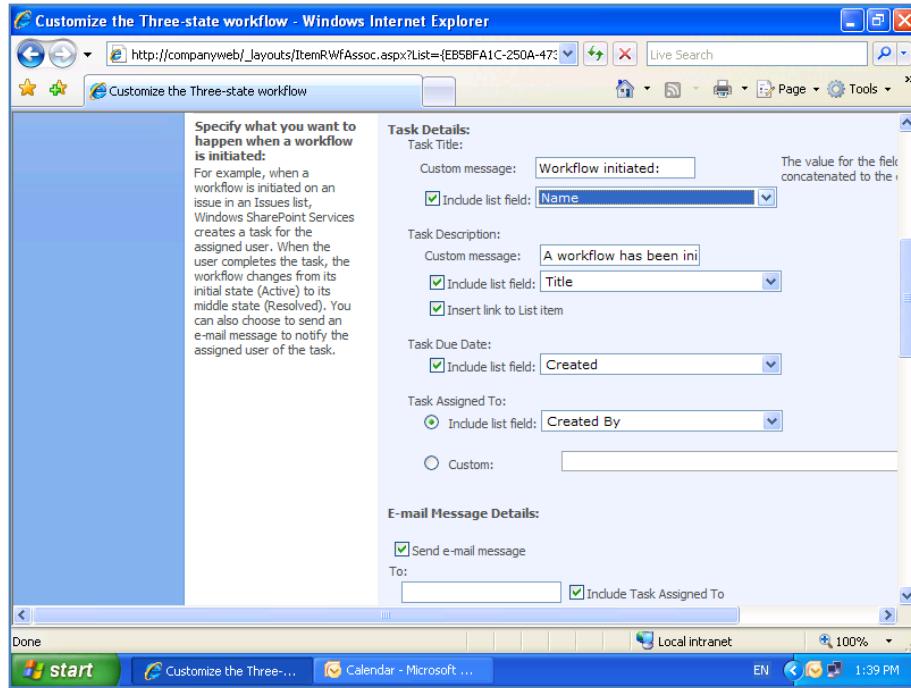
In the *Workflow states* section you are now asked to select a field in your document library that can be used to control the workflow progress.

In this case, because that field was created prior to starting the workflow configuration process (at the beginning of this tutorial), it has automatically selected this field (which is called *Status*). If you do not have a suitable field in your document library then you will not be able to progress past this point, because you will have to return and create a suitable field.

You can adjust the state values for *Initial*, *Middle* and *Final* to any value in the choice field if required, however in this case they are correct.

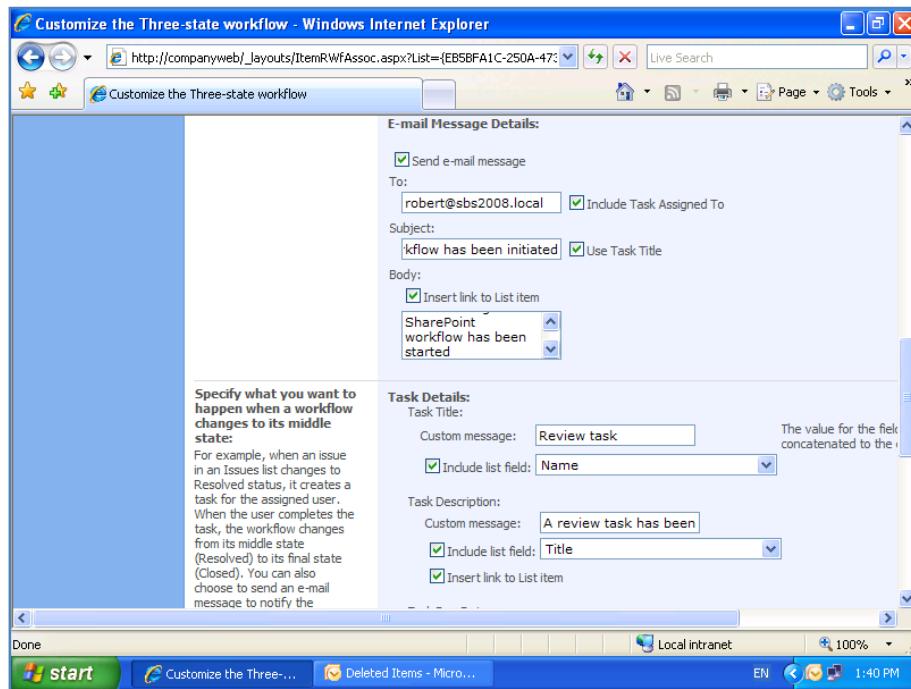
Scroll down the screen for further options.

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Next, you need to decide what actions will take place when a workflow is initiated (the first stage of the workflow). You can now set the options for what will appear in the workflow task list that you created in the previous screen and also determine when the task is due and who the initial task will be assigned to.

Scroll down the screen for further options.

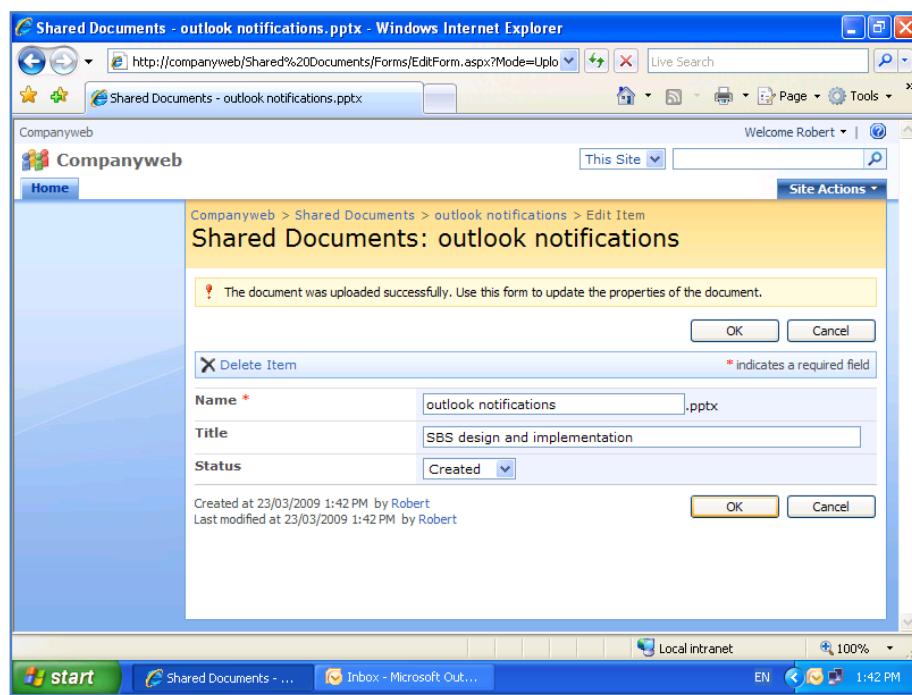


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As part of the workflow initiation process you can also elect to send an email to any email address as well as to whom the task is assigned to. The reason for this maybe to give visibility to some third party that the workflow is progressing. Also, as part of that email you can include a specific subject and body as well as a link to the list item.

The next section of the workflow is similar to that you have just completed except it applies to actions that will be taken when the workflow changes to its middle state (or second stage).

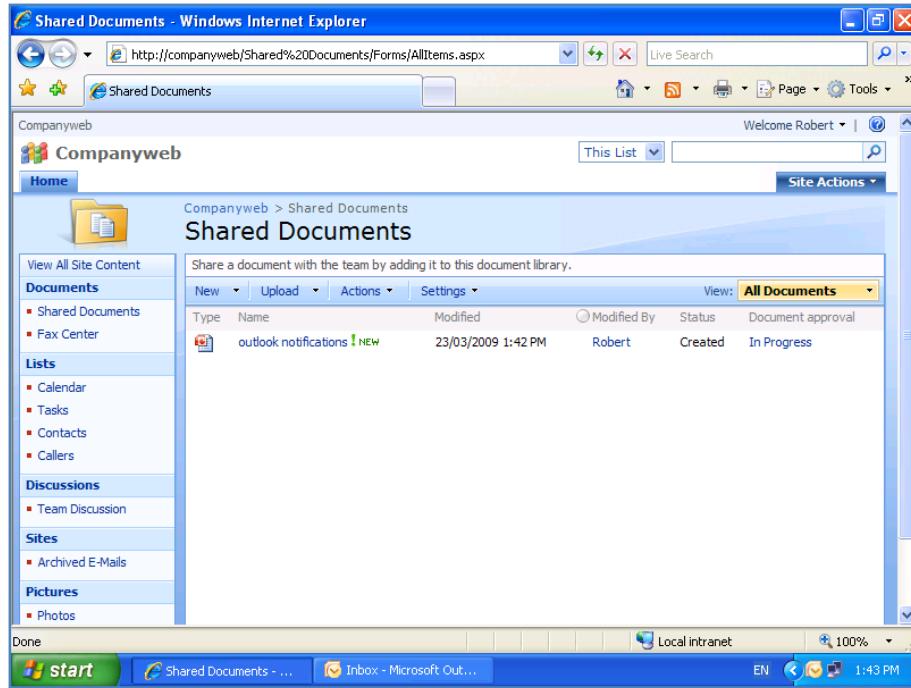
Once this information has been entered scroll down to the bottom of the screen and press the **OK** button to save the workflow.



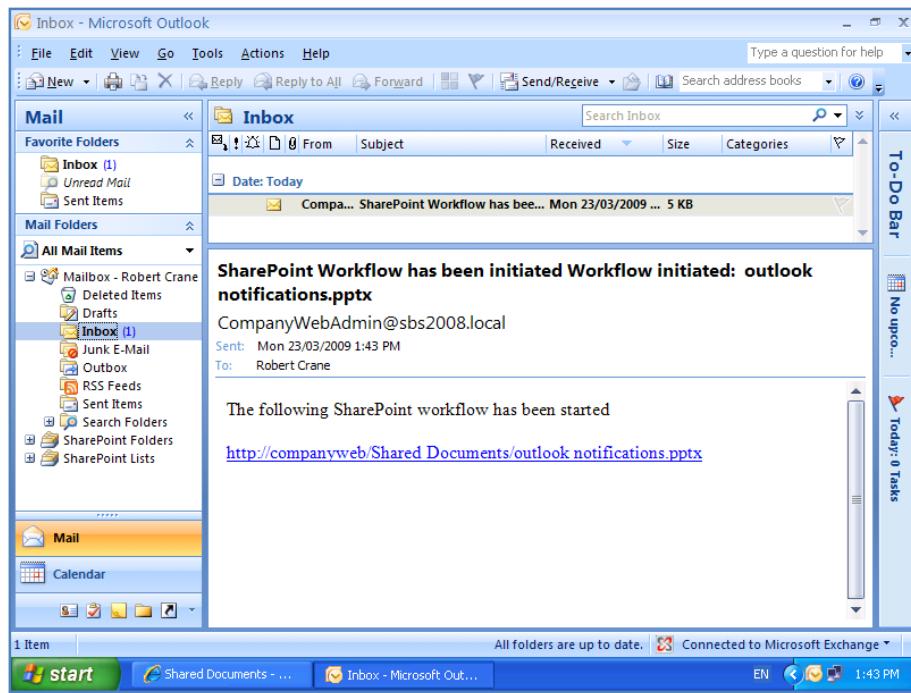
If we now return to the document library and upload a new document we will initiate the workflow just created.

When we do this we see the *Status* field with the default entry of *Created* as shown above. Once we press the **OK** button and save the document to the document library the workflow will commence since we configured it to automatically commence whenever a new item was created in the document library.

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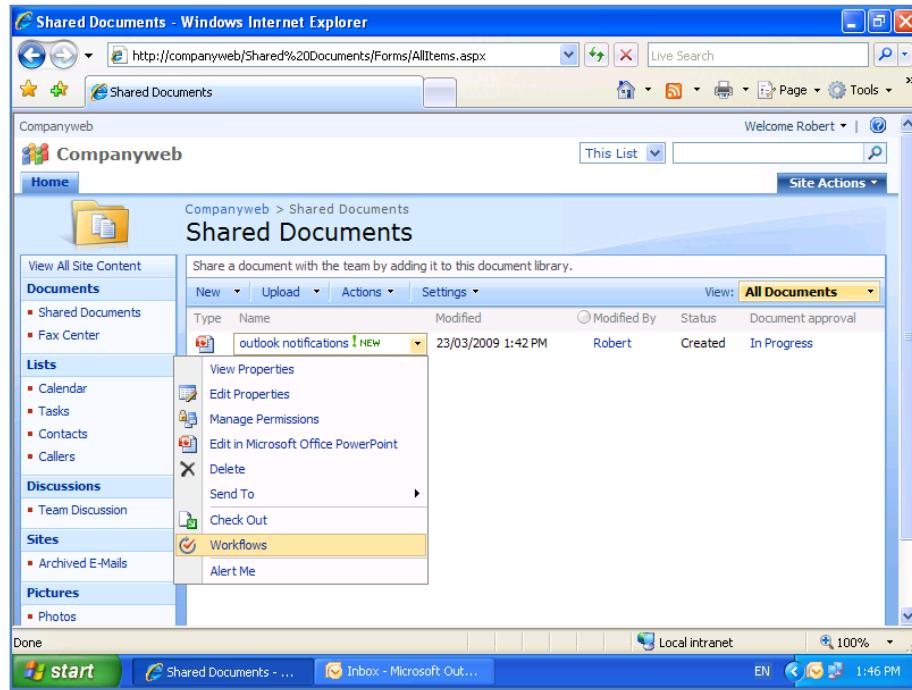
After saving the document to the document library we can now see it listed along with the workflow field (*Document Approval*) which indicates that the workflow is *In Progress*. We can also see that the *Status* of the item is set to *Created*.



If we now examine the inbox of the person whom we nominated to receive the workflow initiated email alert when the workflow was initiated, we find the above email

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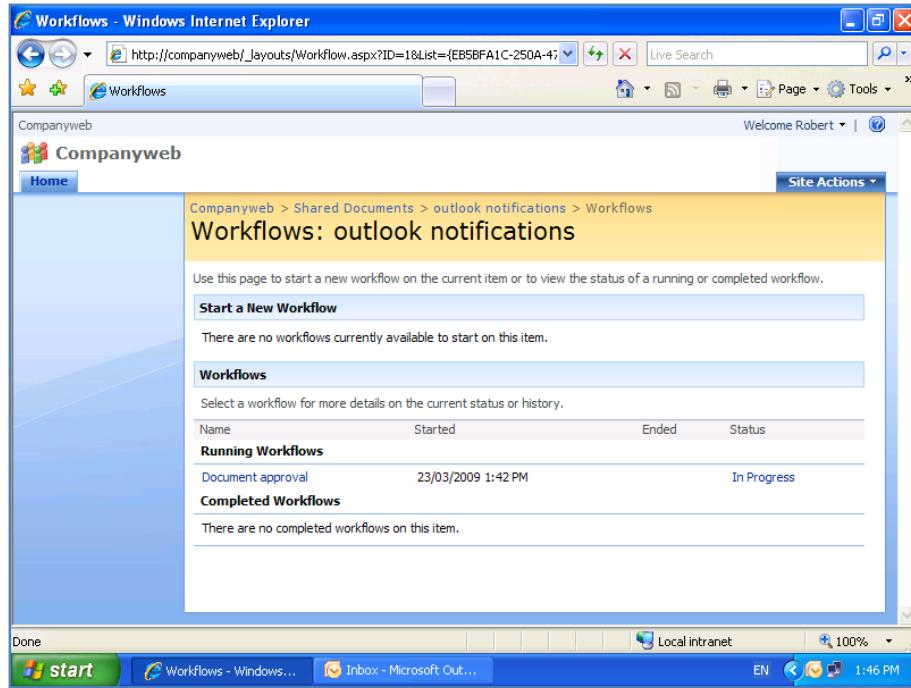
from WSS v3. You will notice that the email has a link to the WSS v3 document library to make access very easy.



Returning to the document library we now see there is an additional menu item on the properties menu (the pull down arrow appears when you hover over the item in the document library). This **Workflow** item allows us to view the workflow process in more detail.

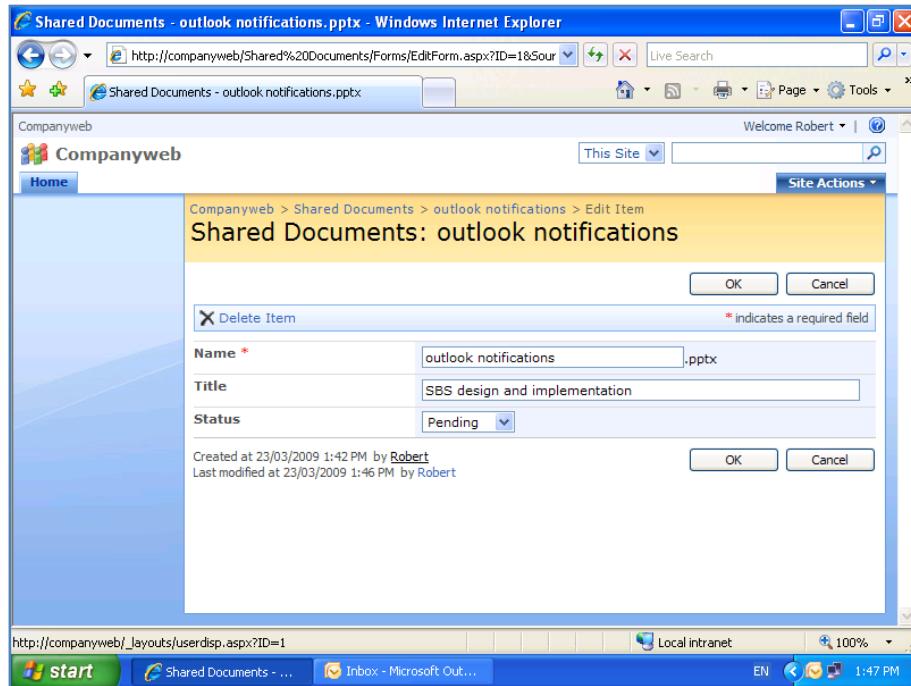
Select the item **Workflow** from the item's property menu.

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We can now see the details of the workflow for that item.

In this case we can see that the item is already running the *Document approval* workflow and that it is *In Progress*.



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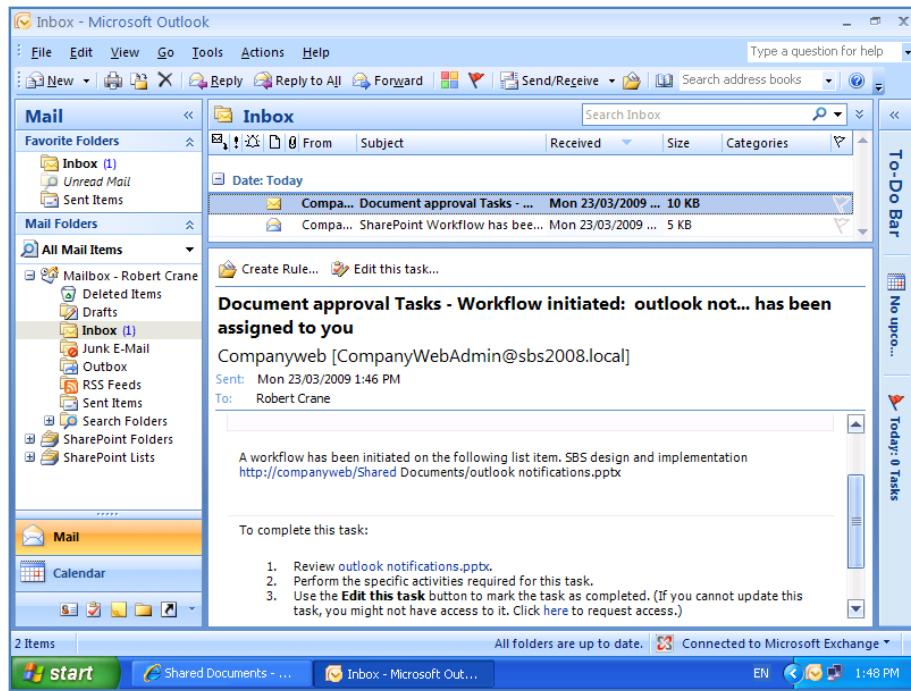
If we now return to the file in our document library, view the properties of the item and then change the *Status* field from *Created* to *Pending* and select **OK** to save we will move the workflow from the initial stage to the next (or middle) stage of the workflow.

The screenshot shows a Microsoft SharePoint 'Shared Documents' library. The document 'outlook notifications' has been updated to 'Pending' status, and the 'Document approval' field is still 'In Progress'. The status bar at the bottom indicates the document was modified by Robert on 23/03/2009 at 1:46 PM.

Type	Name	Modified	Modified By	Status	Document approval
File	outlook notifications ! NEW	23/03/2009 1:46 PM	Robert	Pending	In Progress

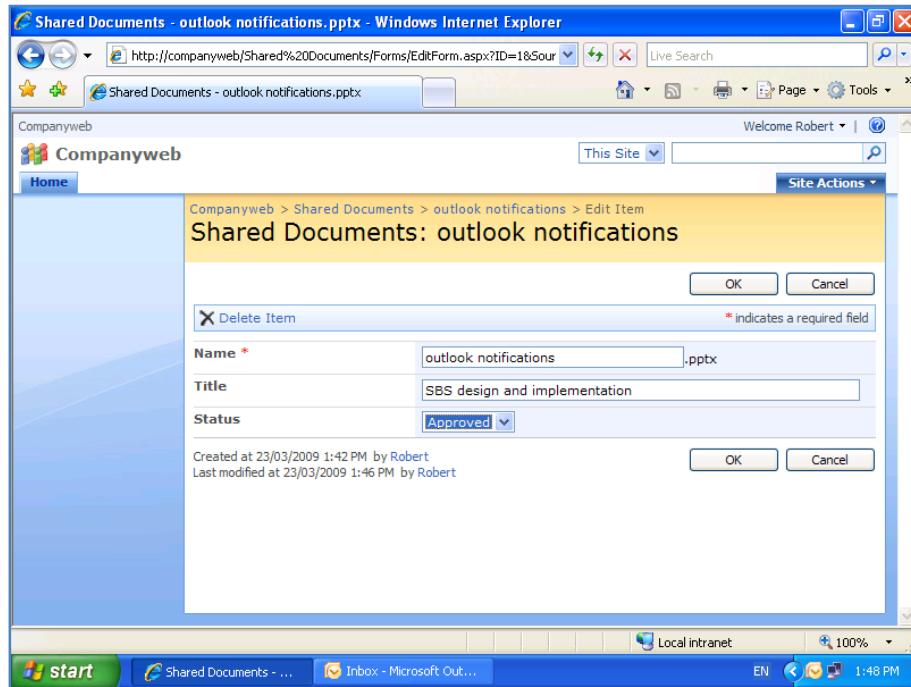
Once the document properties update is complete we see that the *Status* of the document has now changed to *Pending*. Also note that our workflow field, (*Document approval*), still shows as *In Progress* because the workflow still hasn't been completed.

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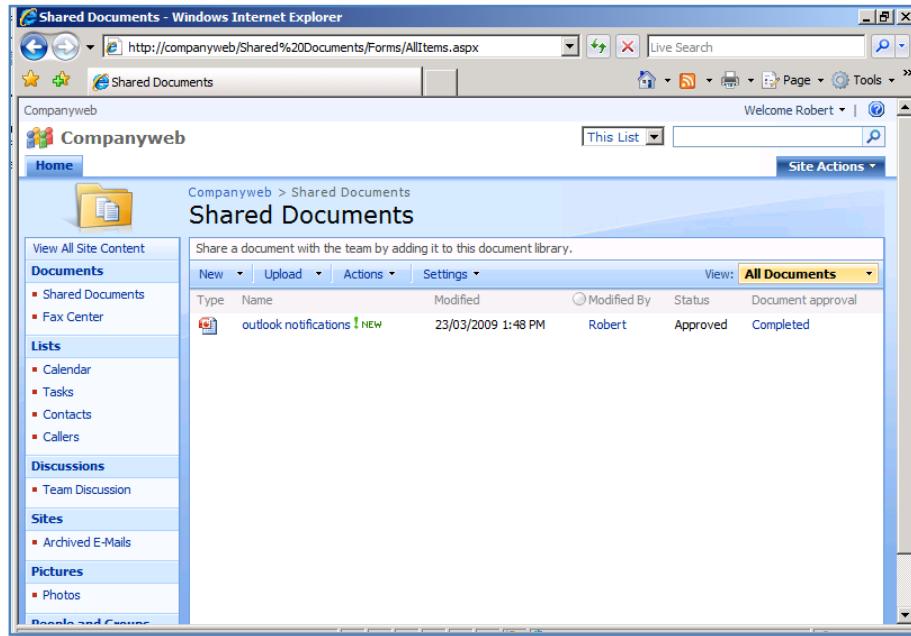
If we examine the inbox of the recipient of the email whom we configured to receive a task alert when the workflow entered its second (or middle) stage, we find an email similar to that shown above.

The email outlines the steps that must be taken to complete this task as well as links to relevant areas in the WSS v3 site.



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As part of this document approval process we return to the properties of the item in the WSS v3 document library and change the *Status* field to *Approved* and press **OK** to update.

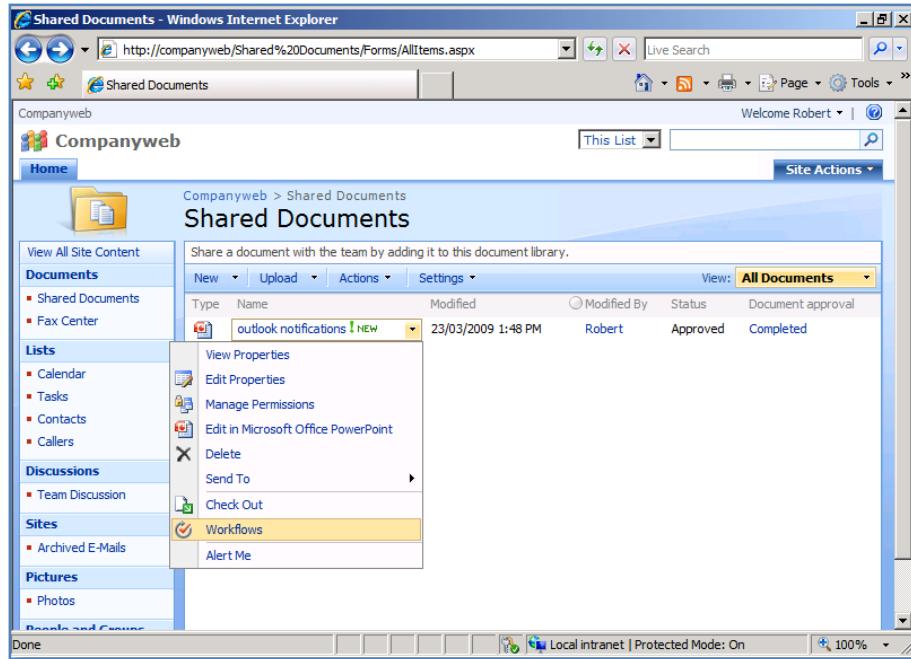


The screenshot shows a Microsoft SharePoint 'Shared Documents' library. The left navigation bar lists 'Documents', 'Lists', 'Discussions', 'Sites', 'Pictures', and 'People and Groups'. The main content area displays a single item named 'outlook notifications' with a status of 'Approved' and a workflow status of 'Completed'. The item was modified by 'Robert' on '23/03/2009 1:48 PM'.

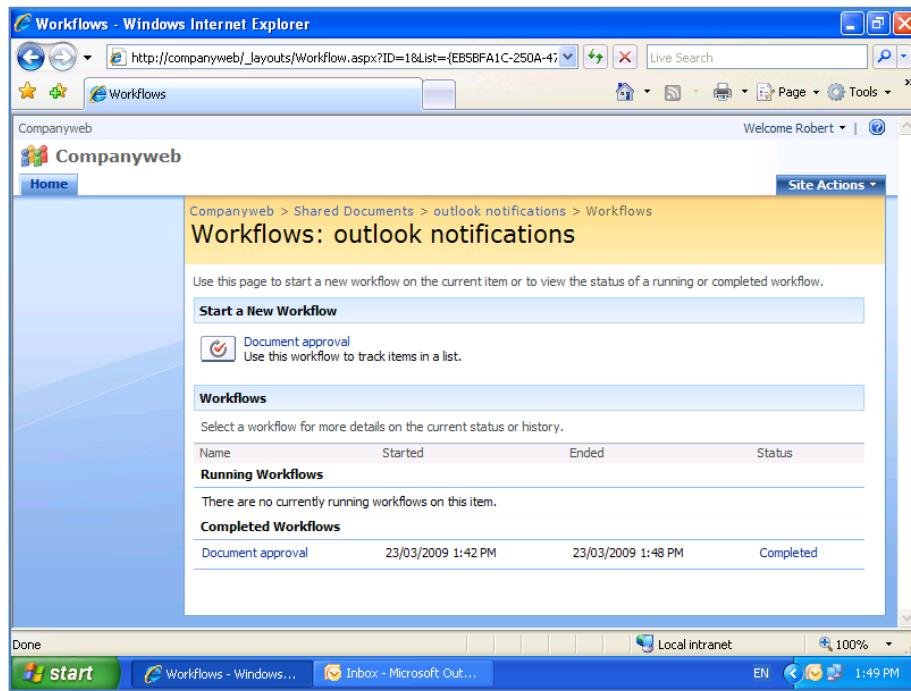
Type	Name	Modified	Modified By	Status	Document approval
File	outlook notifications <small>1 NEW</small>	23/03/2009 1:48 PM	Robert	Approved	Completed

Once the document status has been updated you will be returned to the document library. You will now see that the workflow field, (*Document approval*), has changed to read *Completed*. This indicates that the workflow process for that document is now complete.

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If you now select item properties for the item in the document library again and choose the *Workflows* item you will be able to view the properties of the workflow again.



At the top of the screen you will see that it is possible to initiate another workflow on this item (since the previous one is now complete). You will also notice that the status of the workflow says *Completed*.

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To view the history of the workflow click on the workflow name, in this case *Document approval*, under the heading *Completed Workflows* at the bottom of the screen.

The screenshot shows a Microsoft SharePoint 'Workflow Status' page in Internet Explorer. The title bar reads 'Workflow Status - Windows Internet Explorer'. The URL in the address bar is 'http://companyweb/\_layouts/WrkStat.aspx?List={EB5BF1C-250A-4739-AFE...}'. The main content area has a yellow header 'Workflow Status: Document approval'. Below it, a 'Workflow Information' section shows details: Initiator: Robert, Document: outlook notifications, Started: 23/03/2009 1:42 PM, Status: Completed, and Last run: 23/03/2009 1:48 PM. A 'Tasks' section lists two tasks assigned to Robert: 'Workflow initiated: outlook notifications.pptx' and 'Review task outlook notifications.pptx', both completed on 23/03/2009. A 'Workflow History' section shows a single event: 'Three-state workflow started on 23/03/2009 1:42 PM by Workflow User Robert'. The status bar at the bottom shows the taskbar with 'Workflow Status - Wi...', 'Inbox - Microsoft Out...', and other icons, along with system information like 'EN', '100%', and '1:51 PM'.

You can see the tasks that were assigned, their due dates as well as their status. You can click on the task names if required for more information.

Continue to scroll down the screen for more information.

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The screenshot shows a Windows Internet Explorer window titled "Workflow Status - Windows Internet Explorer". The URL in the address bar is [http://companyweb/\\_layouts/WrkStat.aspx?List={EB5BFA1C-250A-4739-AFE](http://companyweb/_layouts/WrkStat.aspx?List={EB5BFA1C-250A-4739-AFE). The page content includes a table of workflow items and a "Workflow History" section.

**Workflow Items:**

Assigned To	Title	Due Date	Status	Outcome
Robert	Workflow initiated; outlook notifications.pptx <span style="color: green;">! NEW</span>	23/03/2009	Completed	The task has been completed.
Robert	Review task outlook notifications.pptx <span style="color: green;">! NEW</span>	23/03/2009	Completed	The task has been completed.

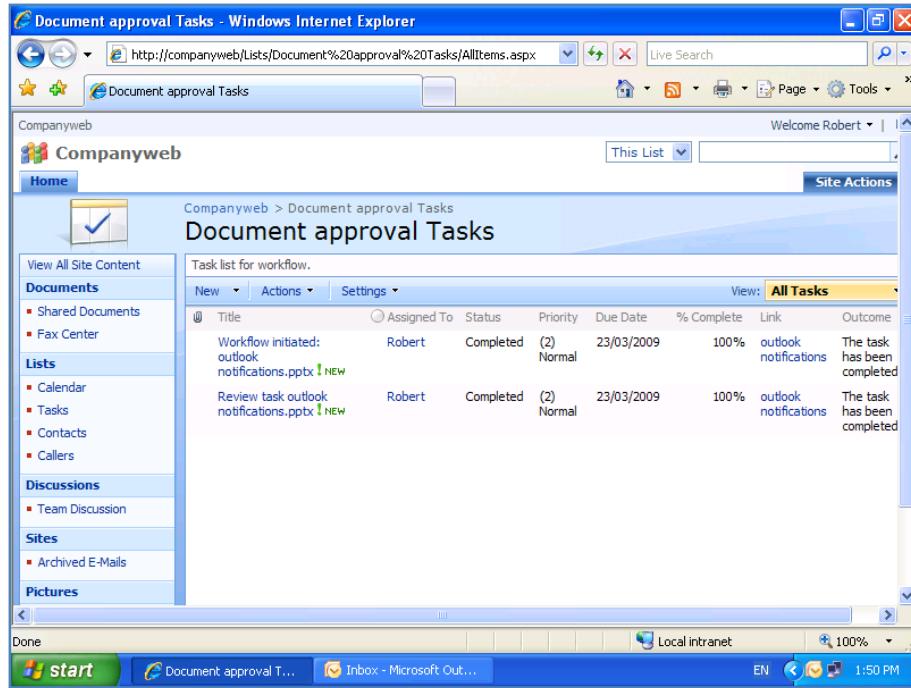
**Workflow History:**

Date Occurred	Event Type	User ID	Description	Outcome
23/03/2009 1:42 PM	Workflow Initiated	Robert	Three-state workflow started on <a href="http://companyweb/Shared Documents/outlook notifications.pptx">http://companyweb/Shared Documents/outlook notifications.pptx</a> .	
23/03/2009 1:46 PM	Task Completed	Robert	Three-state workflow state change on <a href="http://companyweb/Shared Documents/outlook notifications.pptx">http://companyweb/Shared Documents/outlook notifications.pptx</a> . Shared Documents.Status is now Pending.	The task has been completed.
23/03/2009 1:46 PM	Error	System Account	The e-mail message cannot be sent. Make sure the outgoing e-mail settings for the server are configured correctly.	
23/03/2009 1:48 PM	Task Completed	Robert	Three-state workflow state change on <a href="http://companyweb/Shared Documents/outlook notifications.pptx">http://companyweb/Shared Documents/outlook notifications.pptx</a> . Shared Documents.Status is now Approved.	The task has been completed.
23/03/2009 1:48 PM	Workflow Completed	Robert	Three-state workflow completed on <a href="http://companyweb/Shared Documents/outlook notifications.pptx">http://companyweb/Shared Documents/outlook notifications.pptx</a> .	

At the bottom of the screen you will find the workflow history providing you a complete audit trail of all the steps that have been taken.

All of this workflow information is available at any stage during the workflow process.

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The screenshot shows a Microsoft Internet Explorer window displaying a SharePoint list titled "Document approval Tasks". The URL in the address bar is <http://companyweb/Lists/Document%20approval%20Tasks/AllItems.aspx>. The page header includes the SharePoint logo, the site name "Companyweb", and a "Welcome Robert" message. On the left, there is a navigation menu with links to "View All Site Content", "Documents", "Lists", "Discussions", "Sites", and "Pictures". The main content area shows a table with two rows of task information. The columns are: Title, Assigned To, Status, Priority, Due Date, % Complete, Link, and Outcome. The first row has a title of "Workflow initiated: outlook notifications.pptx" and an outcome of "The task has been completed". The second row has a title of "Review task outlook notifications.pptx" and an outcome of "The task has been completed".

Title	Assigned To	Status	Priority	Due Date	% Complete	Link	Outcome
Workflow initiated: outlook notifications.pptx	Robert	Completed	(2) Normal	23/03/2009	100%	outlook notifications	The task has been completed
Review task outlook notifications.pptx	Robert	Completed	(2) Normal	23/03/2009	100%	outlook notifications	The task has been completed

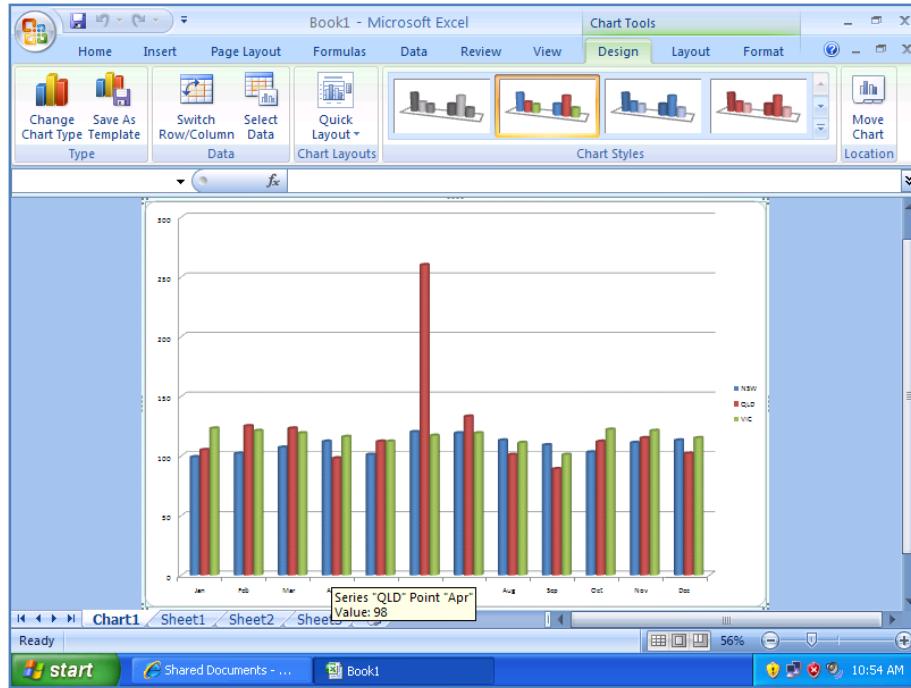
If you *View All Site Content* (in the upper left above the *Quick Start* menu) you will find a Task list corresponding to your workflow (in this case called *Document approval Tasks*) if required for review.

This tutorial has taken you through the steps of configuring and using a basic three state workflow that come standard with WSS v3.

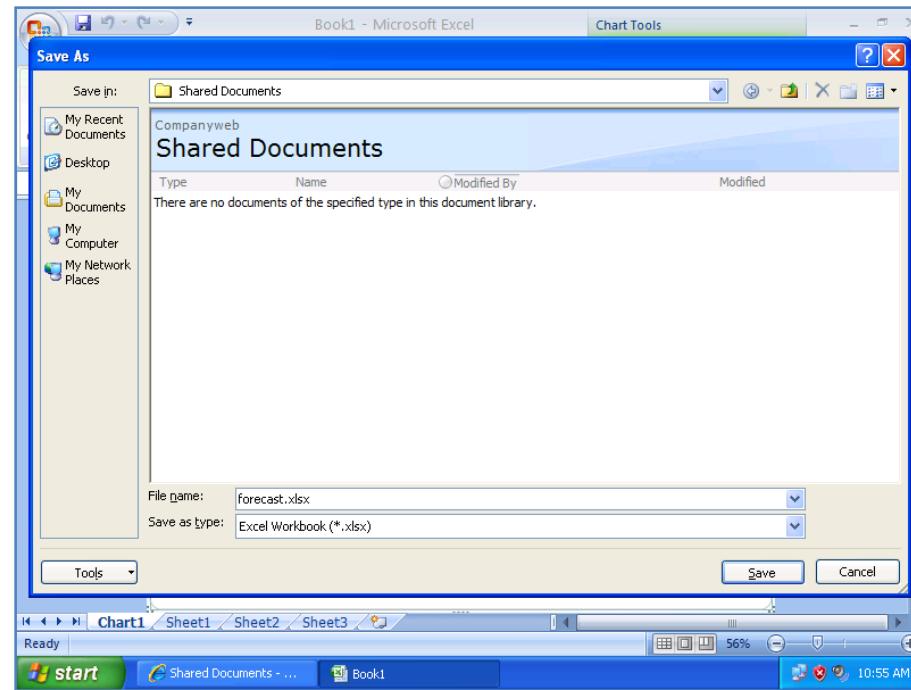
## 16.5 Displaying an updating spreadsheet

This tutorial will cover the creation of an updating Excel graph displayed in WSS v3. This can allows the display of a range of graphical results in WSS v3 directly linked and updated from a spreadsheet.

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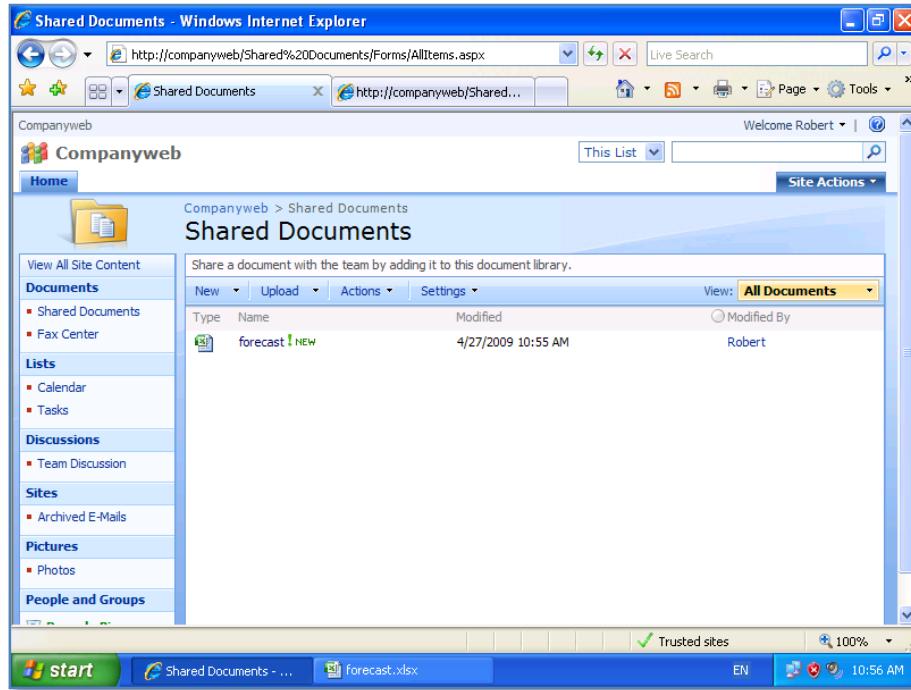
The first step in the process is to create a spreadsheet including a graph using Excel. It is recommended that the graph be moved to its own sheet (in this case called *Chart1*).



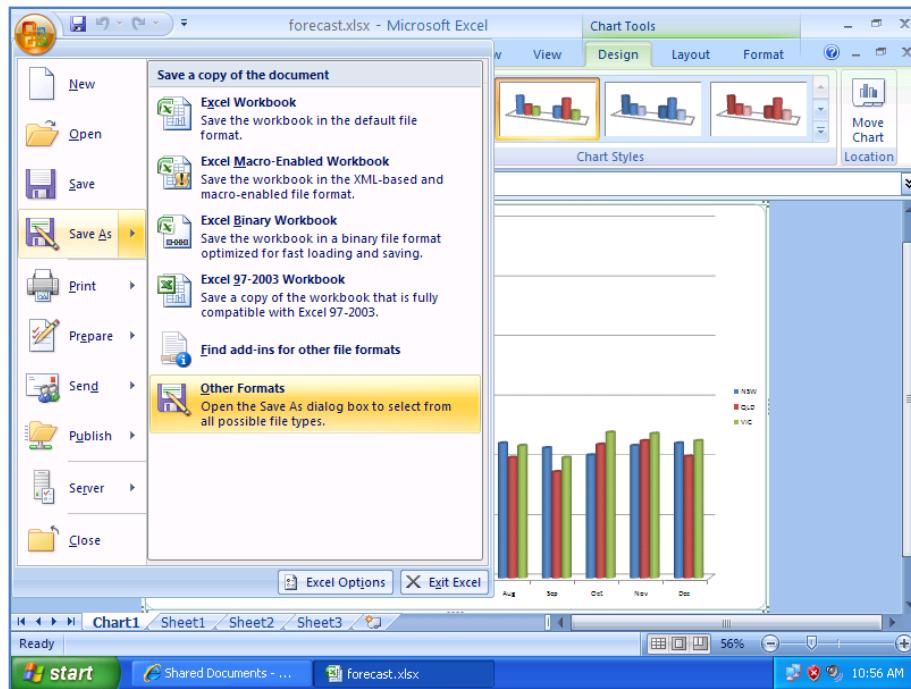
Once the spreadsheet has been created, save it into a document library within your WSS v3 site (in this case *Shared Documents*).

