Teamspace Plus training documentation(SP 2007)

Guide for Sharepoint 2007 Administration

2011

Syngenta
www.syngenta.com

This document is the detailed training documentation for upgraded Teamspace Plus sites in the new Microsoft Office SharePoint Server (MOSS) environment. It focuses entirely on the Administrator role, but there is additional documentation available focusing on end-users.

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1. Introduction

Setting up a new teampsace

To set up a new Teamspace, you need to contact your **Knowledge Advisor**. After discussing with your Knowledge Advisor, he/she will request it for you. By default the size of the Teamspace is **1GB.** Additional space can be requested also by your Knowledge Advisor, up until 5 GB.

If you do not know your Knowledge Advisor you can find the list here:
http://teamspace/sites/kan/Lists/KA%20List%20Globally/By%20Country.aspx

Some sites require what's known as a "Digital ID". A Digital ID is simply a certificate that is installed into your browser and helps identify you when accessing the TeamspacePlus service. TeamspacePlus sites that require Digital IDs are used whenever there is a need to store certain types of information. You are normally informed if you need one and how to acquire one during the registration of your account. Digital ID-enabled sites can easily be identified as they have the word "strong" in the URL (e.g. https://tsplus-strong.syngenta.com/sites/mysite/). You can ignore the rest of this section if the TeamspacePlus site you are accessing is not enabled for Digital IDs

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Your role as Administrator

As Administrator, you are the one responsible for the **design**, **set up** and **well being** of your Teamspace.
Responsible for the content and the access of the Teamspace is the general owner (listed in Web Admin – not to confuse with the owners group in Site Permissions) even though you, as Administrator, will most probably perform the needed actions. You have to work closely with the owner and act on his/her behalf. You are the only one that has **rights to add and remove members**, **add and delete Webparts** and **do major modifications** beyond collaboration on content. The Administrator role is important and needs to be taken seriously.

Required Vocabulary

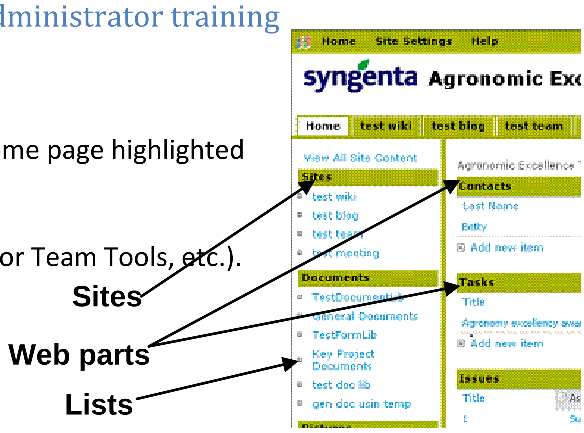
To understand the following chapters, you need to read and understand the following concepts!

- **Lists:** the Teamspace mostly works based on lists.
  A list is **like a spreadsheet** and is made up of **columns** and **rows** (for instance **Contact** List, **Event** List, **Discussion** list, **Links** list …). These columns are also called **attributes** and they are meant to define the different items in a list. These columns could refer to the name of the item, the name of the author, date of creation, or to other more specific attributes such as document type, status of a task…which are particular for one type of list.
  Lists structures are different depending on the type of list (Events, Contacts, Tasks, Libraries…) and the settings made by your Administrator.
  The Administrator of the Teamspace can set **different access permissions for different lists**.

  Libraries are a particular type of list serving as a **collection of documents**. All documents posted on the Teamspace are located in libraries. Each library has a different purpose, and may have a different structure, which can be **adapted by the Administrator** in order to serve its purpose.

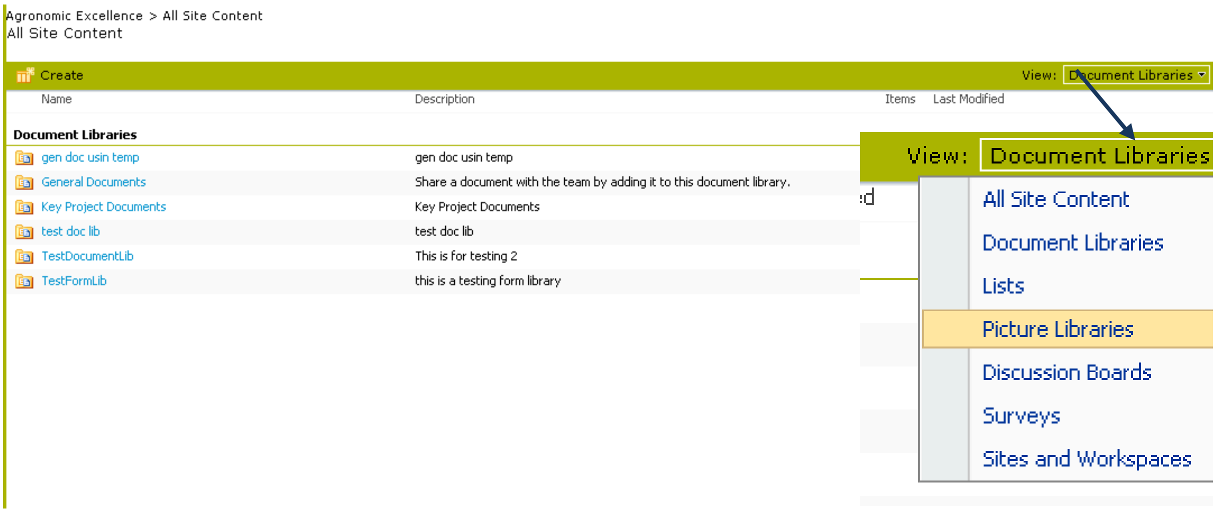
- **Webparts:** each part of the home page highlighted

  by a color bar is a Webpart
  (for instance Announcements or Team Tools, etc.).



The behavior of the various Webparts is described in the relevant section. Webparts can be added by the Administrator.

- **Views**: a view is a way of displaying the content of a list.
  There can be several views for the same list, as views can filter or sort documents or other list items according to various criteria.
  In the 2007 version, views are located on the right top corner of every list.



- **Alerts**: an alert is a message that is sent automatically from the Teamspace to your e-mail, notifying you of changes on the Teamspace.
  Alerts are set up by each team member as they wish. Alerts can be set up either for individual items or whole lists.

2. Getting started: What can/shall I customize?

- The first thing to do in a new Teamspace Plus site is to check the accuracy of the **Teamspace details**, especially the name of the Teamspace owner. If this is not right, → See Modifying Teamspace details.
- Then post the **photo** to be used on the Home-Page → See Photo for Home-Page
- The next point is the addition of specific **Team Tools** → See Team Tools
- To work properly Document libraries need to be customized by the addition of **specific attributes** → See Customizing a Document Library.

It can also be useful to create **specific Document Libraries** other than the default ones → See Adding a Document Library.

It might also be useful to **customize the Views** for a more effective access to specific documents → See Creating Views

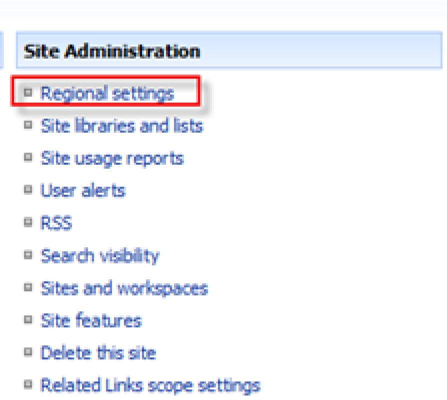
- To **accommodate calendars** for several different purposes the event list can be customized by the addition of attributes and creation of specific Views → See Creating/customizing a List, and Creating/customizing a View
- If the team members have special requirements you may need to add **specific Lists**. There is a wide range of things that you can do with Lists → See Working with Lists.
- You also need to **register team members** and **give them the relevant permissions** → See Creating User Groups and Adding Users
- Your KA may also need to request additional space for the Teamspace, the default one is **1GB** and you can request to increase it **up to 5GB.** From 5GB to 15GB (the max) a special approval is required also for the KA.
- You may want to **re-use customized Webparts from another Teamspace** → See Importing Lists and Libraries