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You can save directly to a WSS v3 document library in Excel by typing the URL (i.e <http://companyweb>) into the *File name* field when you go to save the file and then navigate the WSS v3 from there.

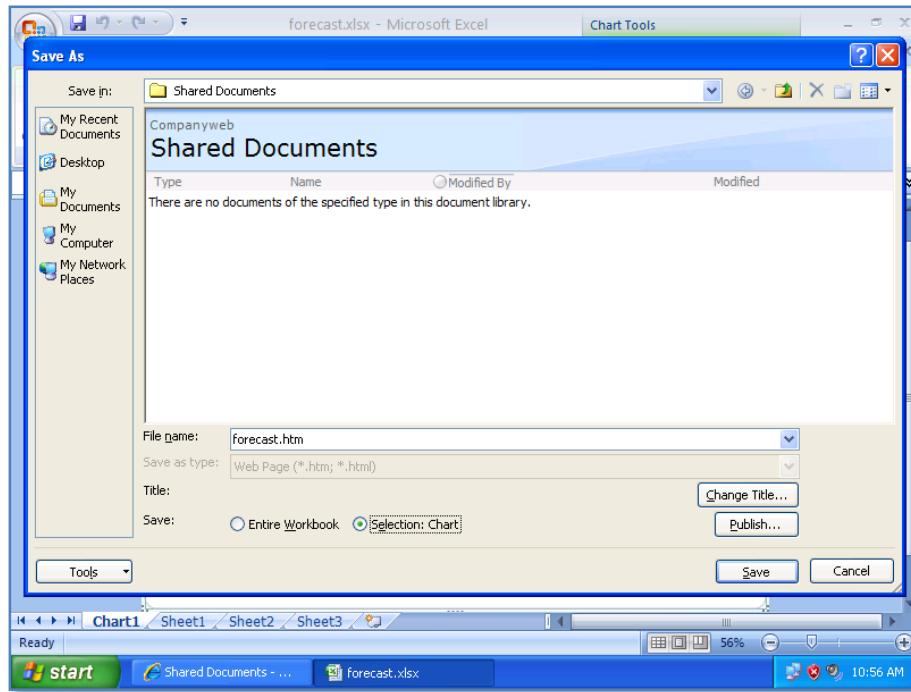


Once the save is complete, if you display the WSS v3 document library in a browser you should see the spreadsheet file you just saved displayed (in this case *forecast*).



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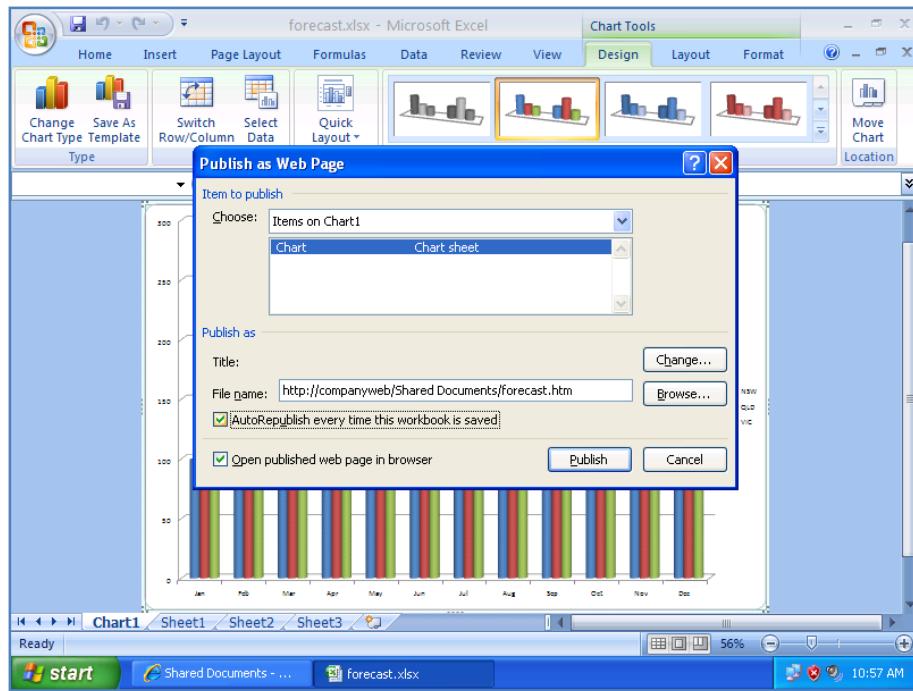
Now return to the spreadsheet and select the chart tab (in this case *Chart1*). Then select **Office Start Button | Save As | Other Formats**.



Navigate to the same document library in WSS v3 if not already displayed. Change the *Save as type* field to *Web page (\*.htm, \*.html)*. Next, select the option to save the chart rather than the entire workbook by selecting *Selection: Chart* in the *Save:* area towards the bottom of the *Save As* window.

Now press the **Publish** button.

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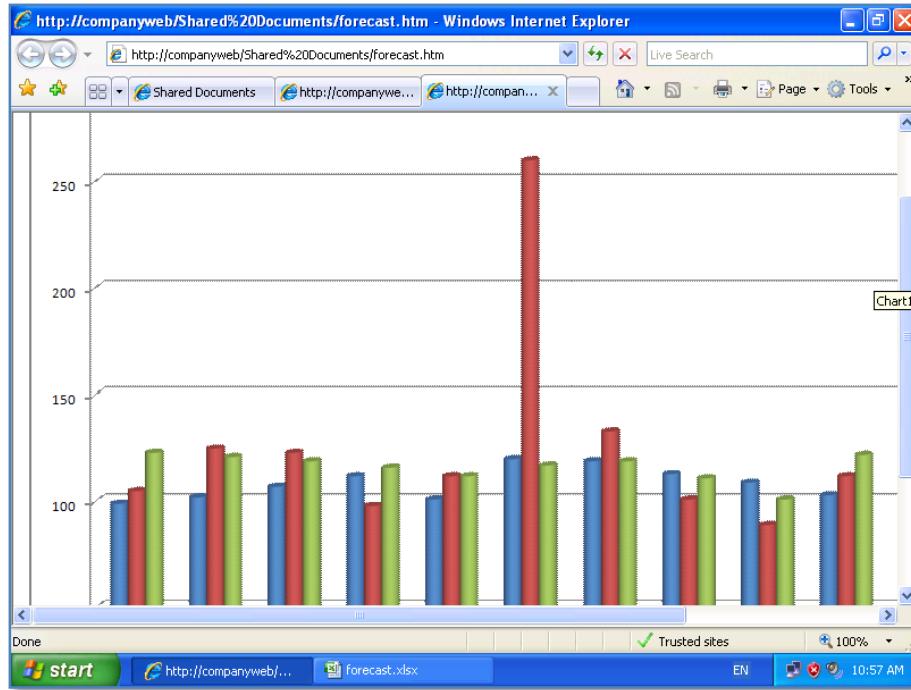


You should now see the *Publish as Web Page* window appear. The chart should already be selected in the *Choose:* area, along with the filename which has a .htm extension and destination of the WSS v3 document library.

If you wish this chart .htm file to be updated every time spreadsheet is saved then ensure you check the *AutoRepublish every time this workbook is saved* option. If you also check the *Open published web page in browser* you will see the chart displayed as a web page which is recommended.

Press the **Publish** button to complete the process.

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The chart should now be displayed in your browser. Leave the page open so that the URL address can be copied and pasted into your WSS v3 site later.

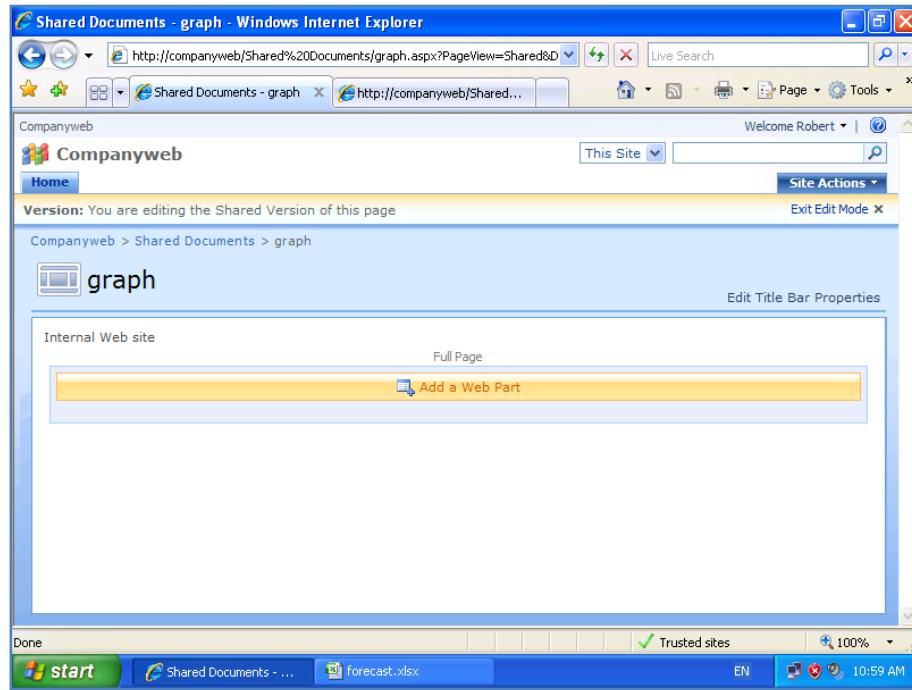
The screenshot shows a Windows Internet Explorer window displaying a SharePoint "Shared Documents" library. The left navigation menu includes "Documents", "Lists", "Discussions", "Sites", "Pictures", and "People and Groups". The main content area shows a list of documents with columns for Type, Name, Modified, and Modified By. Two files are listed: "forecast1.htm" and "forecast1.xlsx". Both were modified on 4/27/2009 at 10:57 AM by Robert.

Type	Name	Modified	Modified By
file	forecast1.htm	4/27/2009 10:57 AM	Robert
file	forecast1.xlsx	4/27/2009 10:55 AM	Robert

If you now examine the WSS v3 document library, which you may need to refresh in your browser, you should see a new file. This file will be the .htm chart that was just

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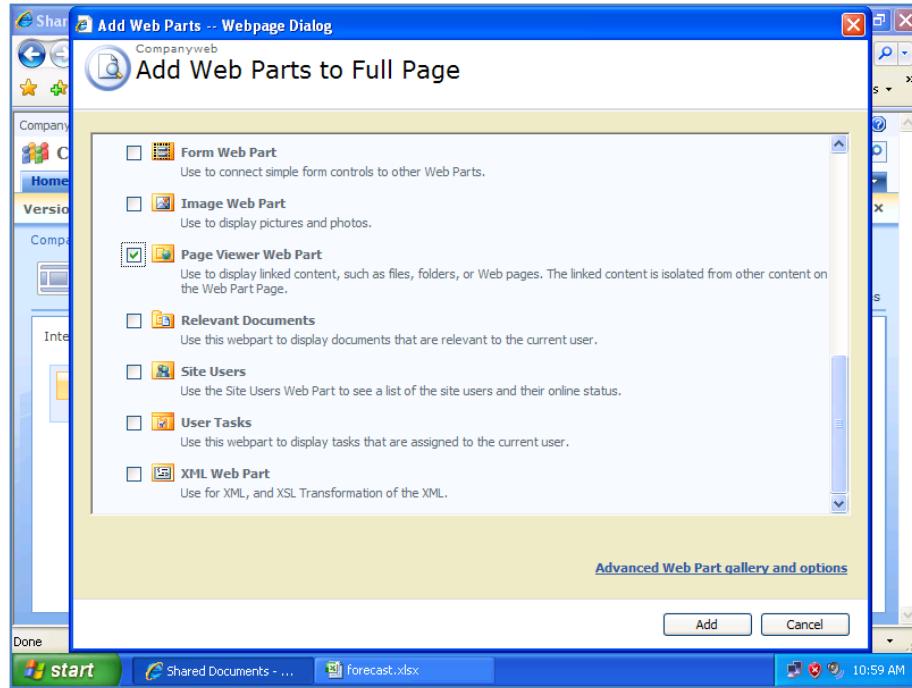
published (in this case *forecast*). If you look closely at the *Type* icon you will notice a slight difference to the standard Excel file, denoting a published Excel file.



To display the graph you will need to insert a web part into the desired page. Remember that web parts can only be added to web part pages generally. In this case a new web part page called *graph* has been created to host the Excel chart.

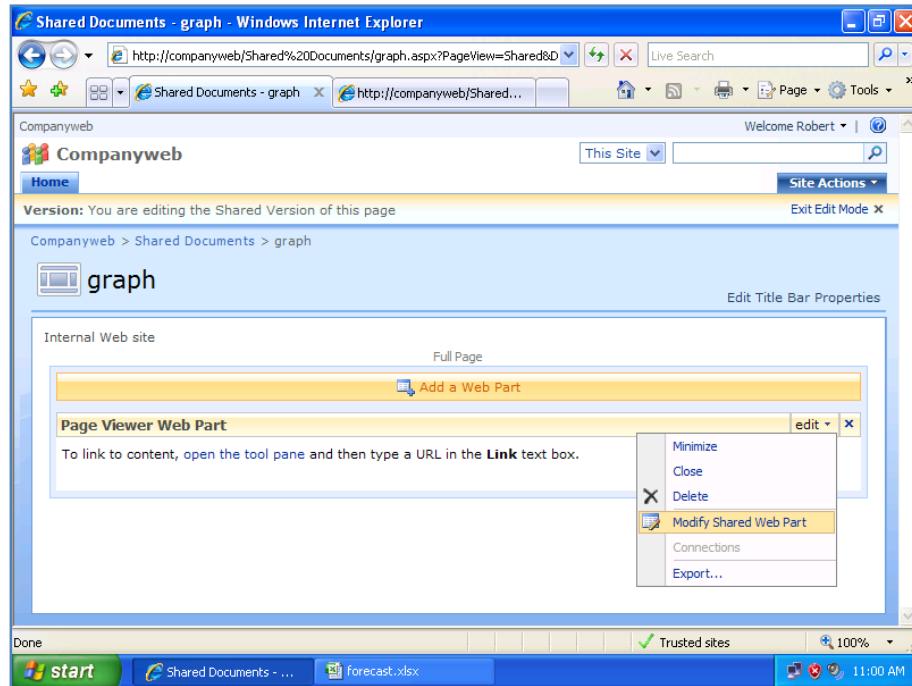
Click the area **Add a Web Part** to continue.

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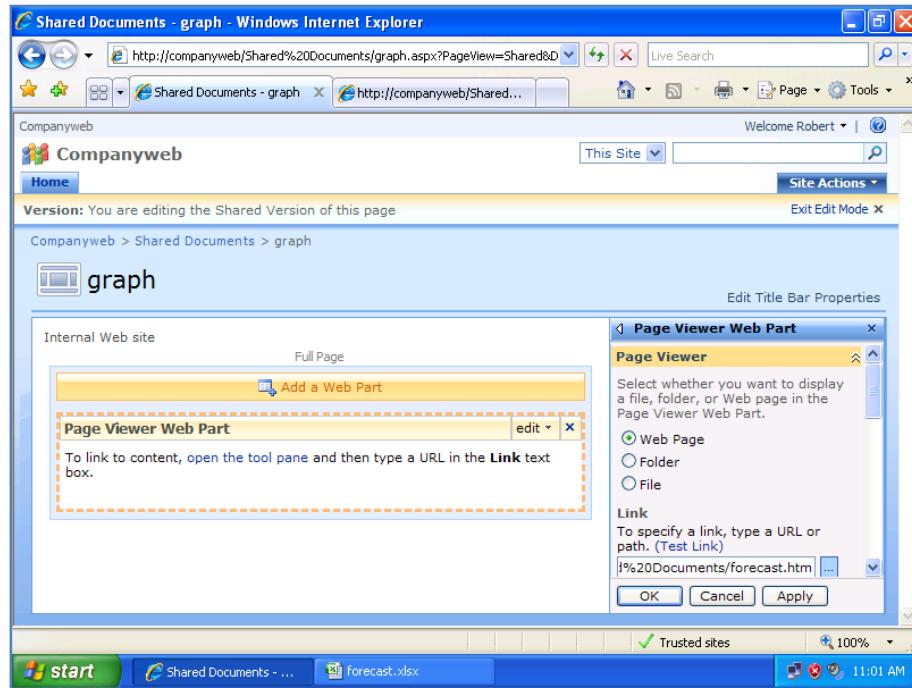
From the *Add Web Parts* window that appears, scroll down until you locate the *Page Viewer Web Part* option and place a tick in the corresponding box.

Press the **Add** button to continue.



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When the web part is displayed on the page select the **Edit** option in the top right of the web part and then **Modify Shared Web Part** from the menu that appears.

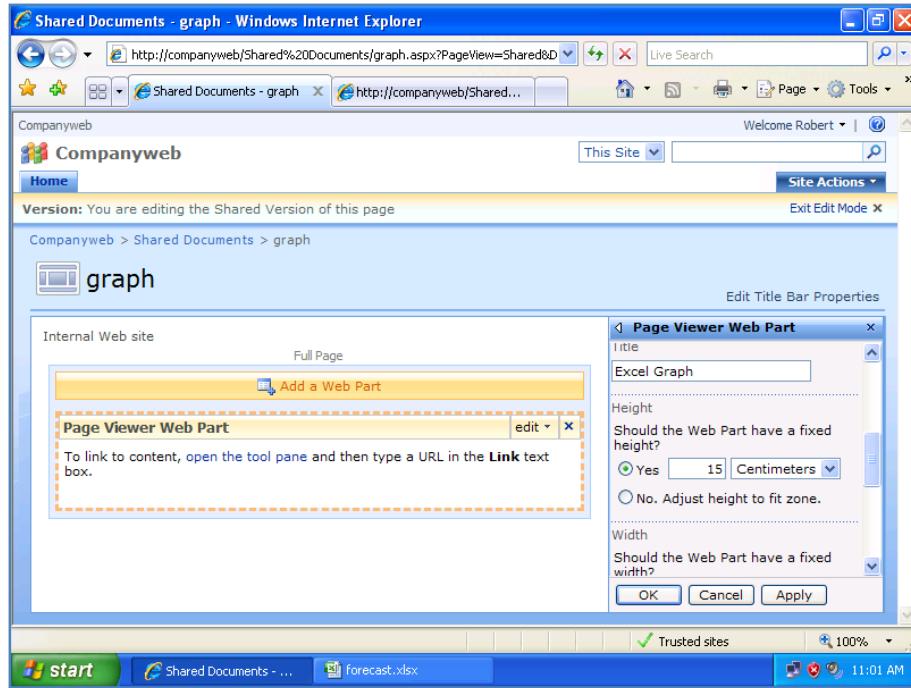


When the properties of the web part are displayed enter the URL of the chart by copying and pasting from the previously viewed browser page. This URL should appear something like <http://companyweb/Shared%20Documents/forecast.htm>.

Also ensure that the *Web Page* option is selected at the top of the column.

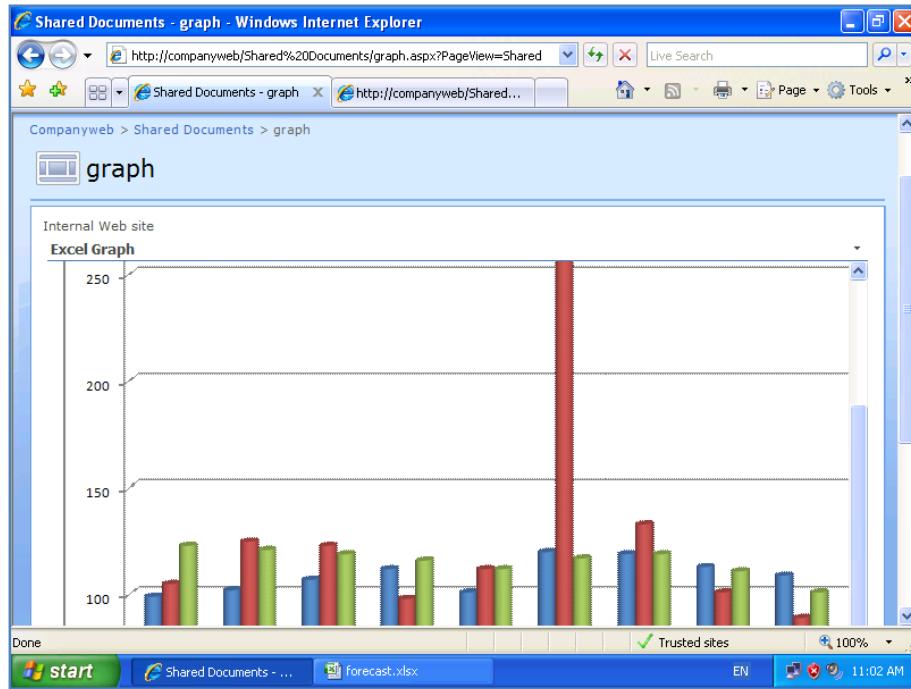
Scroll down the page for further options.

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You may need to adjust how the chart page is displayed within the web part. This can be done under the appearance options where you can set properties like the *Title* and the size of the window in which the chart appears.

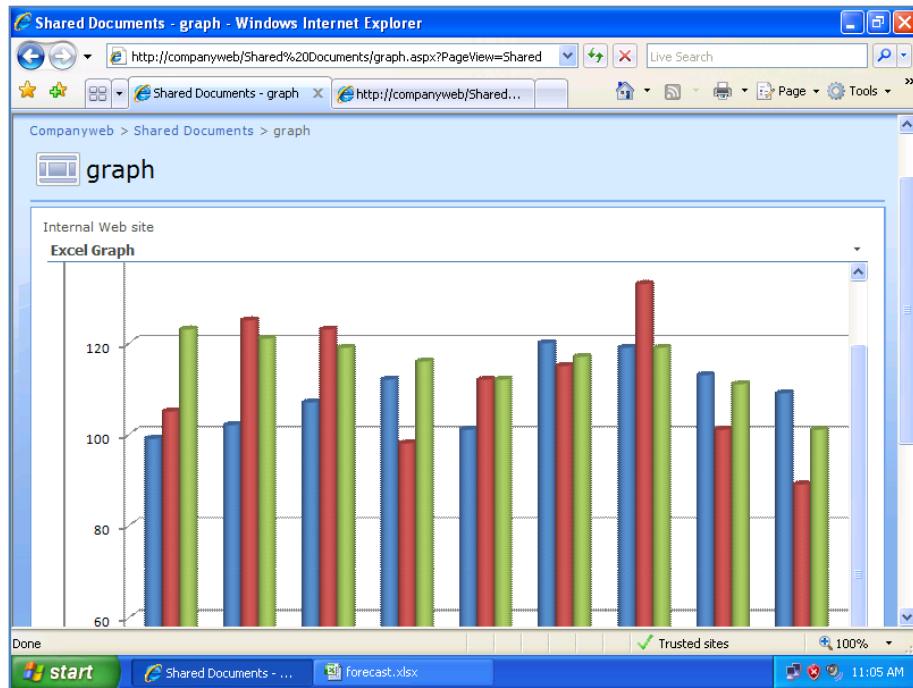
You may return at any point and re-edit these options if needed. When complete press the **OK** button to continue.



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If you now also exit *Edit Mode* (top right hand side if displayed) you should see the Excel chart displayed on the WSS v3 page as shown above.

To ensure that the chart does indeed update, return to the Excel spreadsheet and make a change. After saving the chart in Excel (remember, updates will only take place once you save the updated spreadsheet), return to the WSS v3 chart page.



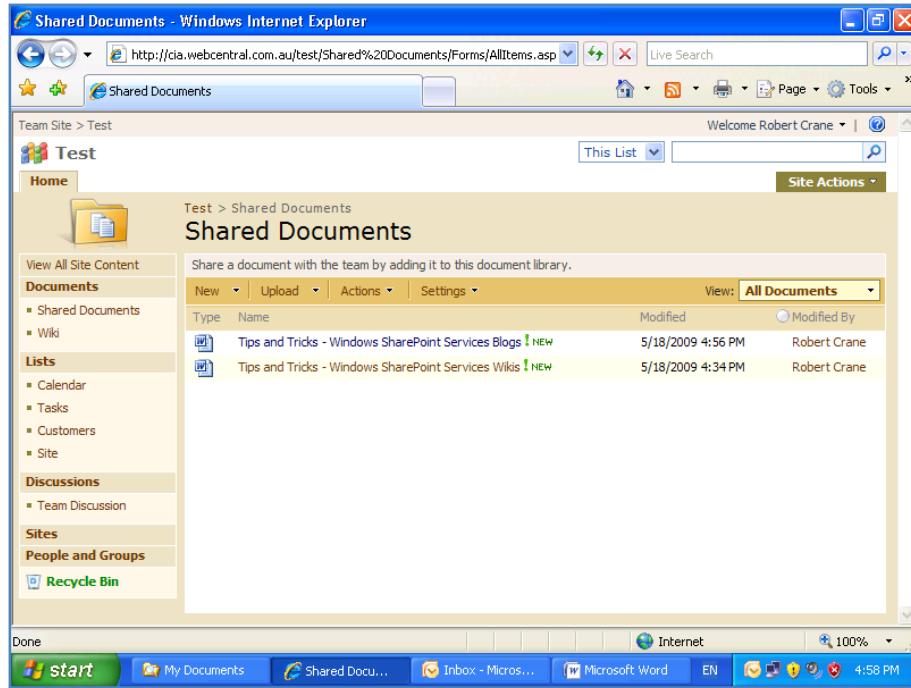
If you now press the refresh button in your browser you should see that the page has updated. If not, ensure that you selected the option to *AutoRefresh* the graph highlighted earlier.

This tutorial has shown you how to publish an updating Excel chart to a .htm file and to display that chart via a web part in WSS v3.

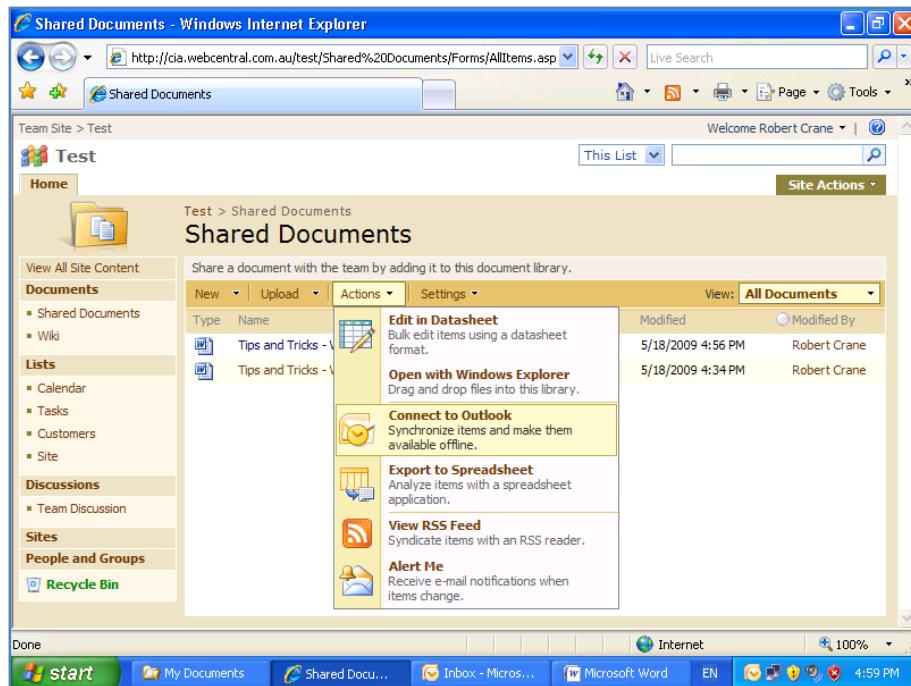
### 16.6 Taking files offline with Outlook 2007

This tutorial is designed to explain how to take documents in WSS v3 Document Libraries offline with Microsoft Outlook 2007. To complete this process you will require access to a WSS v3 site via a web browser as well as Microsoft Outlook 2007 installed on your local system.

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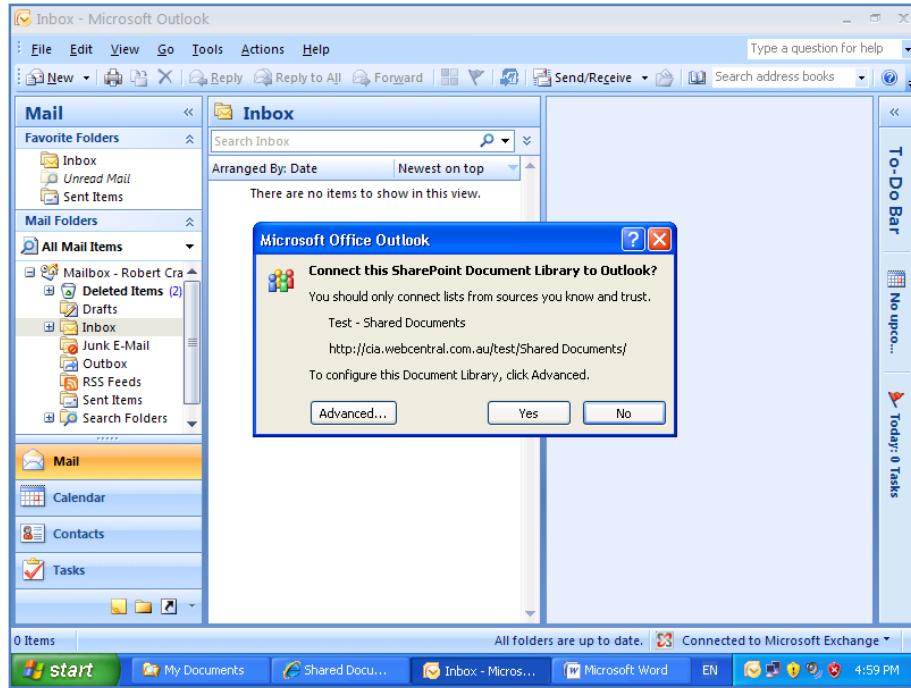


To take files from a WSS v3 Document Library offline using Outlook 2007 firstly navigate to the Document Library in your WSS v3 Site using a web browser.



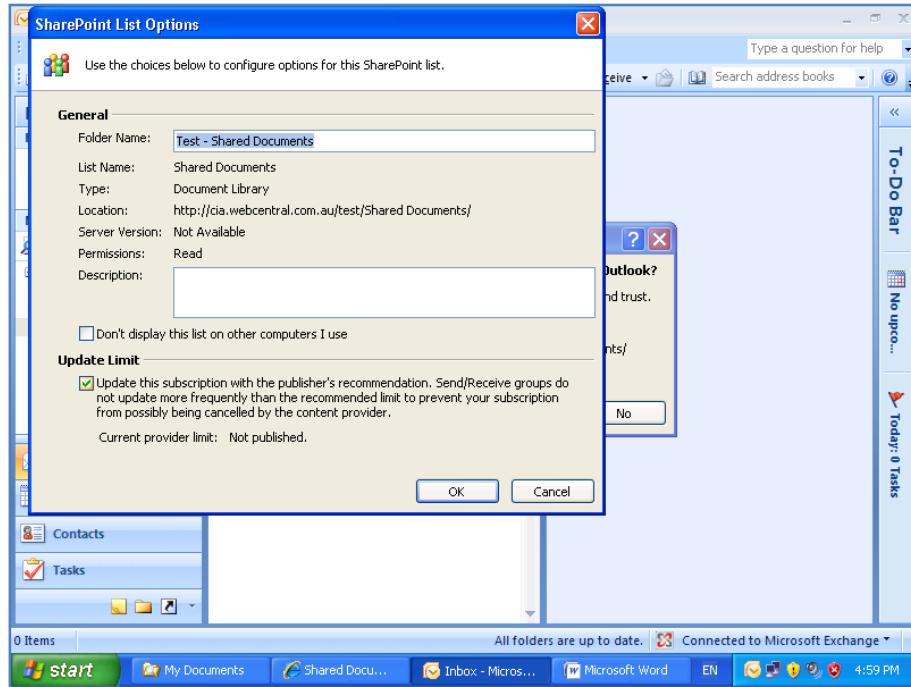
From the **Actions** menu item of the Document Library select **Connect to Outlook** item.

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If not already open, Outlook 2007 will launch. You will then be presented with a warning window like that shown above asking whether you wish to allow Outlook 2007 to connect to this document library.

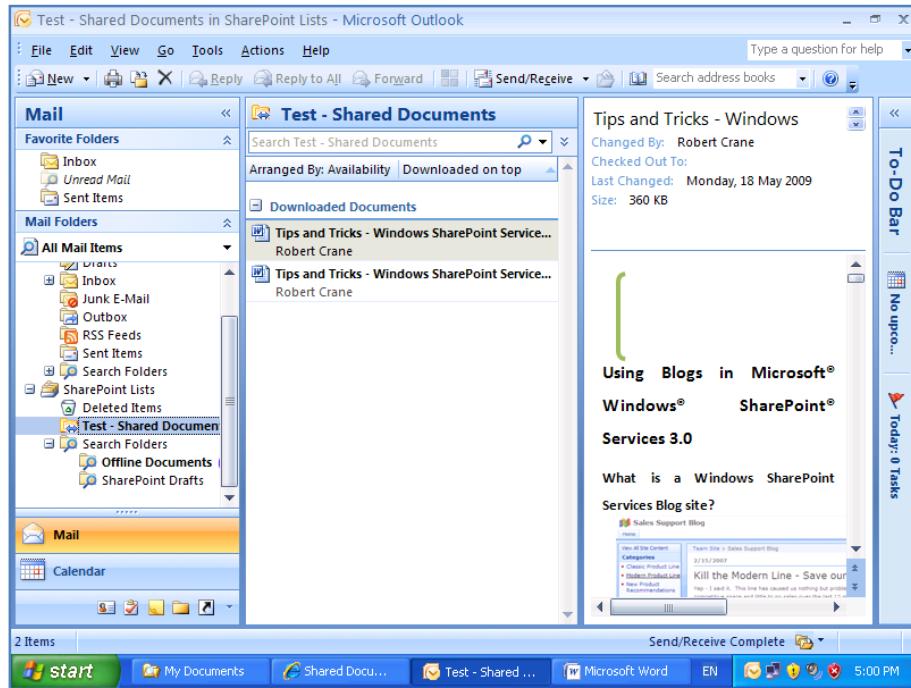
Press the **Yes** button to allow this connection.



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If you press the *Advanced* button a new window appears with a number of additional options displayed that can be altered if desired.

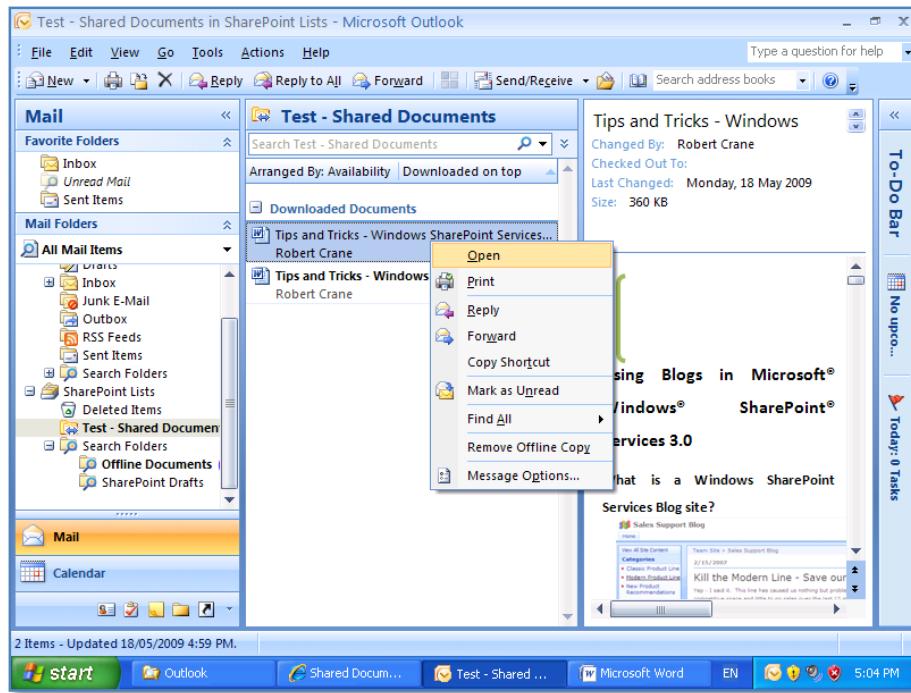
Make any changes and press the **OK** button to continue.



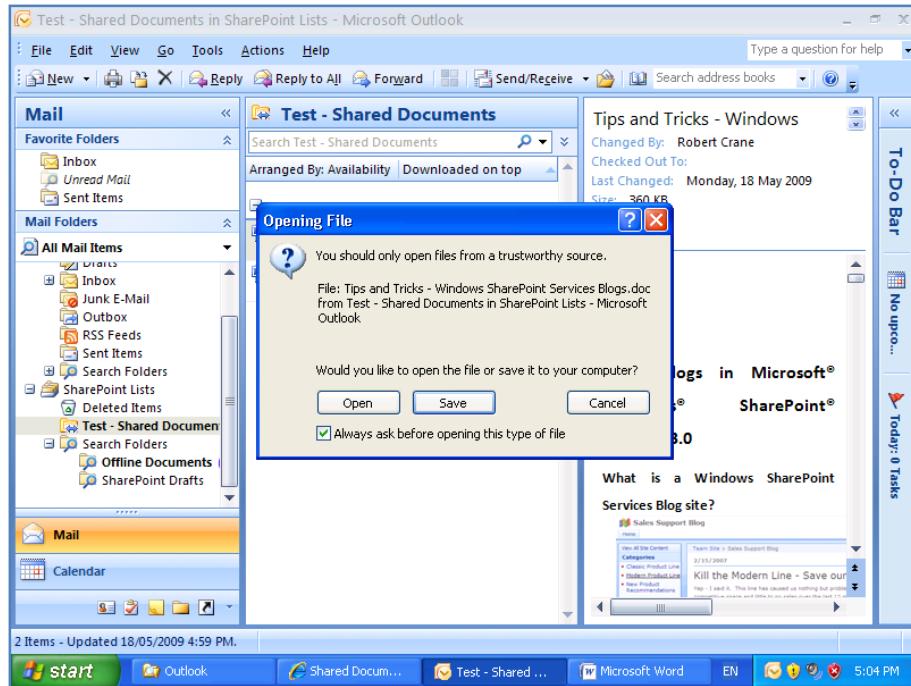
Once the WSS v3 Document Library is connected you will see that Outlook 2007 creates an additional folder (if it did not already exist) called *SharePoint Lists* under the current mail folders on the left of the screen. Underneath this folder you will find your linked SharePoint list (in this case *Test – Shared Documents*).

If you click on this *SharePoint List* in Outlook 2007 you will see a list of the documents in the WSS v3 document library appear as items. Selecting any of these items will display a preview of that file (provided the appropriate file viewer is available in Outlook 2007).

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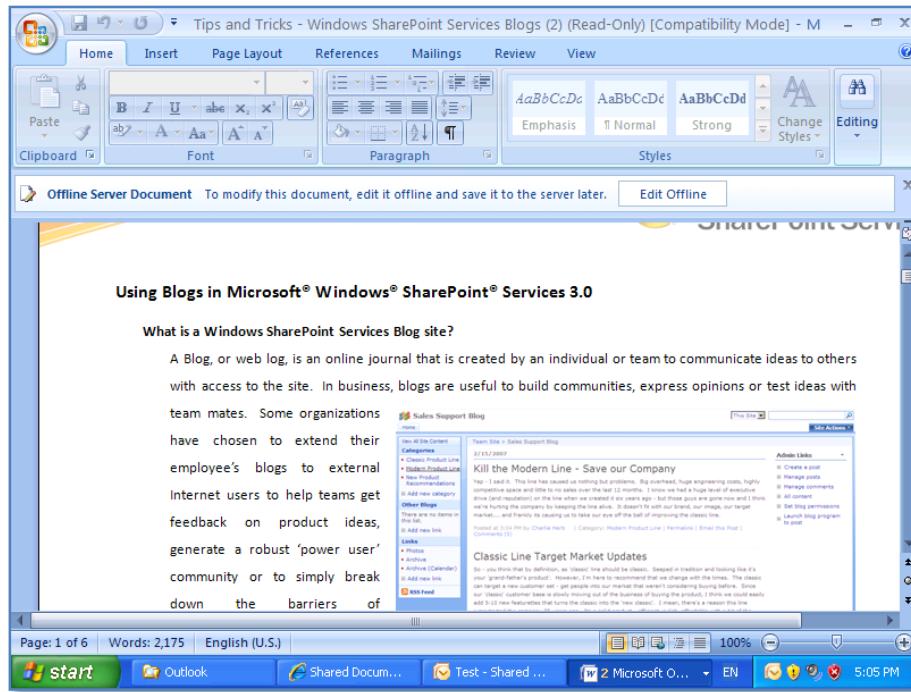
You can open an item in the list by **double clicking** on it or using the **right mouse** and selecting **Open** from the menu that appears.



You will normally be prompted as to whether you wish to open the file since the source may be un-trusted to the local machine.

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In this case select the **Open** button to continue.



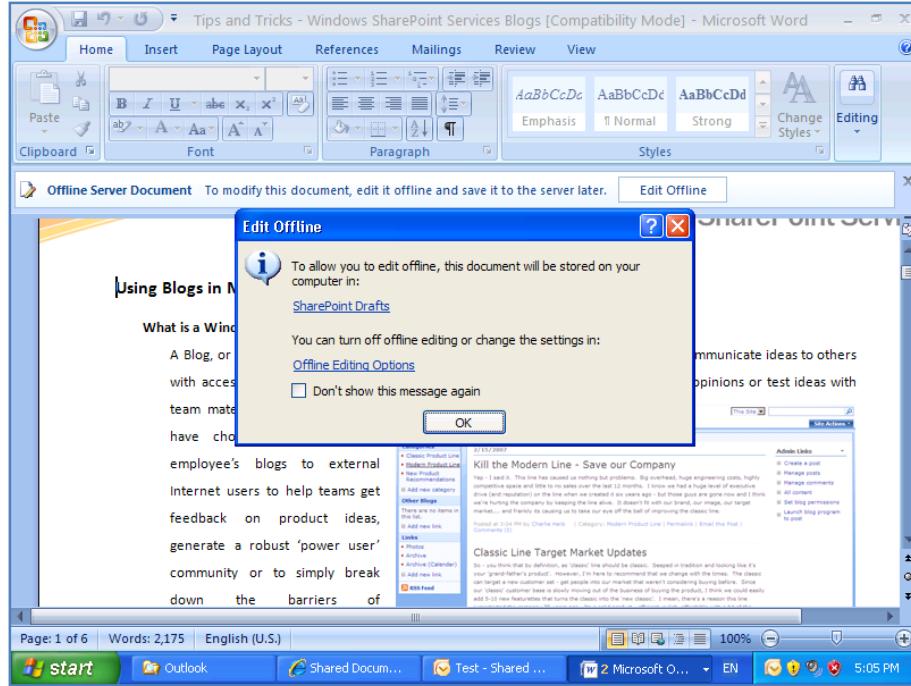
The document will now open. Because the document opened is a *Word* document it will open in the version of *Word* we have on our local machine. A document will not open on the local machine unless the correct program to open that file is installed.

When opened in Word you will notice a message bar, just below the ribbon menu that says:

**Offline Server Document.** To modify this document, edit it offline and save it to the server later.

You will also notice an *Edit Offline* button to the right.

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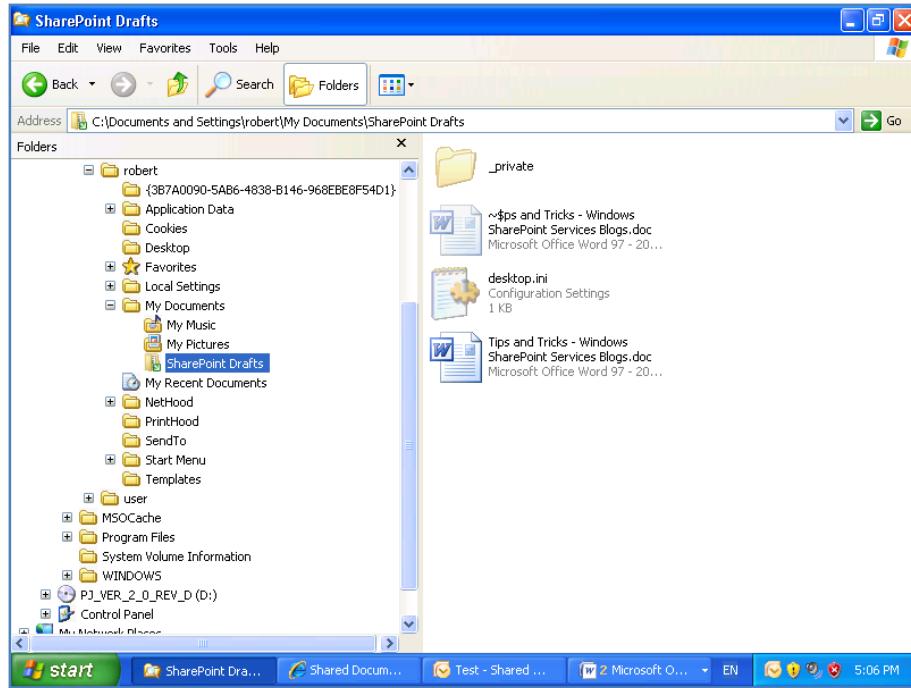


If you wish to edit the document press the **Edit Offline** button.

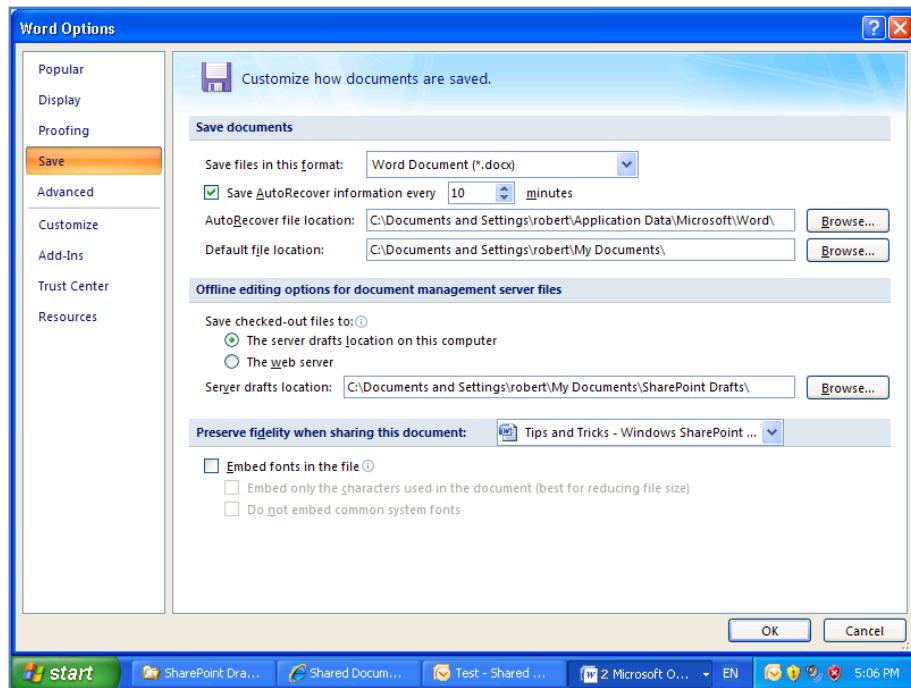
A message like shown above will be displayed indicating that a local copy of the document will be stored in the *SharePoint Drafts folder* on the local machine. You will also be informed that this setting can be altered by changing the *Offline Editing Options* in *Word*.

Press the **OK** button to continue.

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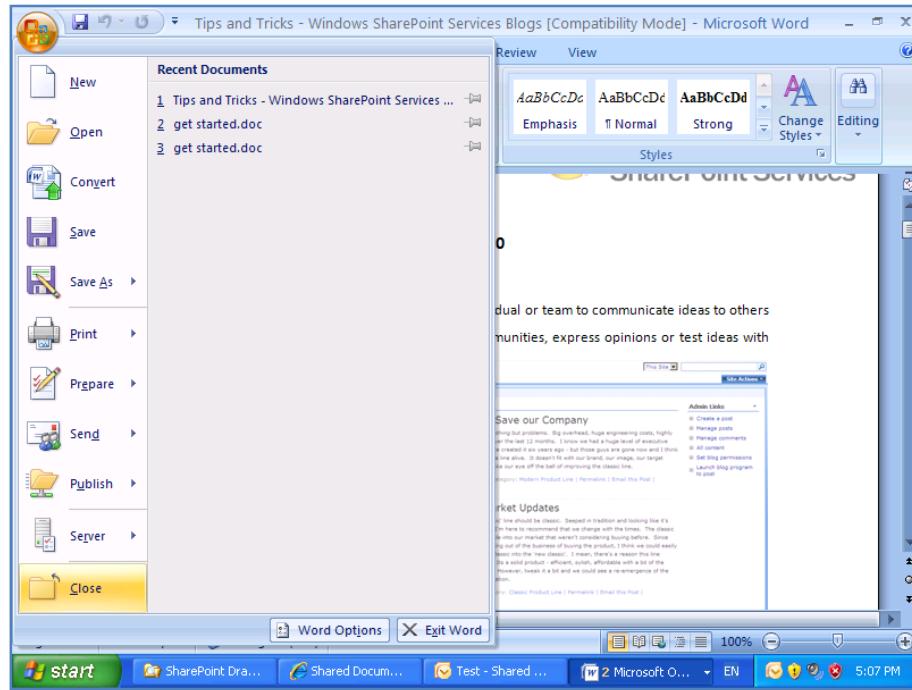
The location of the SharePoint Draft folder by default is *C:\Documents and Settings\<current\_user>\My Documents\SharePoint Drafts* as shown above.



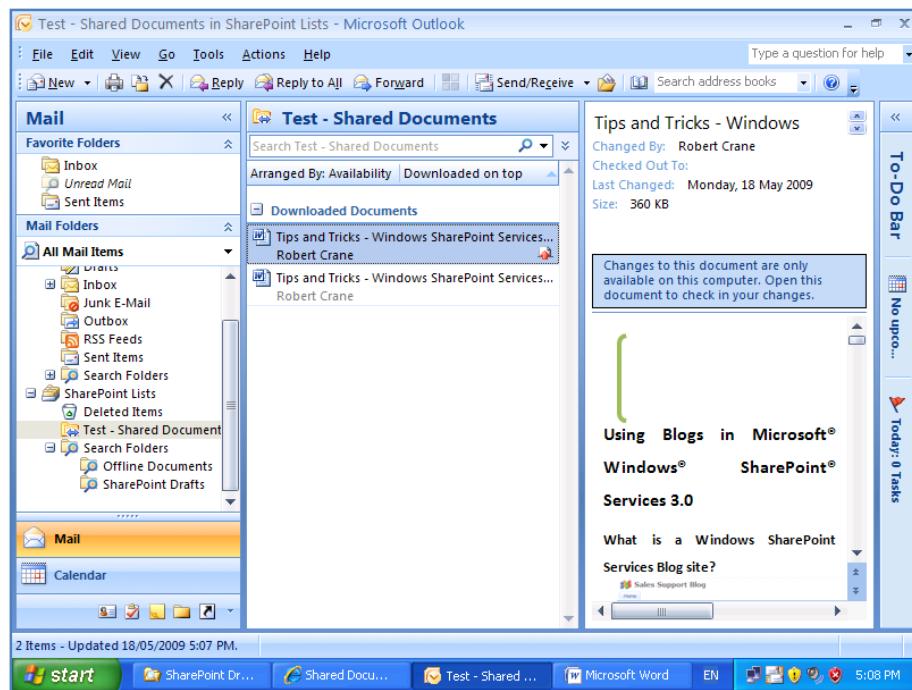
You can alter the offline *Word* options either by clicking the hyperlink shown in the previous window or selecting **Office Button | Word Options | Save** in *Word*.

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When you do you will see a window similar to that displayed above. The middle section on the right displays the offline editing options which can be changed if desired.

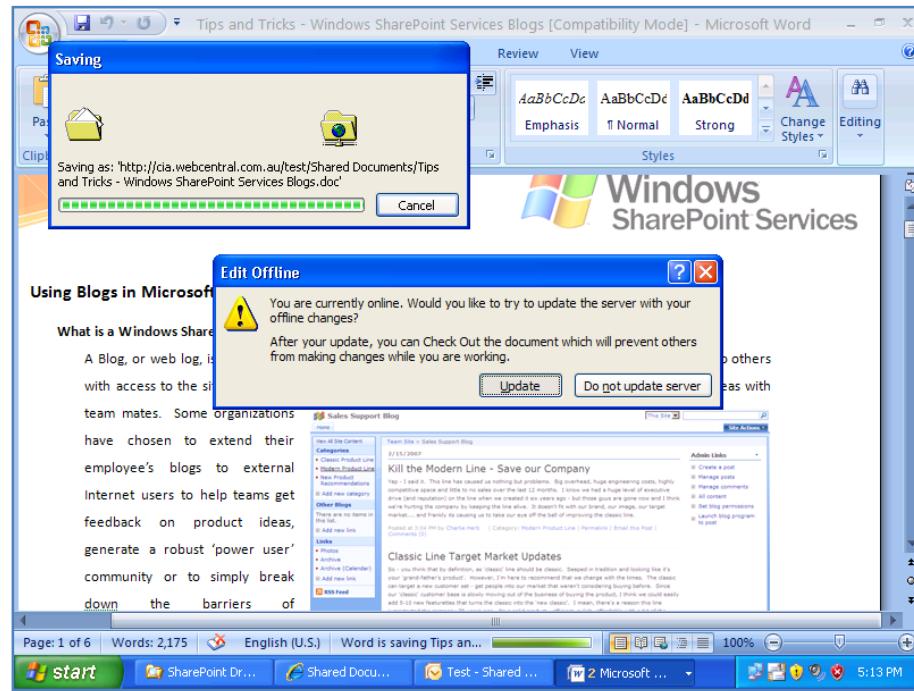


After you finish editing the document and close it,



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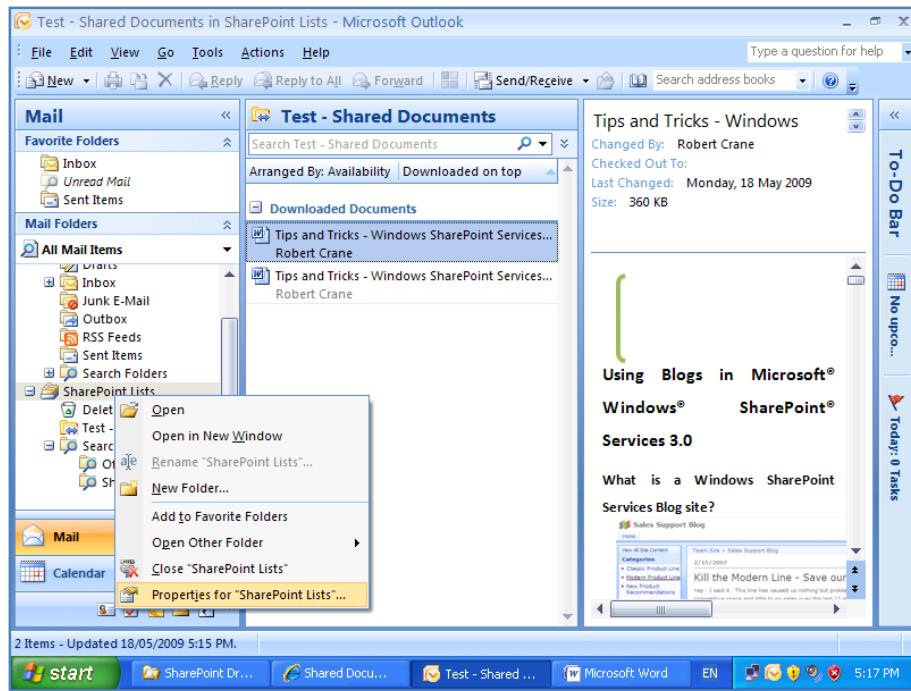
You will now see in a small icon in the bottom right of the item in Outlook 2007 as well a message window in the document preview basically telling you that the changes made to the document only reside on the local machine and have not been updated to the WSS v3 Document Library. This is typically because the machine is now working in an ‘offline’ state, not connected to the original WSS v3 Document Library.



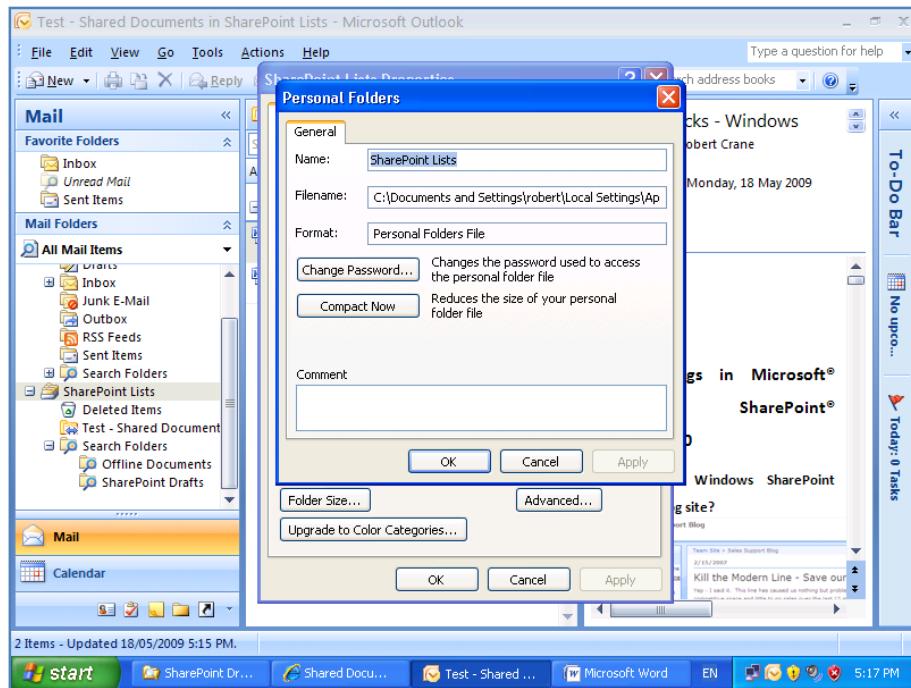
When the local machine is able to connect to the original document library again and the same document is opened again, subsequently changed and closed, a message window will appear like that shown above indicating that the WSS v3 Document Library is available. The user is prompted to whether they wish to update the changes made offline.

If the desired document changes are to be updated to the WSS v3 Document Library simply press the **Update** button. Once pressed you should see a copy of the document being saved to the WSS v3 Document Library as shown above.

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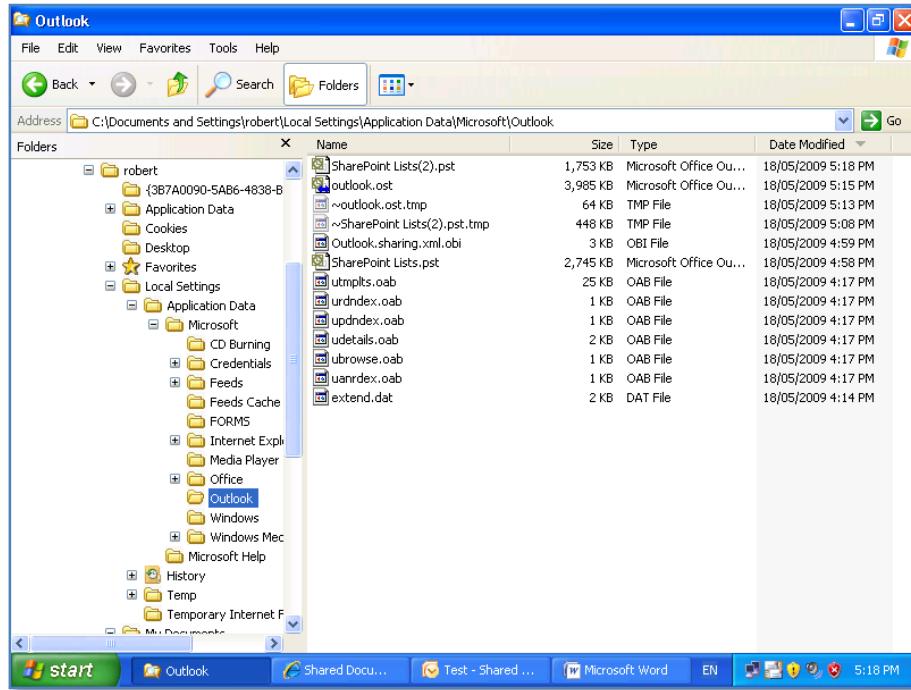


The actual SharePoint Lists folder in Outlook 2007 is merely a PST file saved on the local workstation. You can determine the location of this PST by **right mouse clicking** on the *SharePoint Lists* item in Outlook 2007 and then selecting **Properties** from the menu that appears.



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In this case you can see that SharePoint Lists item is a *Personal Folder File* format (i.e. PST) and by default its location is *C:\Documents and Settings\<current\_user>\Local Settings\Application Data\Microsoft\Outlook*.

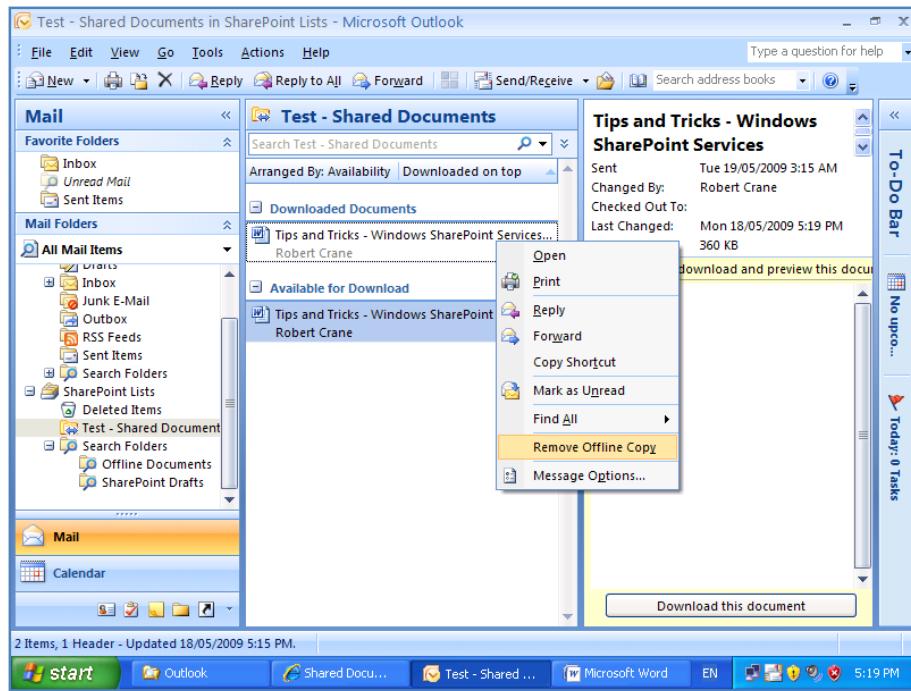


If you view this location with the Windows file manager you can see the .PST file (in this case *SharePoint Lists.pst*).

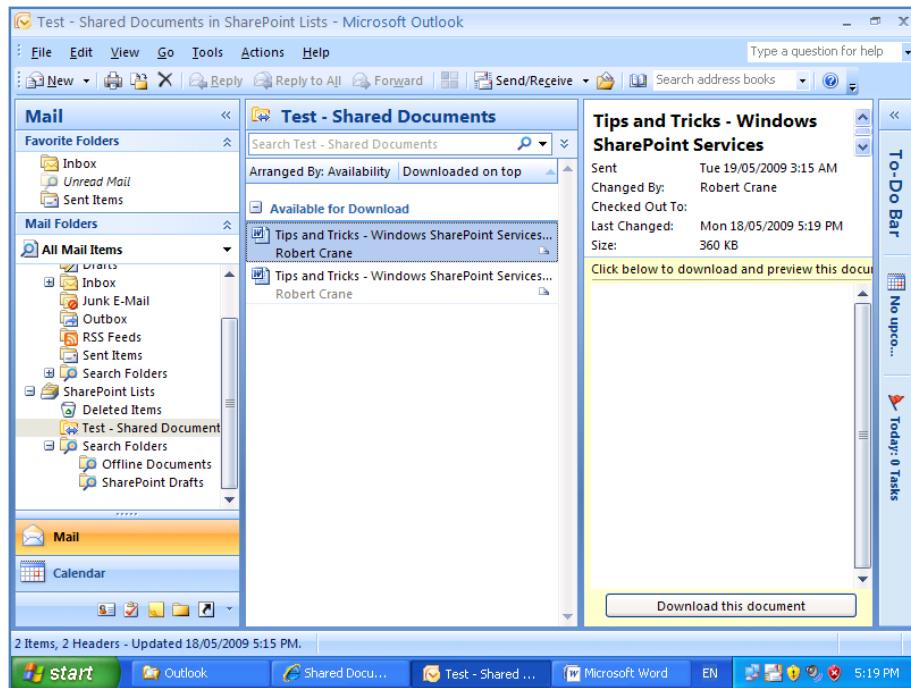
Inside this PST file is initially kept a full copy of every document in your WSS v3 Document Library. If you wish to connect to a large document library it could result in a large PST file being created on the local system.

It is also important to note that while the offline files remain read only they reside inside this PST. When you elect to edit them locally a copy is also stored in the *SharePoint drafts folder* also on the local machine as shown previously.

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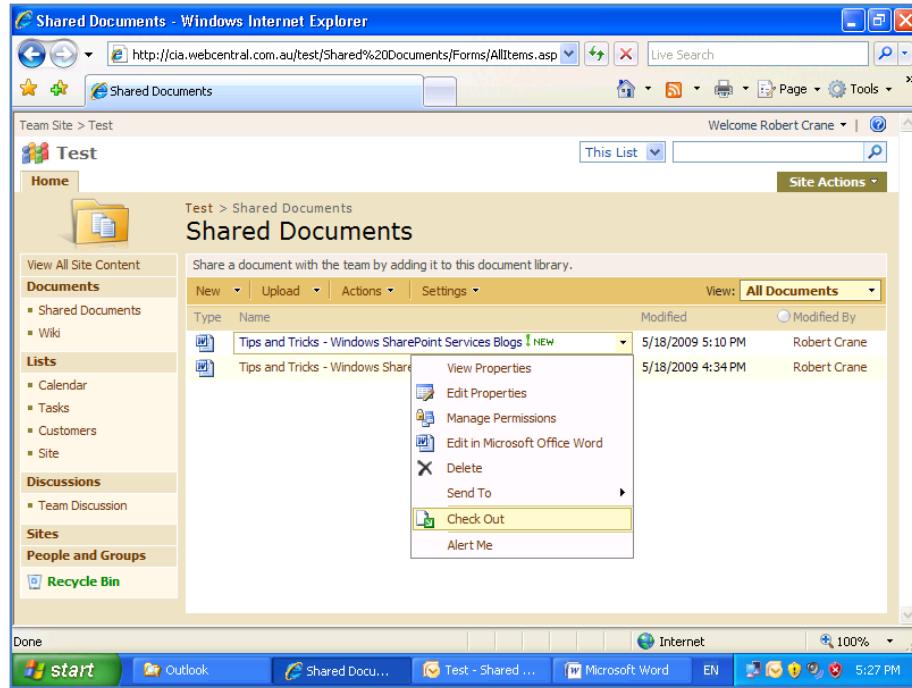


It is possible to remove the offline copy of the file from the local PST file by **right mouse clicking** on the item and selecting **Remove Offline Copy** from the menu that appears.



After doing this you will no longer see a preview of that file. If you wish to have an offline copy for viewing simply click the **Download this document** button to copy that file from the WSS v3 document library back to the local .PST file again.

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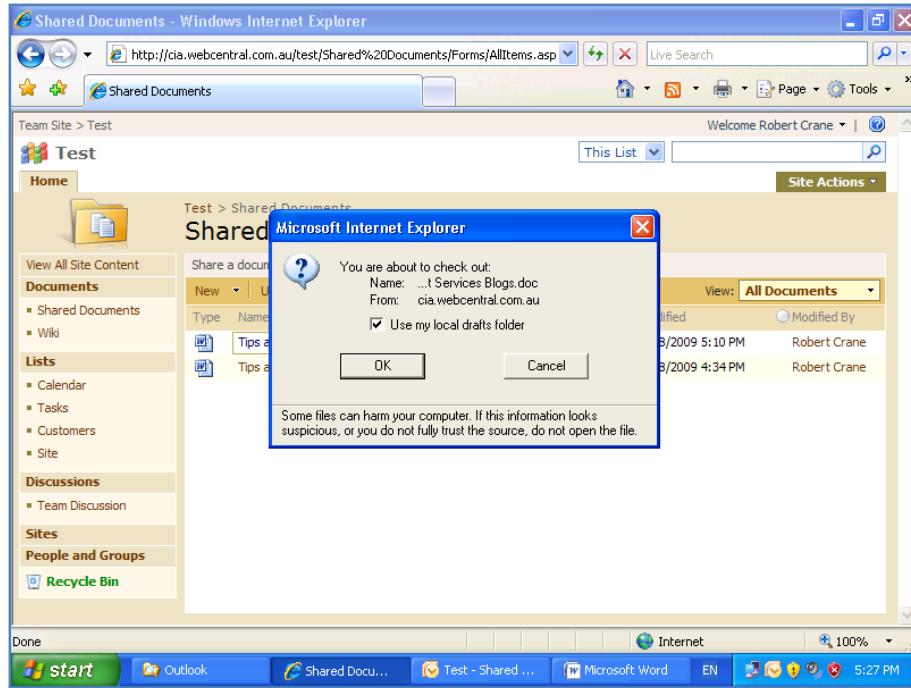


If you connect to a WSS v3 document library in Outlook 2007, subsequently take it offline and edit documents offline, you may face the issue of document version conflicts when you try and update a document to the WSS v3 Document Library upon return. This is because another person may have already updated that document in your absence.

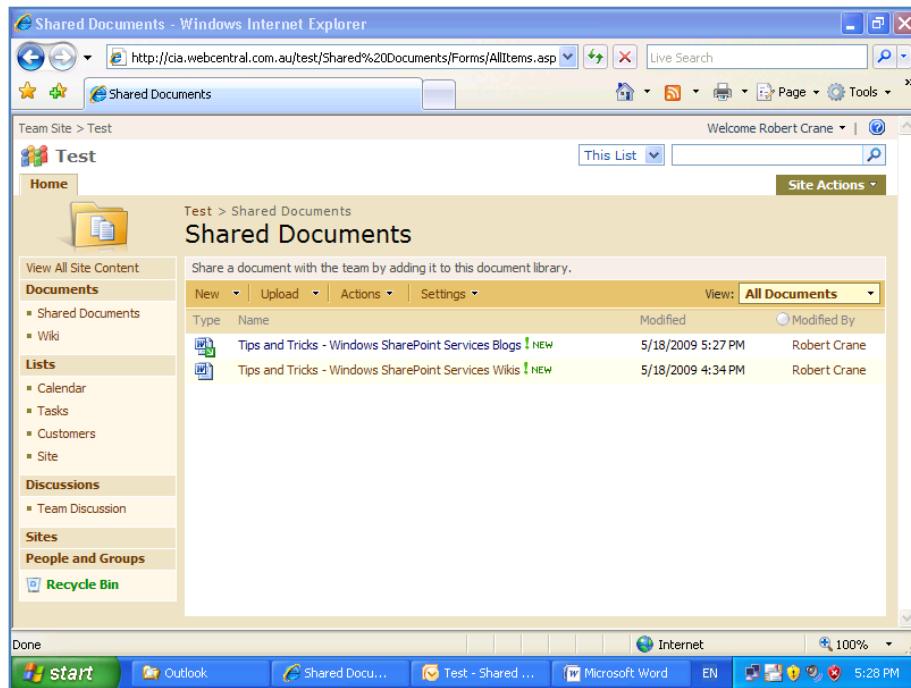
Any such document version conflicts will need to be handled by the document application software.

To prevent document version conflicts you should ensure any documents you wish to take offline for editing are checked out in the document library beforehand. This checkout process can only be done via a browser in the WSS v3 Document Library and not via Outlook 2007. Simply select the **options arrow** to the right of the document name and select **Check Out** from the menu that appears.

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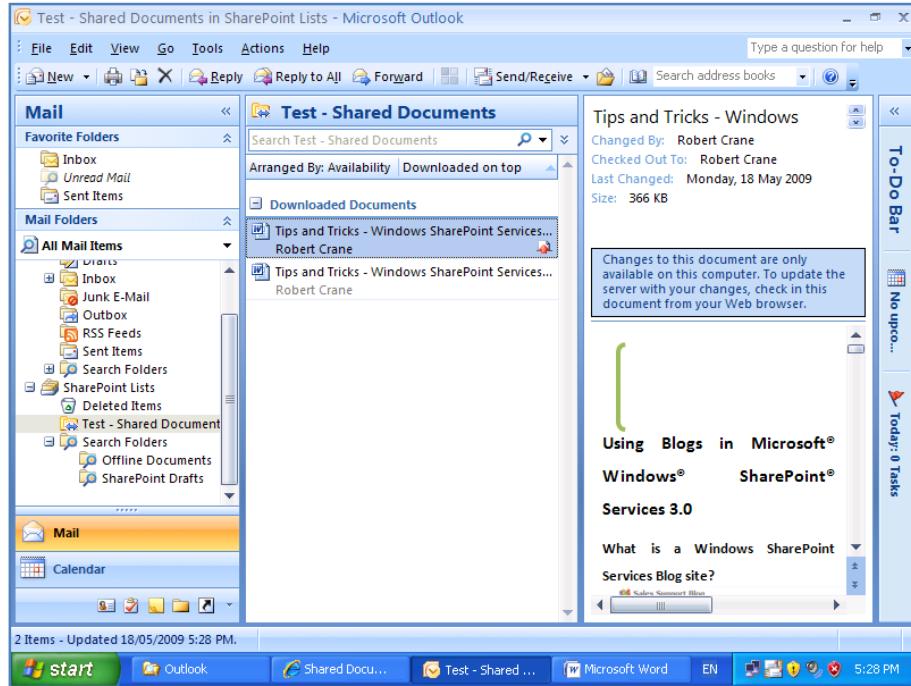


When you do a check out you will be prompted whether you wish to use the local draft folder. This again stores a copy of the file in your *SharePoint Drafts folder* as detailed previously. If you elect not to use the local draft folder, a copy will be made anyway when you elect to edit the document after opening it in Outlook 2007.



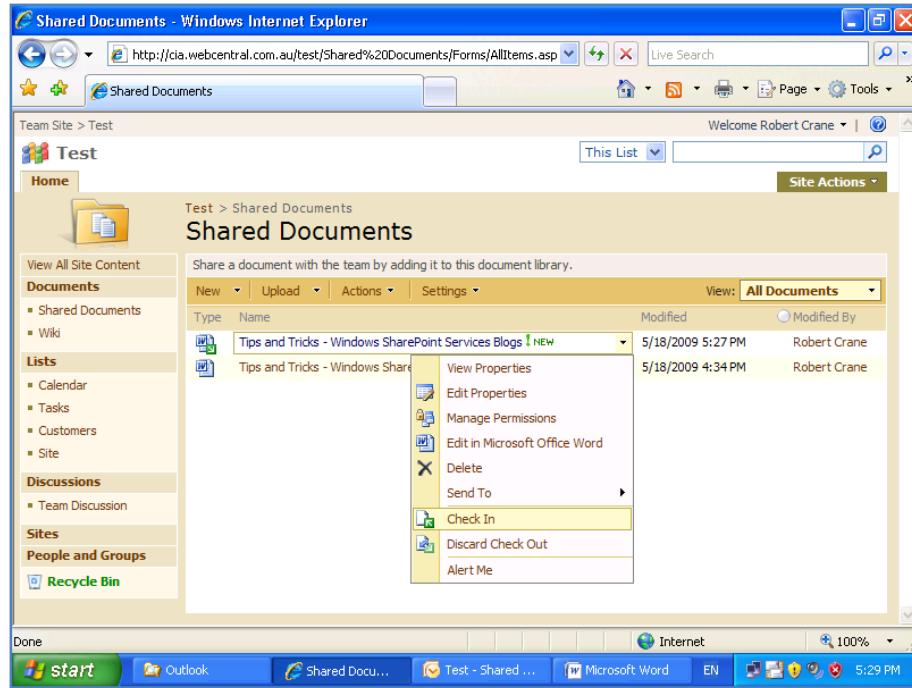
## Chapter 16 – Tutorials

When a document is checked out from a document library the *type icon* appears with a little green arrow in the bottom right when viewed in a web browser. In this mode any other user will only be able to view this file and not make changes until the file has been checked back in.

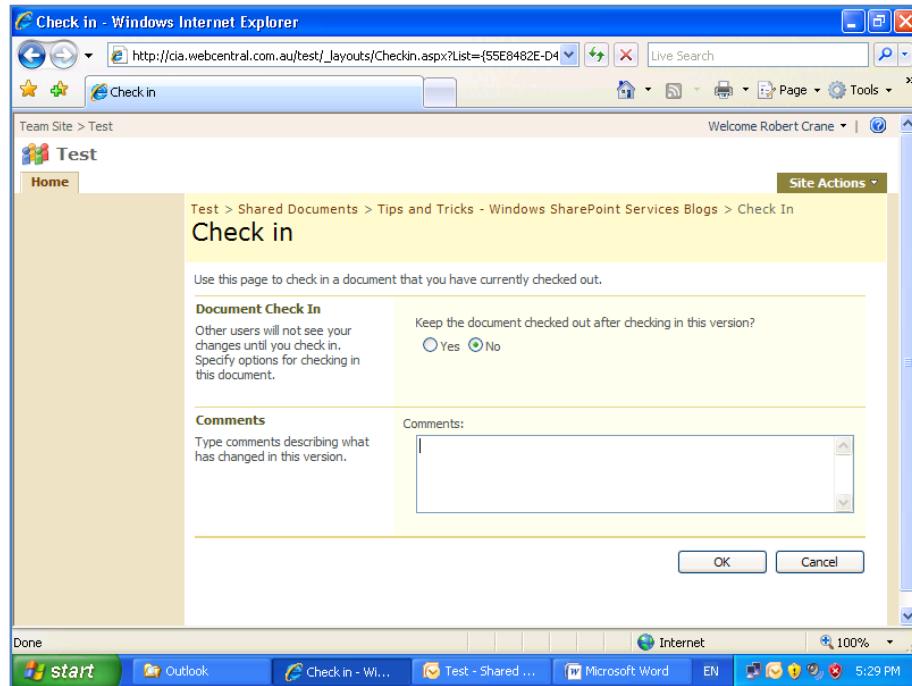


After the file has been checked out, and in this case saved to the local drafts folder, you will again see the icon in the bottom right of the item in Outlook 2007 and the message window in the document preview telling you that the document is currently on the local machine.

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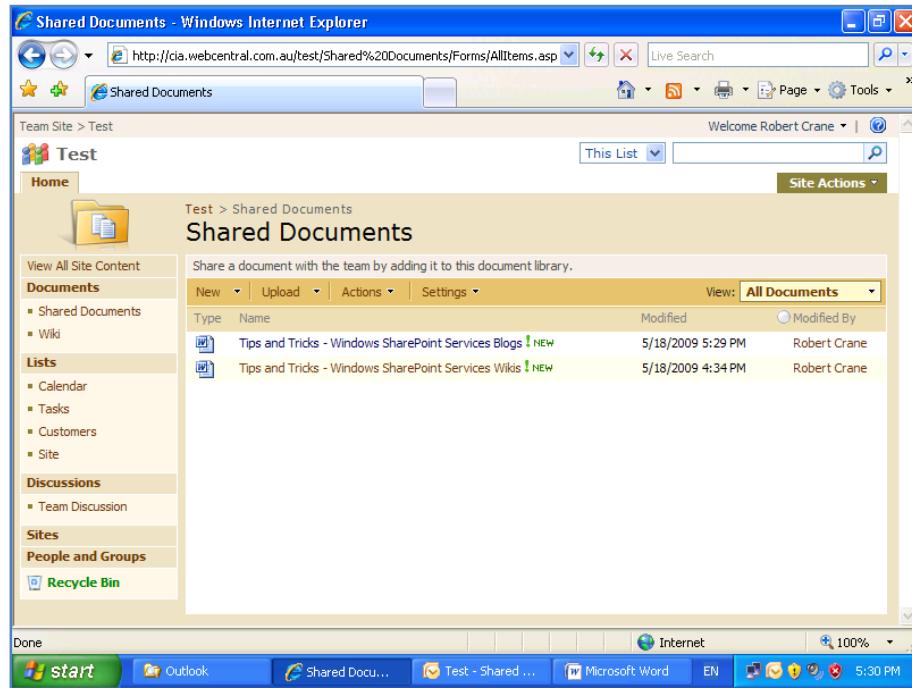


When the local machine has been returned ‘online’ and any offline documents have been updated you need to return to the WSS v3 Document Library via a web browser and check in any documents that were previously checked out so other people can edit them.



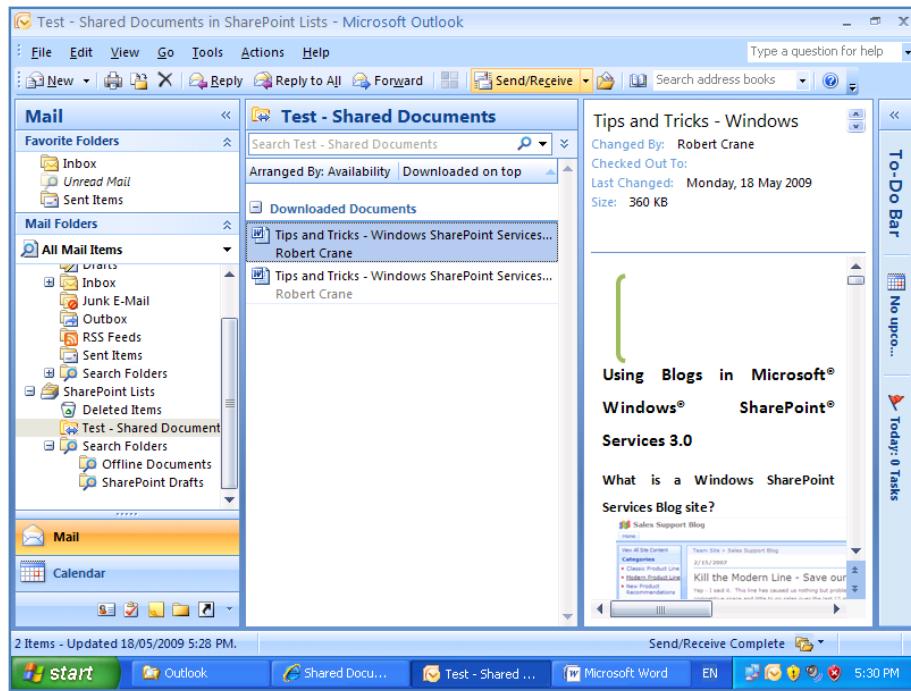
## Chapter 16 – Tutorials

When you check in a document you will be prompted as to whether you wish the document to remain checked out and enter any comments about the version you wish. Normally, you will select the option for **Yes** to check the document back into the library and press the **OK** button to continue.



Once the document has been checked back in you will no longer see a green arrow in the bottom right of the document type icon.

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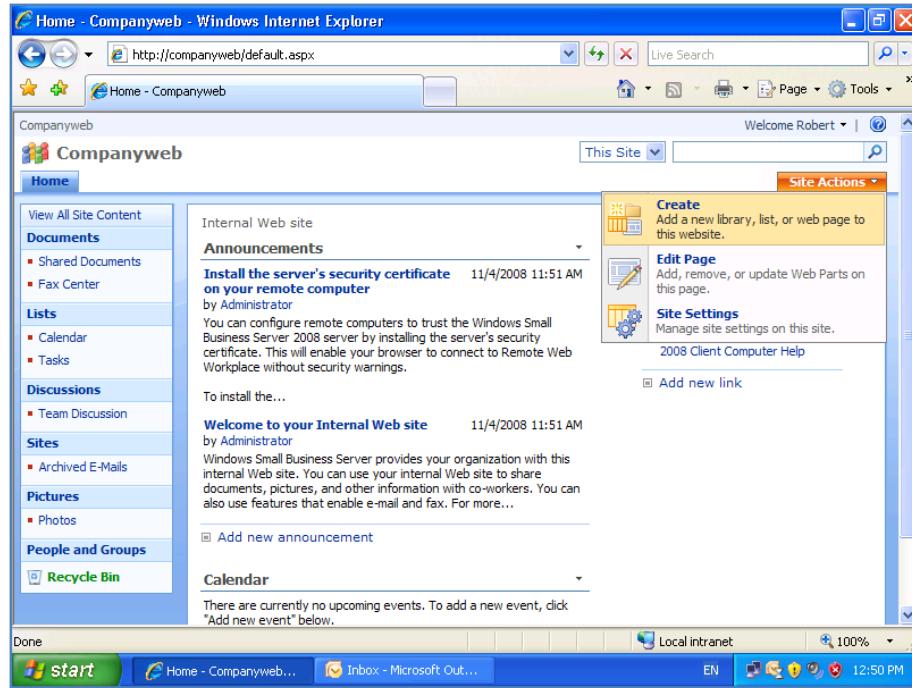
If you also return to Outlook 2007, you will no longer see any indication that there is a local edited copy.

## 16.7 Creating a wiki and linking with Outlook 2007

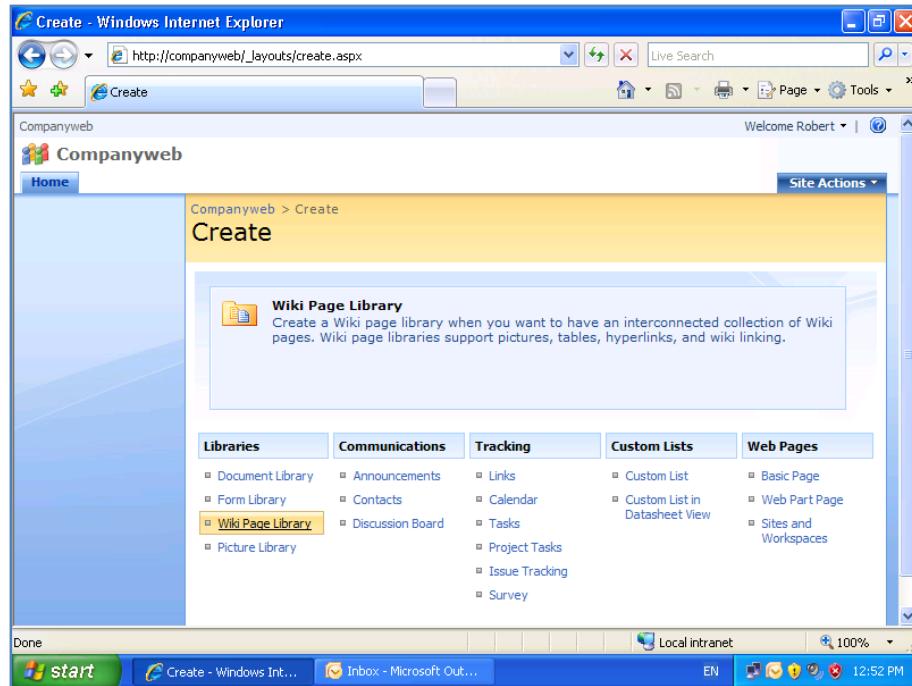
This tutorial will demonstrate the process of creating a wiki as well as making it available offline using Outlook 2007. You will need access to the WSS v3 site to complete this tutorial and have Outlook 2007 installed on the local machine.