3. Setting the Teamspace Regional Settings

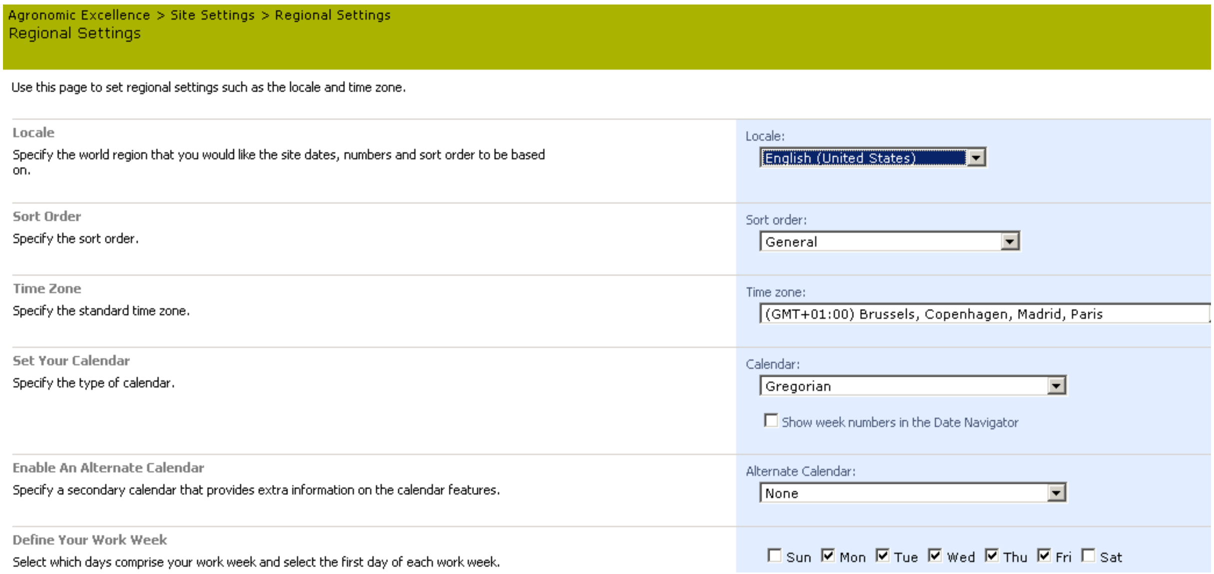
You need to **check the regional settings** in use for this Teamspace.
By default, they will be **English (United States)** as indicated in the web part. This has an impact on the **format of dates**, **numbers** and **sorting of text**, for instance the format of date is MM/DD/YYYY. EAME Teamspaces should have English (United Kingdom) as Regional Settings.

If this is not correct for your team, you can modify this as follows:

1. Go to **Site Settings** and under **Site Administration**, click on **Regional Settings**.



2. In the Regional Settings page **select the appropriate region** to reflect the format **your users are used to**.



4. Adding photos

- **Adding a team photo**
- **Uploading and adding pictures to other pages**

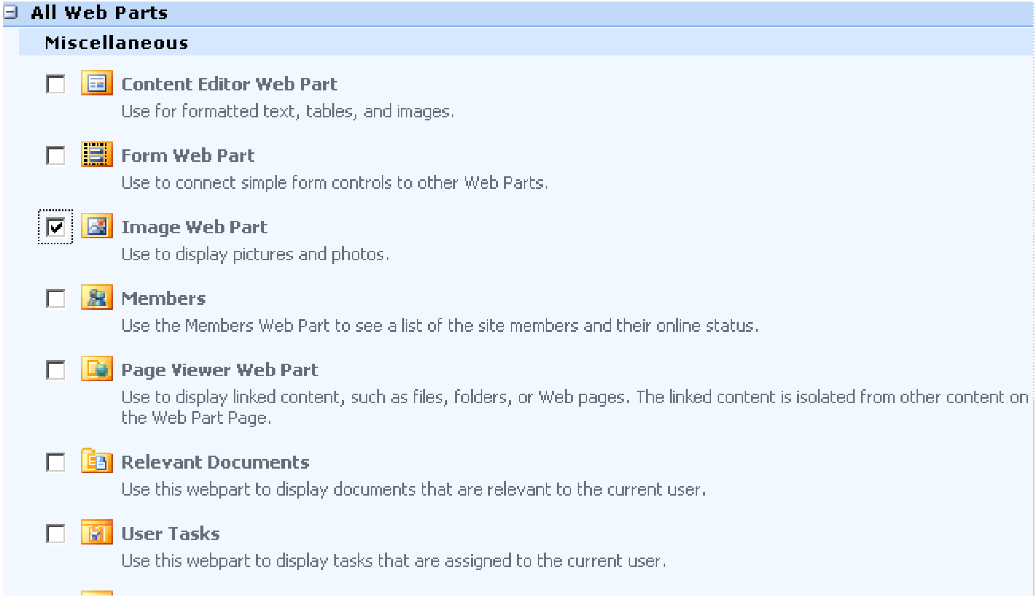
Adding a team photo (or replacing

the default team photo):

Make sure the picture you want to use as a team photo is stored on a Teamspace with the name "**teamphoto.jpg**".
(name ="teamphoto" is compulsory to allow automatic inclusion in home page; format "jpg" to minimize size).
The picture should not be more than **256 x 192 pixels to fit with home-page** design. You can use **Microsoft Office Picture manager** to change the picture size.

- For a later step, you need to have the link to the picture you have stored. You can do it by using the "copy shortcut" functionality.

- In the Teamspace click on **Site Actions**, **Edit Page**, **Add Web Part**, a list of 'parts' will appear; select **Add Web Image Part** (found under **miscellaneous**).

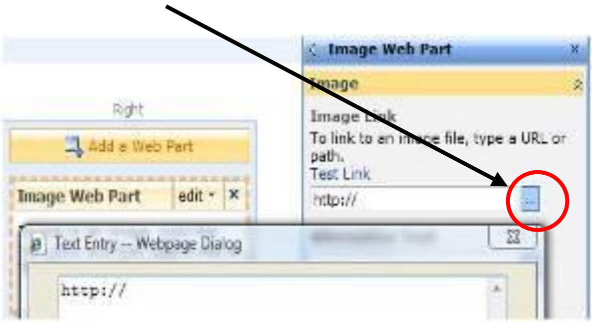


- **Open the tool pane** (a link will appear in the **Image Web Part**) and **upload** your picture under the name “teamphoto.jpg”. There is no **Overwrite Existing file** box.

You may want to go to the document version history and delete the previous picture.

- If the picture you plan to use contains people**, make sure all people on the picture have given approval** for its publication on the Teamspace. You can also use any other type of picture that would **illustrate the purpose of the Teamspace** such as **logos**, **site** picture, **crop, etc..**
- If necessary to use another format than jpg you can modify by following the steps below :

1. Click on this box to modify it.



2. This will open the Text entry pane.
3. Click now “paste” and the link of your team photo will be inserted
4. Click on **OK**
5. When you are finished click **OK** at the bottom of the **Image Web Part** box.

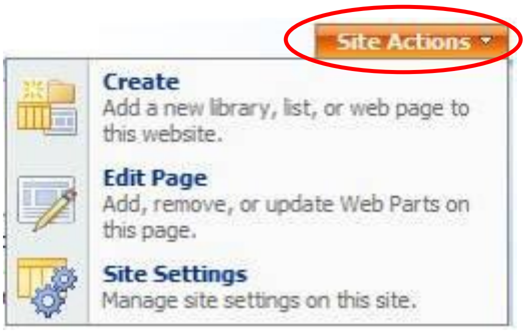
5. Adding a Document Library

A new Library should be added only when it should be **used by a specific group** of users, different from the Teamspace contributors, **or** if it is **to store numerous documents of the same type**.

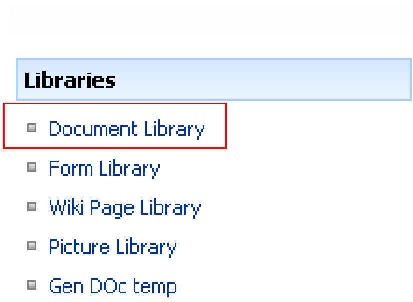
There should not be too many Document Libraries on a Teamspace: it can be confusing for users who might hesitate on where they should place documents.