A wiki is a collection of web pages designed to enable anyone with access to contribute or modify content, using an online editor. Wikis are used to create collaborative websites and to provide a central location for business intelligence. The collaborative encyclopaedia Wikipedia is one of the best-known examples of a wiki and is one of the best places for a group of people to work with information rather than forwarding it around using email.

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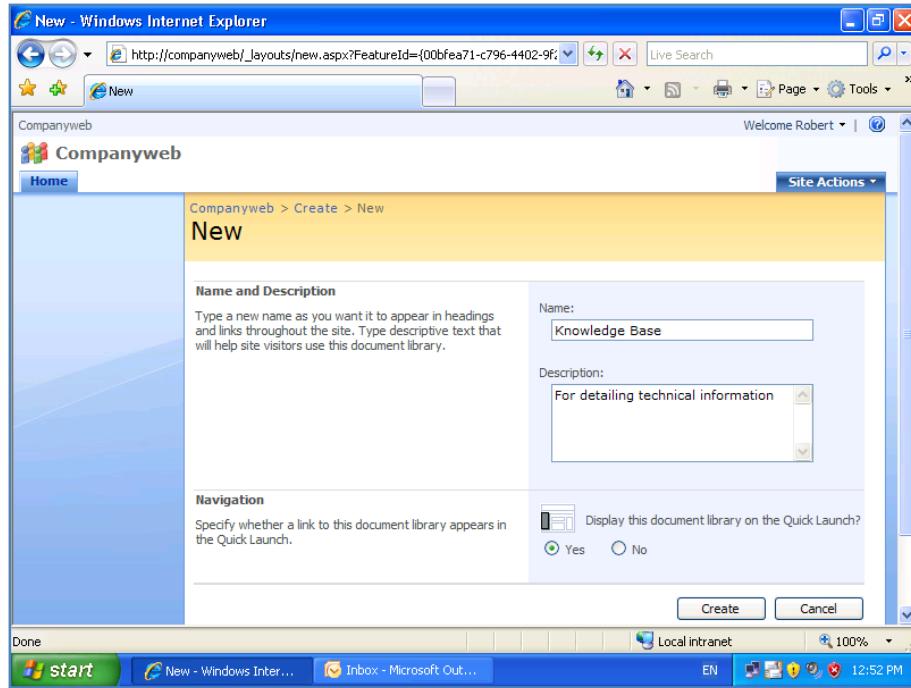


To create a wiki, log into the WSS v3 site as at least a user with design rights. From the **Site Actions** menu in the top right of the screen select **Create**.



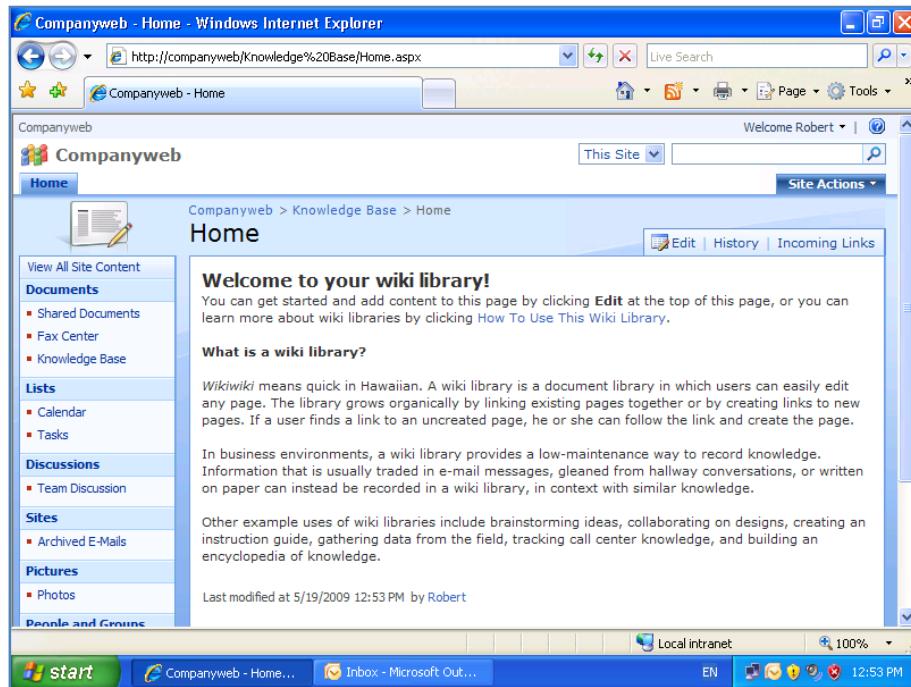
In the **Create** section select **Wiki Page Library** from the **Libraries** section at the left of the window.

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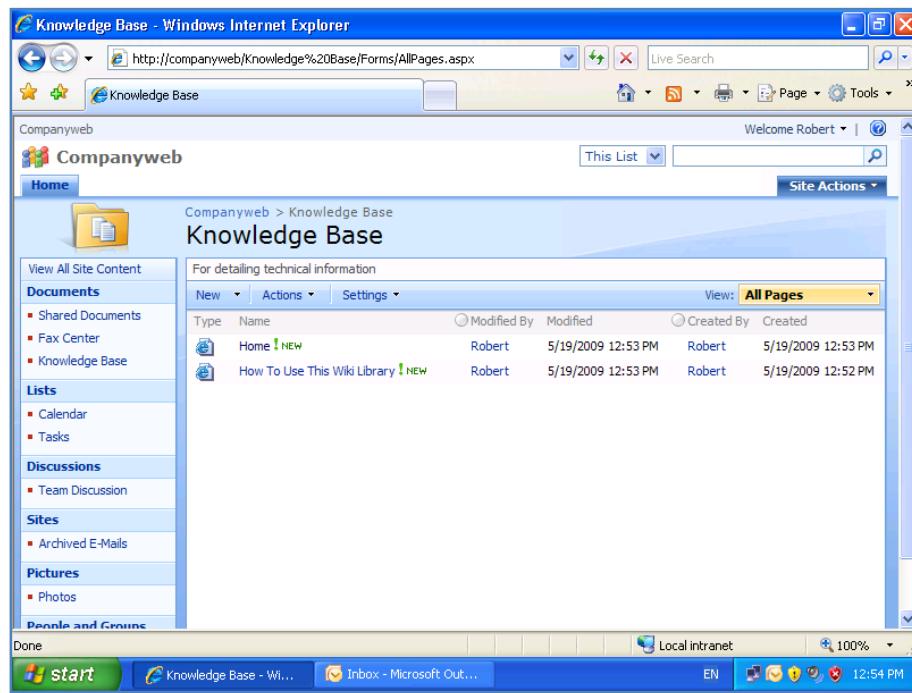
Next, provide a suitable name for the new wiki (in this case *Knowledge Base*) as well as a description. Also, select whether you wish this new wiki library to appear in the *Quick Launch* (which is the menu area to the left of most pages on a WSS v3 site).

When complete press the **Create** button to continue.



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When the wiki has been created you will be shown a screen like that displayed above. This is actually a document in the wiki that has been created by default. To view all the documents in the wiki select the wiki name (in this case *Knowledge Base*) from the bread crumb navigation at the top of the page or from under the *Documents* heading in the *Quick Start* menu (if you elected to display it there).

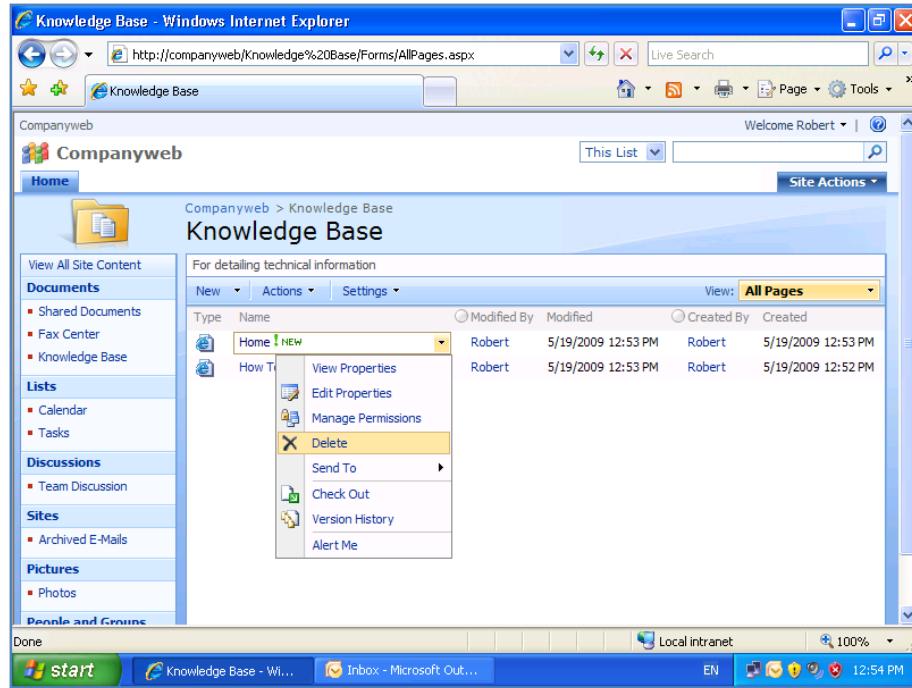


The screenshot shows a Microsoft SharePoint 'Knowledge Base' library in Internet Explorer. The left sidebar contains links for 'View All Site Content', 'Documents' (selected), 'Lists', 'Discussions', 'Sites', 'Pictures', and 'People and Groups'. The main content area displays a list of pages with columns for Type, Name, Modified By, Modified, Created By, and Created. There are two items:

Type	Name	Modified By	Modified	Created By	Created
Page	Home <small>! NEW</small>	Robert	5/19/2009 12:53 PM	Robert	5/19/2009 12:53 PM
Page	How To Use This Wiki Library <small>! NEW</small>	Robert	5/19/2009 12:53 PM	Robert	5/19/2009 12:52 PM

You should now see two default documents in this new wiki called *Home* and *How To Use This Wiki Library*.

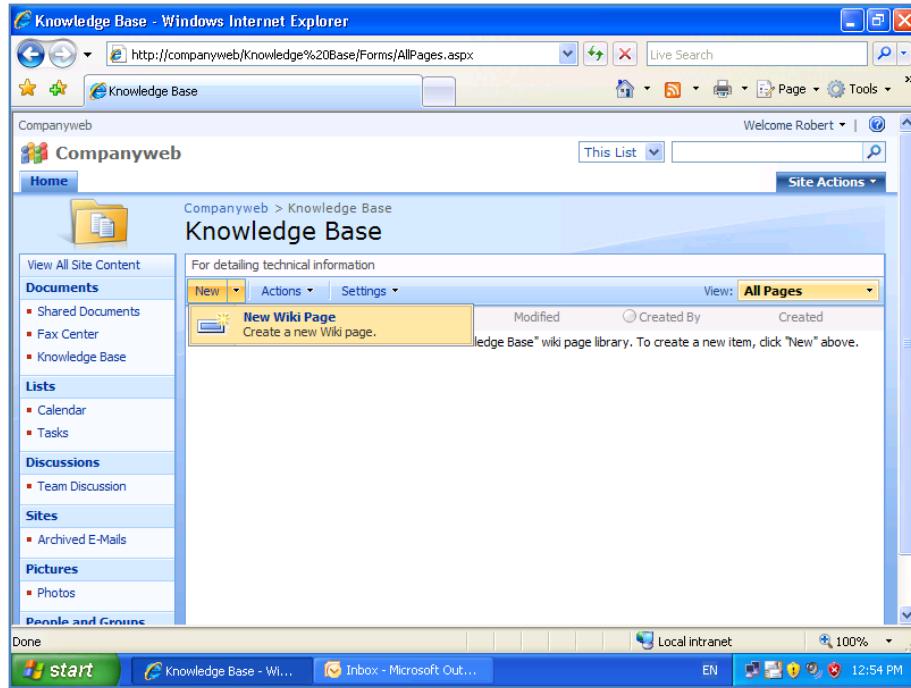
## Chapter 16 – Tutorials



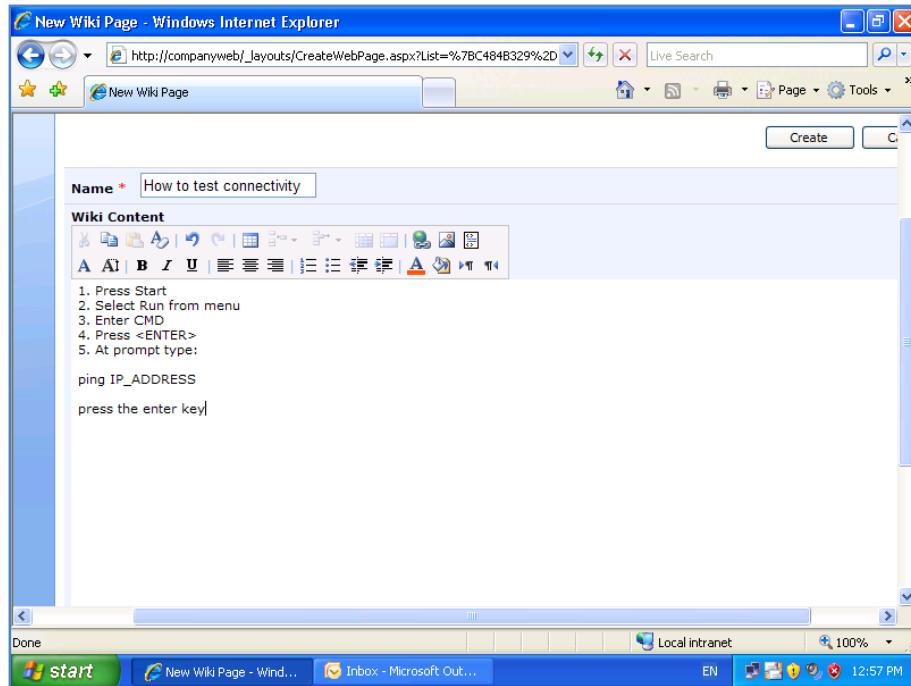
To delete these default documents select the item option menu from the arrow at the right of the *Name* field. Then select **Delete** from the menu that appears.

Once you have removed the item *Home* from the wiki when you now access that wiki in future you will see a list of all the items in the wiki much like when you view a Document Library. However, if you wish your wiki to display an opening page simply create a new item and call it *Home*. Now, when you select the wiki you will see the contents of the item called *Home* displayed. In summary, if you create a wiki item called *Home* it will always display when anyone visits the wiki. Removing the *Home* item will instead display a list of all the items in the wiki.

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Once these default documents have been deleted select the **New** item from the WSS v3 wiki menu to create a new item.

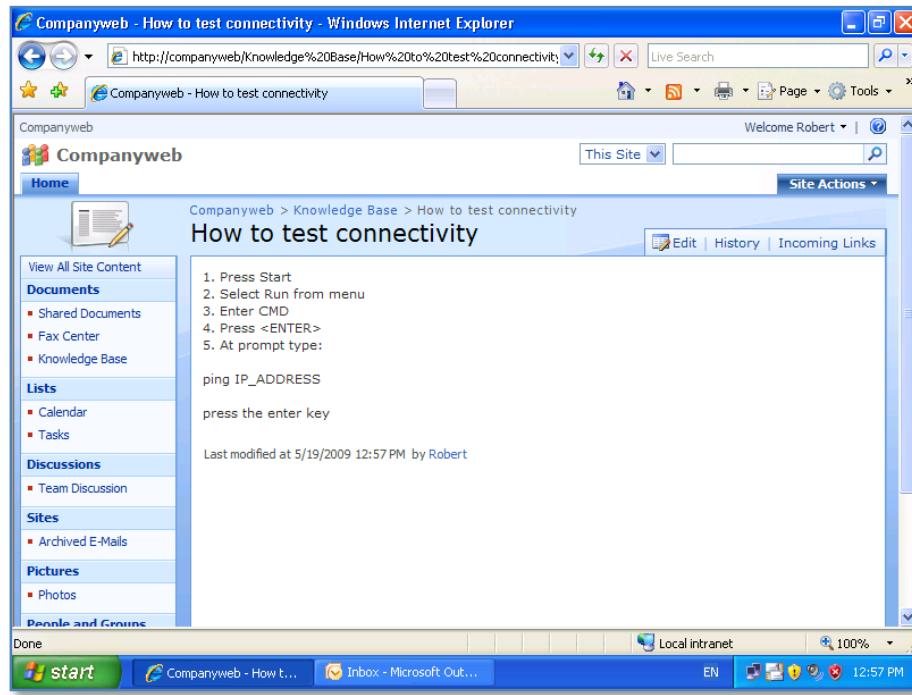


Give the item a title. The title has a few restrictions and can't include some special characters like ./#)( etc.

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In the *Wiki Content* area you can now enter the information required. You can customize the text in this area using the menu bar that appears at the top of the box if required.

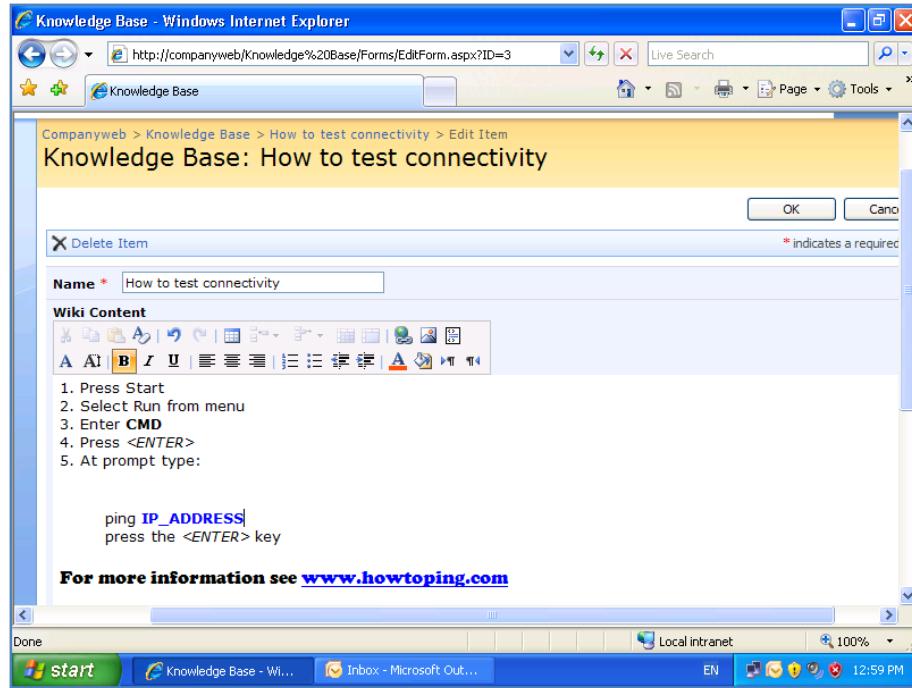
When complete press the **Create** button.



You should now see the information you entered displayed in the article.

Press the **Edit** button in the upper right to make changes to this item.

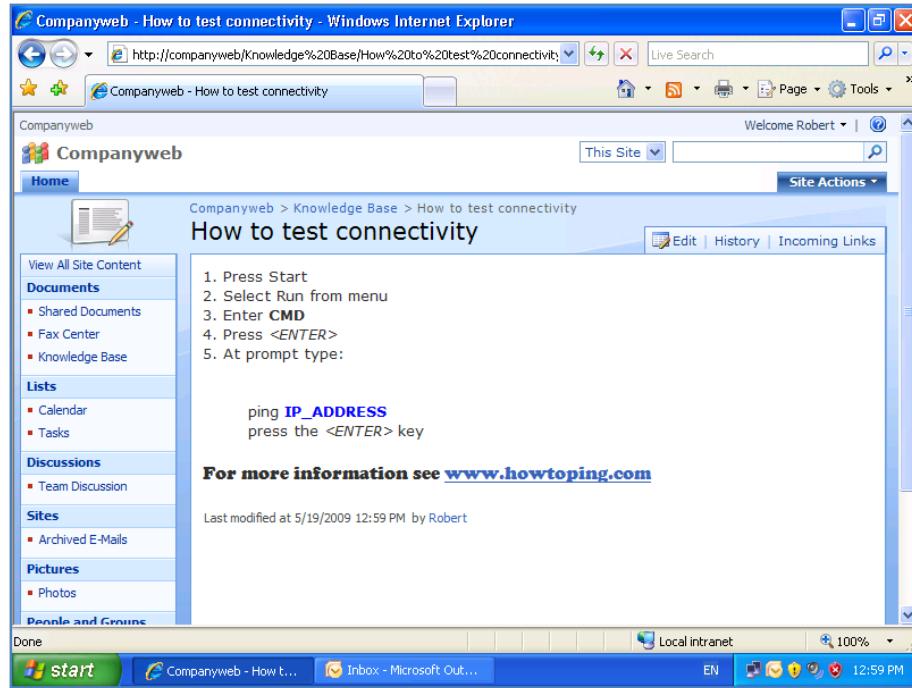
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As you can see from the above screen shot, you are able to easily customize the information displayed in the item at any time. This may include changing the text colour, making the text bold or even changing the font. You will also note that any internet address will automatically be hyperlinked.

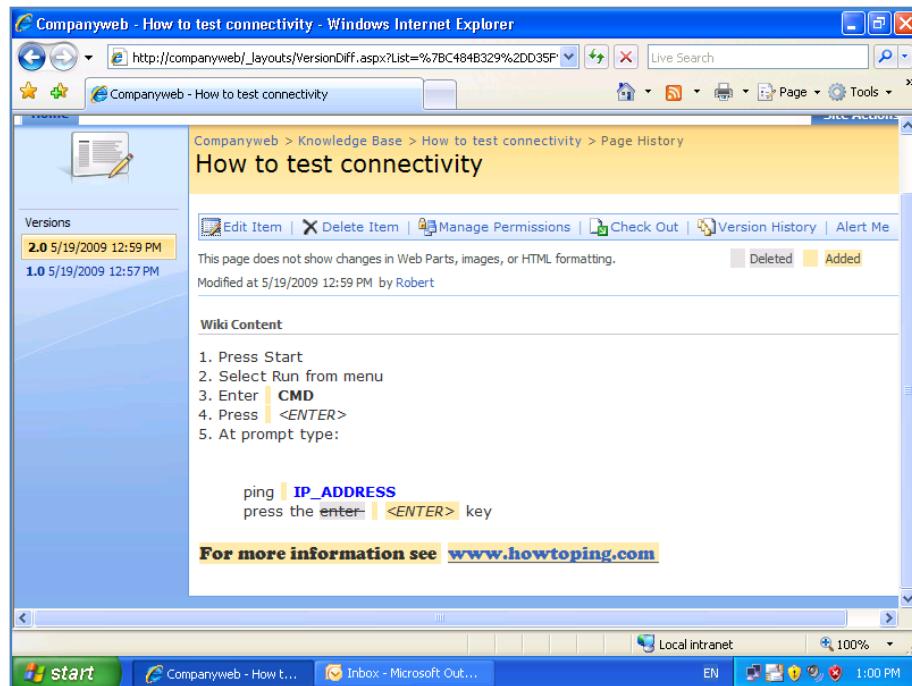
When you have completed making additional changes to the item press the **OK** button to continue.

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Once again, you should see the item displayed with all the changes you just made.

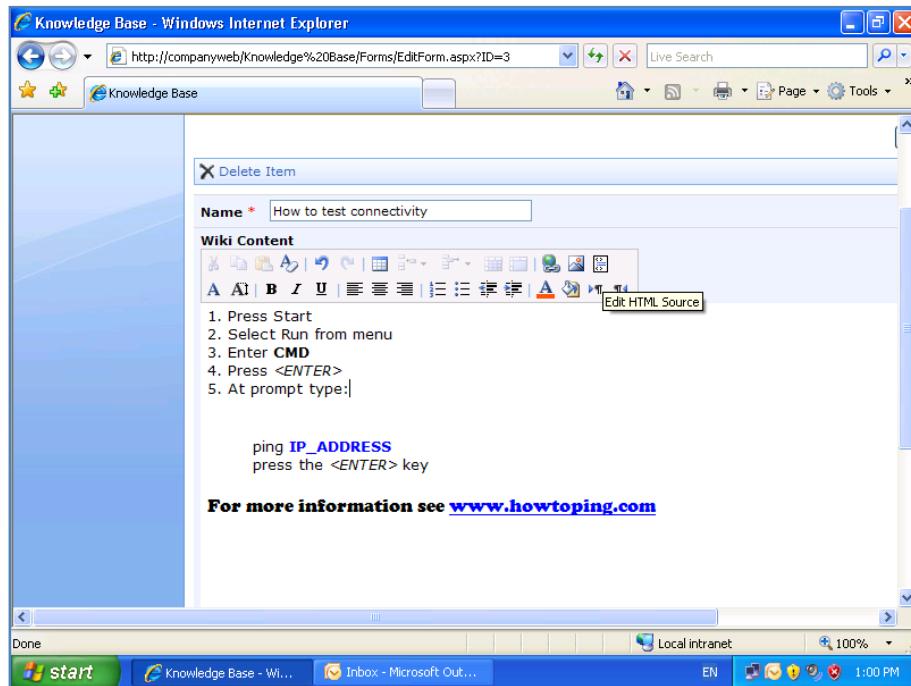
One of the benefits of the WSS v3 wiki is that it automatically tracks changes. To view these changes select the History link in the upper right hand side of the screen.



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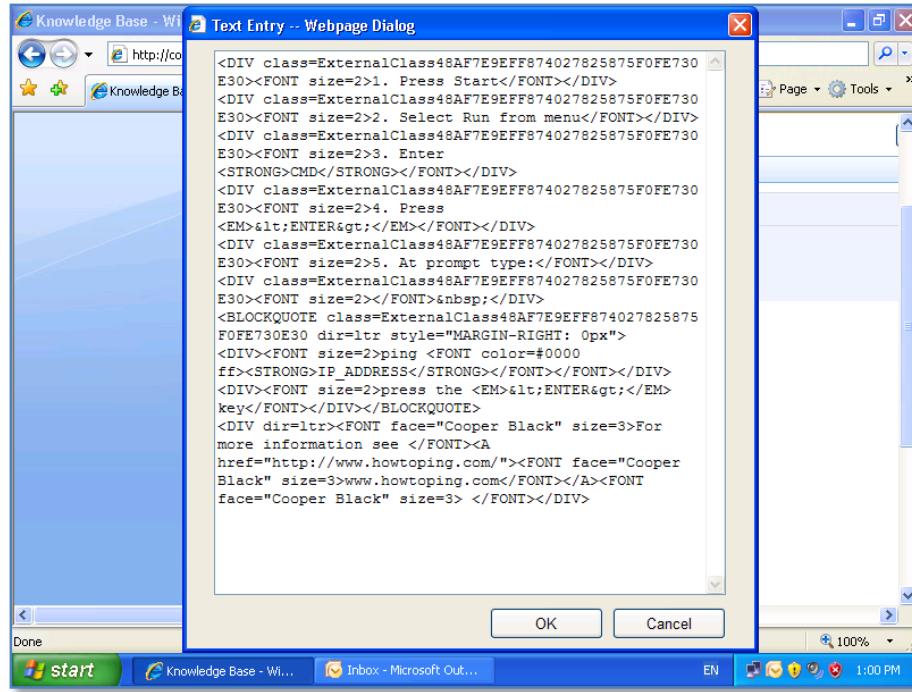
You should now see the number of versions of the document displayed on the left hand side (in this case 2.0). You will also notice that version additions are marked in beige and deletions in grey. You can also select to edit the item, delete the item, manage item permissions, check the item out, view the version history and set up alerts on this item from the menu.

When complete press the **OK** button to continue.

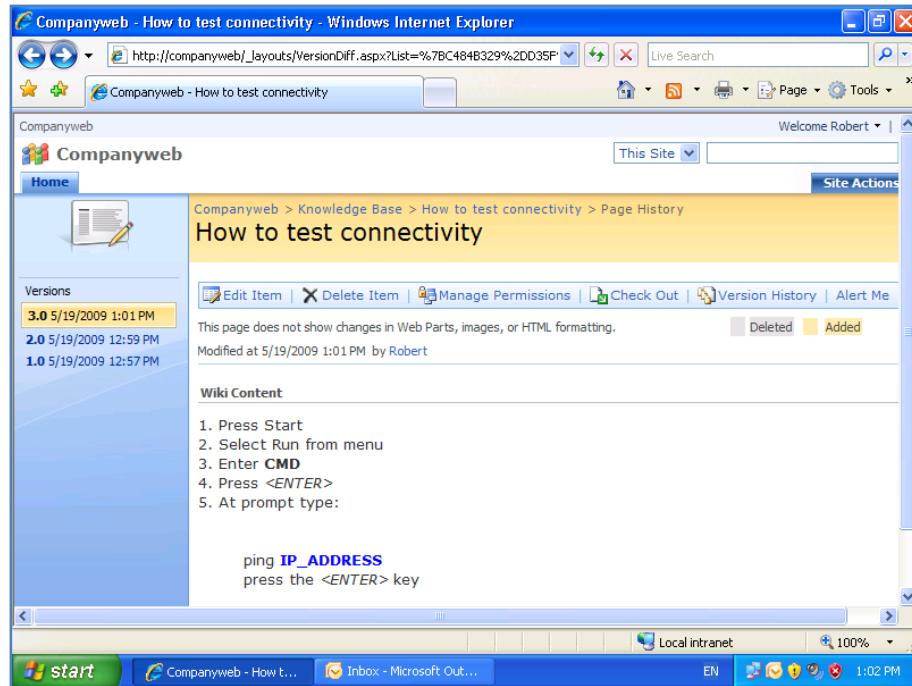


When you edit a wiki item you are able to also make changes to the base HTML. To do this select a wiki item and then select the **Edit** link. To work with the HTML directly select the **Edit HTML Source** button (last one on top row) once you are editing the item.

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A separate window will now appear showing you the HTML code for that item. Simply make the required changes and press the **OK** button to continue.



If you now return to the *History* link for that item, you will see that, in this case, three separate versions of this item have been recorded.

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Select the **Version History** item on the menu bar that appears across the top of the item.

The screenshot shows a Microsoft Internet Explorer window displaying the 'Version History' page for a document titled 'How to test connectivity.aspx'. The page header includes the URL 'http://companyweb/\_layouts/Versions.aspx?list=%7BC494B329%2DD35F%2'. The main content area shows two versions of the document:

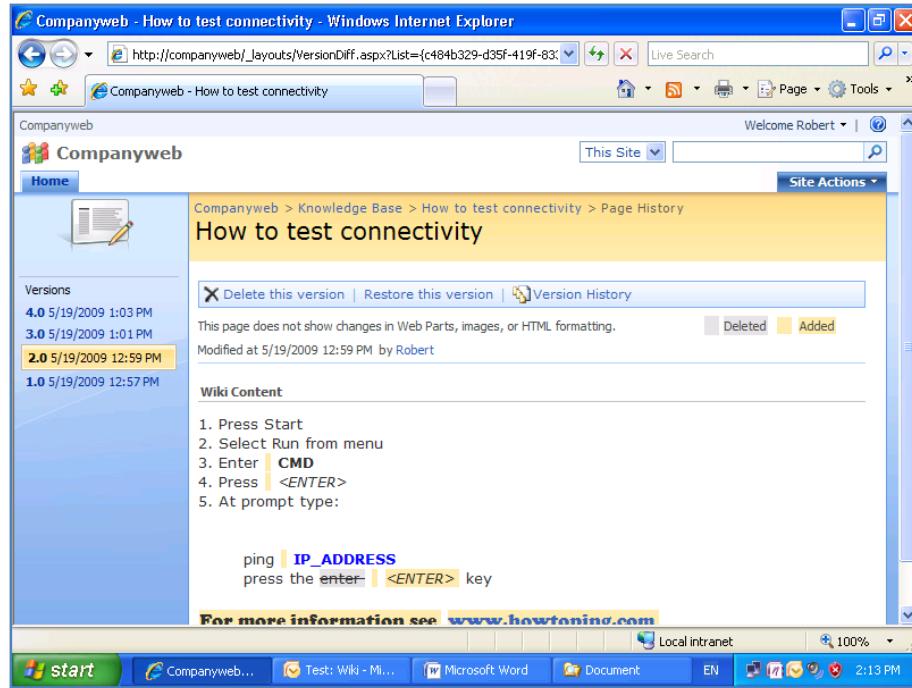
No.	Modified	Modified By	Size	Comments
3.0	5/19/2009 1:01 PM	Robert	3.2 KB	Wiki Content 1. Press Start 2. Select Run from menu 3. Enter <b>CMD</b> 4. Press <ENTER> 5. At prompt type:  ping IP_ADDRESS press the <ENTER> key
2.0	5/19/2009 12:59 PM	Robert	3.2 KB	Wiki Content 1. Press Start

A 'Delete All Versions' button is located above the table. Below the table, a link reads 'For more information see [www.howtoping.com](http://www.howtoping.com)'. The browser's status bar shows the path 'Local intranet' and the time '1:02 PM'.

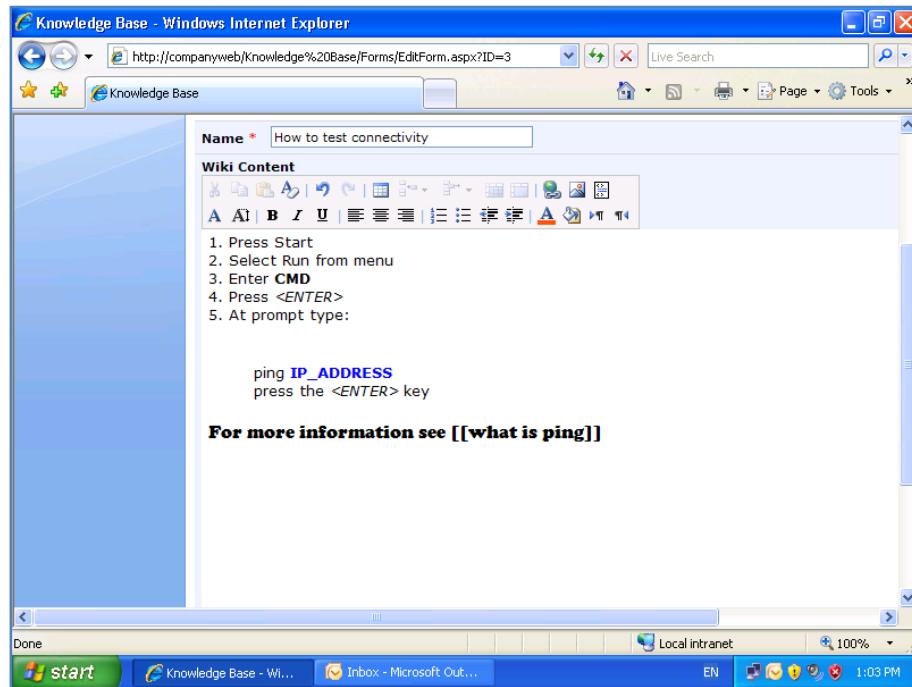
You can now browse through the exact information for each separate version of the item in a single screen.

You also have the option to *Delete All Versions* here which will save disk space.

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If you return to the page history again and select a previous version on the left hand side (in this case version 2.0) it will be displayed. You now have the option, via the menu bar to *Restore this version* of the item. This will delete the current version and overwrite it with the version that you are viewing. This allows you to recover from any mistakes or errors in that item.

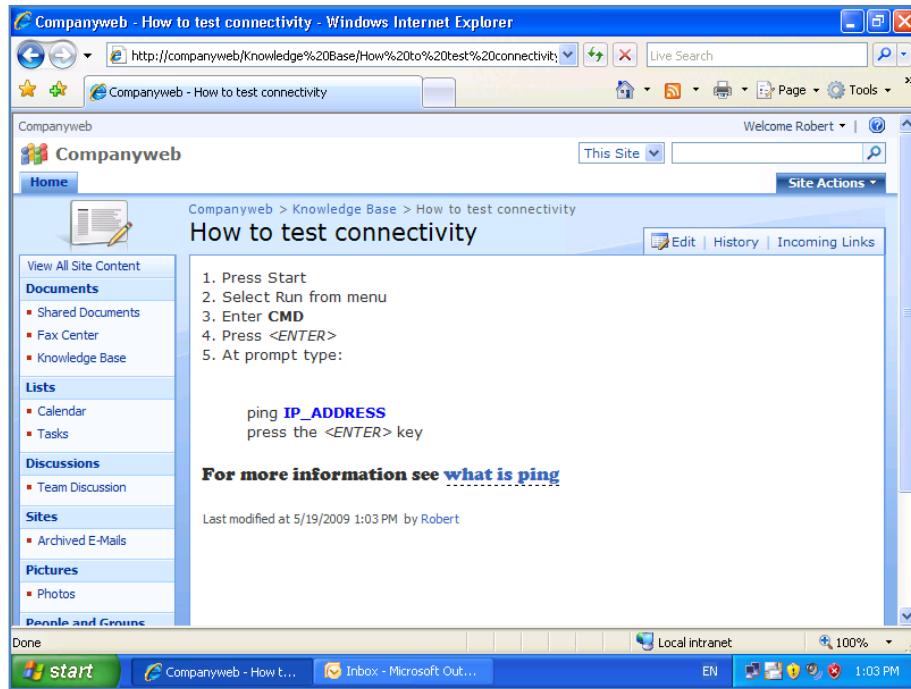


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When you create a wiki item you can also easily create a link to another wiki item. This is recommended practice since it is much better to have a large amount of smaller documents about specific topics than a few very large ones.

To create a link to a new wiki item, even if the page doesn't already exist, simply place the text inside double square brackets (i.e. [[ ]]).

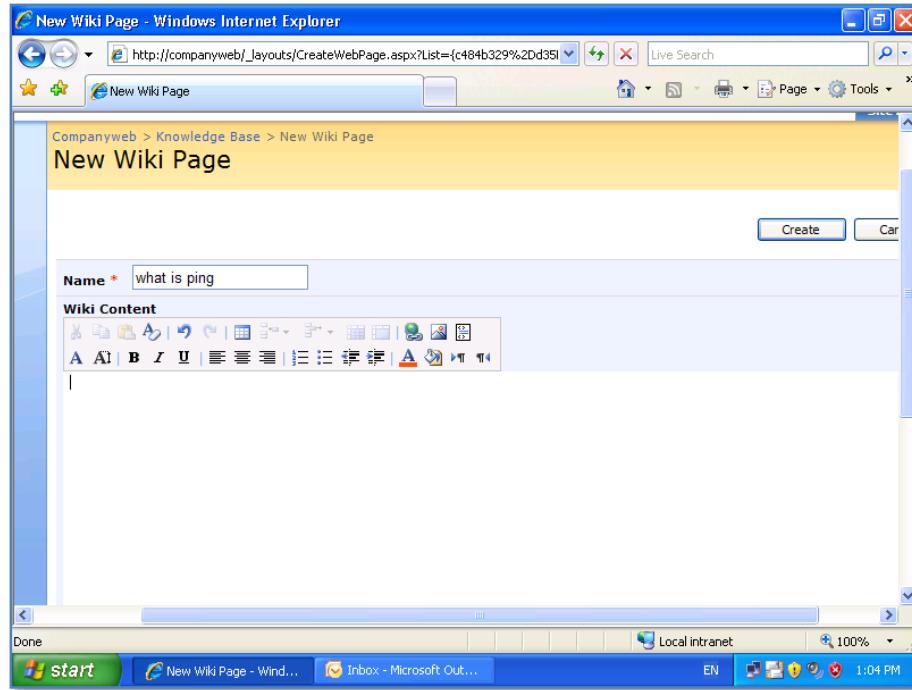
As before, when editing is complete simply press the **OK** button.



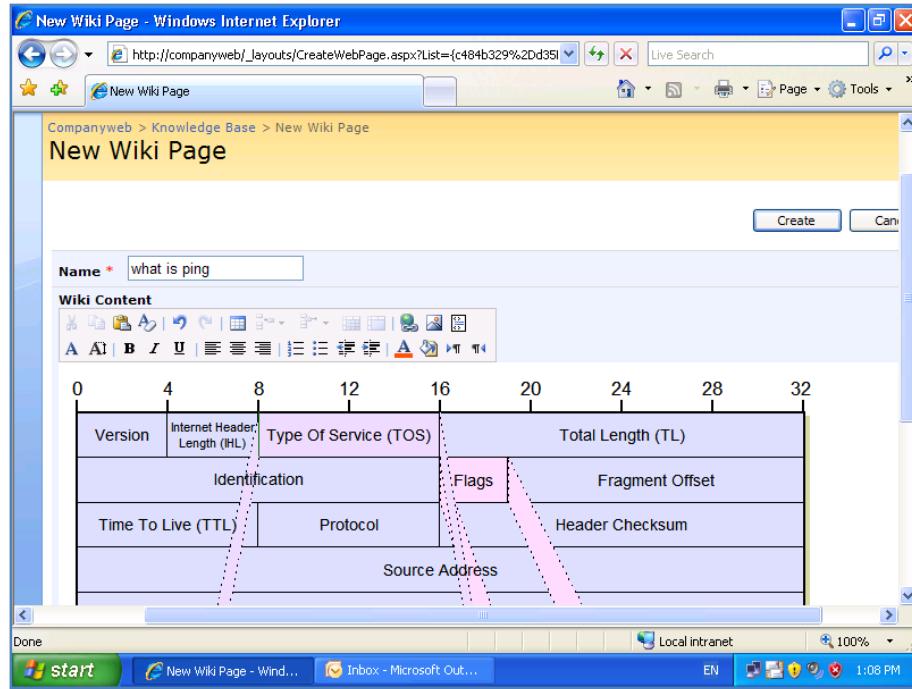
When you now view the document you will see that the text you enclosed in double brackets has a broken line underneath it and is in fact hyperlinked.

If you now click on the hyperlinked words you will be automatically taken to that item in the wiki.

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If the item link which you just selected does not already exist in the WSS v3 wiki then you will be automatically placed in the edit mode for this item so it can be created. You also note that the *Name* field has already been completed since this is what is linked.



To complete the process simply add the required information to the item and press the **OK** button.

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By allowing you to create links before you actually create the wiki items WSS v3 speeds up the process of collaboration.

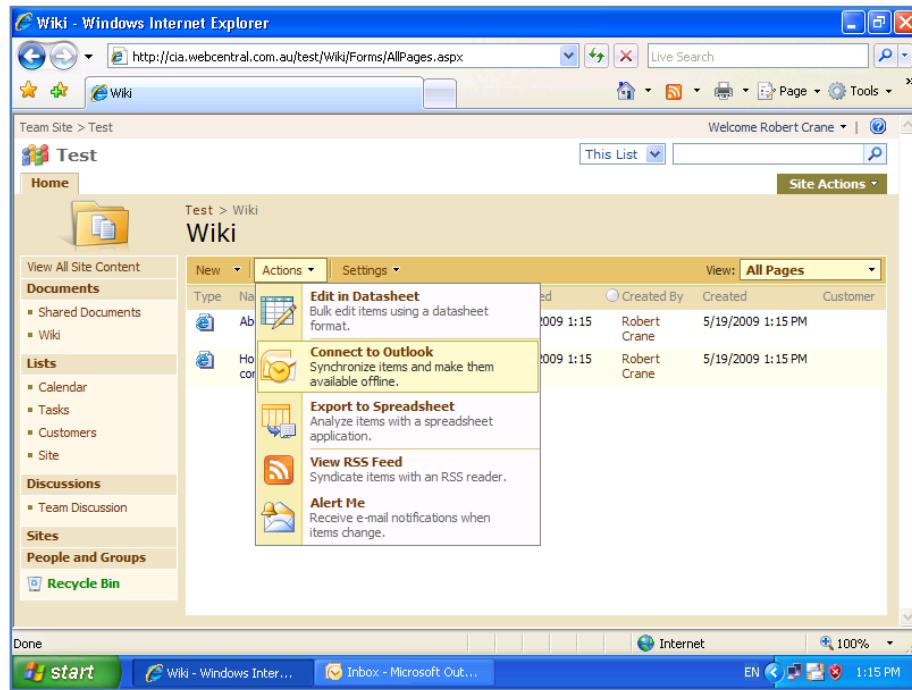
Type	Name	Modified By	Modified	Created By	Created
Document	How to test connectivity	Robert	5/19/2009 1:03 PM	Robert	5/19/2009 12:57 PM
Document	what is ping	Robert	5/19/2009 1:08 PM	Robert	5/19/2009 1:08 PM

Returning to the wiki library you should see the new document you just created.