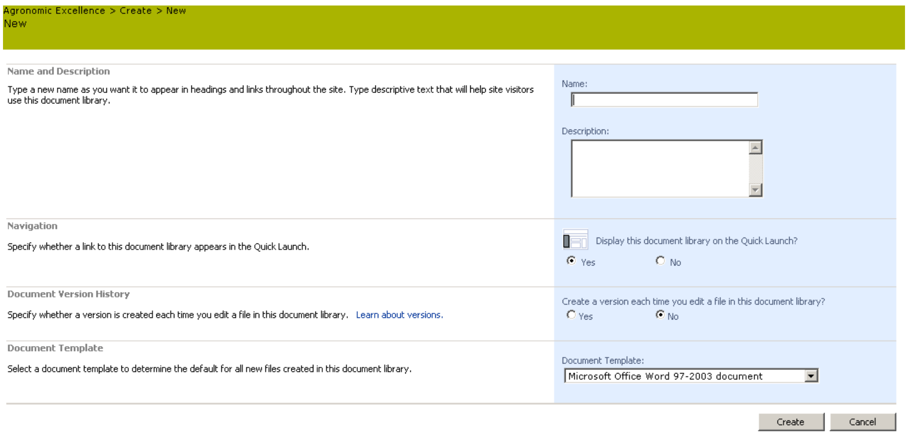
To make your library most useful to your users and to avoid that the library gets messy it is highly recommended to create custom attributes and views in a same library.

1. To add a document library click on **Site Actions** on the right hand side of the top bar.



Click on **Create**, a new page will appear. Click on **Document Library.**



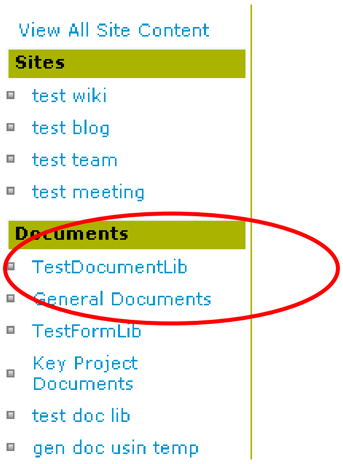


2. In the **Name** box, type a name for the library: make it as **descriptive** as possible**, use underscores between words** better than blank spaces (to avoid %20 appearing in url). It can also be useful to precise in the Library's name that the library is **open** or **restricted**.

3. In the **Description** box, type a description of the **purpose of the library**. The description will appear under the library's name when the library is opened.

The description is optional but strongly recommended.

4. In the **Navigation** section, click **YES,** if you want the library to be displayed on the Quick Launch bar for easy access. This way, document libraries should always appear on the dedicated **Documents** Tab on the Quick Launch.



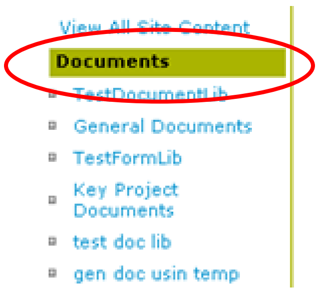
5. In the **Document Versions** section, click **yes** if you want a backup copy or major version to be created each time a file is edited in this library. You should limit the number of major versions.

6. In the **Document Template** section, specify the type of file used as a template for new files in this document library (optional).
By **default,** the **New Document button** in a document library will open **Word**, but if you select as Document Template Excel or PowerPoint then, the New Document button for this library will open the selected tool. Unfortunately, you can only select **one tool per library**.

7. Click **Create**.

The new library will immediately open so that you can check it. You can use this opportunity to customize it to fit the purpose defined by the users. See → Customizing a Document Library.

The new document library will be immediately added to your Teamspace on the left hand side under **View All Site Content**



You can also create a new library by **using an existing library as a template**. This is especially useful if you have put lots of effort in creating specific attributes and views and want to re-use these in another Teamspace. To be able to do this you first need to have saved the model library as a template. See → Saving a library as a template.

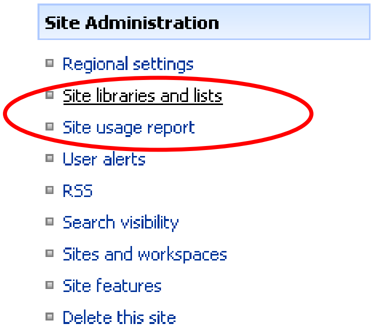
6. Customizing a Document Library

For a Document Library to fit the needs of the users you may need to customize it. There are two ways to access the customization page.

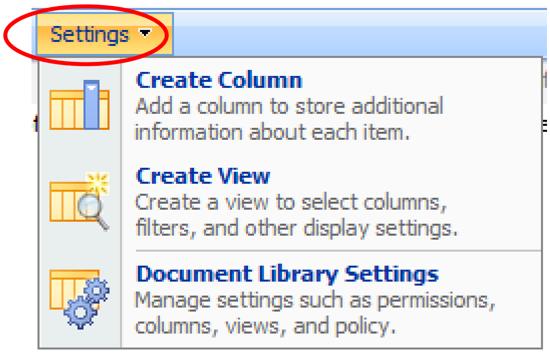
From any page you can go to the top bar, click **Site Actions**, then in the drop down box select **Site Settings**, and click on **Site libraries and lists** under Site Administration.

You can also click on **Site Settings** in the top bar : 

From the next page, select **the library you want to customize.**



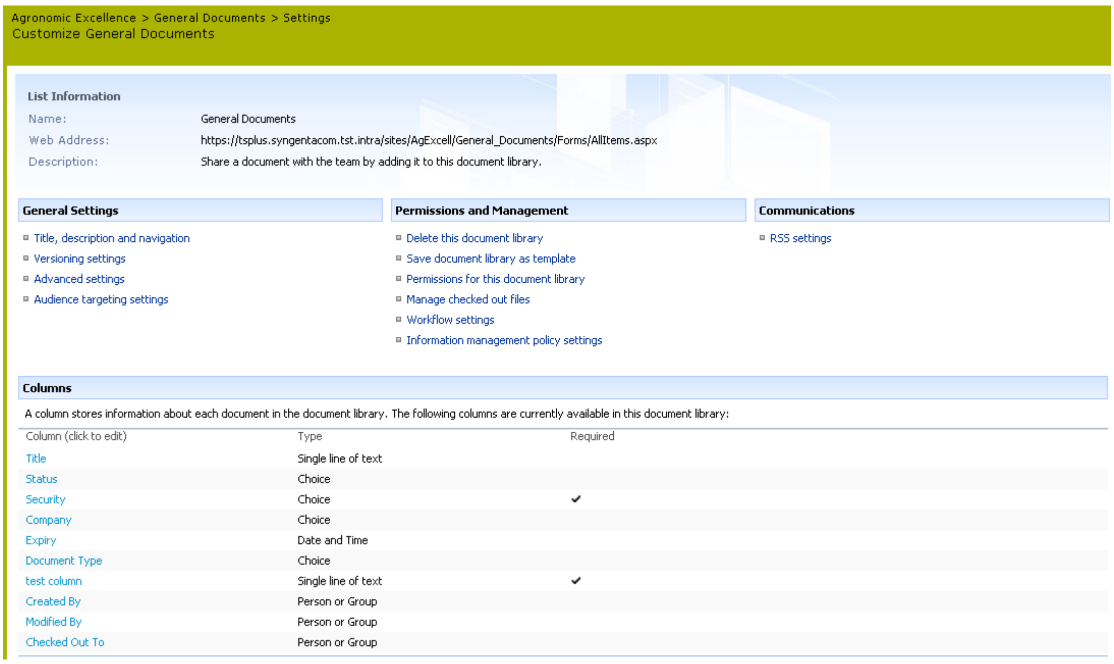
An alternative is once you have opened the **Document Library** (under **View All Site Content**), click on **settings** > Document library settings on the top bar.



Customizing a library can start with changing the **General Settings for this library** (**permissions**, **versioning**, **approvals**) → See Customizing General Settings for a Document Library

- Customizing a library is also about amending default **attributes** captured as **columns** and/or adding new ones to allow effective management of the library content →See Adding/customizing Columns

- An important part of the library customization is the creation of the most relevant **Views** for an effective access to documents → See Creating/customizing Views.