- All Pages
- By Author
- By Editor
- Created By Me
- Recent Changes
- Modify this View
- Create View

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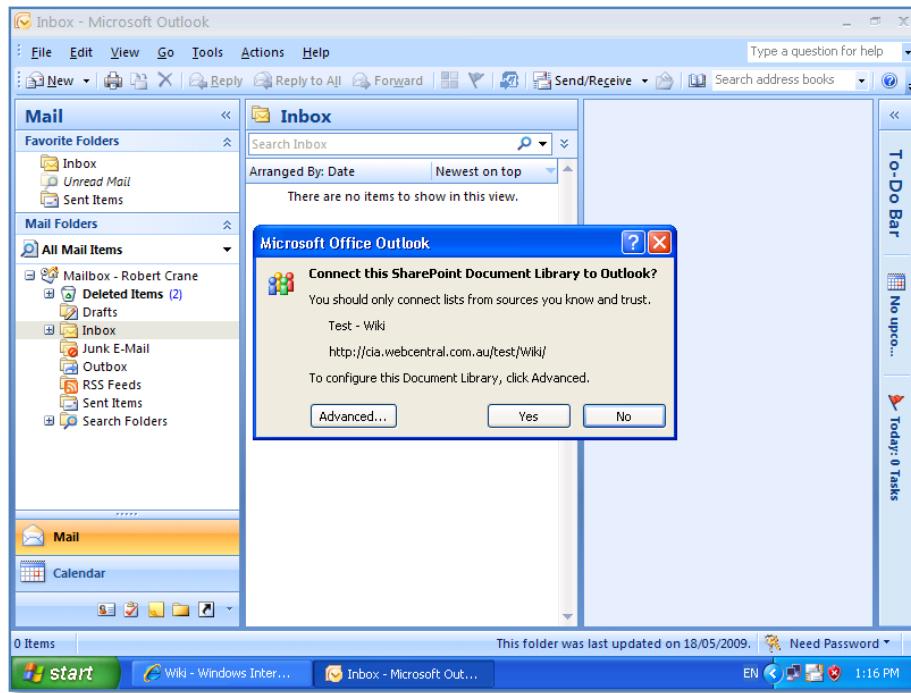
Using the *View* option on the right hand side you can change the view of the wiki to only see certain documents that meet that criteria. You can also create your own views if desired.



The screenshot shows a Microsoft SharePoint site titled "Test". The left navigation bar includes links for "View All Site Content", "Documents" (with "Shared Documents" and "Wiki" sub-options), "Lists" (with "Calendar", "Tasks", "Customers", and "Site" sub-options), "Discussions" (with "Team Discussion" sub-option), "Sites", "People and Groups", and "Recycle Bin". The main content area displays a list of pages with columns for Type, Name, Ed, Created By, Created, and Customer. A context menu is open over the first page, listing options: "Edit in Datasheet", "Connect to Outlook", "Export to Spreadsheet", "View RSS Feed", and "Alert Me". The status bar at the bottom shows the taskbar with "Wiki - Windows Internet Explorer" and "Inbox - Microsoft Out..." open, along with system icons for battery, signal, and time (1:15 PM).

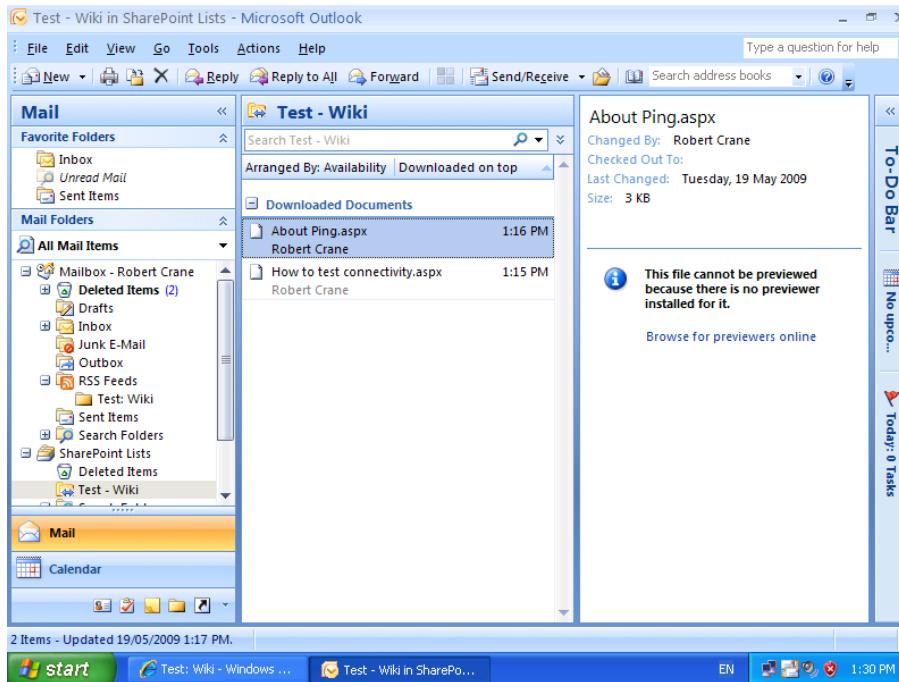
The most logical method for taking wiki information offline is to connect it with Outlook 2007. To do this, navigate to the wiki library and select **Actions** from the menu. From the menu that appears select **Connect to Outlook**.

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If Outlook is not already running it will be launched. You will then be prompted as to whether you wish to connect to this SharePoint Document library.

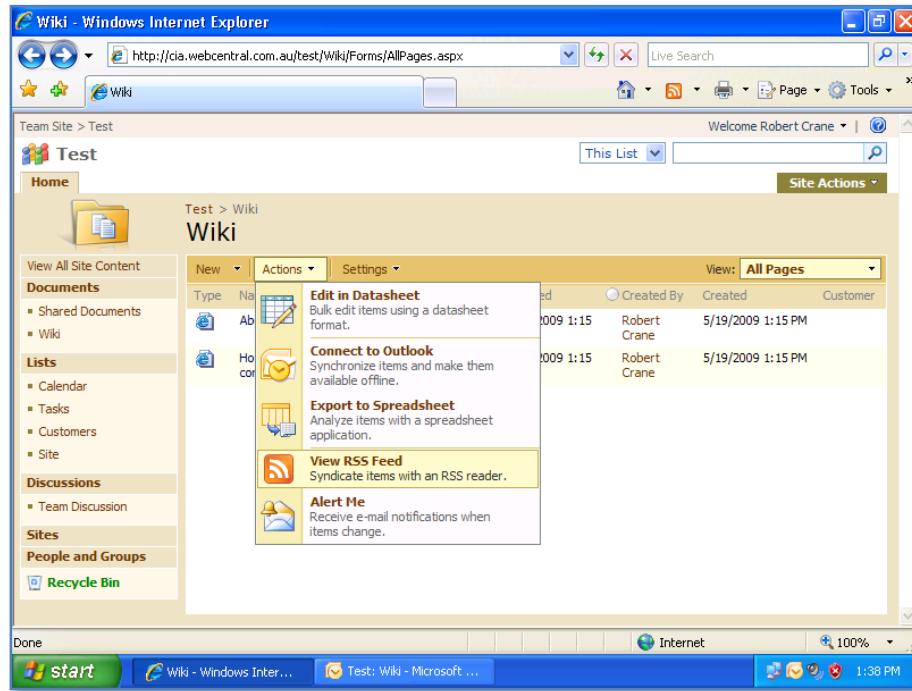
Select **Yes** to accept the connection.



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Once the connection has been made you will find the Wiki information under *SharePoint Lists*. However, when you select the list (in this case *Test – Wiki*) and an item (in this case about *ping.aspx*) you will see that you receive no preview. This is because there is currently no viewer for the wiki items (.aspx pages).

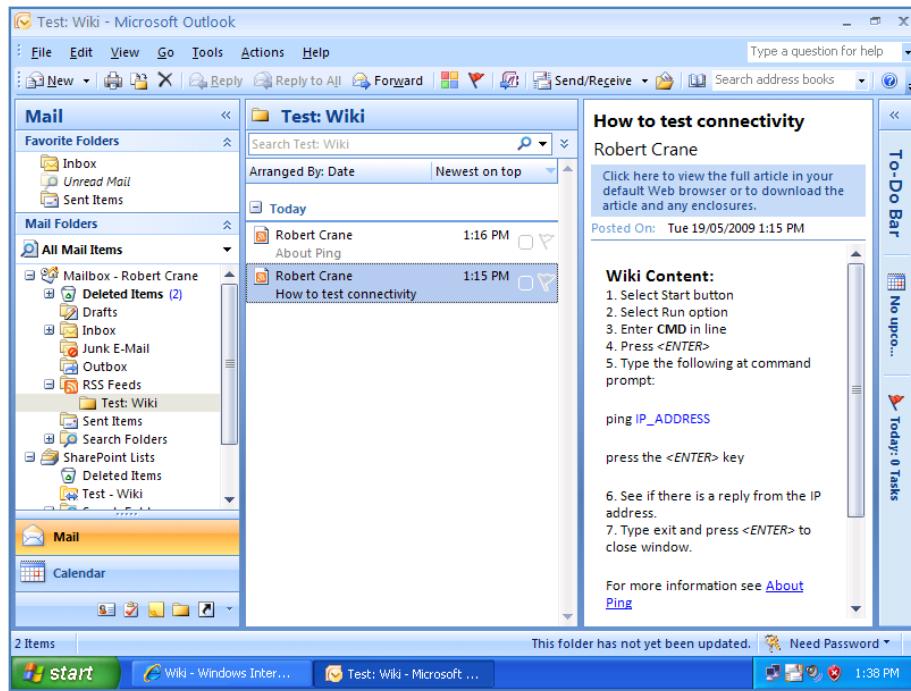
This limitation is a major drawback of connecting wikis to Outlook.



An alternate connection method is to use an RSS feed.

Return to the WSS v3 wiki library and select **Actions** from the menu and then **View RSS Feed** from the menu that appears.

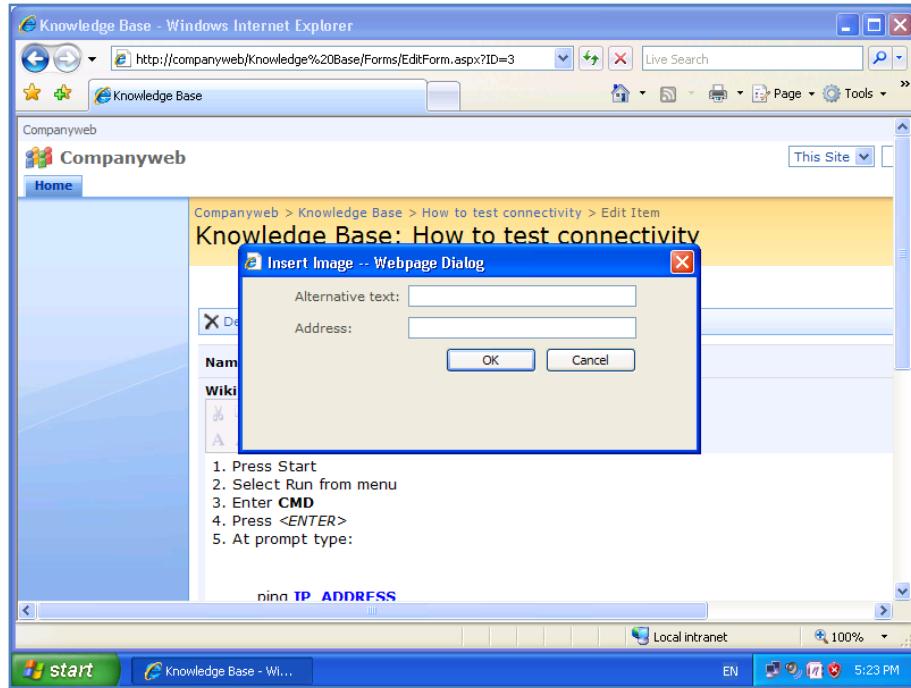
## Chapter 16 – Tutorials



You can then copy and paste this RSS feed into Outlook (which is also an RSS reader).

This now allows you to view each wiki item as shown above.

Another major issue with WSS v3 wikis is that you can't simply cut and paste an image into a wiki item. An image will only appear in a WSS v3 wiki if it referenced via a link. Thus, images that already appear on the Internet can be linked as well as images that appear in the WSS v3 Picture Library can be easily added but simply cutting and pasting from another document won't work.



Thus, if you wish to add custom images to your wiki you need to ensure that they already exist in the WSS v3 Picture Library before they are linked to the wiki item using the insert image button. The above screen shot shows what happens when you press the *Insert Image* button. You are requested to enter a link to the image you wish to display, which you need to know beforehand.

Despite some limitation WSS v3 wiki can be utilized to great effect in most businesses.

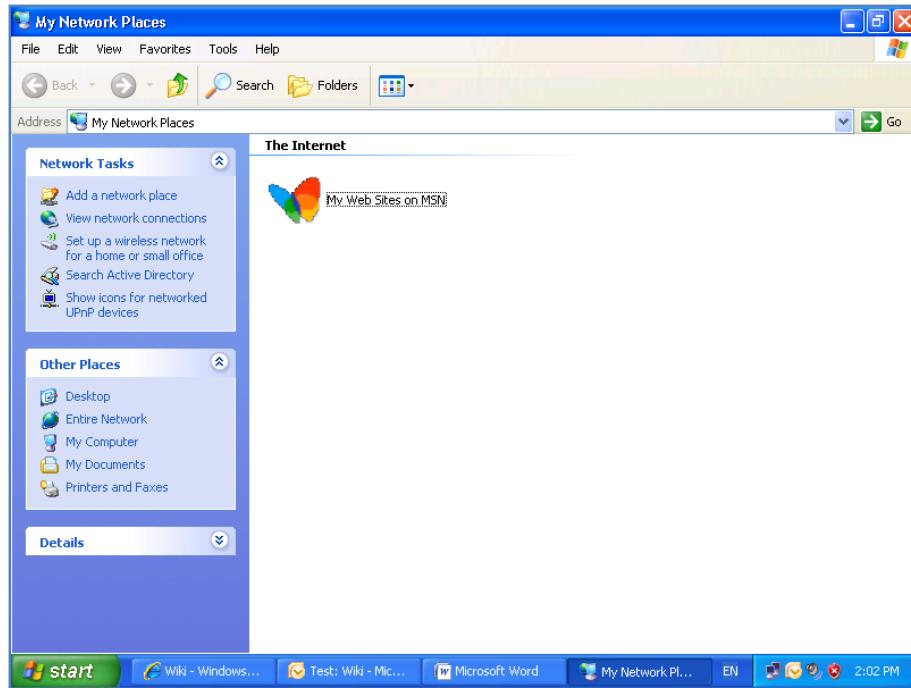
## 16.8 Mapping a Network Place

This tutorial will cover how to create a standard Windows network place that points to a WSS v3 Document Library. You will need access to a local workstation and need to know the address of the WSS v3 Document Library you wish to directly map to.

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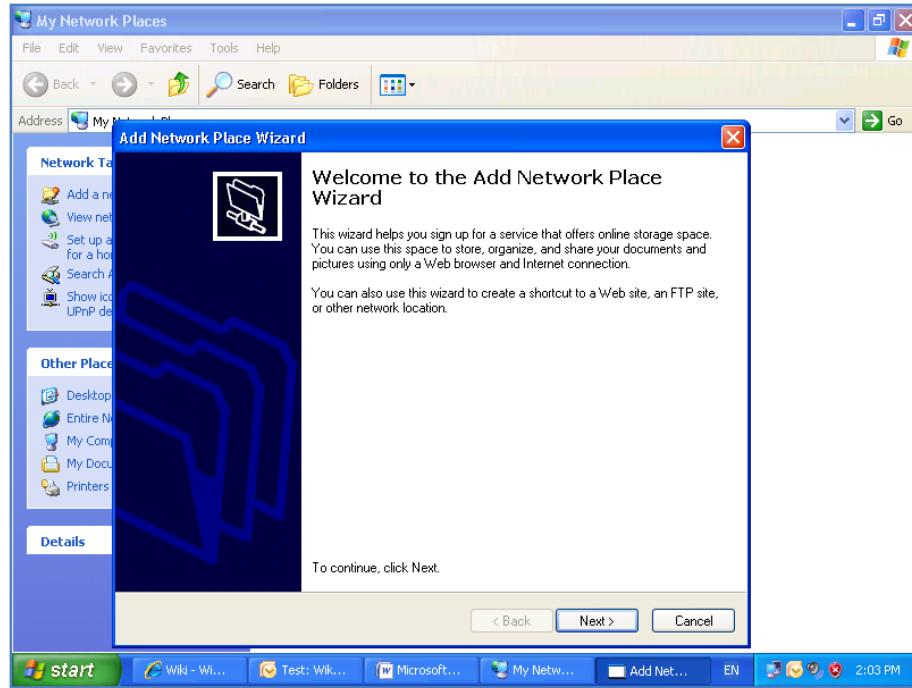


On a local workstation select the option to view Network Places after logging in as the required user.

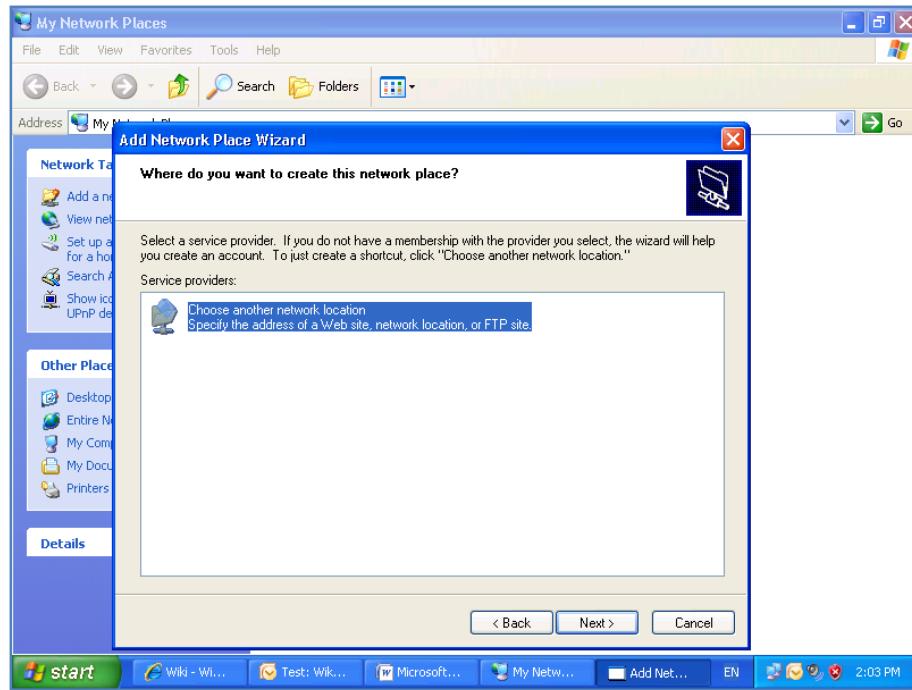


Select the option to **Add a Network Place**.

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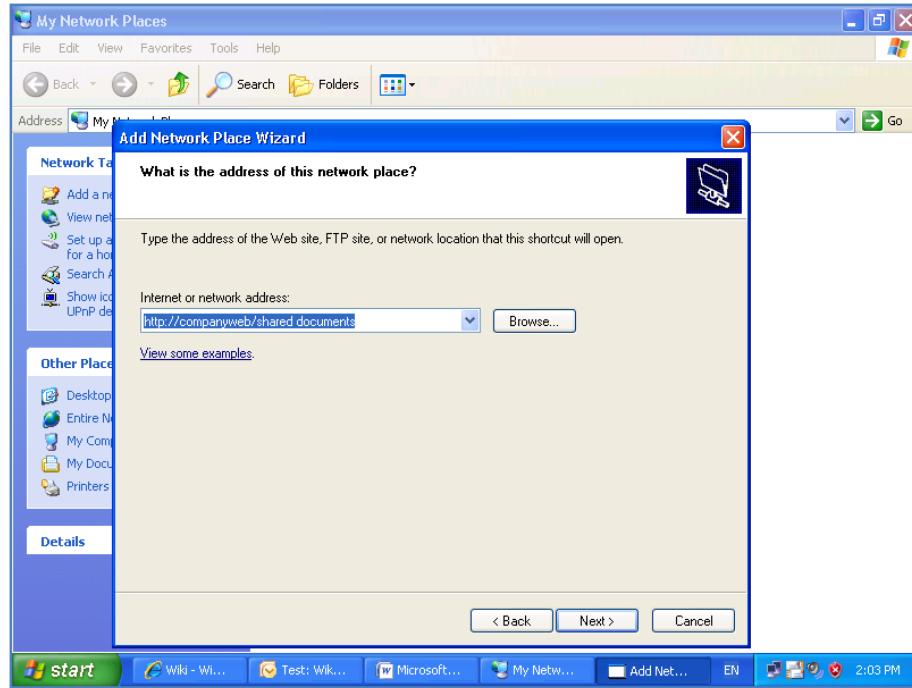


In this case click **Next** to continue with the wizard.



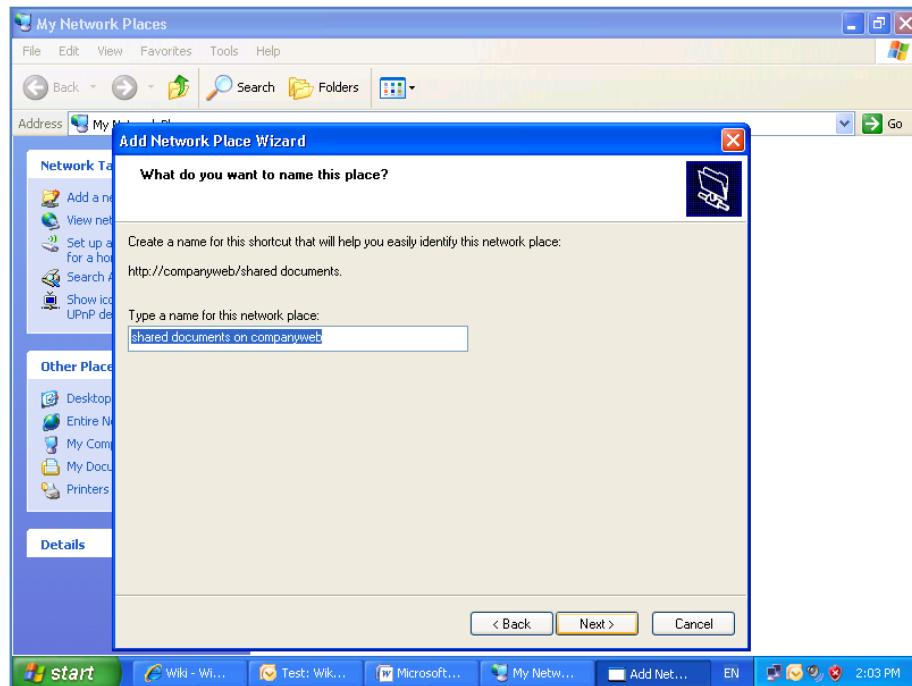
Click **Next** again to continue.

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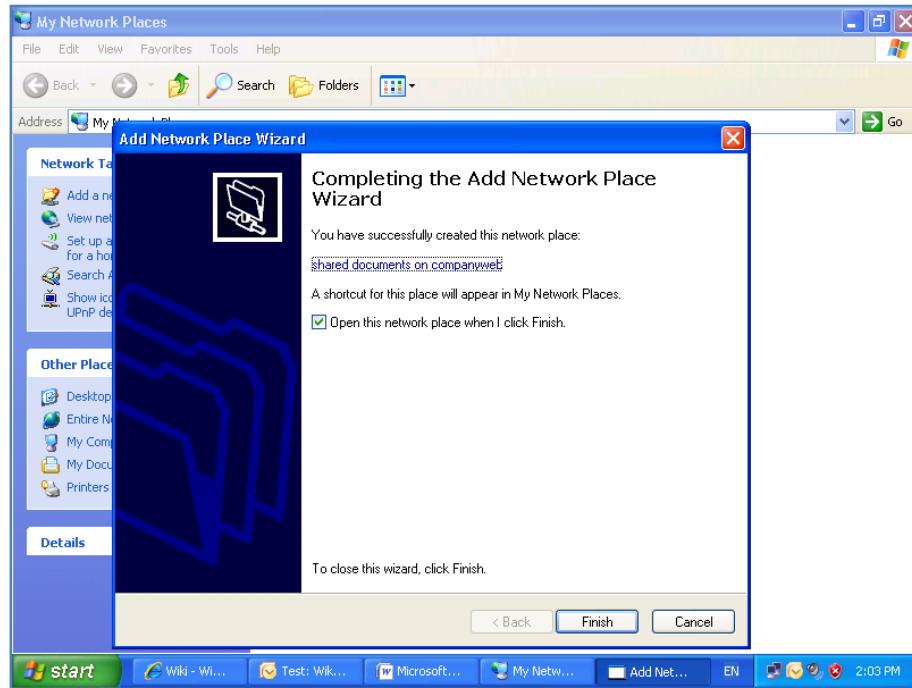
Enter the address of the WSS v3 Document Library, in this case  
*http://companyweb/shared documents.*

Press **Next** to continue.



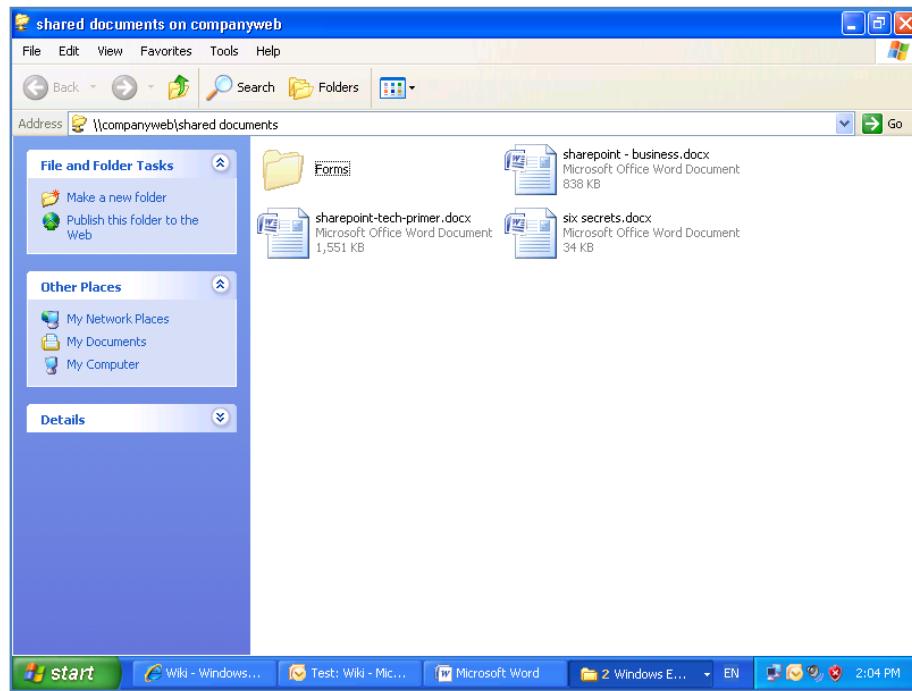
## Chapter 16 – Tutorials

Provide a descriptive name for the new network place, in this case ‘shared documents on companyweb’.



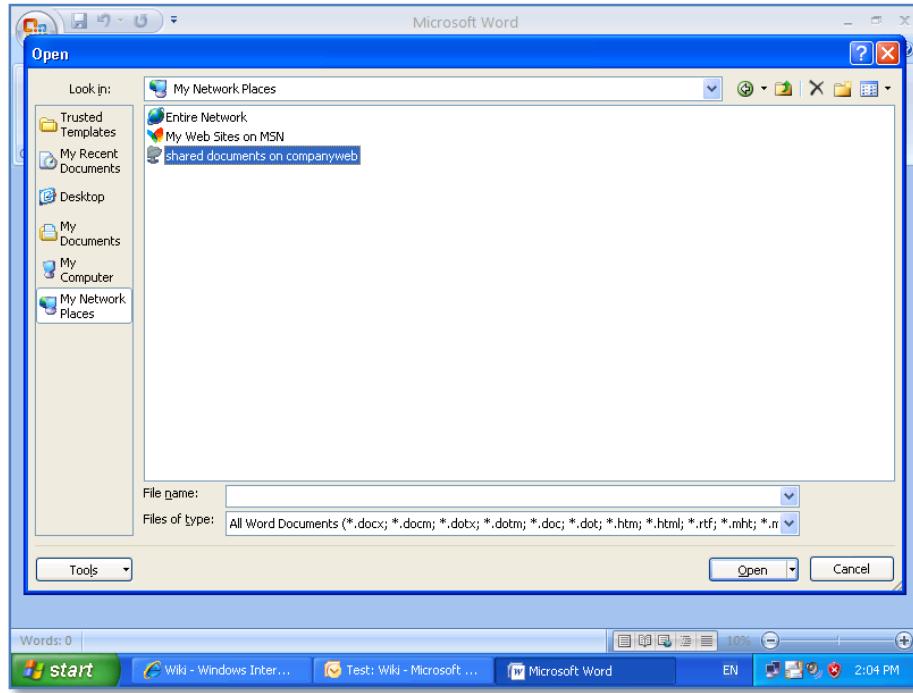
Leave the *Open this network place when I click Finish* checked.

Press the **Finish** button to complete the process.

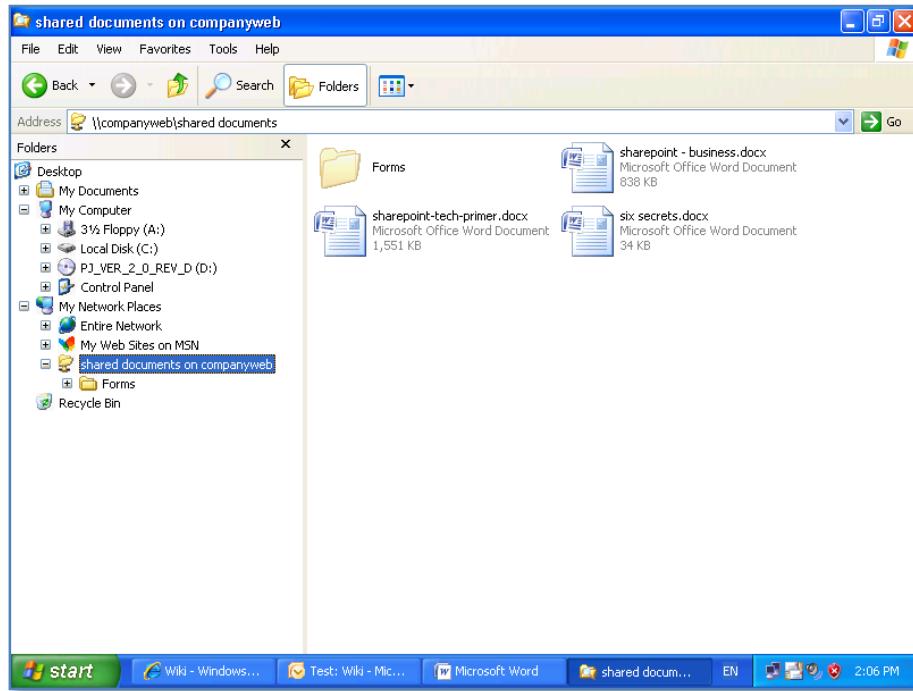


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The network place should now be displayed and it should display the files in the WSS v3 Document Library.



Now, when you use any application you can navigate to the network place you just created that points to the SharePoint Document Library just like any other file location.

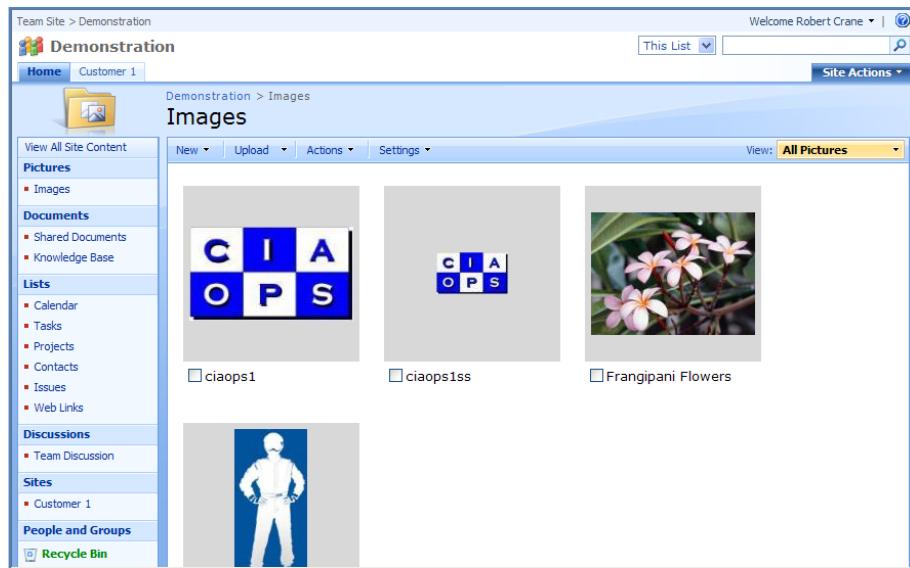


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If you use Windows Explorer you should also be able to browse to this location under *My Network Places*. The ability to create and edit documents here is determined by the user rights within WSS v3.

## 16.9 Working with Picture Libraries

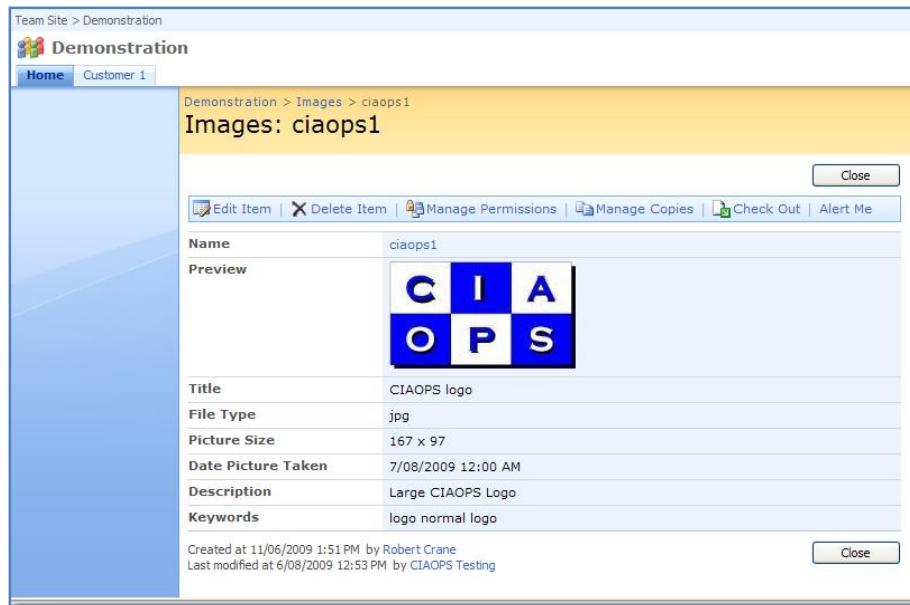
*Picture libraries* in WSS v3 work in a number of different ways from regular *Document Libraries*. The reason for this is that they are designed specifically for operation with images.



In most cases you access your *Picture Library* by clicking on the name of the library as it appears in the left hand side *Quick Start* menu (in this case *Images*).

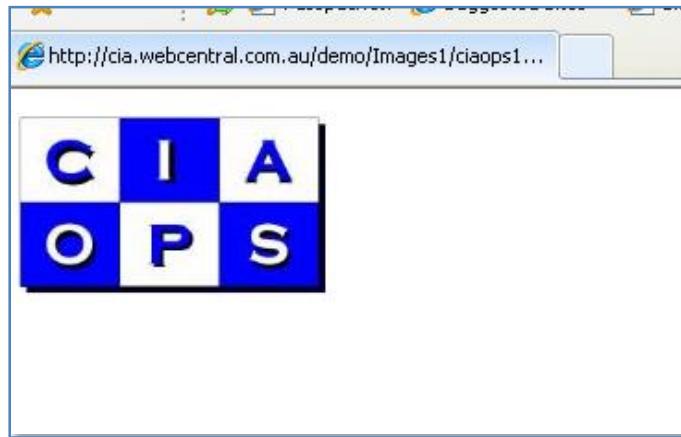
When clicked you should now see a thumbnail preview of all the images in the library. If you click on any of the images you will be taken to a more detailed view.

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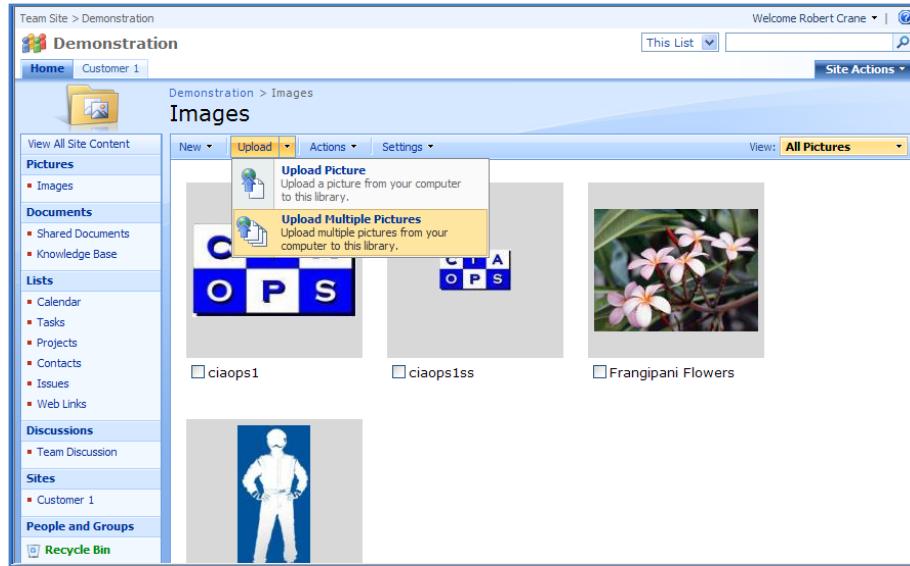
Here you can perform a number of tasks, including editing the item, managing permissions and so on.

If you now again click on the image you will be the full image only in your browser like so:



[Uploading multiple images to a Picture Library](#)

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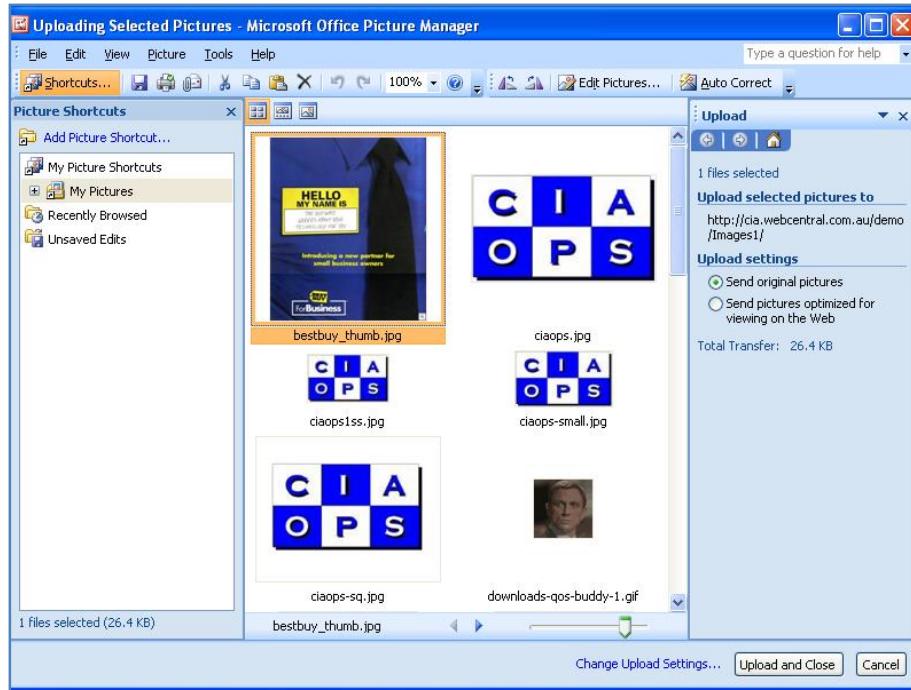
You can upload images into a *Picture Library* in much the same way that you can with *Document Libraries* however there are number of differences when you wish to upload multiple documents to the *Picture Library*.

The first step in the process of uploading multiple documents is to select **Upload Multiple Pictures** from the *Upload* menu item in the main view of the *Picture Library*. It is important to note that the *Picture Library* is currently using the *All Pictures* view.

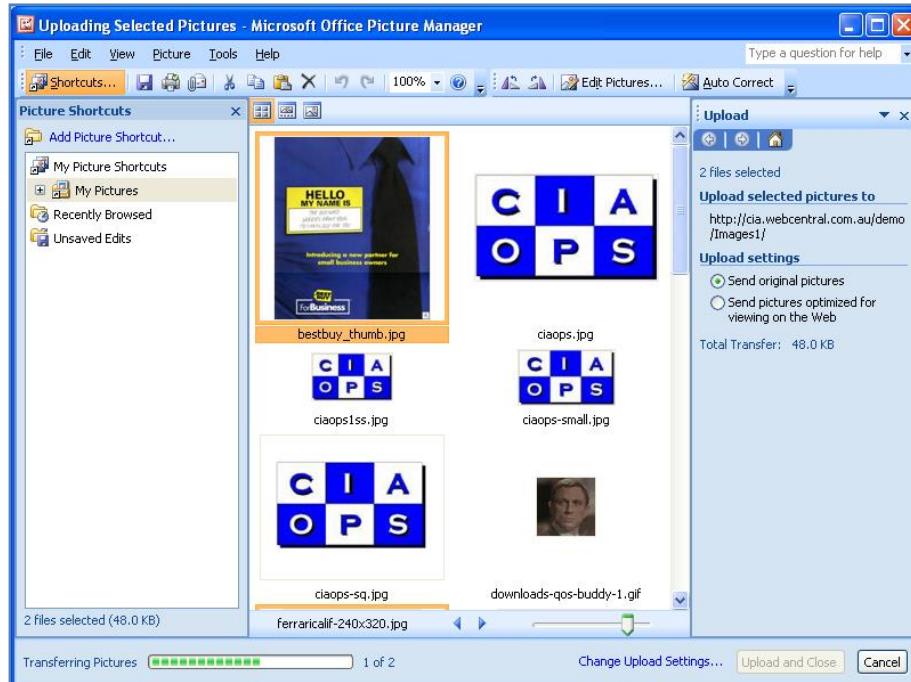


You should now see a page like that shown above. This indicates that the actual uploading process is going to be handled by another program.

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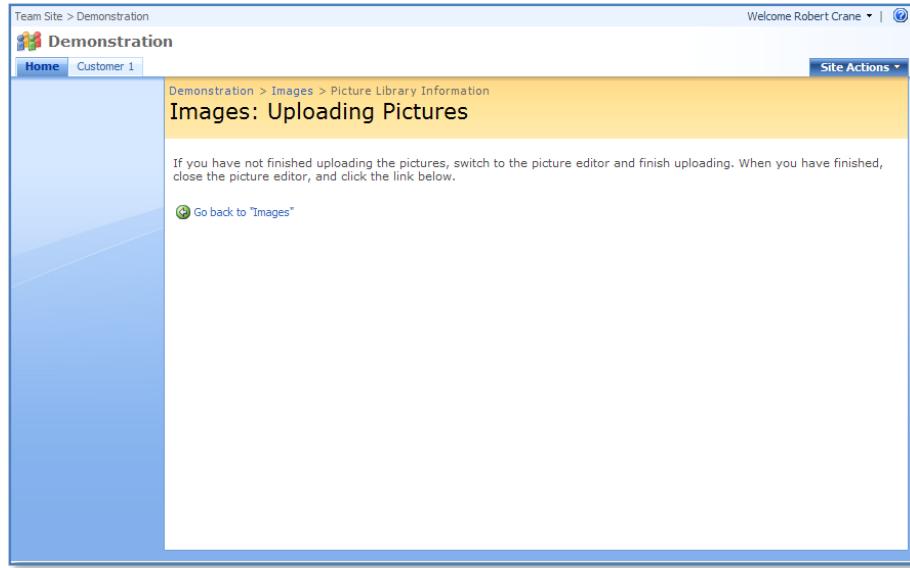


That program is the Microsoft Office Picture Manager that comes as part of Microsoft Office. Thus, you simply use this application to locate the images you wish to upload and when complete press the **Upload and Close** button in the lower right of the screen.

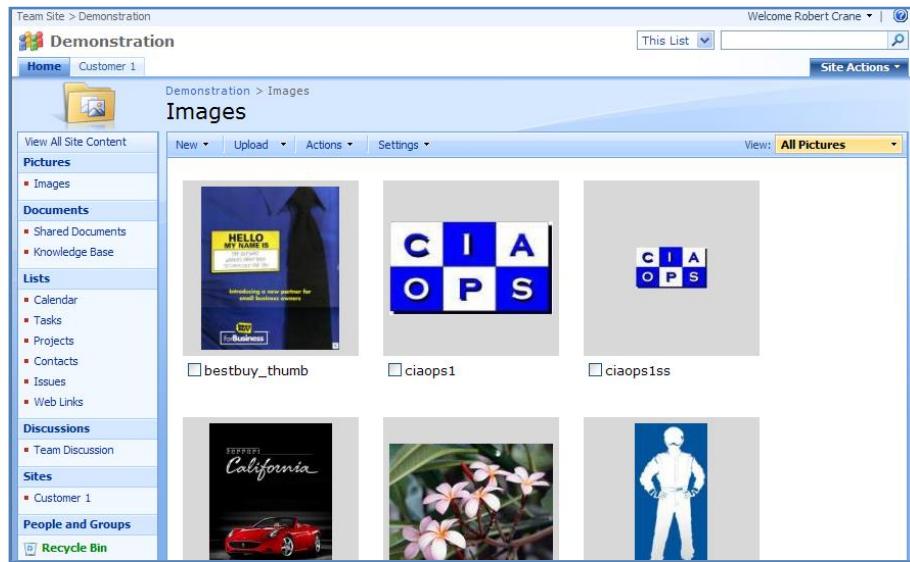


Once you press this button you will see in the lower left of the screen a progress bar indicating the transfer of the images you have selected.

# Chapter 16 – Tutorials

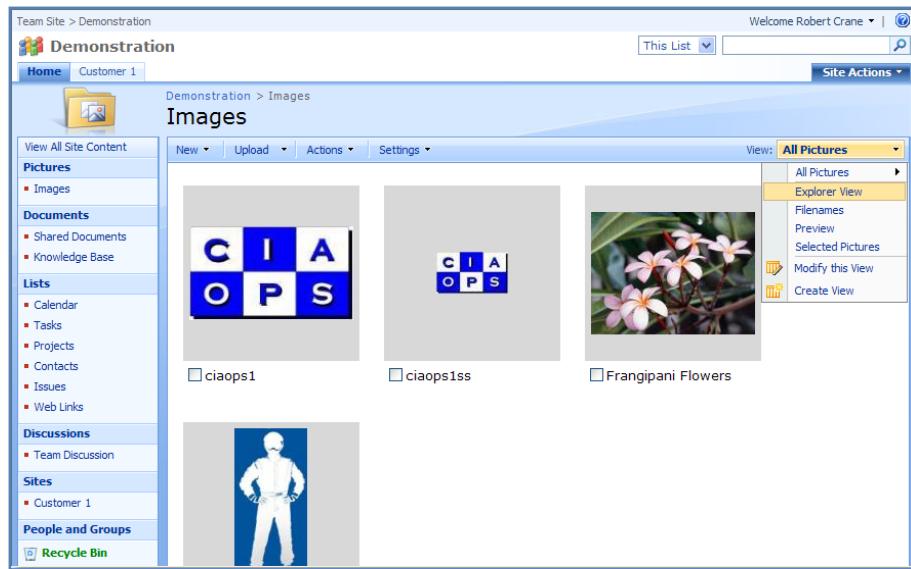


When the process is complete, the Microsoft Office Picture Manager should now close and you will be returned to the above WSS v3 page. Simply click on the link **Go Back to “Images”** to return to your *Picture library*.

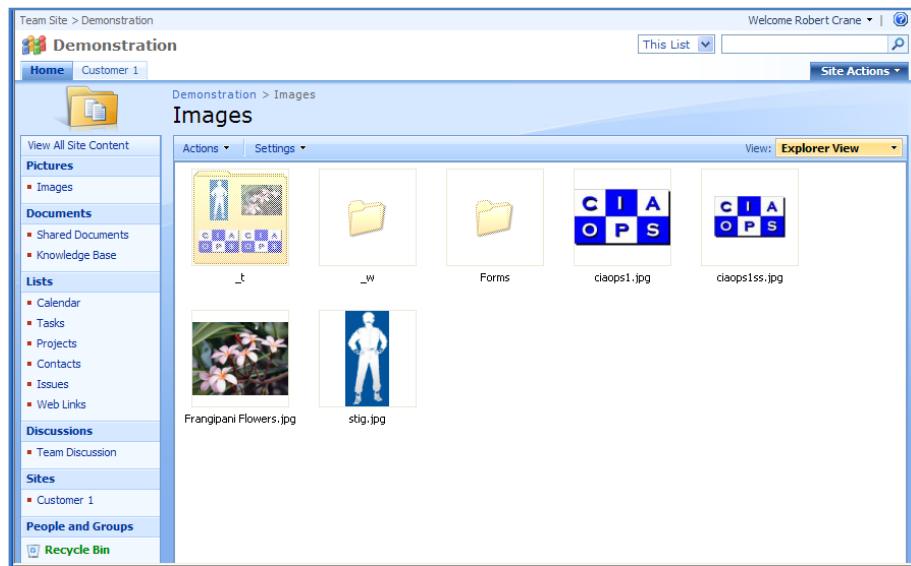


Once back at the picture library you should now see the additional images you select appear in the list.

# Chapter 16 – Tutorials

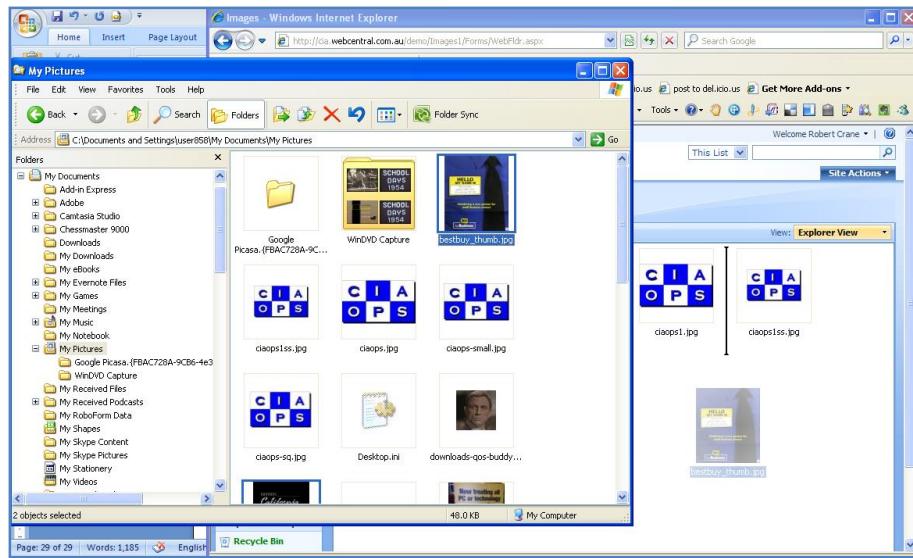


Using the Microsoft Office Picture Manager program can prove cumbersome at times. An alternate method to upload multiple documents is to firstly change the view of the *Picture Library* from the default *All Pictures* to *Explorer View*. You do this by selecting *Explorer View* from the *View* menu in the top right hand side of the *Picture Library* as shown above.

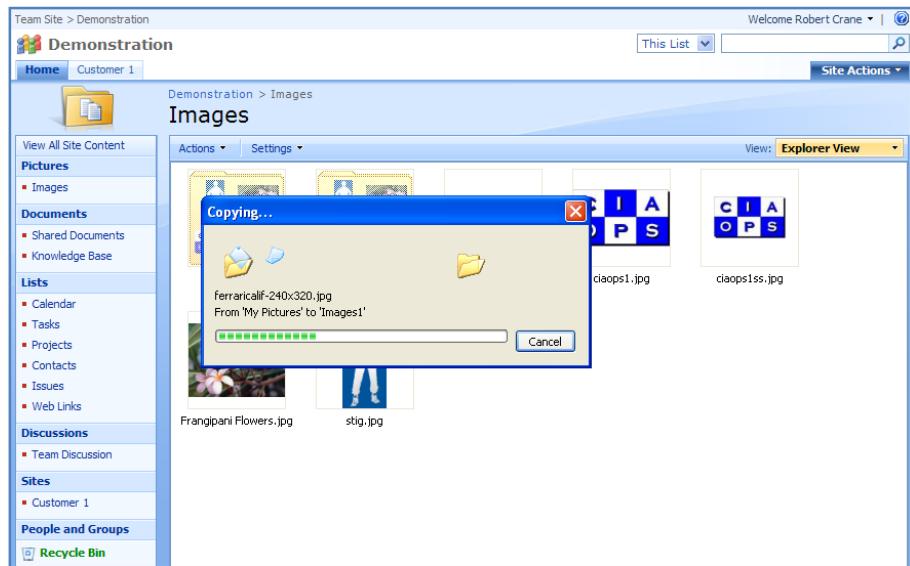


In *Explorer View* you will see the images in the library displayed slightly differently from what you saw before.

# Chapter 16 – Tutorials

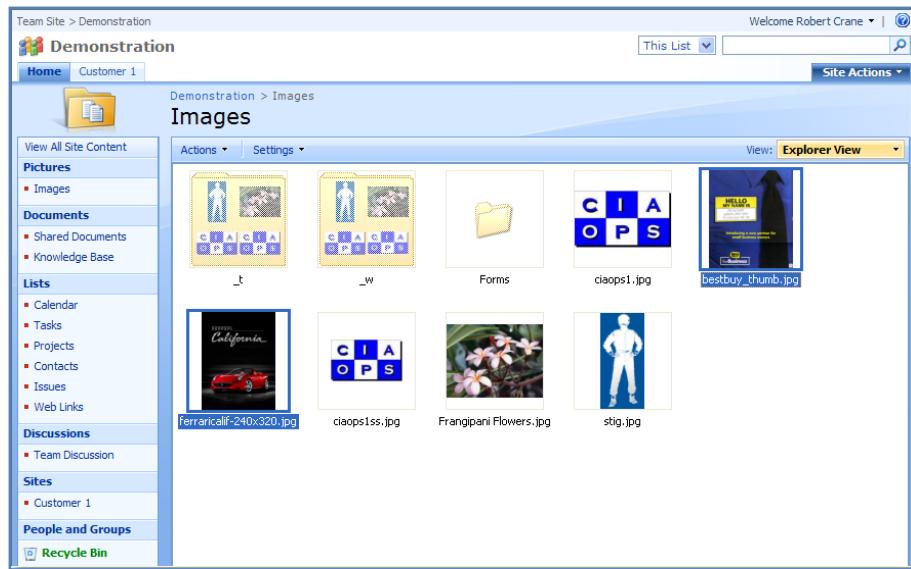


To upload multiple images into the library now, simply open your normal Windows Explorer file manager, locate the files you desire to upload and drag and drop them into the *Explorer View* page in the WSS v3 page.

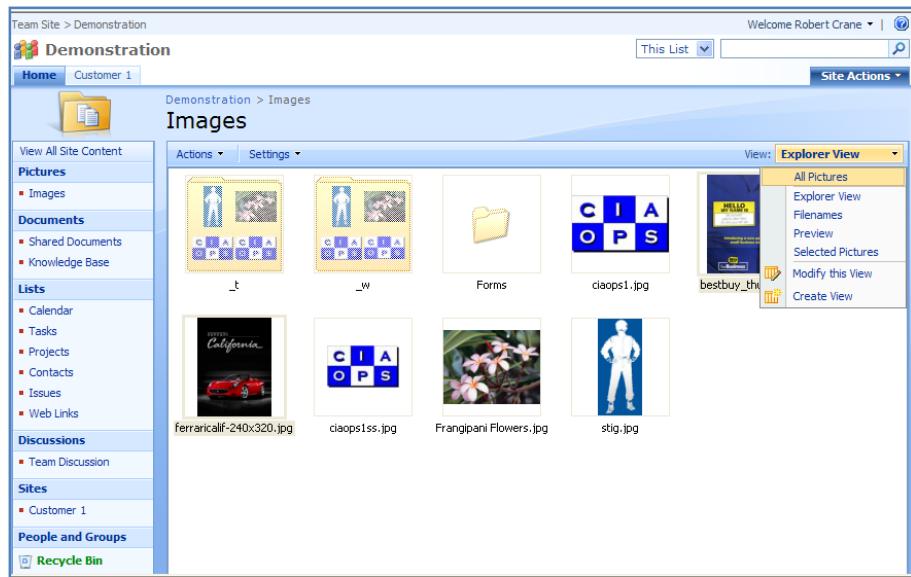


Once you have dropped the images into the WSS v3 *Picture Library* you should see them being copied across like shown above.

# Chapter 16 – Tutorials

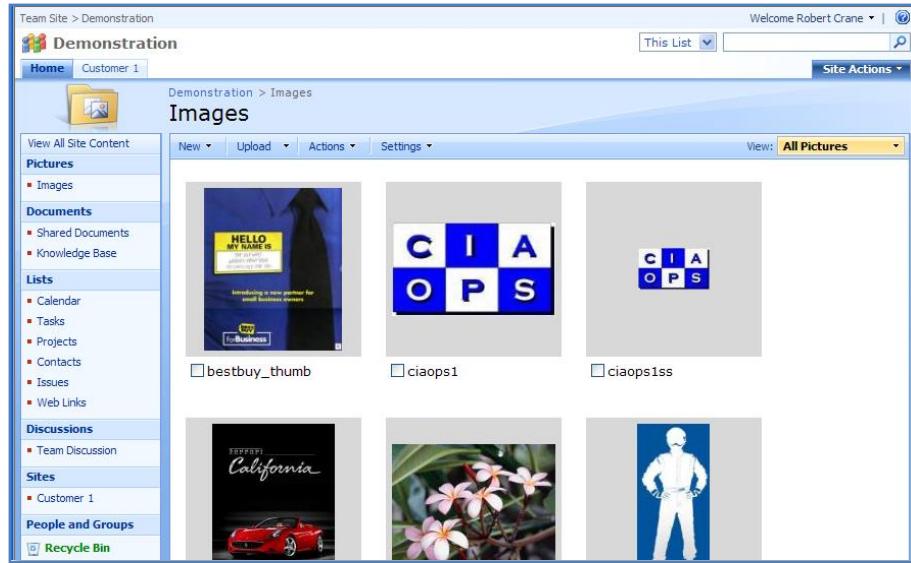


The new images should now appear in the *Picture Library*.

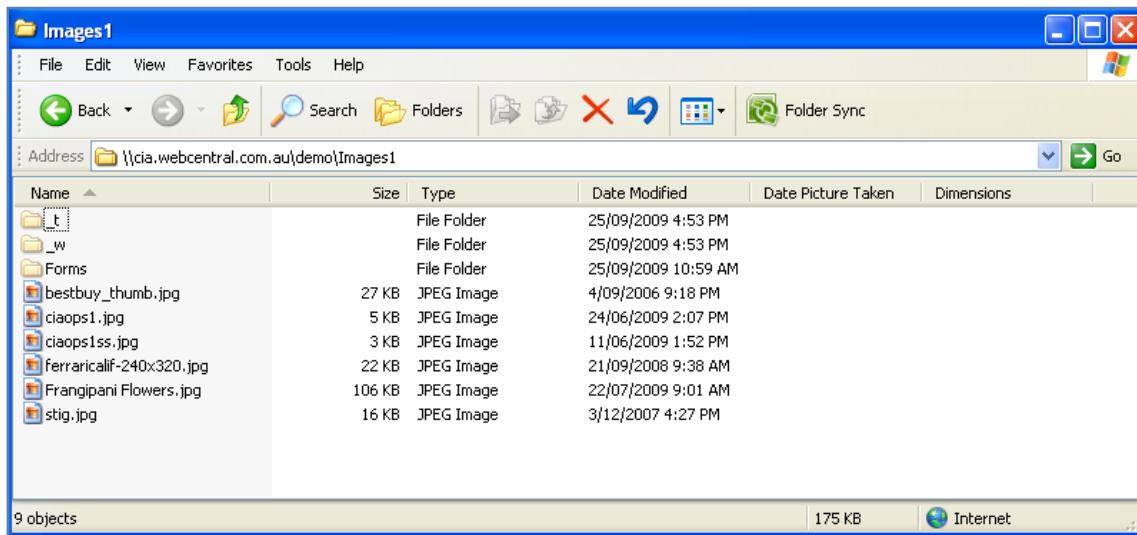


If you now change the view back to *All Pictures* all the images should now appear as the thumbnails as they did before.

# Chapter 16 – Tutorials

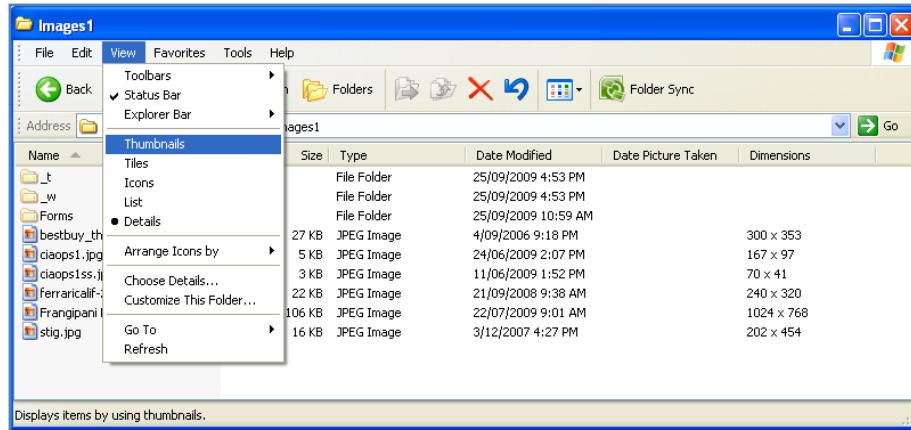


A third method to upload multiple images is to firstly map a network place to the *Picture Library*, as has been shown before for *Document Libraries* in **Section 16.8**. When this mapping is complete the *Picture Library* should appear like:

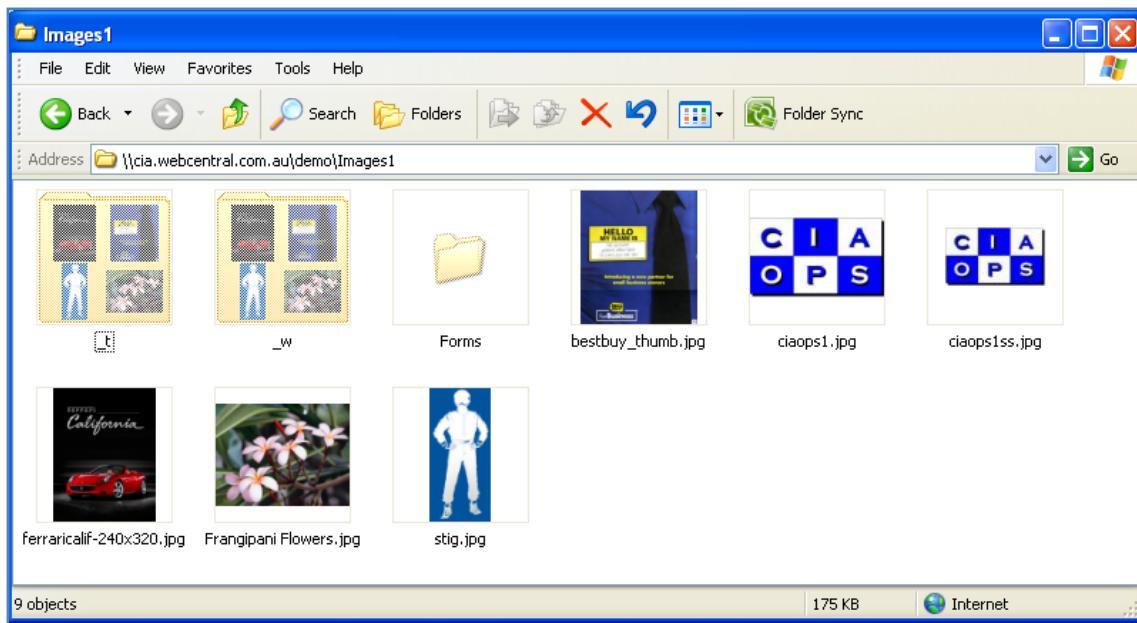


You can change the view of the files just as you would any other folder using Windows Explorer.

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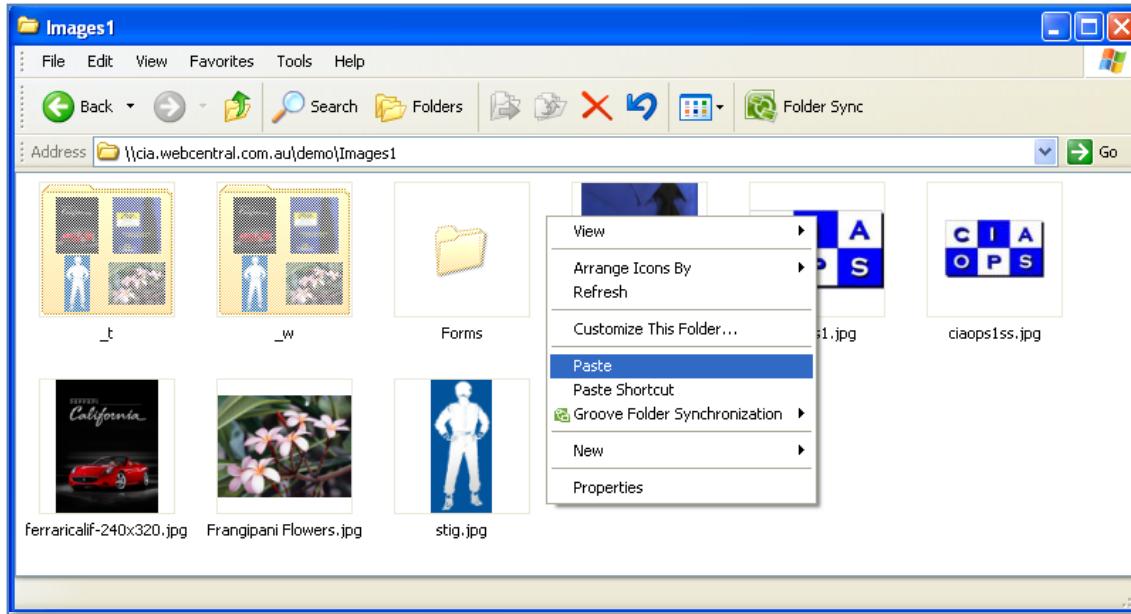


Simply select **View | Thumbnails** to see previews of all the images in the library.

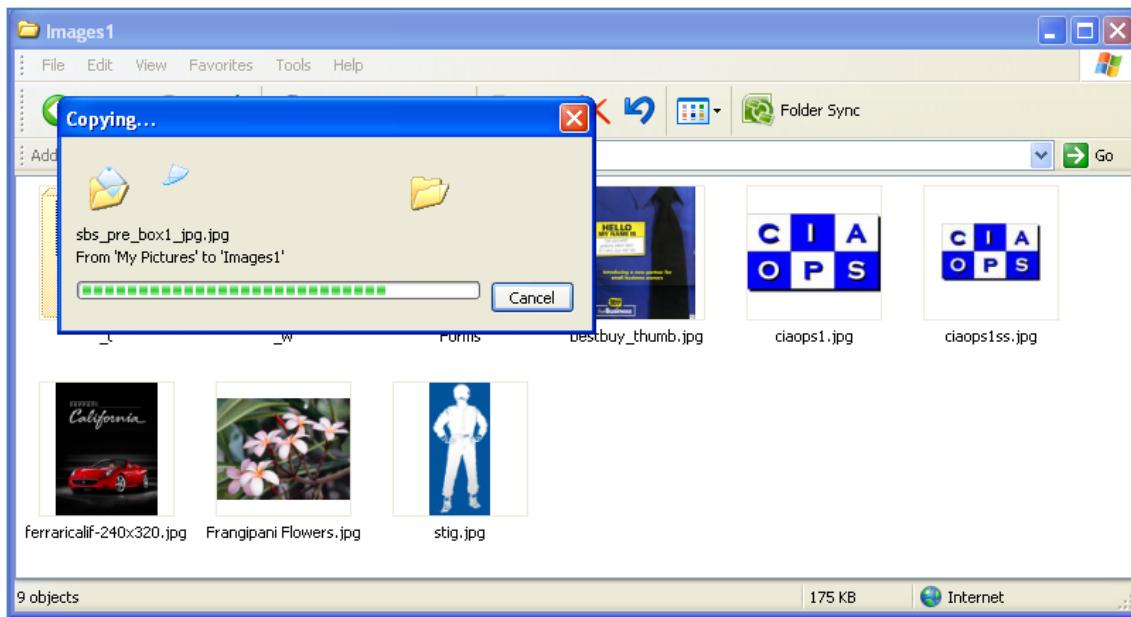


Because the *Picture Library* is now being displayed effectively in Explorer View you will notice a number of additional folders that generally remain hidden in the WSS v3 library. It is important that these folders are not altered.

## Chapter 16 – Tutorials

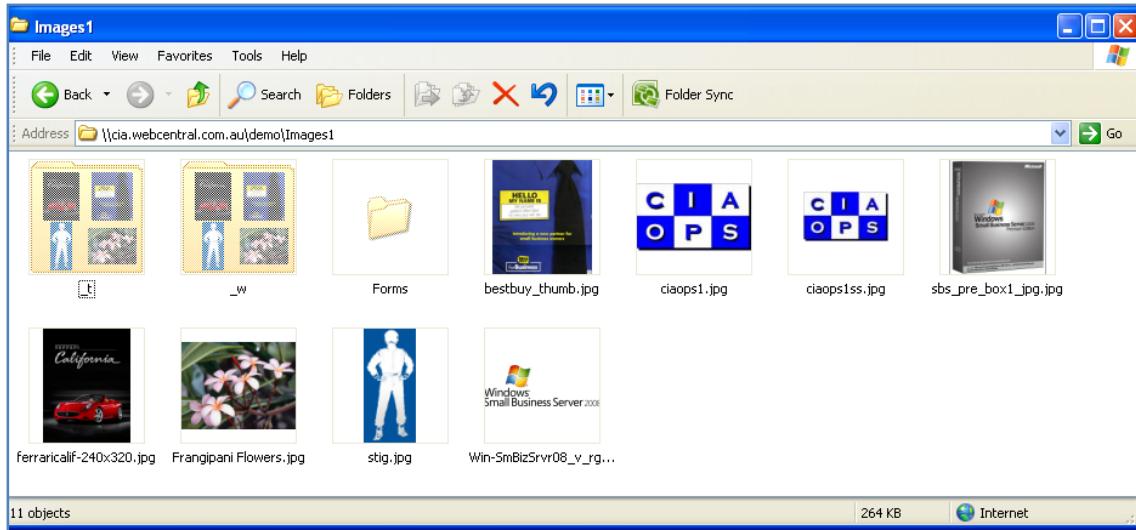


To upload multiple images here simply copy the desired files from another Windows Explorer windows and return to the WSS v3 mapped *Picture Library*. Then **right mouse click** and select **Paste** from the menu that appears.



You should then see the images being copied over into the location.

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Once the copy is complete the new images should appear in the folder as shown above.

A screenshot of a SharePoint 'Images' library page. The left navigation bar shows 'View All Site Content' and lists 'Pictures', 'Documents', 'Lists', 'Discussions', 'Sites', 'People and Groups', and 'Recycle Bin'. The main area displays eight image thumbnails: 'bestbuy\_thumb', 'ciaops1', 'ciaops1ss', 'ferraricalif-240x320', 'Frangipani Flowers', 'sbs\_pre\_box1.jpg', 'stig', and 'Win-SmBizSrvr08\_v\_rg...'. Above the thumbnails, there are buttons for 'New', 'Upload', 'Actions', and 'Settings', and a dropdown menu 'View: All Pictures'.

If you now return to the WSS v3 *Picture Library* and refresh the page all the new images should appear in the library.

## 16.10 Implementing shared OneNote notebooks

OneNote is an electronic version of a paper notebook where you can record all sorts of information that you probably now typically keep on paper. You enter the information into OneNote in a variety of ways including typing, copying and pasting as well as using a stylus if available. You can also easily draw diagrams and include other graphics to enhance the information that you save.

## Chapter 16 – Tutorials

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OneNote allows you to easily edit and relocate your information. You can quickly and easily create more space at the bottom of a page, move a section to another location or create new pages and sections quickly and easily. You can even have multiple notebooks for each different type of information.

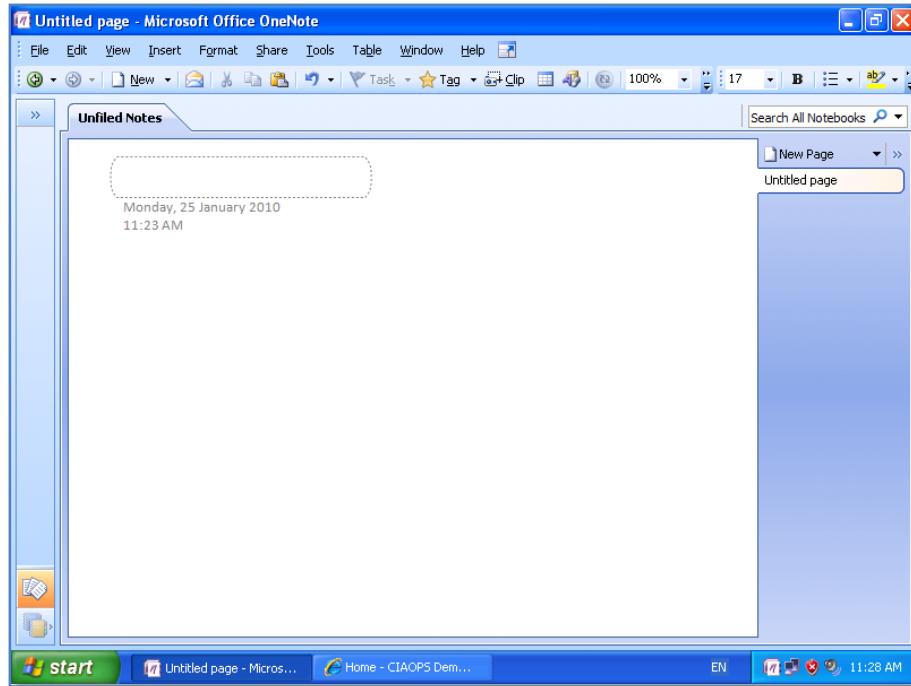
When OneNote is installed it also installs a number of ‘clipping’ buttons to other applications like Outlook and Internet Explorer. This allows you to easily send information like emails or web pages directly to OneNote for later reference. As part of this clipping service, OneNote will tag your information so you know exactly where it came from for later reference if required.

By default, OneNote creates notebooks on your local computer. It is however also possible to save these notebooks in a shared location such as a File or SharePoint server. Once the notebooks are saved in a shared location they can be accessed by multiple people. This allows a team to easily collaborate and share information such as emails and projects. When changes are made they are immediately updated so that they are available to all users of the notebook.

If the notebooks are saved in a shared location it is possible to work with them offline and update the shared copy when back online. Using this feature it is possible to locate OneNote notebooks on shared locations on the Internet and have them available to users connected to the Internet. When these users are not connected to the Internet they can still work on their local copy of the notebook and update the shared copy when they return to being online.

This tutorial will show you how to create a shared OneNote notebook on a SharePoint server that is hosted on the Internet.

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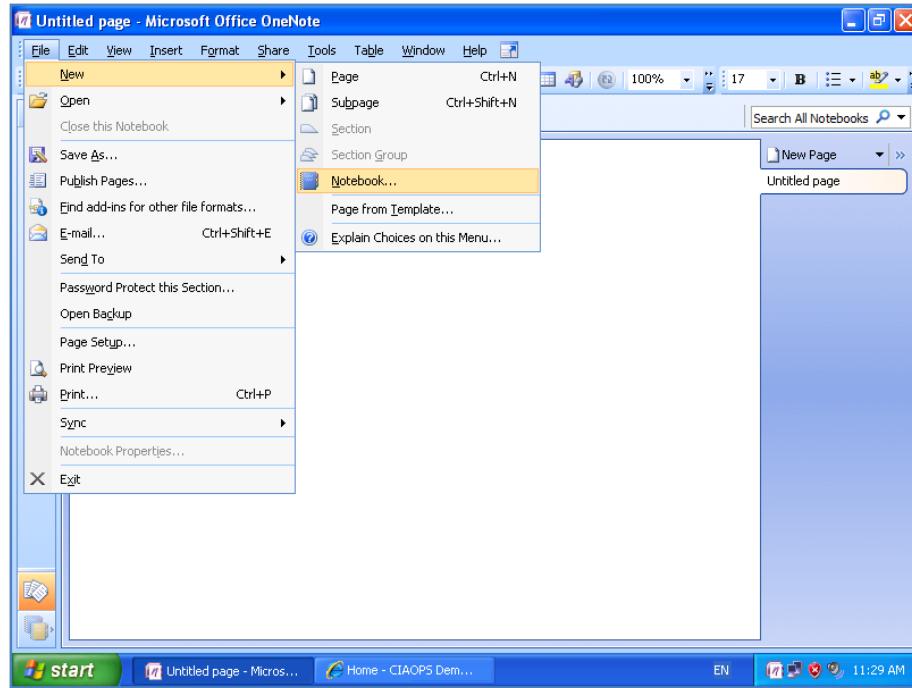


The first step is to ensure that you have OneNote installed on your local machine. If you do not already have a copy you can download a free trial copy from:

[http://trial.try microsoft office.com/trialaustralia/product.aspx?re\\_ms=oo&family=onenote&culture=en-AU](http://trial.try microsoft office.com/trialaustralia/product.aspx?re_ms=oo&family=onenote&culture=en-AU)

Once installed on your machine open OneNote, like shown above. You may find a number of demonstration notebooks are loaded by default. You can either close these or select to continue.

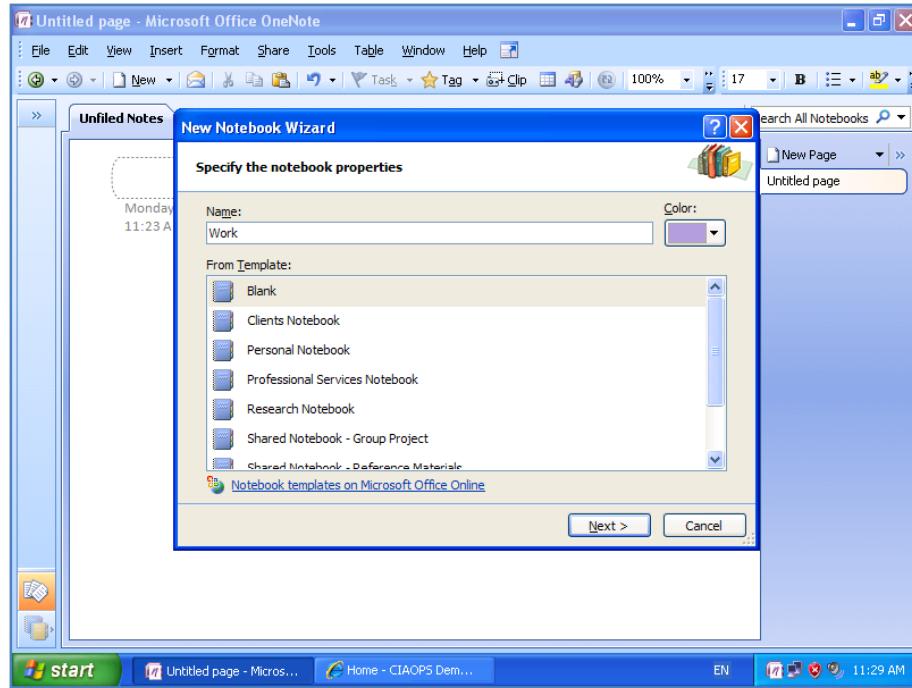
## Chapter 16 – Tutorials



To create a new shared OneNote notebook you will first need at least contributor rights on a SharePoint site, whether hosted on a local server or on the Internet. You will also need to know the location (directory or URL) into which the new notebooks will be saved prior to creating the notebook. It is recommended that you create a separate document library for saving OneNote notebooks to keep the same content types together but this is not absolutely necessary.

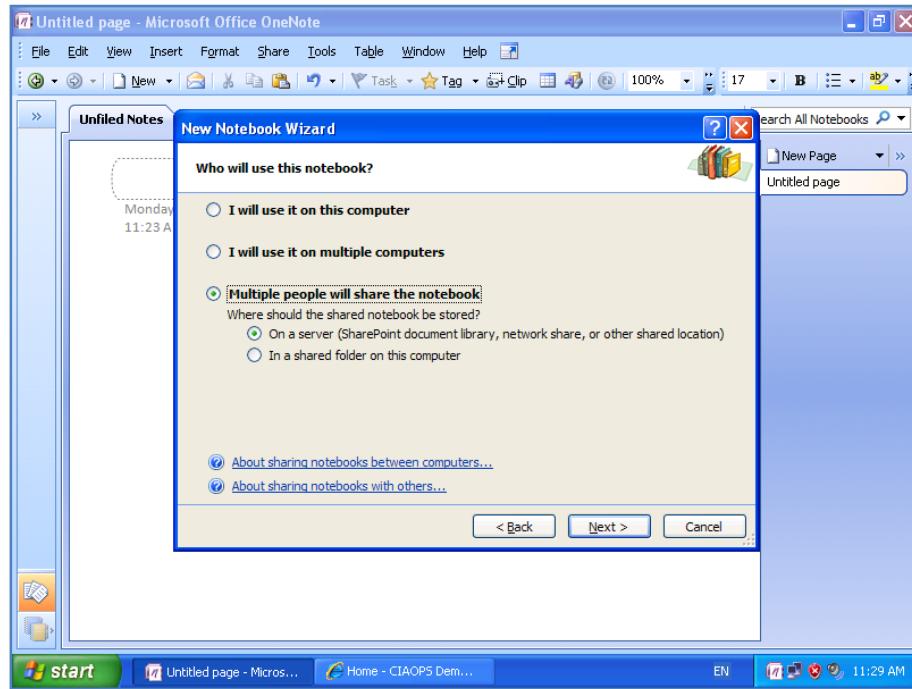
Once you have this information select **File | New | Notebook** from the menu.

## Chapter 16 – Tutorials



You will then be prompted for a notebook name and template style for the new notebook. It is recommended that you keep the notebook name as short but descriptive as possible and avoid using special characters like spaces, question marks, exclamation marks and so on.

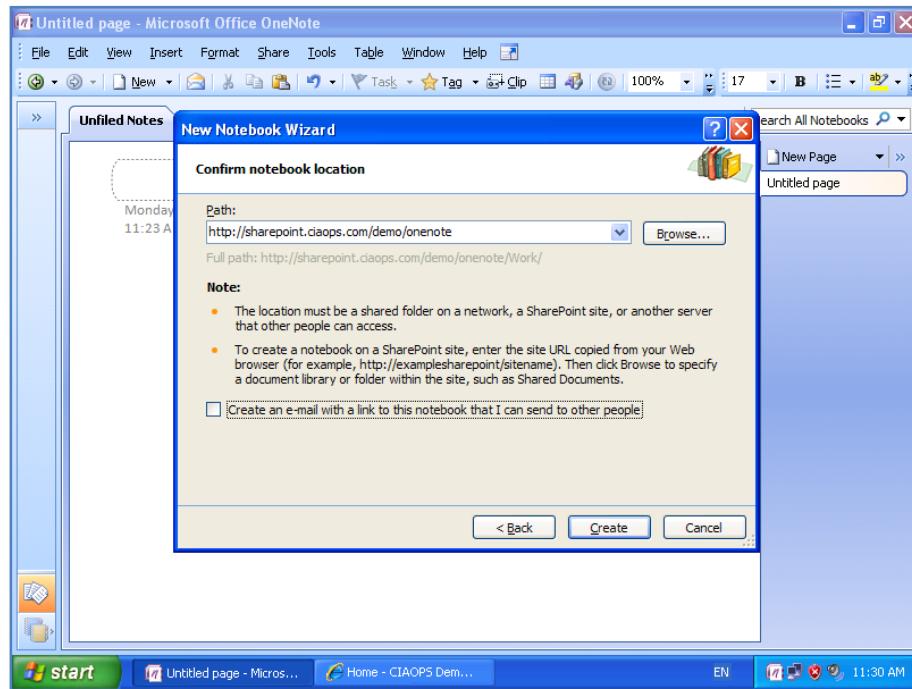
Once you have selected these options press the **Next** button to continue.



## Chapter 16 – Tutorials

You will now be prompted for the location in which you wish to store the notebook. The default option is usually '*I will use it on this computer*', however to allow sharing select the last option, '**Multiple people will share the notebook**' and in this case because the notebook will be hosted on a SharePoint server select the option '**On a server**'.

Press the **Next** button to continue.

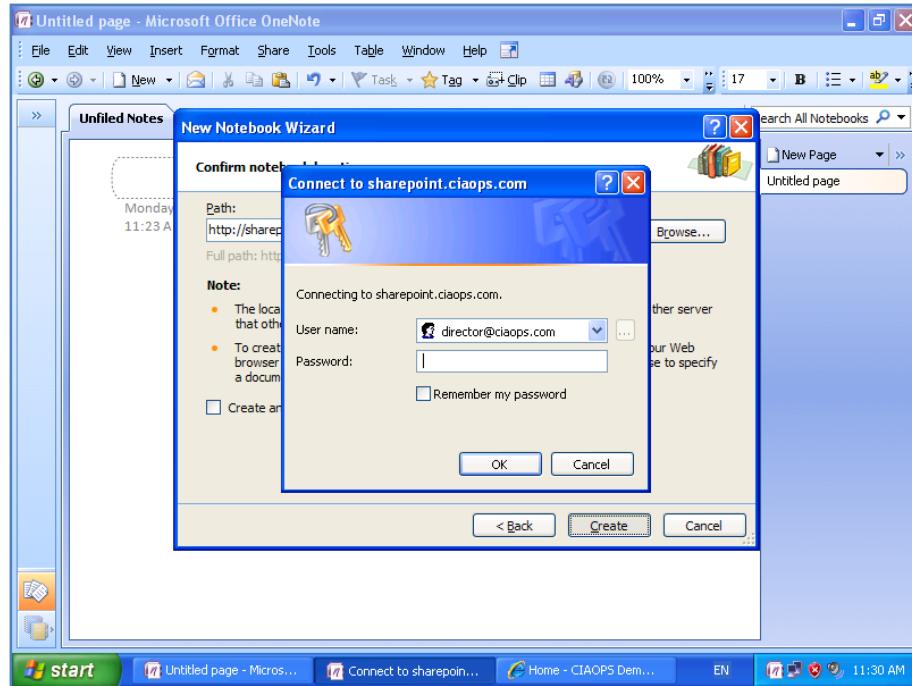


You will now need to enter the path or URL of the location in which you wish to store the notebook. Remember that you require the ability to create files in that location. In this case, the new notebook is being stored on a SharePoint server that is hosted on the Internet, so the full URL is entered.

You can also elect to send an email to others to let them know about this new shared notebook but it is recommended that you uncheck this option because identical emails can be sent out once the notebook has been created.