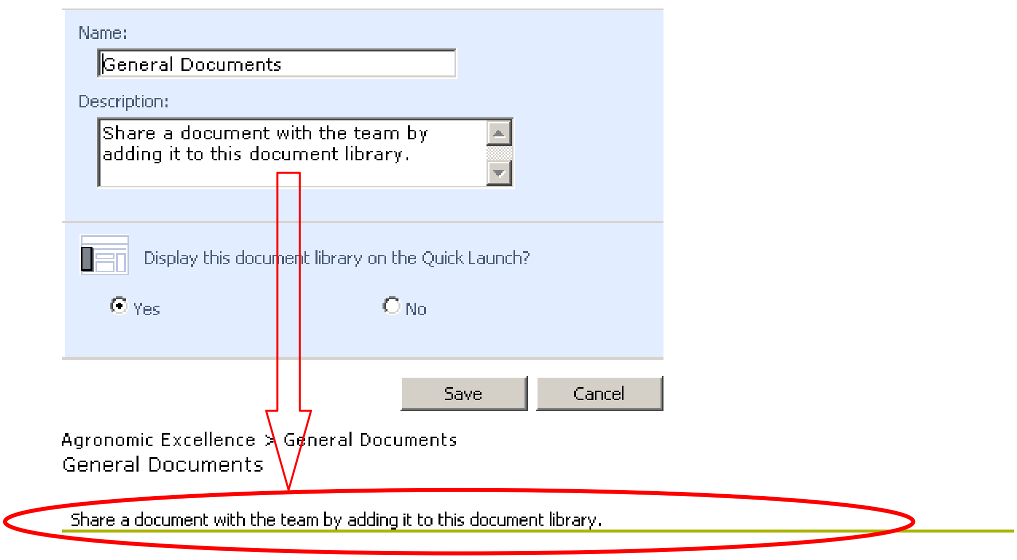
7. Customizing General Settings for a Document Library

Customizing a library can start with changing the General Settings for this library (permissions, versioning, approvals).

From within a Document Library, click on **Settings** in the top menu bar then select **Document Library Settings**.
To change the name of the document library select **title, description and navigation**. Here you can change the name, description and navigation settings. Please note that **the URL cannot be changed**. **If the name should change too much** and the access rights also change, it is **better to create a new library**, transfer the documents and delete the old one.

e.g: url is http://teamspace /sites/EKA/Unrestricted_Documents/ : if you decide to change its name because the access group has changed and is now restricted, the url will still contain 'unrestricted' and this is confusing.

You can also include instructions and links to the top of the library page by including them in the **Description** box.

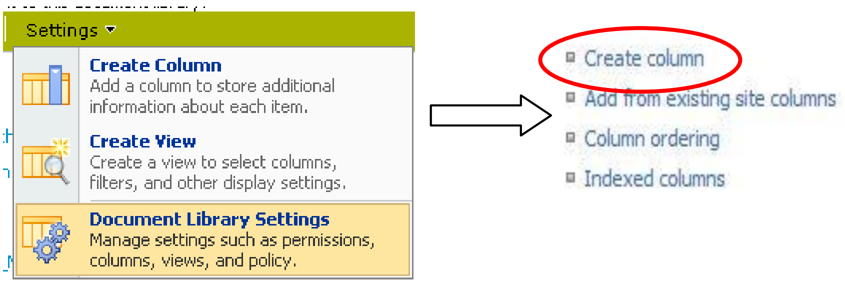


Change permissions for this document library to manage permissions related to this library. →See [Changing permission settings for a list or library]

8. Adding/customizing a column in a Document Library

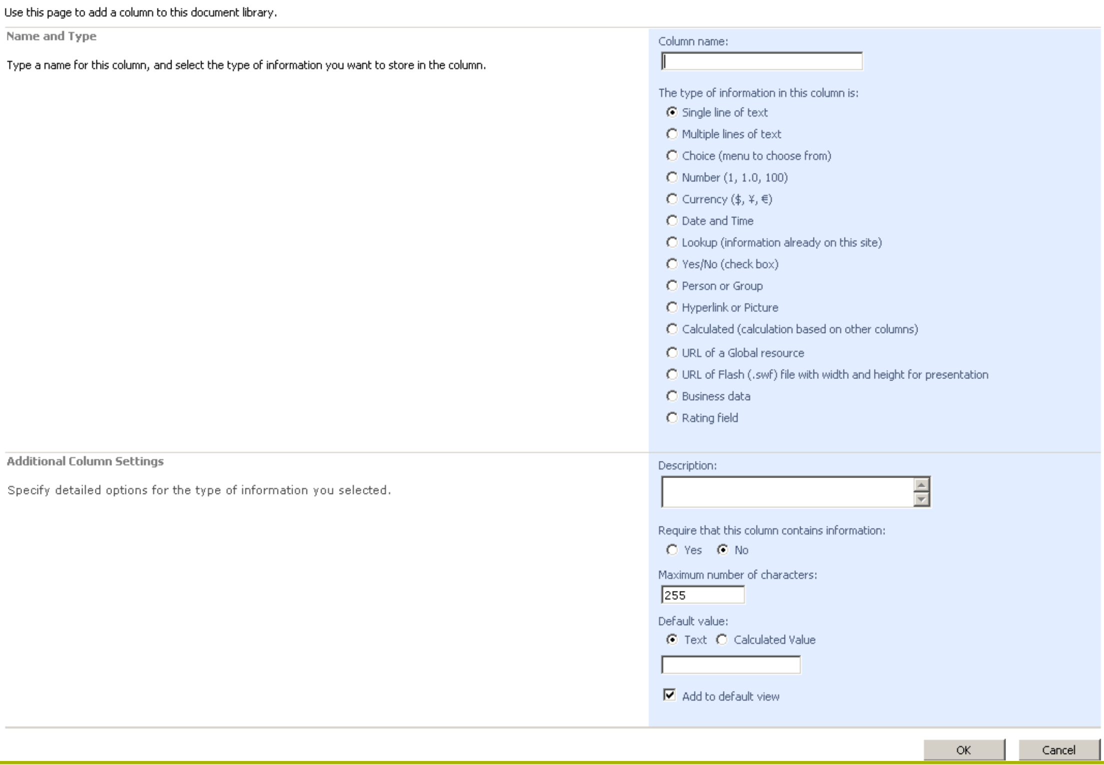
Customizing a library is also about **amending default attributes** captured as columns and/or **adding new ones** to allow **effective management of the library content**. To think of the most useful columns for your specific Teamspace, think about the most useful filtering criteria for the content in your Teamspace. E.g. **would you like to be able to filter the documents by topic, region, product?** Or would you like to be able to filter the documents by expiry date? These thoughts will help you later on to think about the needed columns and will automatically lead to the needed views in your Teamspace.

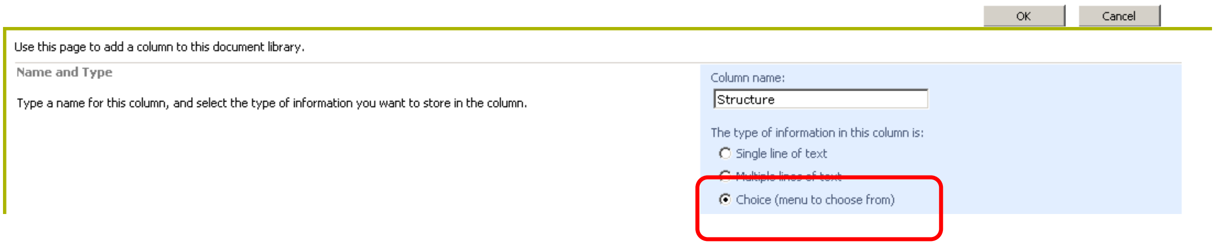
1. From within the document library you want to modify, click **Settings** then **Document Library Settings**.