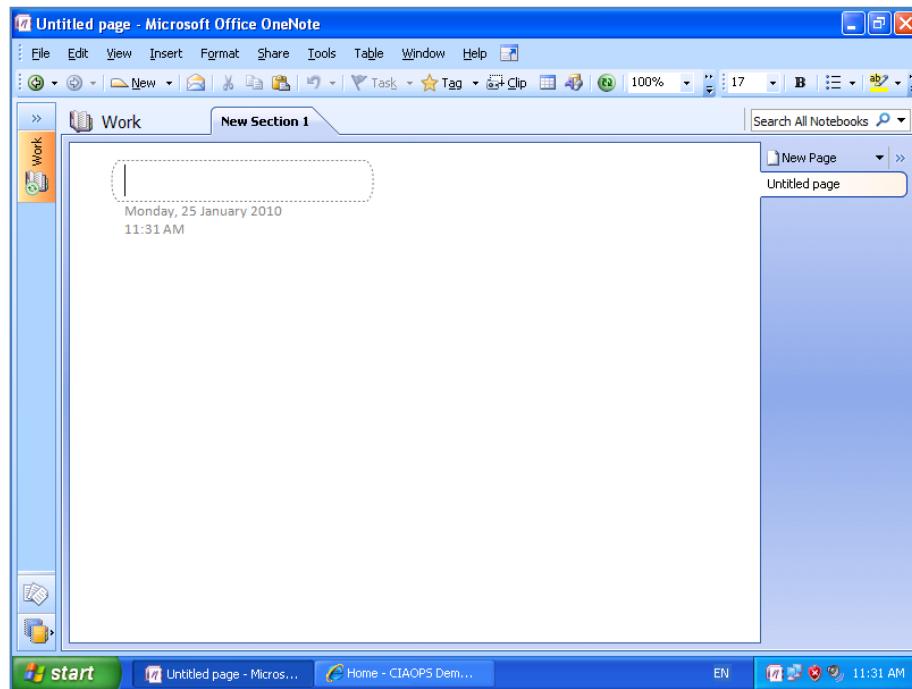
When you have entered the required information select the **Create** button to continue.

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If the location in which you have chosen to store the new notebook requires a password for access you will need to enter it now. If you are storing the new notebook on an internal server then you will normally not be prompted for credentials as they will automatically be passed through to the server for you.

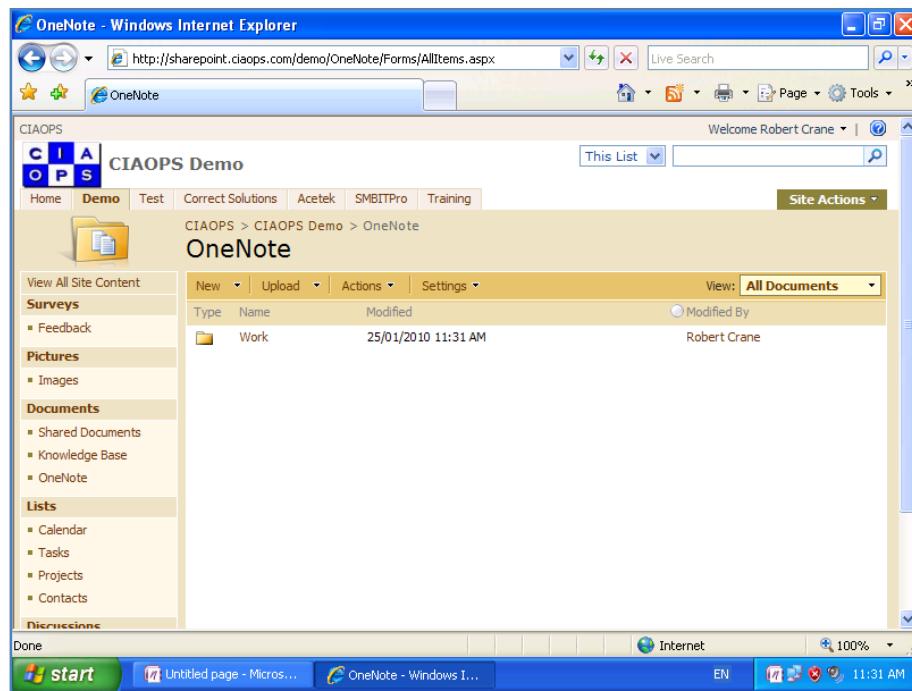
Press the **OK** button once you have entered your login details.



## Chapter 16 – Tutorials

You should now see a new notebook displayed in OneNote. You will notice that near the notebook name, in the upper left of the screen, is a sync icon. In this case it is green which indicates that the information on the server and the information displayed to you are the same.

Once you start entering information into this notebook it will automatically be synced with the server in the background. This process will also update any one else who is working with the notebook from the server.



If you now visit the location where the notebook is stored on the SharePoint server, you will find a folder with the name of the notebook in the document library (in this case **Work**).

# Chapter 16 – Tutorials

A screenshot of a Windows Internet Explorer browser window displaying a SharePoint list titled 'OneNote'. The list shows a single item: 'OneNote Table Of Contents' (Type: Document, Name: OneNote Table Of Contents, Modified: 25/01/2010 11:31 AM, Modified By: Robert Crane). The left sidebar shows a navigation tree with 'CIAOPS Demo' selected, and the 'Documents' section is expanded, showing 'OneNote' as a sub-item.

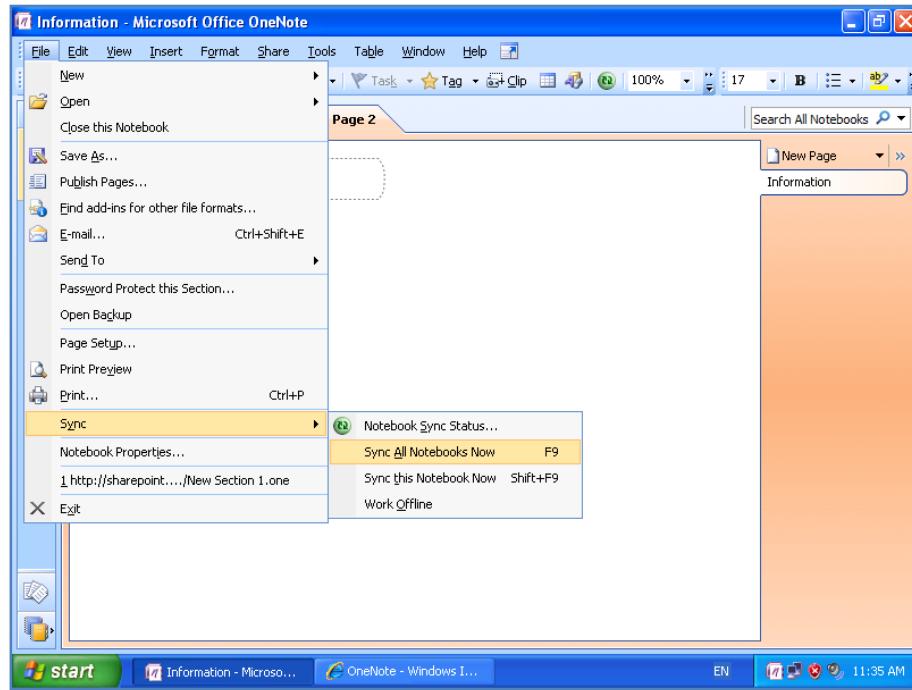
If you drill into that folder you will find the contents of that notebook displayed as single files.

In the above screen shot you can see only a single file as that is all that there currently is in our new notebook.

A screenshot of a Windows Internet Explorer browser window displaying a SharePoint list titled 'OneNote'. The list shows three items: 'New Section 1' (Type: Document, Name: New Section 1, Modified: 25/01/2010 11:34 AM, Modified By: Robert Crane), 'OneNote Table Of Contents' (Type: Document, Name: OneNote Table Of Contents, Modified: 25/01/2010 11:33 AM, Modified By: Robert Crane), and 'Page 2' (Type: Document, Name: Page 2, Modified: 25/01/2010 11:34 AM, Modified By: Robert Crane). The left sidebar shows a navigation tree with 'CIAOPS Demo' selected, and the 'Documents' section is expanded, showing 'OneNote' as a sub-item.

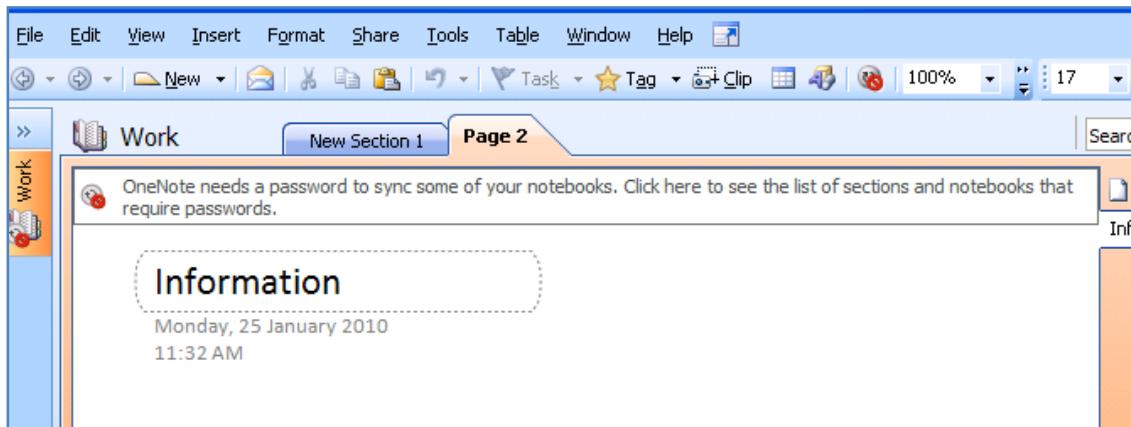
## Chapter 16 – Tutorials

Once you update the notebook and add more pages you will see them appear in the folder in the document library.



Although a notebook stored on a SharePoint server will automatically synchronize in the background it is possible to force this synchronization process at any time. To do this select **File | Sync | Sync All Notebooks Now** or simply press the **F9** key.

When synchronization occurs, the green sync icon next to the notebook name in the upper left of the screen will spin. Once it stops spinning the synchronization is complete.

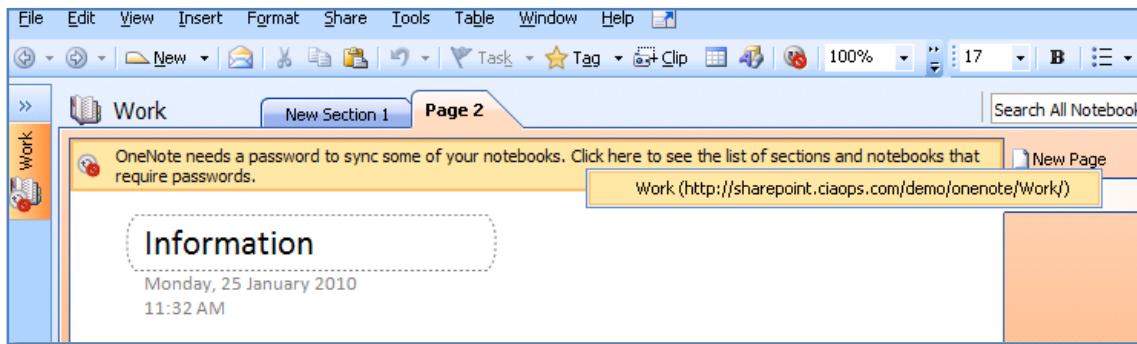


If you return to the notebook after closing the OneNote application you will find that OneNote automatically opens the notebook for you. However it merely opens the last local copy of the notebook it has stored. It is possible that additional updates have been

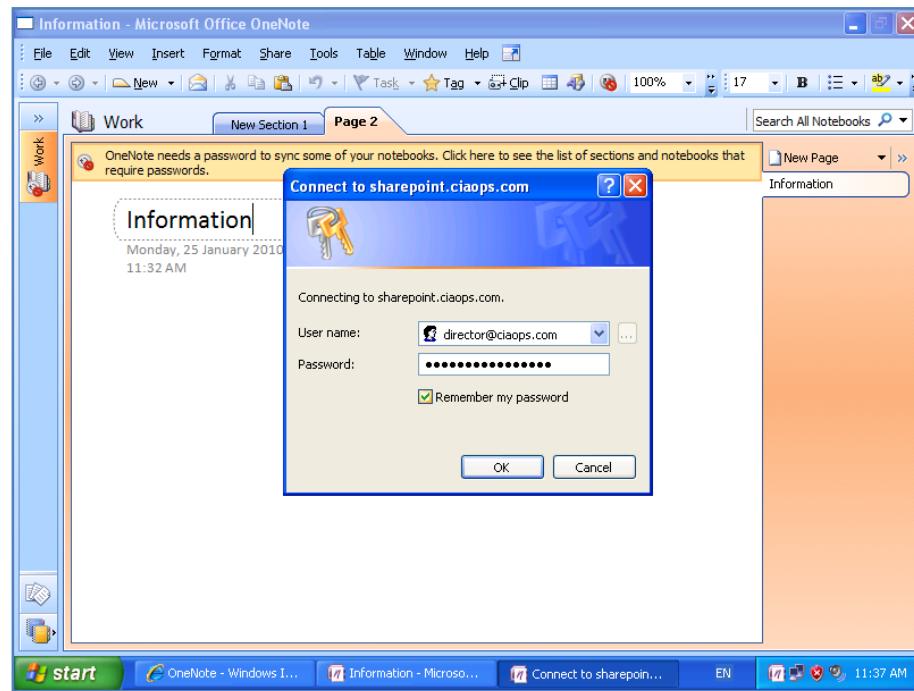
## Chapter 16 – Tutorials

made to the notebook since it was closed so you need to ensure that these changes are synchronized.

As you can see above, when you open the notebook at the top of the page will appear a warning that prompts you that you need to login to get the latest changes to the notebook from the remote server. This will normally not occur with internal servers as they typically automatically pass through any login credentials.



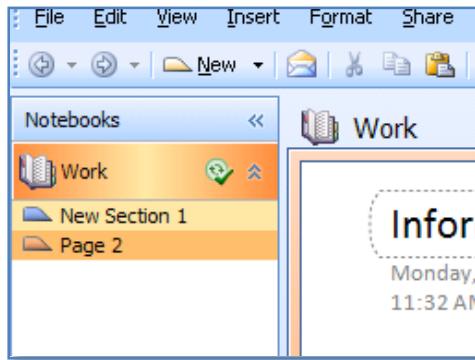
To login to the remote notebook to access any changes simply click on the warning message and select the location of the notebook that appears.



You will then be prompted to enter your login details for the remote notebook.

Press the **OK** button when complete.

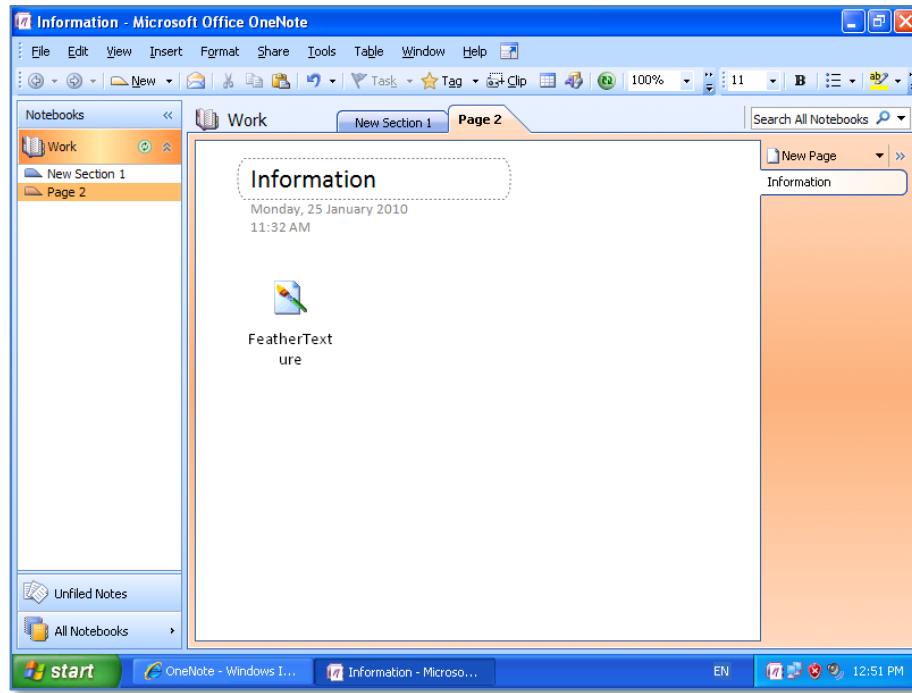
## Chapter 16 – Tutorials



Upon correct login you should see the green sync icon near the notebook name spin as any updates are loaded to your local copy. The time that this synchronization takes depends on how many changes have occurred since the local notebook was last synchronized with the server.

When the synchronization process is complete the sync icon will stop spinning and remain green. Depending on how you have your notebook view configured you may also see a green tick with the sync icon indicating that the process is complete.

Now the copy of the local notebook and the one on the server are the same.



If a file is embedded in a OneNote notebook that is stored on a SharePoint server that file can be updated without the need for OneNote on the remote desktop.

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A screenshot of a Windows Internet Explorer browser window displaying a SharePoint document library. The URL in the address bar is <http://sharepoint.ciaops.com/demo/OneNote/Forms/AllItems.aspx?RootFolder=%2fOneNote%2fWork>. The page title is "CIAOPS Demo". The left navigation menu shows categories like Surveys, Pictures, Documents, Lists, and Discussions. Under the "Documents" category, there is a folder icon labeled "Page 2\_onenfiles". The main content area shows a list of documents with the following details:

Type	Name	Modified	Modified By
Folder	Page 2_onenfiles	25/01/2010 12:51 PM	Robert Crane
File	New Section 1! NEW	25/01/2010 11:34 AM	Robert Crane
File	OneNote Table Of Contents! NEW	25/01/2010 11:33 AM	Robert Crane
File	Page 2! NEW	25/01/2010 12:51 PM	Robert Crane

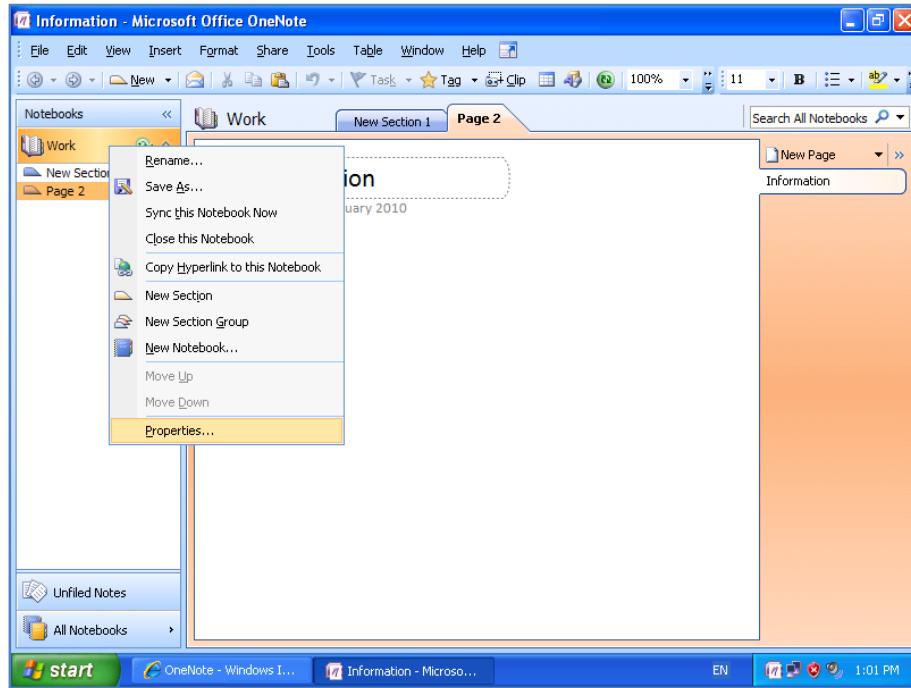
This is because the file that is embedded in the OneNote notebook page is actually saved in a separate folder in the document library as shown above (in this case the folder called *Page 2\_onenfiles*).

A screenshot of a Windows Internet Explorer browser window displaying a SharePoint document library. The URL in the address bar is [http://sharepoint.ciaops.com/demo/OneNote/Forms/AllItems.aspx?RootFolder=%2fOneNote%2fWork%2fPage%2f2\\_onenfiles](http://sharepoint.ciaops.com/demo/OneNote/Forms/AllItems.aspx?RootFolder=%2fOneNote%2fWork%2fPage%2f2_onenfiles). The page title is "CIAOPS Demo". The left navigation menu shows categories like Surveys, Pictures, Documents, Lists, and Discussions. Under the "Documents" category, there is a file icon labeled "FeatherTexture! NEW". The main content area shows a list of documents with the following details:

Type	Name	Modified	Modified By
File	FeatherTexture! NEW	25/01/2010 12:51 PM	Robert Crane

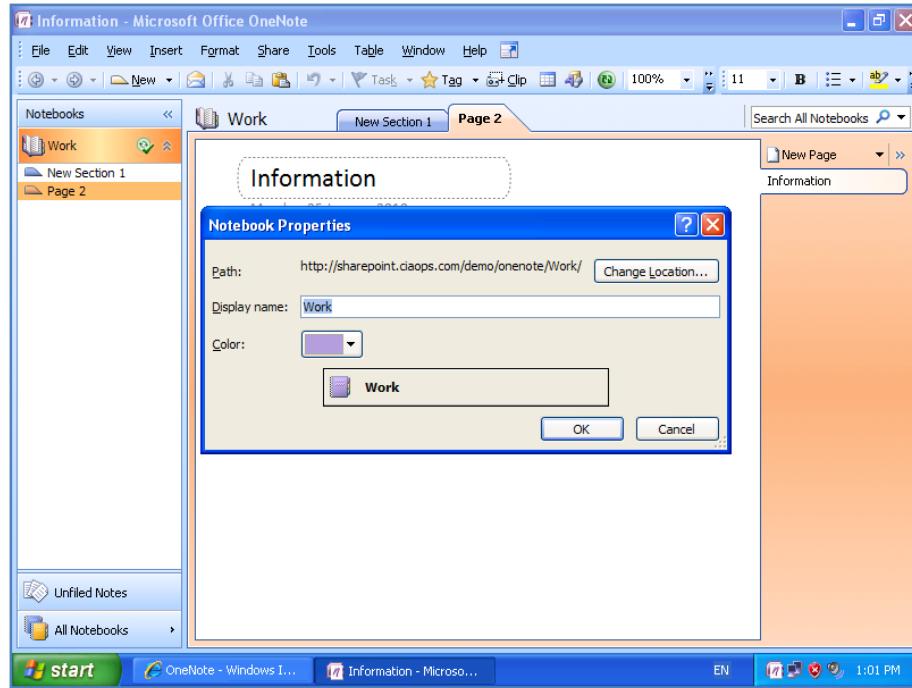
## Chapter 16 – Tutorials

Inside this folder you will find the embedded document which can be updated without OneNote and any updates will also be pushed out to the OneNote notebooks when they synchronize.



You can view the storage location of a OneNote notebook by simply **right mouse clicking** on the notebook name in the upper left and selecting **Properties** from the menu that appears.

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You will then see the path to which the notebook is displayed as well as an option to change its location if desired.

Press the **OK** button when complete.

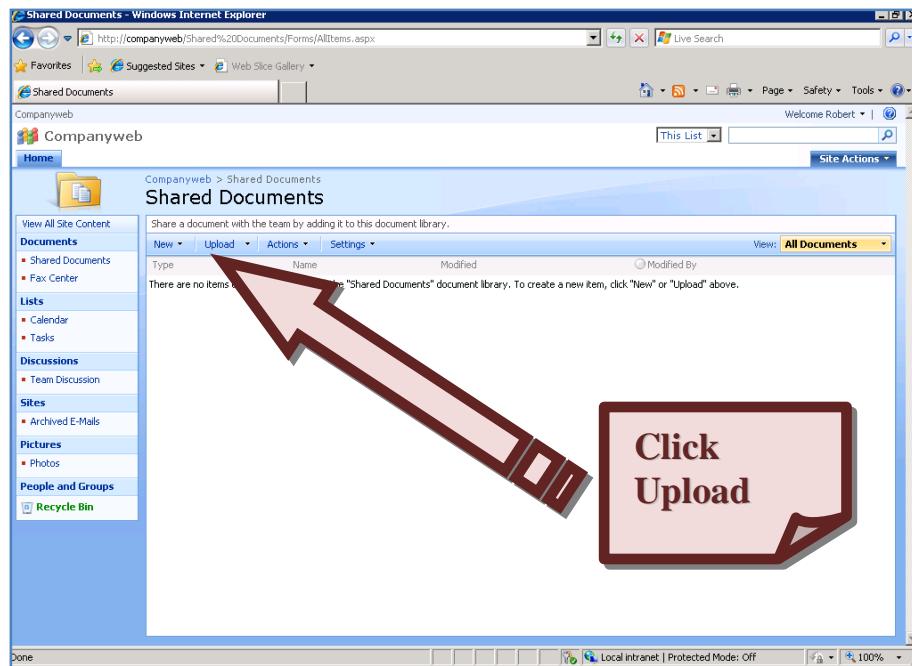
## 16.11 Uploading documents to a SharePoint document library

The *Shared Documents* area in SharePoint is called a Document library. In here you can store any sort of file you wish including things like documents and spreadsheets. This paper will cover the following topics:

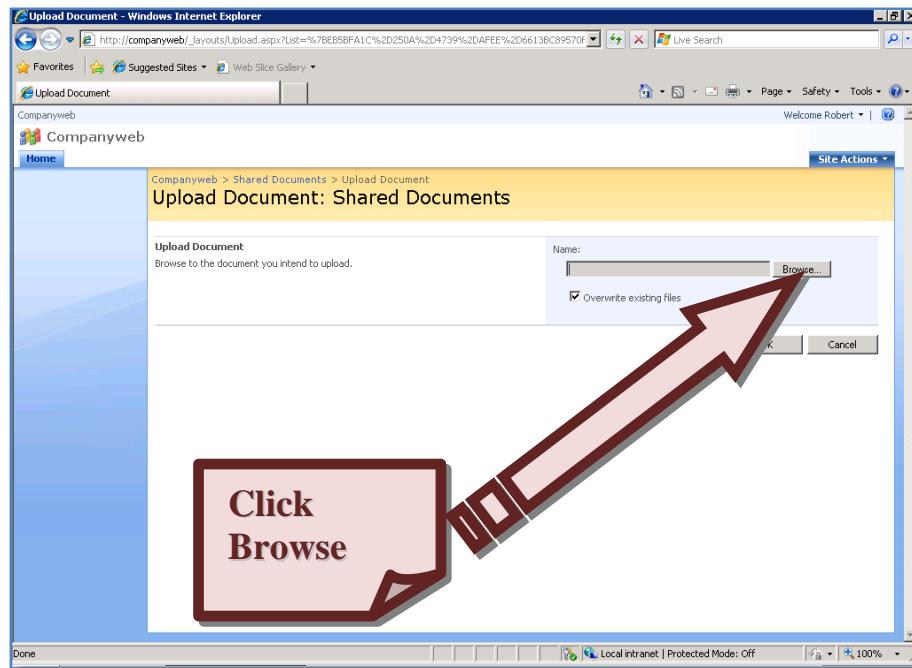
1. Uploading a single document via a web browser
  2. Uploading multiple documents via a web browser
  3. Uploading documents via mapped drives
1. *Uploading a single document via a web browser*

To upload a single document click on the **Upload** button from the menu bar of the Document Library.

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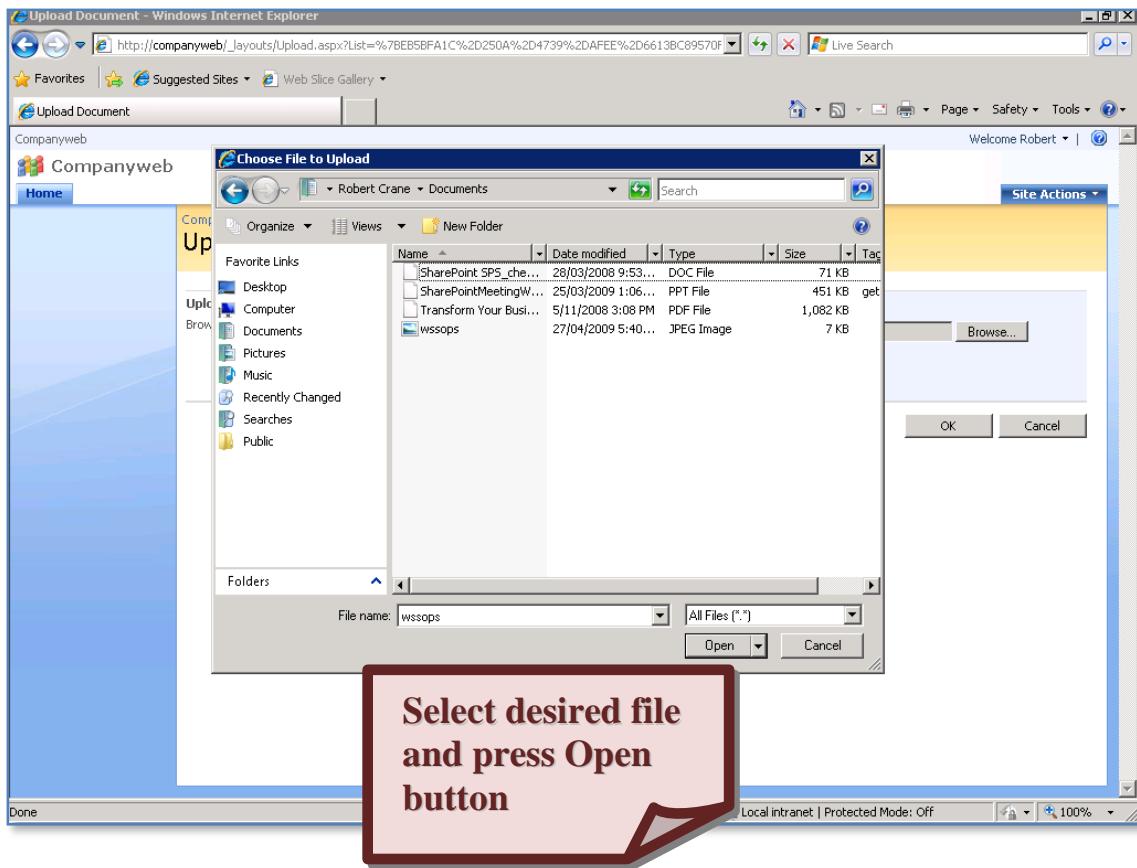


You should now see a screen like:



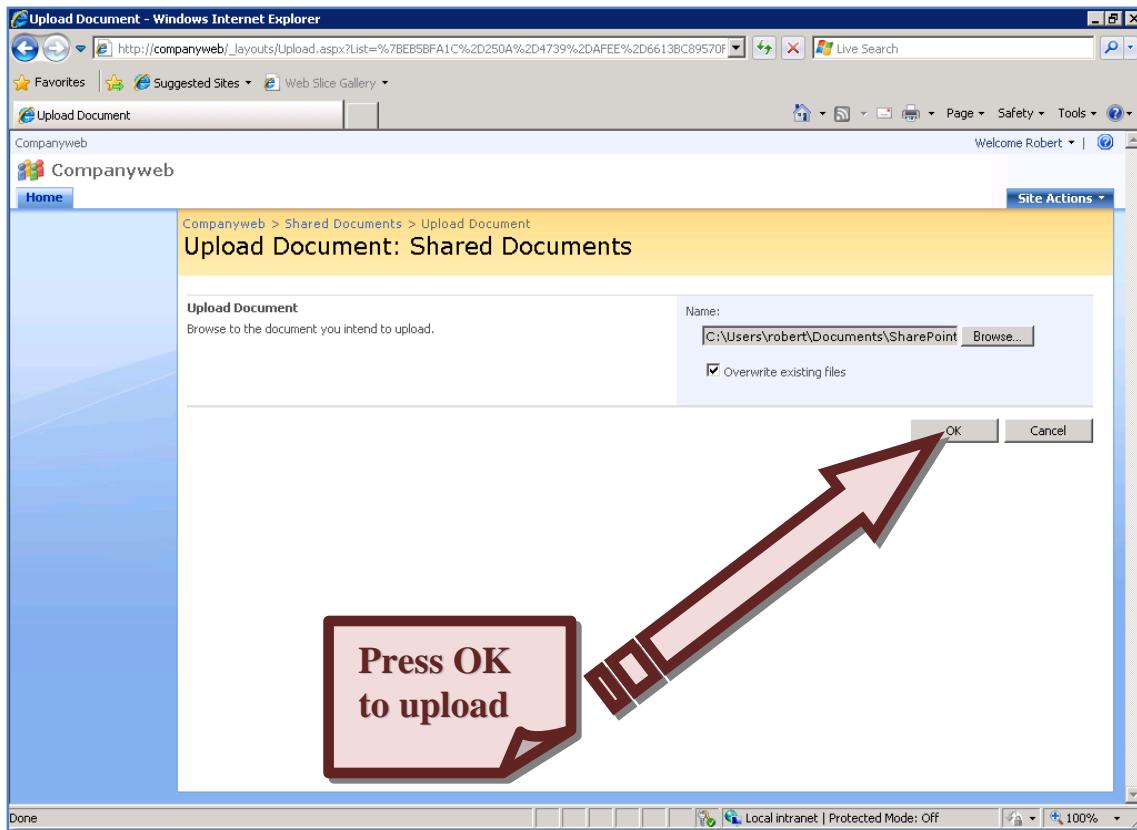
If you click the **Browse** button you can navigate to any file on your local system like so:

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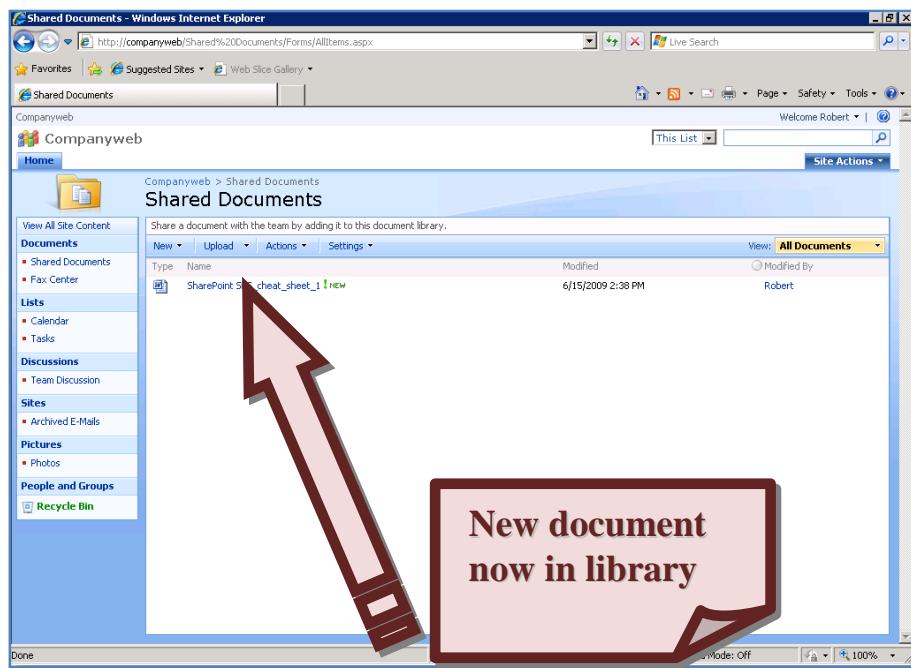


After selecting the file to be uploaded and pressing the **Open** button the location of that file will be transferred to the *Name* field in the SharePoint site.

## Chapter 16 – Tutorials



To upload the selected document to the *Shared Documents* area of SharePoint, simply press the **OK** button.



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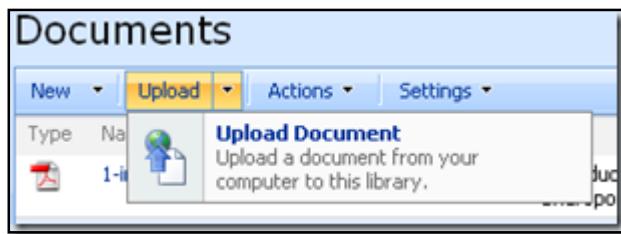
You should now see the document you selected appear in the list for the Document Library. In this case, a Word document has been uploaded and the Word icon appears at the beginning of the line to indicate the document type.

You can repeat this process of selecting *Upload* in a Document Library, then pressing the *Browse* button and locating the desired file and finally selecting *OK* to upload documents.

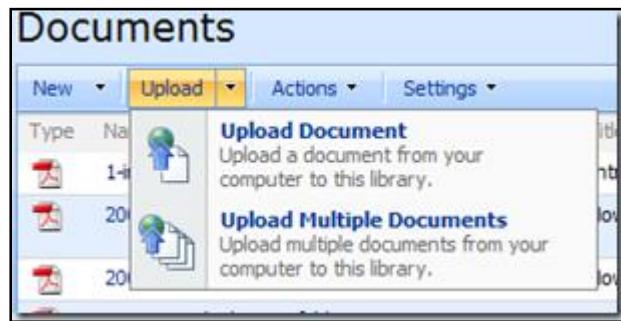
### 2. *Uploading Multiple Documents via a web browser*

SharePoint supports the ability to upload multiple documents, however it only does so on machines that have Microsoft Office installed. This means that unless you have Microsoft Office installed on the machine from which you plan to upload multiple documents to SharePoint that functionality will not be available.

If you access a SharePoint Document Library from a machine without Microsoft Office installed and select the pull down arrow next to *Upload* from the menu you will only see one menu option like so:

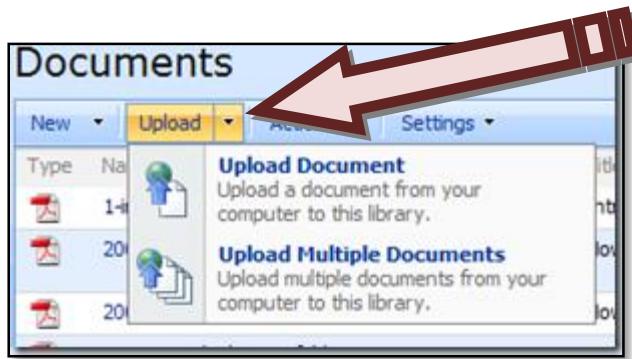


However, if you repeat the process using a machine that has Microsoft Office installed you will see two menu options like so:



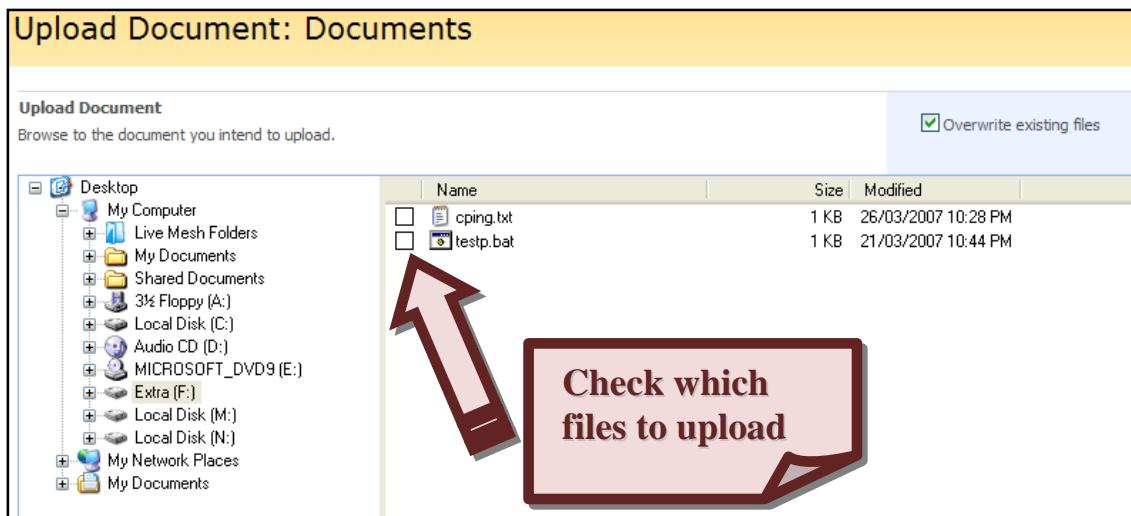
Use the *Upload multiple documents* so you can transfer your documents by simply selecting the files required and pressing the **OK** button.

To do this click the **Upload multiple document** option from the menu after clicking on the arrow to the right of *Upload* to reveal the drop down menu.



Click arrow to reveal menu

You should then see a window like shown below where you can simply navigate to the files that you wish to upload onto your system that reside on your local workstation and press the **OK** button to commence the upload.



Simply use the navigation pane on the left to locate the directories from which you wish to upload file from your local machine. Once you have located the directory and opened it for viewing, simply click in the box next to the required entry on the list of files that appear on the right of the screen.

By default, the option to *Overwrite existing files* will be enabled. This can be disabled by unchecking the option in the top right of the screen.

When you have completed making all your selections simply press the **OK** button to commence the transfer. The time taken to transfer the files will vary depending on the total size of the files you wish transferred.

When the transfer process is complete you will be returned to the [Document Library](#).

### 3. Uploading documents via mapped drives

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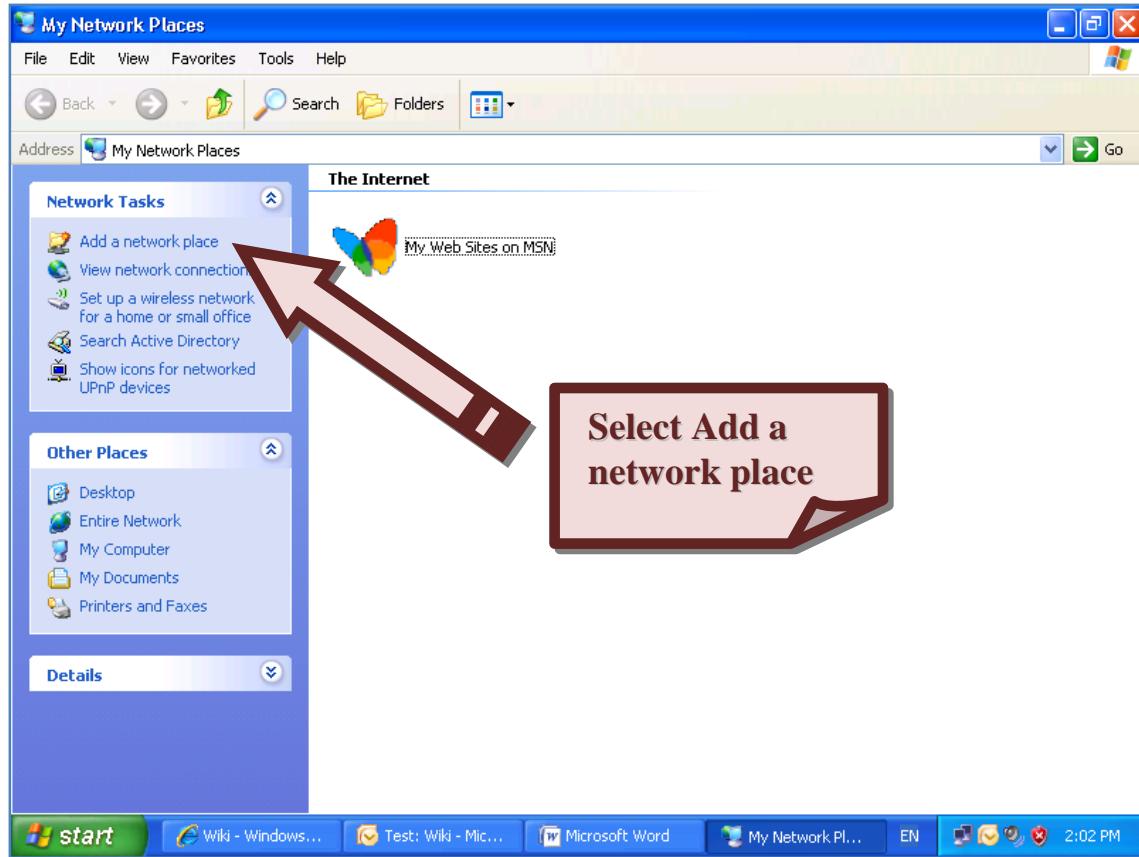
The first step in the process is map a drive on your local computer that refers to the SharePoint site. From there you can use this mapped location as you would any other drive on your system, for example to simply drag and drop files between the locations. The method of setting up a mapped drive varies slightly between versions of Windows. *Uploading documents via network places in Windows XP*

This section will cover how to create a standard Windows XP network place that points to a SharePoint Document Library. You will need access to a local workstation and need to know the address (URL) of the SharePoint Document Library you wish to directly map to.