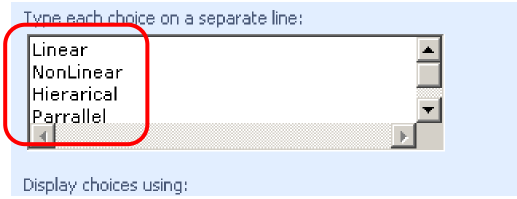


2. To add a new column, click on **Create Column.** You can also go straight from **Settings** and click **Create New Column** in the drop down box.
3. Give a name to this new column (as descriptive as possible) and select the type of content for it. Various types of content may add value to your document library such as :

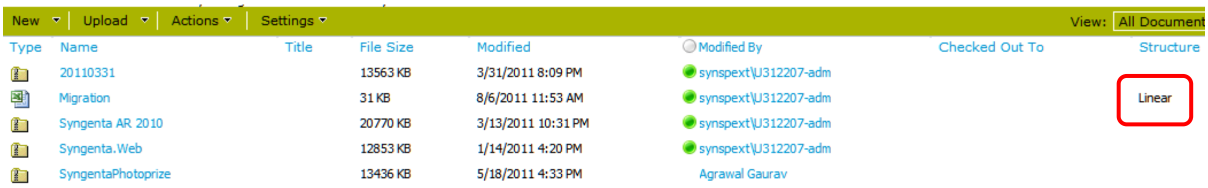
- **Keywords** describing e.g. the content of documents and thus allowing to group/display them by topics. Generally, it is good practice to offer a **choice** for selecting these keywords.
  See example below :





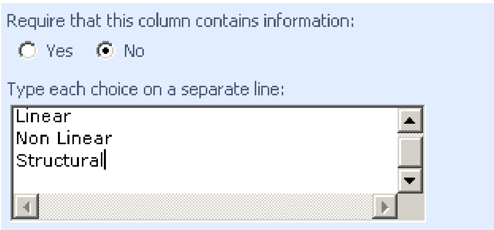


Then when a document is uploaded in the library, the relevant choice is selected for this column and thi information can be shown in the views.



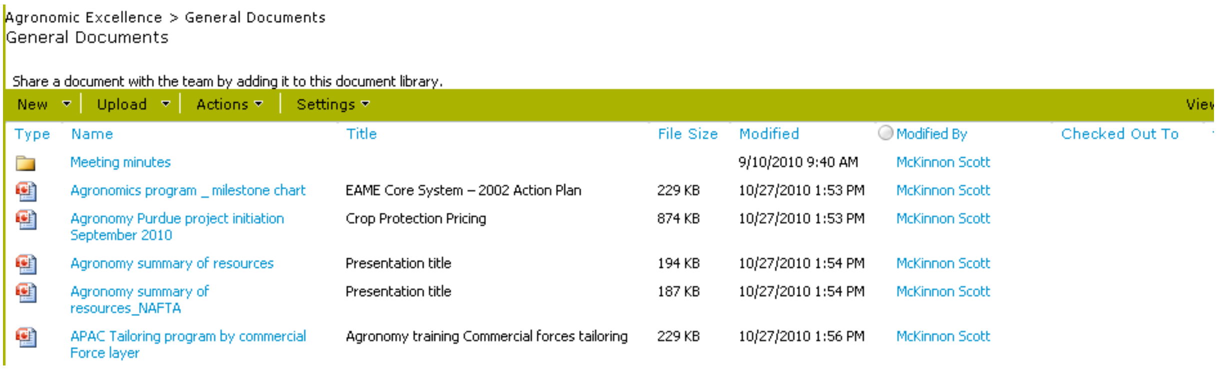
You can also decide if the attribute will have a unique value per document or if you will allow multiple choices. This is heavily driven by the content of your documents and **<u>may have some implications in terms of the views that you will then be able to create (multiple choice attributes doesn't allow sorting or grouping, but are no problem for filtering).</u>**

It is good practice that when you set up such new columns you tick the box **Require that this column contains information** (or the field might not be filled-in by contributors when uploading a file).



If the column is mandatory (require that the column contains information), setup a default value. For instance "pending". Then, when uploading multiple files, the files will be checked in and visible to all. Then the individual value can be added (or changed in spreadsheet view)

- **Dates** to point to review dates or expiry dates or any other date of significance. These dates can be calculated by the system. See example below



To create a date calculated from the day of uploading use the formula **=today+365** (for 1 year from today)

- **Calculated formulas** can also be useful, either for dates or any other sort of formulas **including referring to other columns**
- **Names** to point to team members names (authors, owners, …), select the lookup option and point to the team member list

Type of Attribute	Pros	Cons
Single line of text	Flexible	No sorting No filtering No grouping **-No use for Views**
Multiple line of text	Useful to capture comments and unstructured information	No sorting No filtering No grouping May take a lot of space on the screen **-No use for Views**
Choice + (either 'drop-down' or 'radio buttons') + fill in not allowed	Only single choice possible -allows sorting, filtering, grouping	Need an Admin to add new values No multiple choices
Choice + (either 'drop-down' or 'radio buttons') + fill in allowed	Only single choice possible -allows sorting, filtering, grouping -allows values not in drop-down list	Can create a mess as doesn't need an Admin if value not in drop-down list No multiple choices
Choice + checkboxes (allowing multiple choice) + fill in not allowed	Allows multiple choices	Need an Admin to add new values Grouped values not possible May require multiple filtered views if users don't want to use dynamic filtering
Choice + checkboxes (allowing multiple choice) + fill in allowed	Allows multiple choices Allows values not in list	Can create a mess as don't need an Admin if value not in list Grouped views not possible May require multiple filtered views if users don't want to use dynamic filtering
Number		
Currency		
Date & Time	Can be calculated date to trigger revision	
Lookup	Allow a non-Administrator to manage the list of values (this is a web part on the Teamspace)	
Yes/No		
Hyperlink		
Calculated		

Site Collection columns

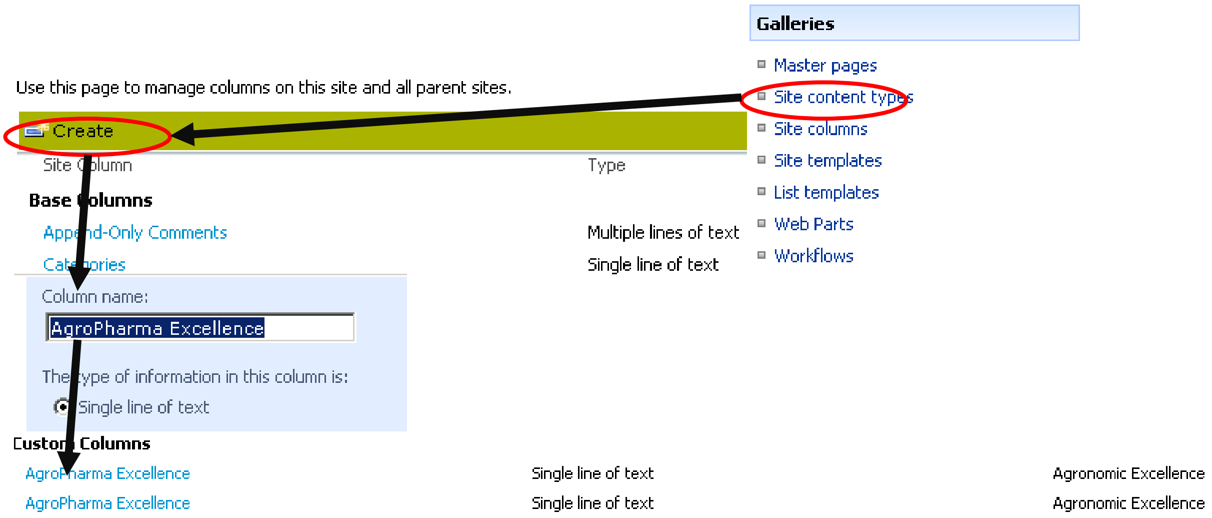
In MOSS, you are now able to create Site Collection Columns. These are the same as the columns for libraries and lists that you may be used to, but they are created at site level, **in the site Gallleries**. The benefit of this is that once you created a custom column here, you can simply add it to several libraries and/or lists, **without creating it each time on the same TS Plus site**.

To create a Site Collection Column, go to **Site Settings/Galleries/Site columns.** Here you will have a list with all the existing Site columns, grouped under different categories (e.g. Core Document Columns as below).

Click **Create** and then **choose in which group you would like to place you column**.

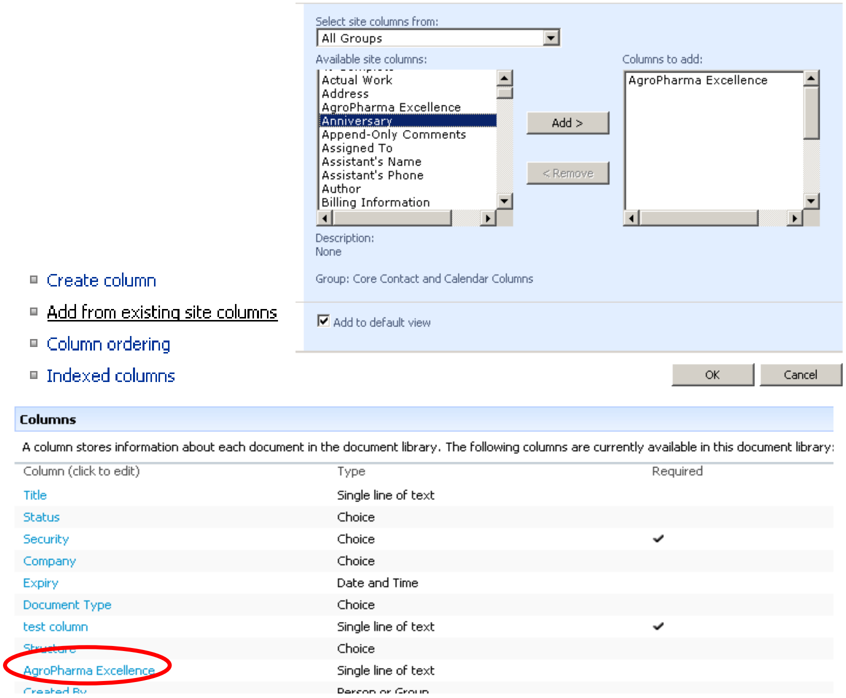
You will be directed to the column creation page (see below). You can now choose what type of column you want. These are identical with the options available for library columns. For more details see the section on Columns from this Administrator's Full Guide.

Your newly created column will be displayed in the Site Galleries, under the group you created it in (e.g.Core Documents,below).



To add a Site collection Column to a Library

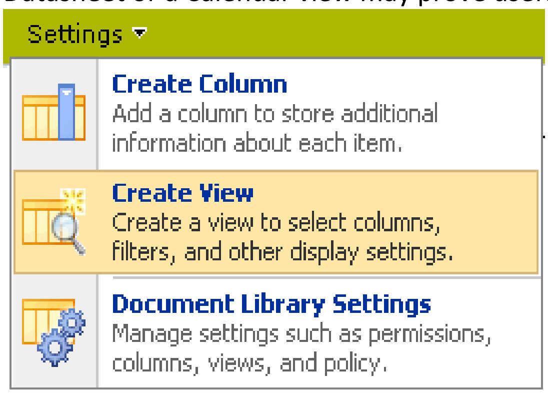
1. Go inside that library, **Settings/Document Library Settings.**
2. Under **Columns,** click on **Add from existing site columns,** choose the group where you saved it, find your column, select and click add.
3. The column will be added to your library structure.

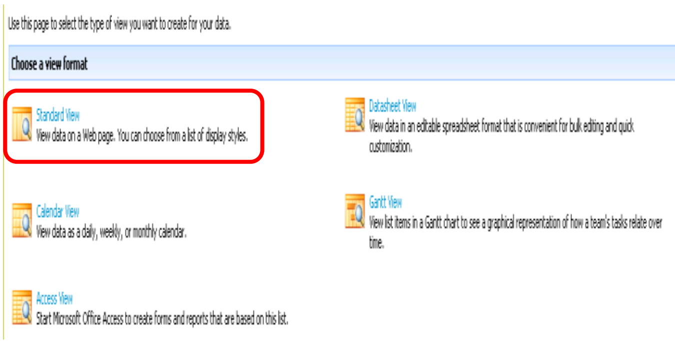


9. Creating/customizing a View

Views are the most important element of the customization of a library or list. Using views **will allow you to access your information in many different ways**, depending on the way you create your attributes. You will then be able to **filter**, **group** and **sort** your information in the way you feel best. Some people may use this information to manage the information differently depending on their requirements. To do that you first need to to set up relevant attributes (columns- see above) which will then enable the creation of the most effective views. For example, some people may wish to organize things by document type, or wish to filter all documents uploaded by themselves.

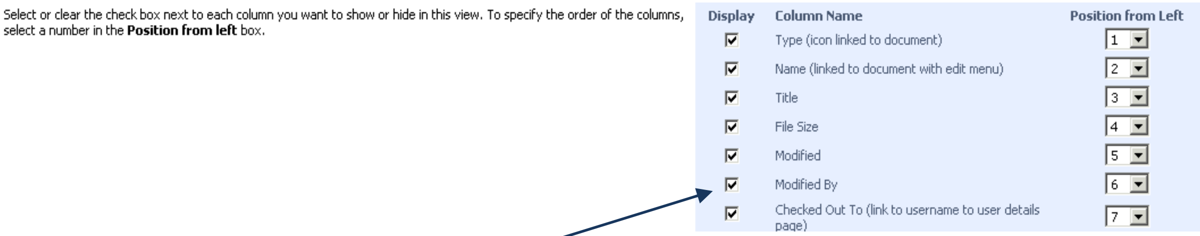
1. Go inside your document library, under **Settings** in the top bar, click on **Create a new View.** Select the type of view you need, generally, it will be a **Standard view**, but in some instance a Datasheet or a Calendar view may prove useful.





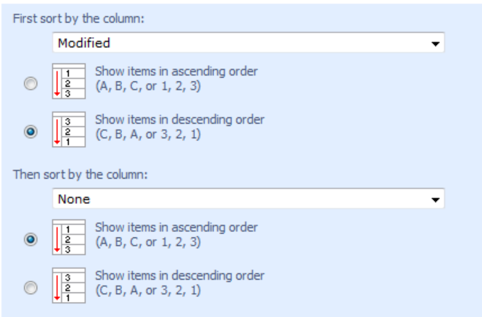
2. Give a name to this new view (as descriptive as possible) and select the audience for it, it is recommended to create only **Public Views**. Various types of Views may add value to your new Document Library such as :

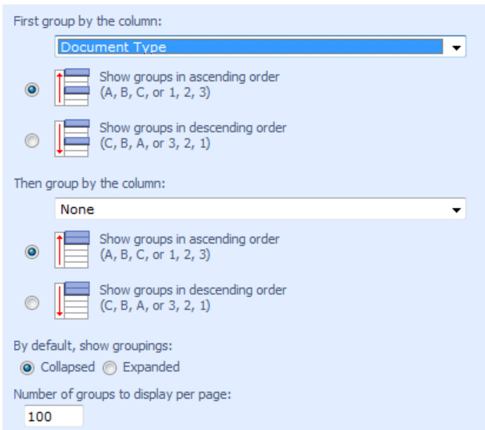
- **Filtered** views displaying only some documents to allow people to find more quickly, what they need based on the value of a specific attribute. For instance if you have a column capturing the author of documents you can then create a View called **My documents** where each user will only **see the documents for which he is listed as the author.**
- To do this, simply tick the boxes in the section **Columns.**



By ticking the column boxes, you can limit the amount of information shown in the view to make it easier to find.

- **Sorted** views, will allow to present documents sorted according to one or several criteria
- **Grouped** views are useful when there is a clear primary entry, thus a meaningful grouping allowing quick access for most users. In most cases, it is recommended to create the view with collapsed groups (default).