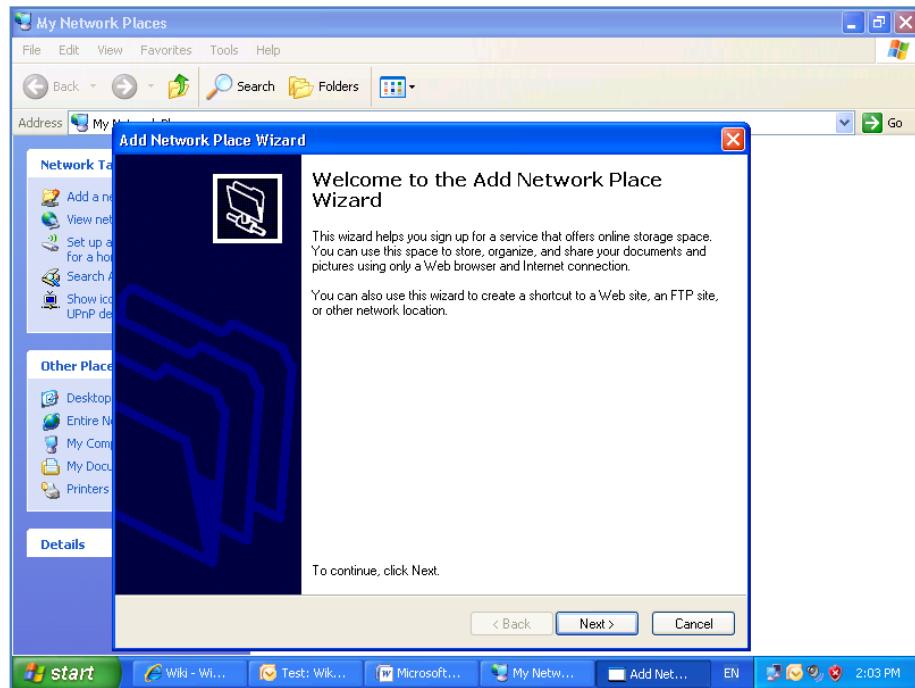


On a local workstation running Windows XP select the option **My Network Places** from the *Start menu* after logging in as the required user.

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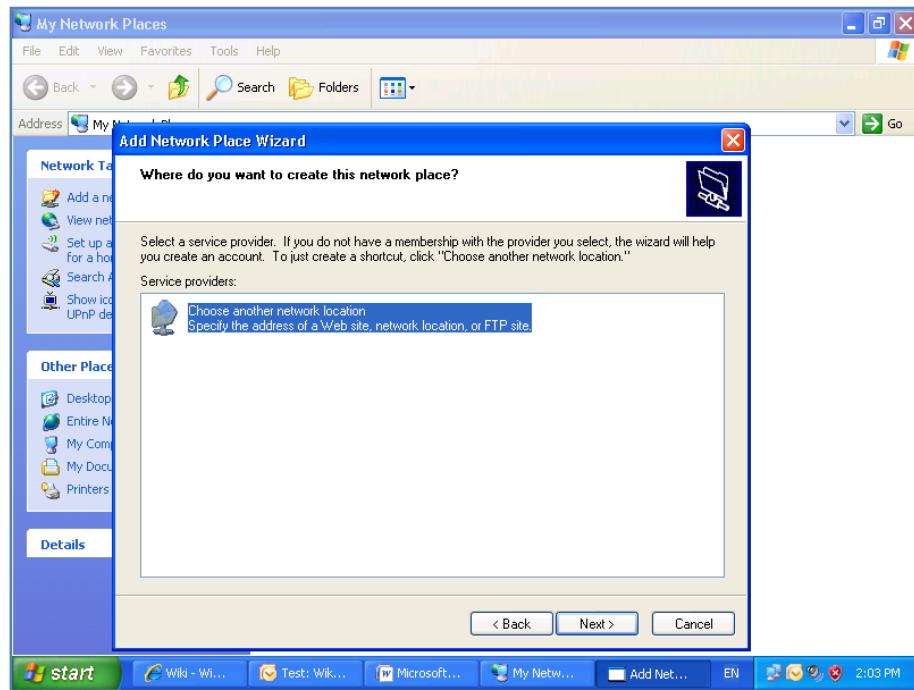


Select the option to **Add a Network Place** located at the top left of the screen.



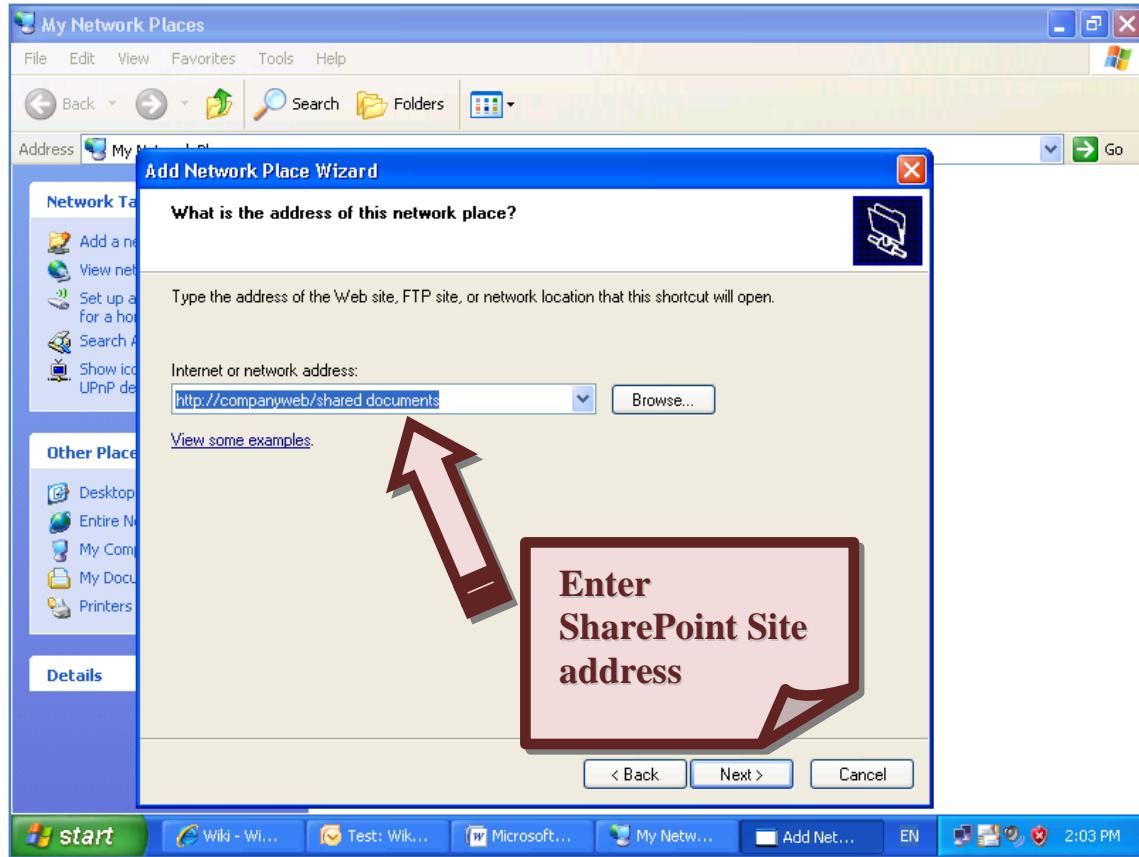
## Chapter 16 – Tutorials

In this case click **Next** to continue with the wizard.



Click **Next** again to continue.

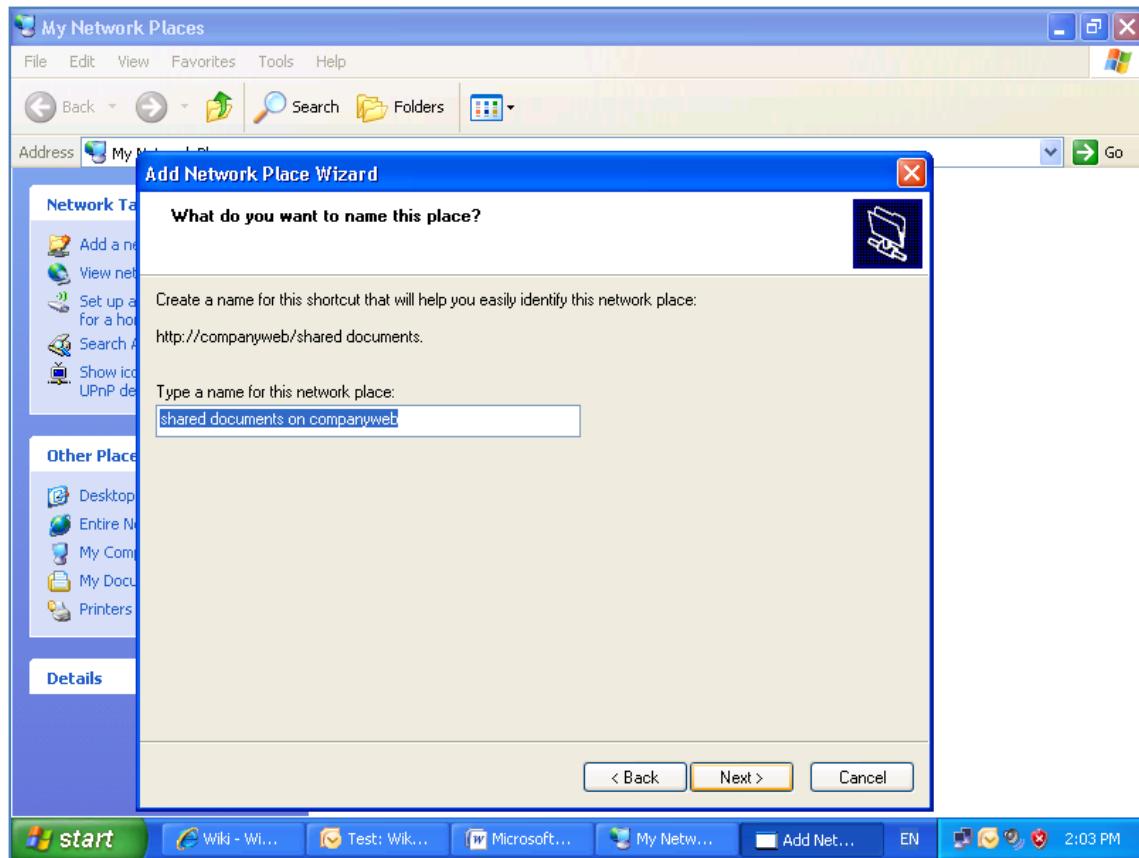
## Chapter 16 – Tutorials



Enter the address of the SharePoint Document Library, in this case  
*http://companyweb/shared documents*.

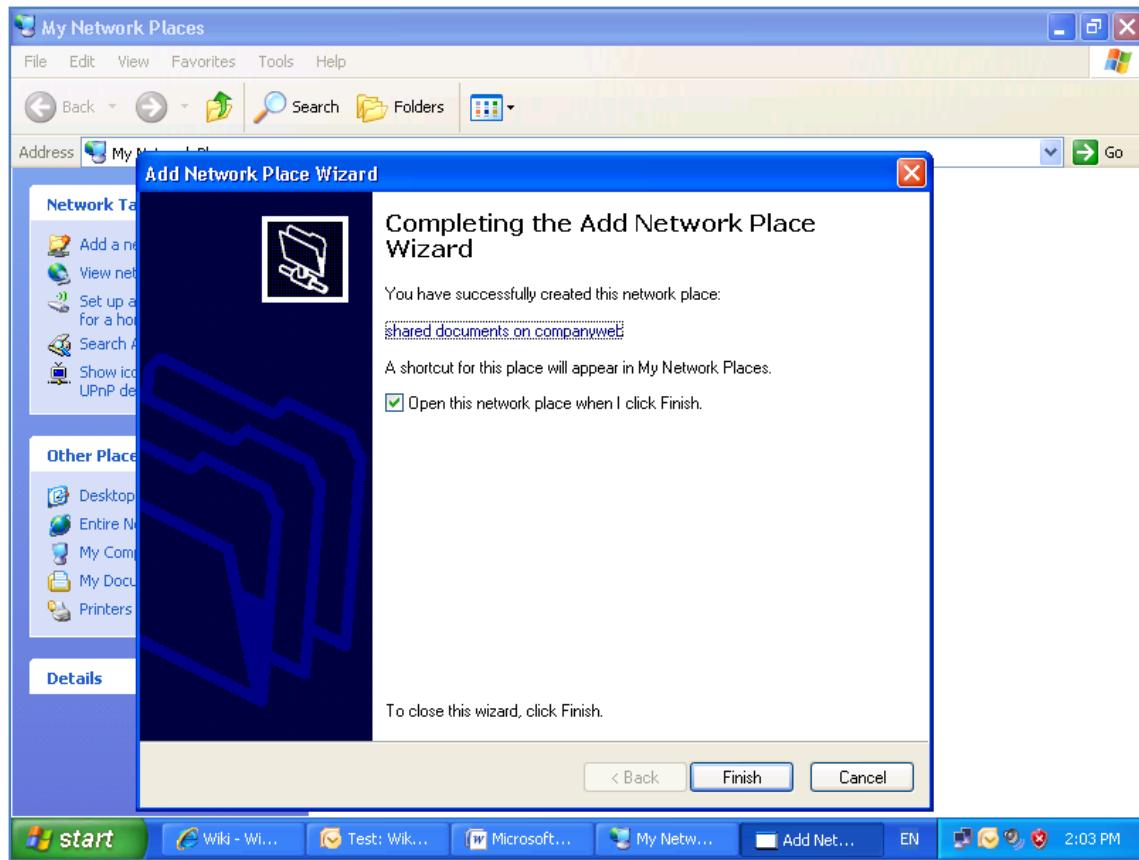
Press **Next** to continue.

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Provide a descriptive name for the new network place, in this case '*shared documents on companyweb*'.

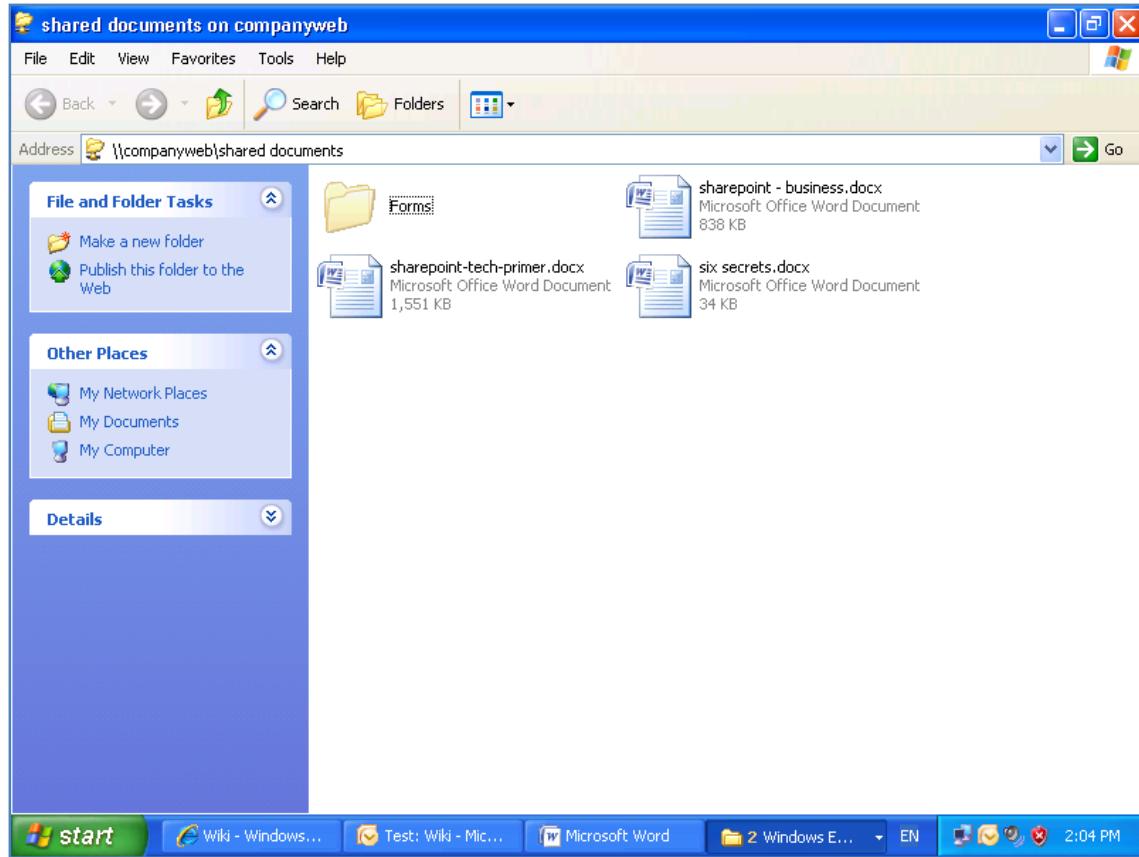
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Leave the **Open this network place when I click Finish** checked.

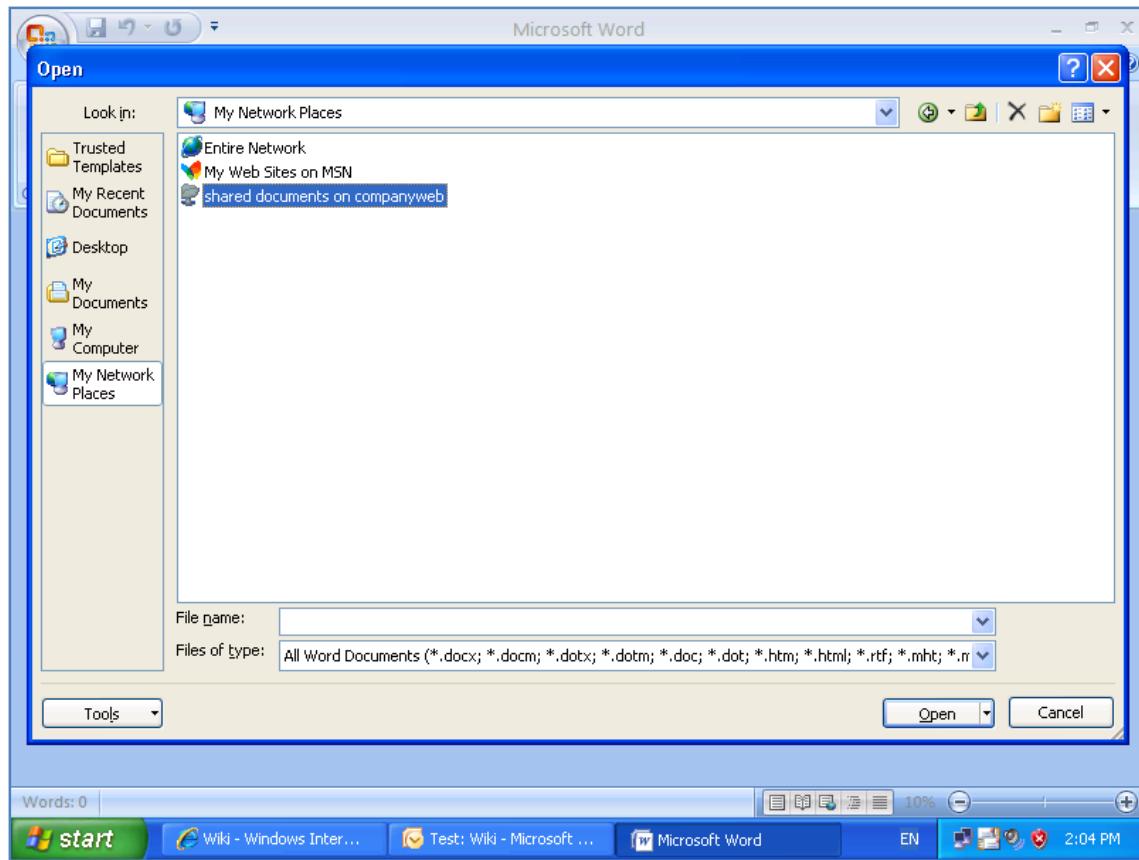
Press the **Finish** button to complete the process.

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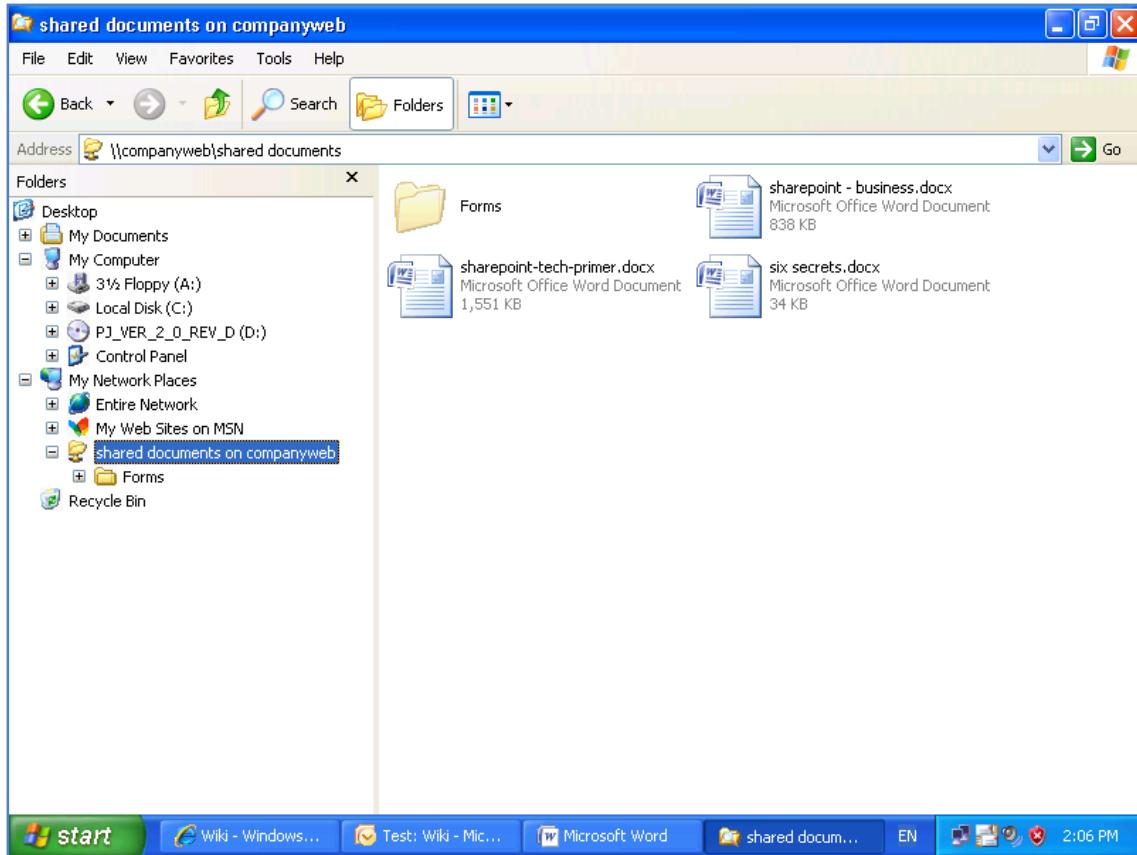
The network place should now be displayed and it should display the files in the SharePoint Document Library.

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Now, when you use any application you can navigate to the network place you just created that points to the SharePoint Document Library just like any other file location.

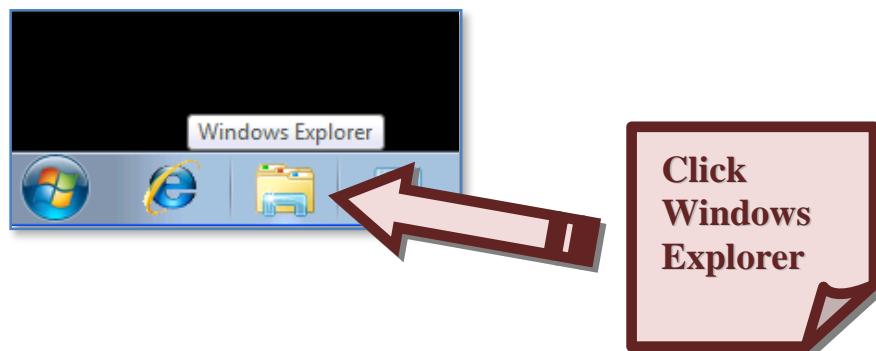
## Chapter 16 – Tutorials



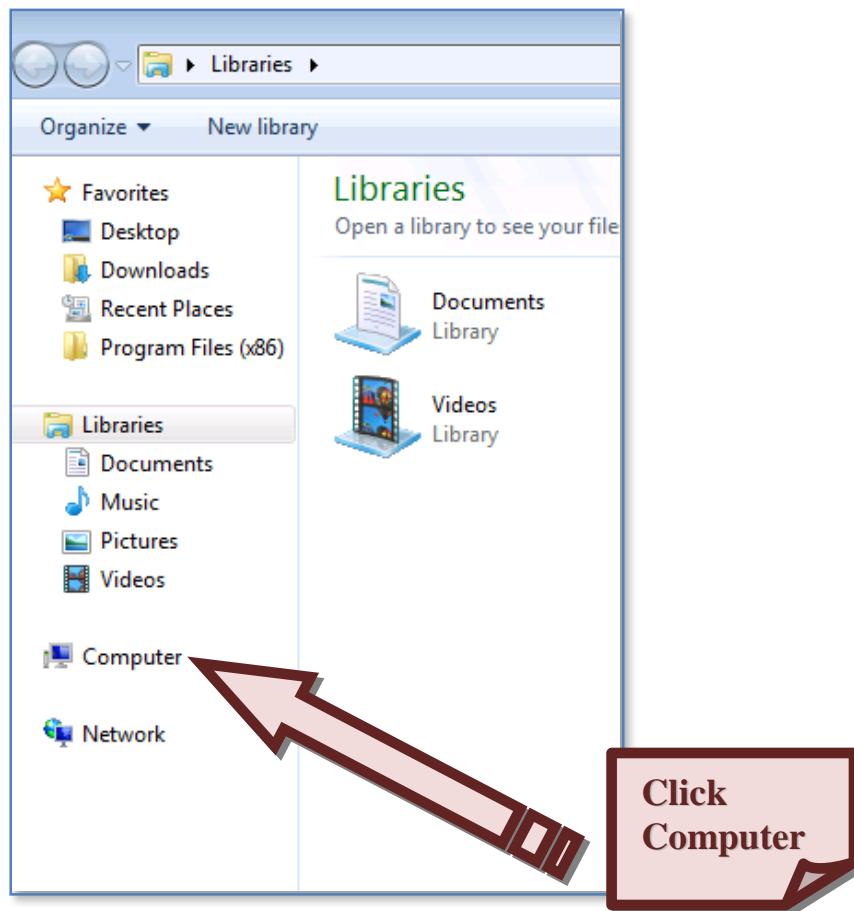
If you use Windows Explorer you should also be able to browse to this location under *My Network Places*. The ability to create and edit documents here is determined by the user rights within the SharePoint site.

*Upload a document via network places in Windows 7 or Vista*

Windows 7 and Vista provide the ability to map directly to a SharePoint site without the need to create a network place. To do this firstly launch Windows Explorer which is normally the folder icon just to the right of the start button as shown below.

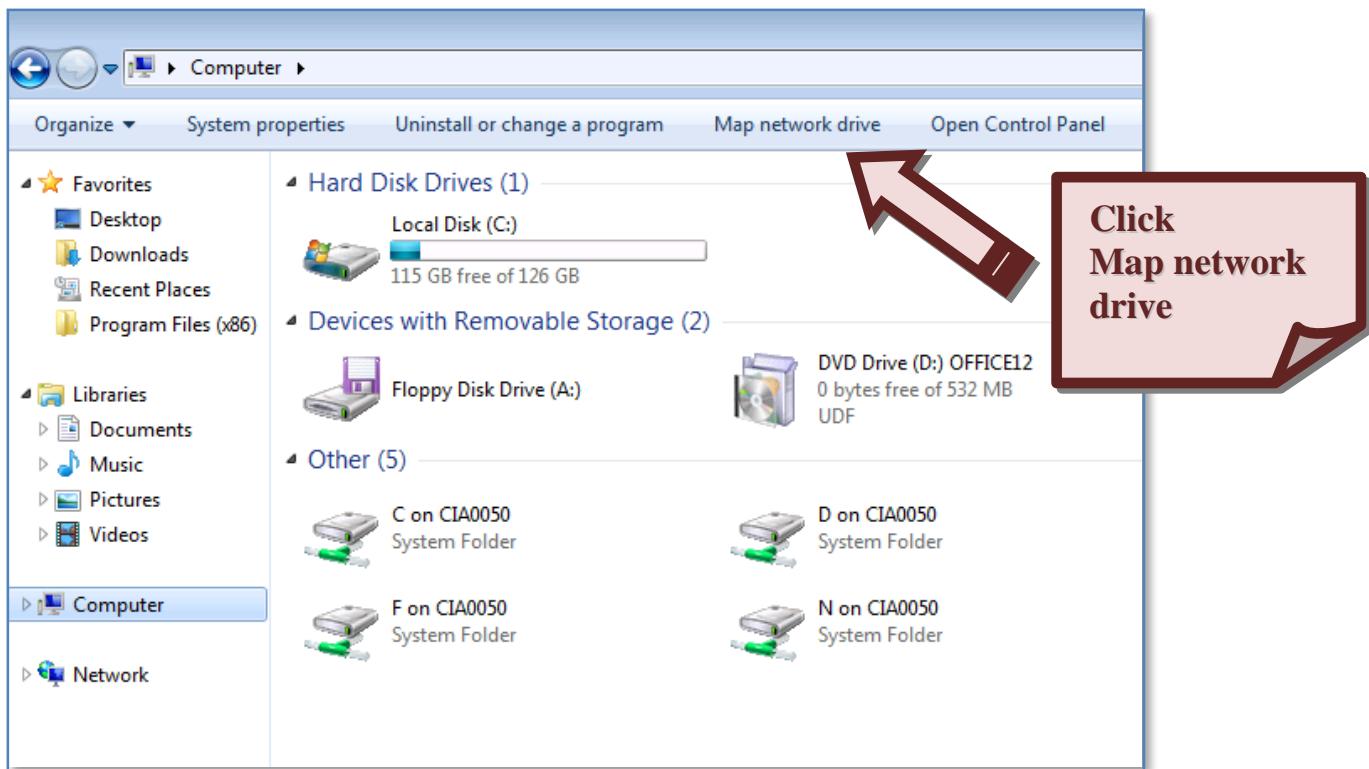


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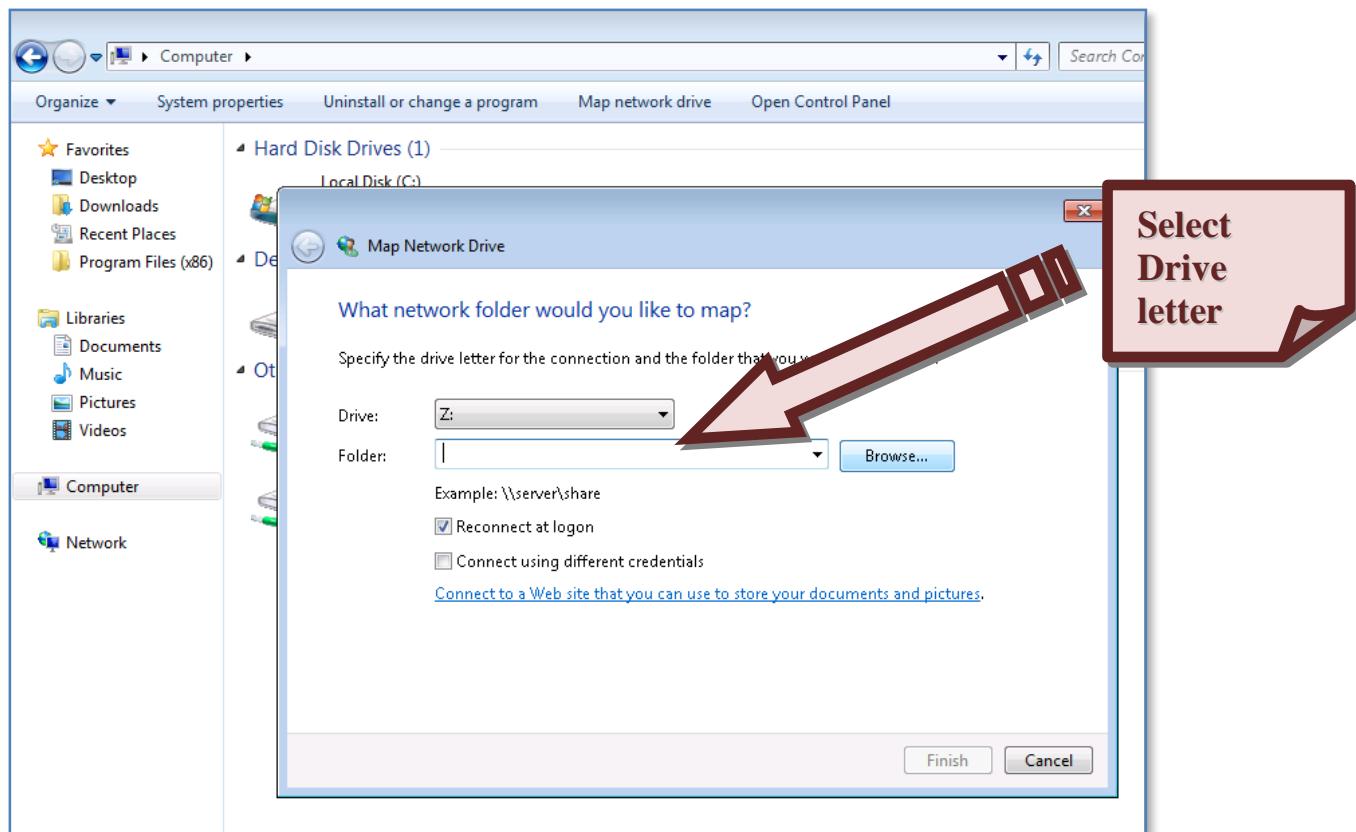
Once Windows Explorer has launched select Computer from the window on the left.

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Upon selecting computer you should see all the drives that are available on your local computer. You will also notice a menu bar appear just below the address bar at the top of the window. One of these items is *Map a network drive*. Click here to proceed.

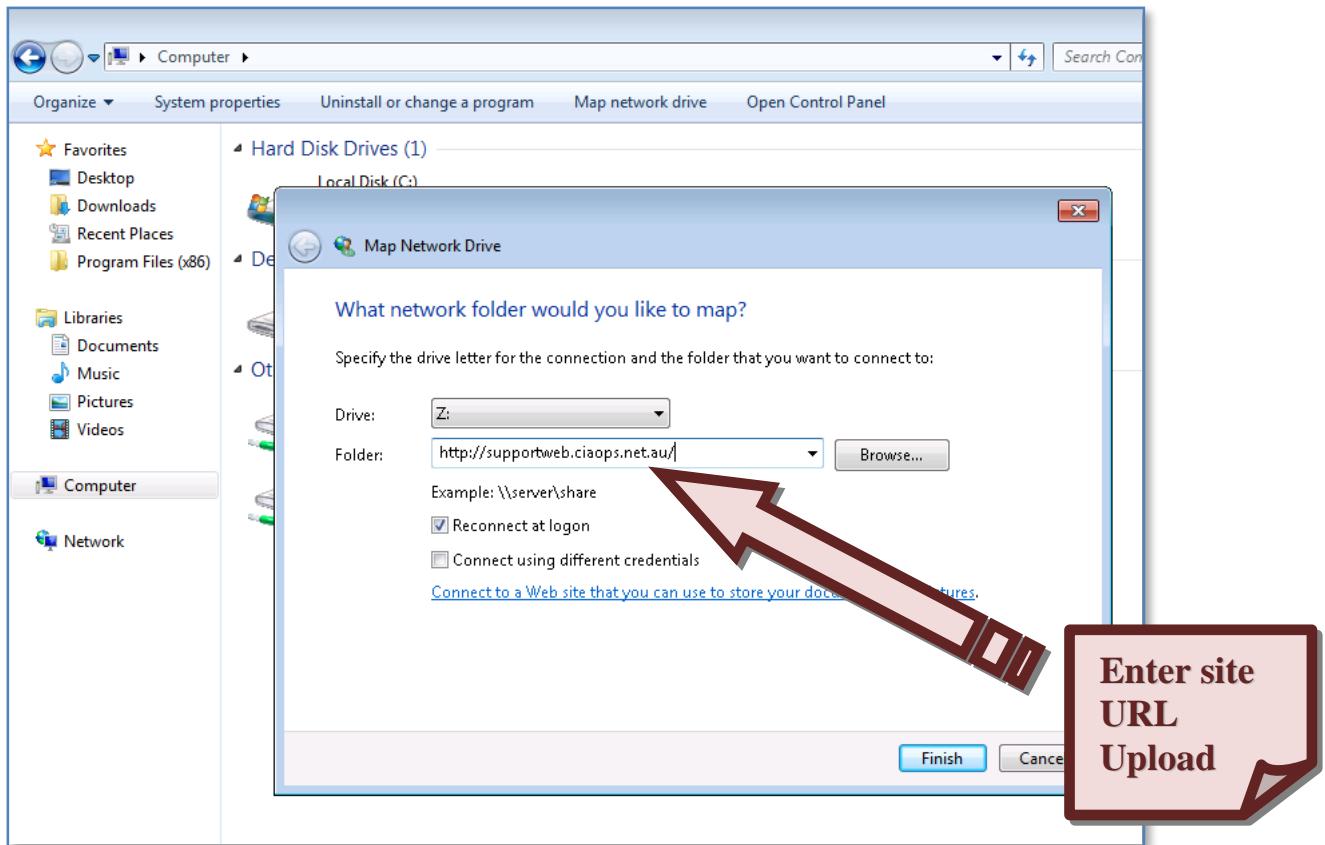
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A *Map Network Drive* window will now appear asking you to select a drive letter and a folder. If select the arrow to the right of the drive you can any drive letter.

Into the folder area you will need to type the address (URL) of your SharePoint site or SharePoint Document Library like shown below.

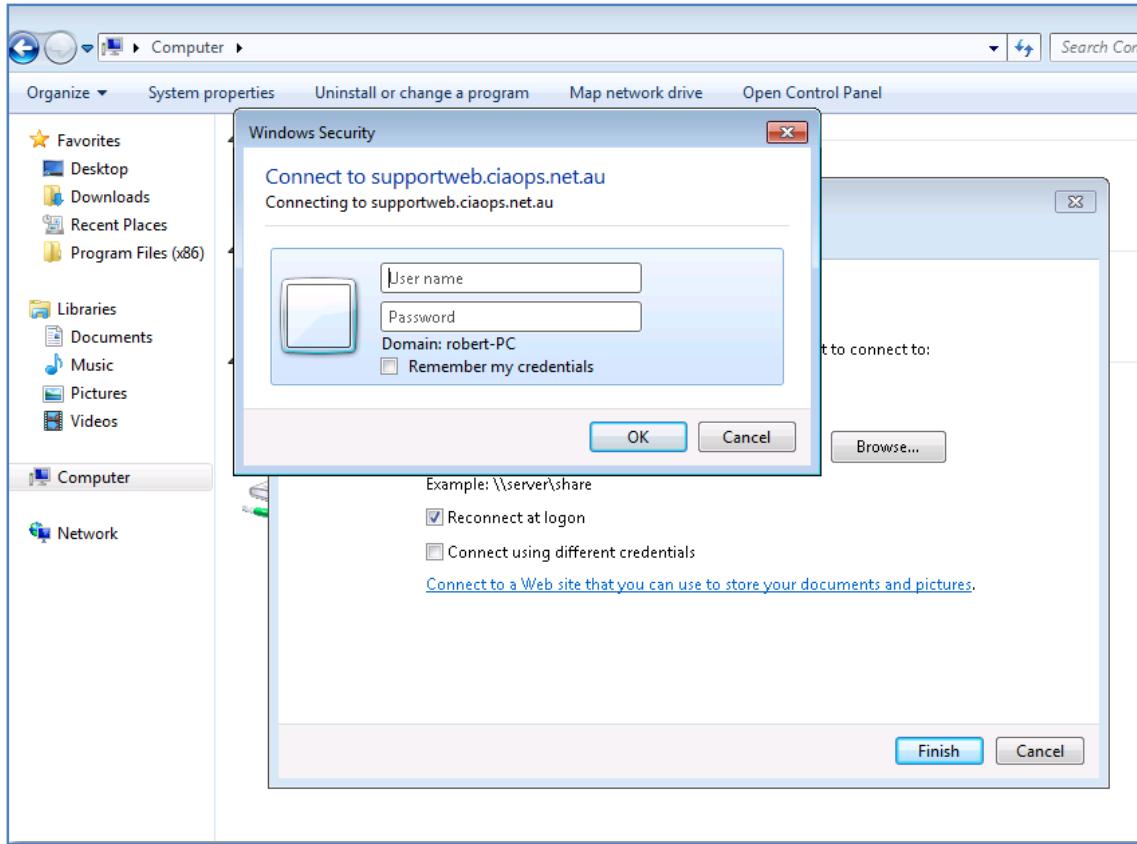
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You can also choose whether you wish to have this drive reconnect at login and whether you wish to access this location with a different set of credentials that you are currently using on your network. If you are planning to continue to use this SharePoint location it is recommended that you check the box *Reconnect at logon*.

When you have made your selections press the **Finish** button.

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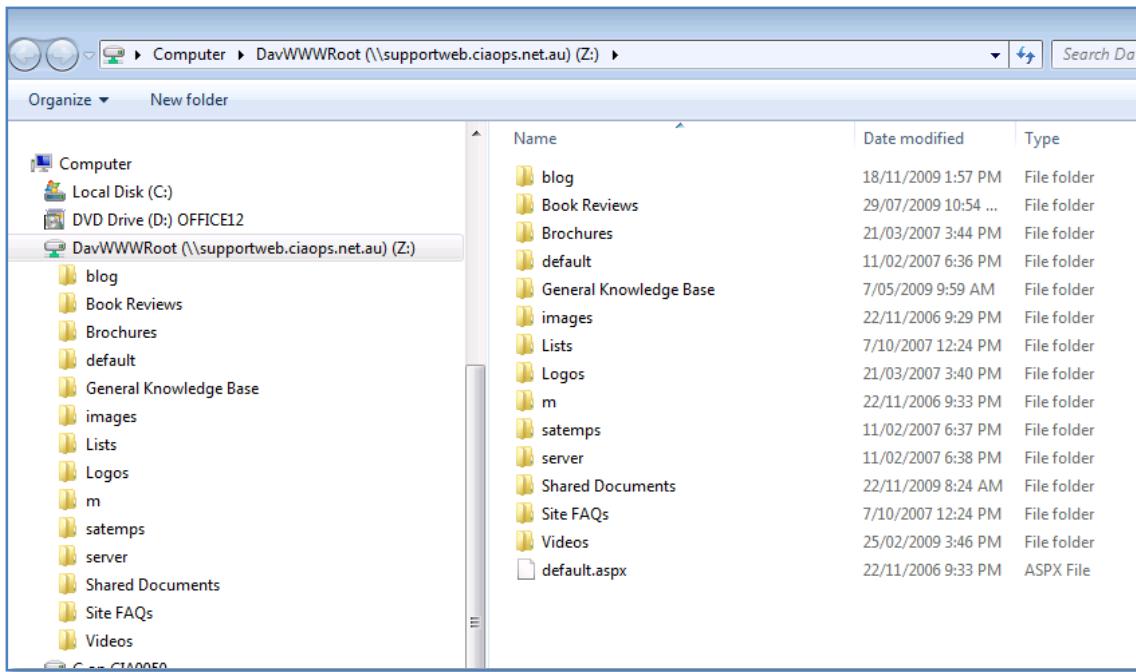


If the SharePoint location you connecting to requires a password you will be prompted for one now.

Simply enter the login details you have been provided for this SharePoint site and check the *Remember my credentials* checkbox if you plan to use this location regularly.

Press the **OK** button to continue.

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The mapping process should now be complete and you will see the SharePoint location displayed as a drive under your *Computer* on the left hand side window. In the title for the drive you will see the drive letter you selected previously (in this case Z:) and the SharePoint site (in this case supportweb.ciaops.net.au).

If you expand this location you will see any other SharePoint resources that this mapping now has access to.

Now that you have successfully mapped a network drive to a SharePoint location you can easily drag and drop files between your local machine and the SharePoint site. You can also work directly with SharePoint files in this drive from any application you have on your local machine.

### 16.12 Conclusion

The aim of this chapter is to show you better understand some of the ways that you can actually use WSS v3 in practice.

If you have any suggestions or comments about the information here please contact [director@ciaops.com](mailto:director@ciaops.com).