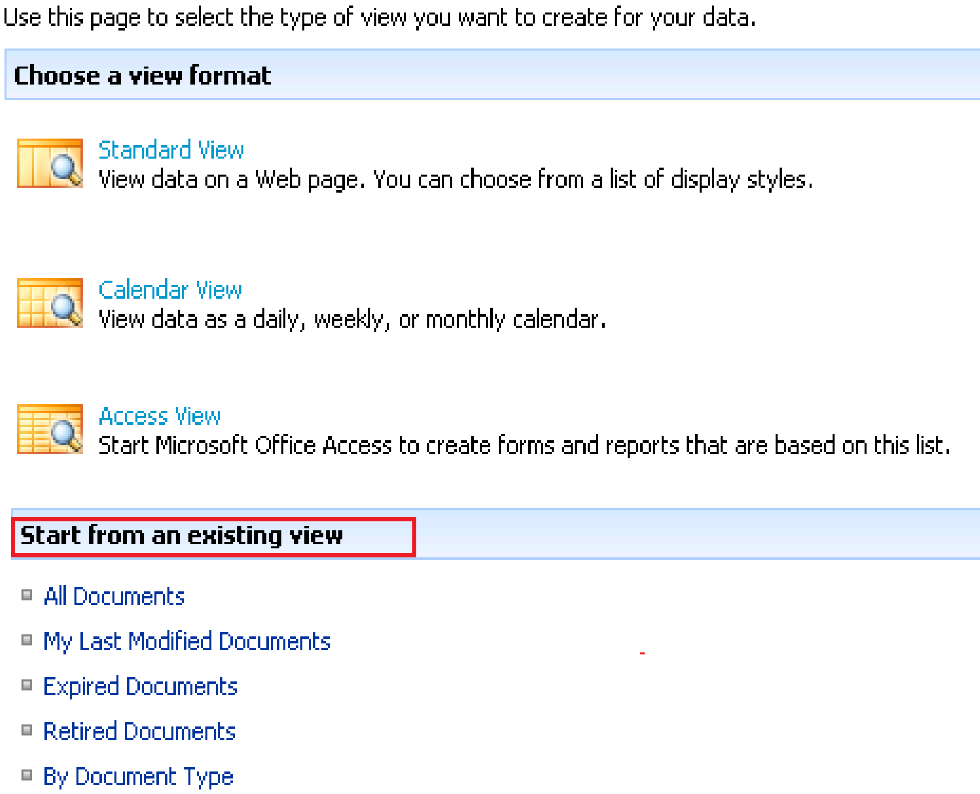


- **Limited** views (Item Limit) are useful when you want to display, for instance, only the 10 most recent documents …. This is especially useful for displaying on the Documents page itself. For this specific use →See Customizing Webparts

You can decide that the new view will be the **Default View** : the one shown when people open the library.

The "**Style**" box can allow specific displays to build shortcuts from Home pages or Documents page. For special use → See [Styles for Specific Views].

3. If you want a slightly different view, but starting from an existing view, once in the library click **Settings**, **Create View.** Then you can modify the choices made before by selecting the view you would like to modify. This can be found under **Start from an existing view** at the bottom of the page.

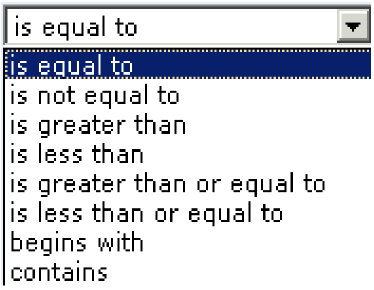


Hints & Tips about Views :

When you use filters usually you will select a criteria and ask that it is equal to a certain value (for instance Product = cyprodinil), but you can also create a view for which a criteria is not equal to a certain value (Product not equal to cyprodinil for instance). When choosing **not equal to** and leaving the value box empty you will filter for all items for which there is a value in the corresponding criteria (any value).

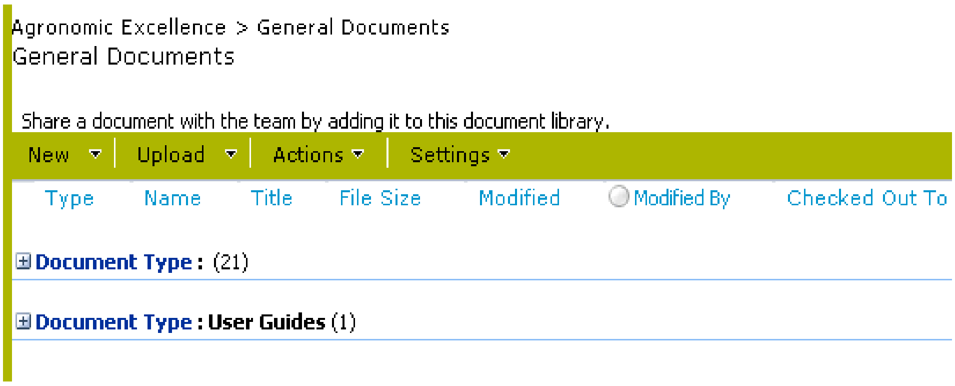
You can also filter on a criterion that contains a certain value, for instance if some file names contain a specific word you can filter according to file name and ask for the files containing this word.

The list of options for filtering is below:

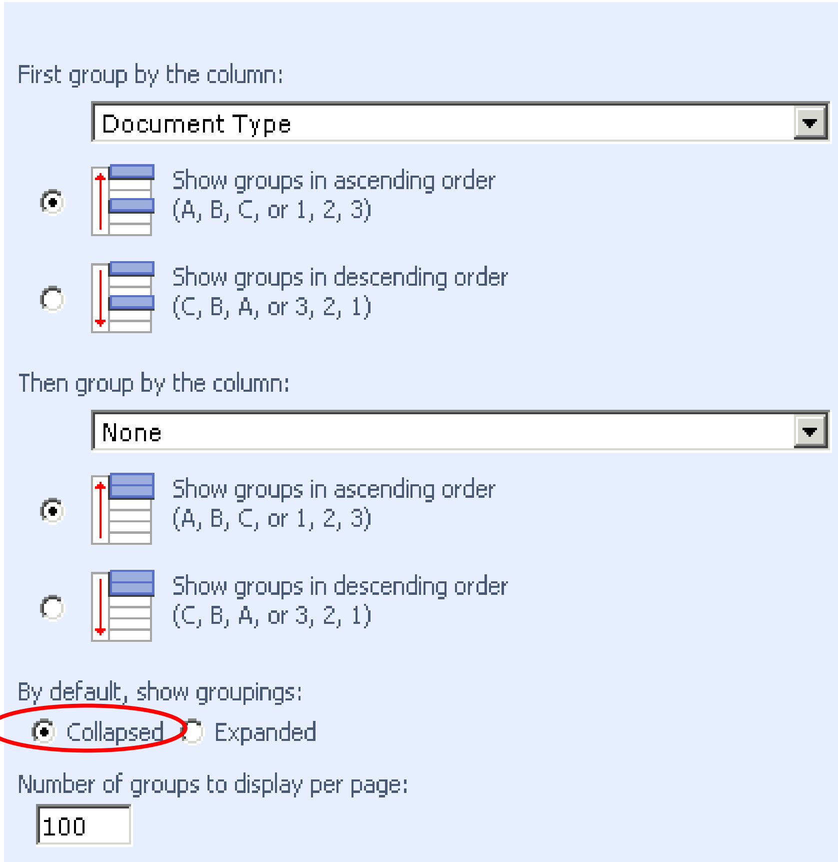


<u>Which view for which way of displaying documents?</u>
Some views may be of interest to allow various people to access what they need more quickly. Depending on the needs of the users, you may wish to use one of the following:

Type of View 1: Created to group documents according to one attribute (in this case Document type)



- Go in to the document library you would like to create a new view for. Go to **Settings/Create view/standard view**
- Give a name to the view, select the columns to display (you do not need to tick the specific column you will use to group items)
- Go to **Group by** and select the column you want to group by (remember you cannot group by an attribute allowing multiple choices)
- Tick the box for **Collapsed** display.



Type of View 2: Created to group documents according to 2 attributes (in this case Created By and Document type).

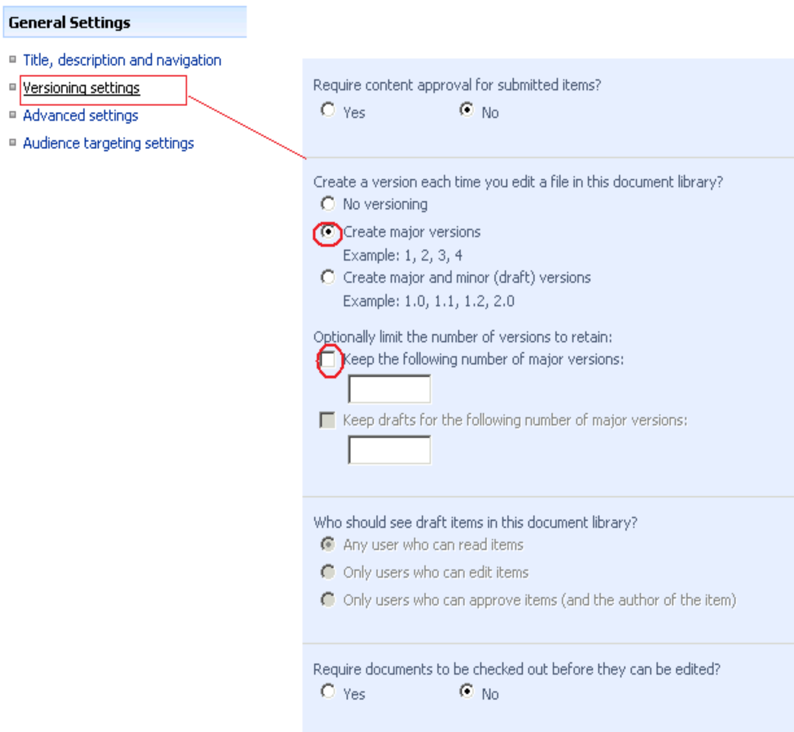
- In the document library go to **Settings/Create view /standard view**
- Give a name to the view, select the columns to display (you do not need to tick the specific column you will use to group items)
- Go to **Group by** and select the first column you want to group by (remember you cannot group by an attribute allowing multiple choices)
- Move to the next box allowing choice of a column and select the **second column you want to group by** (this will appear as sub-groups in the first level groups)
- Tick the box for **Collapsed** display.

Type of View 3: Created to display documents on the basis of words contained in file names instead of attributes.

- In the document library. Go to **Settings/Create view /standard view**
- Give a name to the view , select the columns to display (you do not need to tick the column you want to use to group items)
- Go to **filter** and tick the box **show items only when the following is true**
- In the next box select **Name**, in the next one **Contains**, then type the word you want in the blank box. **All documents with a file name containing this word will be displayed**. Note that you can add other filters by selecting either and/or and then using the next set(s) of box(es).

10. Versionning

By default, when creating a new library (Syngenta Document Library), versioning is disabled. You need to select it as an option to activate it in your library.
To configure Versioning, you need to go to the Library Settings : **Settings** Button **/ Document Library Settings.** Under **General Settings,** you will find **Versionning settings.**



You can **choose** among **no versionning at all**, having **major versions**, or having both **major and minor versions**.
- Major versions are created every time you check out the document, edit it, save it and check it in.
- Minor versions are created when you edit for e.g. document properties. Minor versions are not really necessary.
If you need Versioning enabled, then the recommendation is to set up with a maximum of **3 major versions**.This means that **your current**, and the **previous 3 versions** will be kept (this means you will have 4 items when checking version history: the current version and the previuos 3) . To do this, tick the box for "**keep the following number of versions to retain**" and enter the number.

You can set up a greater or smaller number, but **it is important to set a maximum** so that you avoid using space unnecessarily with unlimited number of versions.

To check the version history of a document, each contributor can go to that document, click on the arrow next to the title and click on **Version History.**

11. Set up Mandatory Check Out and Discard Check Out

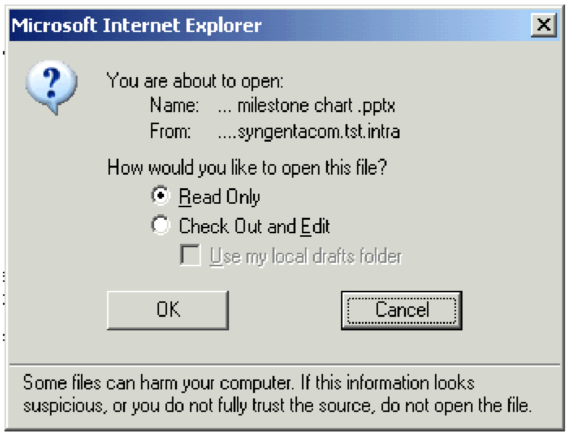
Mandatory Check Out

Checking out files makes the most of versioning. When you check out a file, **a version is created only when you check the file back in**, so that you can specifically designate when a version is created.

To avoid users editing the same document at the same time and losing changes made by them, you can **make check out mandatory** before editing a document. So every time a user would like to edit, they can only do so if they check out the document.
To do this, you need to go into the library, **Settings Button/ Document Libary Settings**, under General Settings, click on **Versioning Settings. In Required Check Out section, click on Yes.**

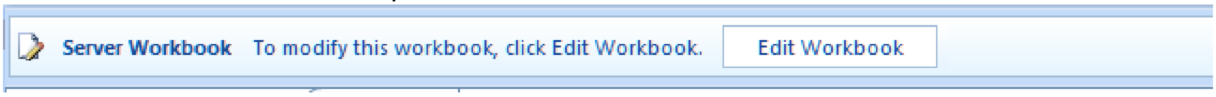
Then every time a user wants to open a document:

Either by just clicking on it : it is possible to check out from the document itself :



If modifications are made anyway, though on in read-only mode, only a new document can be saved.

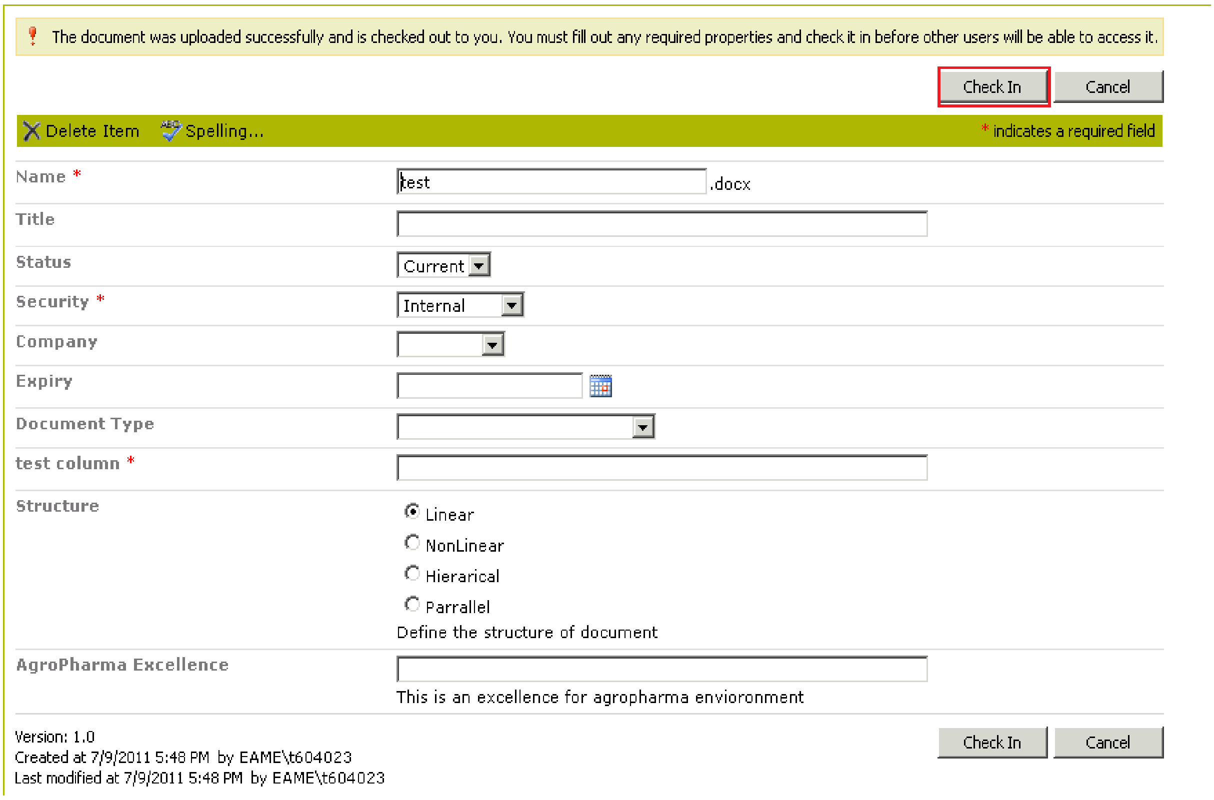
By clicking on Edit this document / Edit workbook, the office document will open in Edit mode and will be checked out automatically.



Remarks (pros and cons about Mandatory check out):

1. When a library has **Mandatory Check Out enabled**, **you must check out a document before editing anything about it**, **even document attributes (properties)!!!** (document type, region, author, status...). This implies **you can no longer edit multiple files columns at once when editing in Datasheet.** If you, as administrator need to edit multiple documents in Datasheet, you need to temporarily remove the mandatory check out option by going into the Library versionning settings as shown above.

2. When a library has the mandatory check out option, when uploading **multiple new documents,** they will be **automatically checked out to you.** **The other users will not see them**. In order to make these documents available to other users, **you need to check them in.**
The option to check in your document is given when uploading one new document - read carefully the note, and check your new document in. If you click **cancel**, your document will be uploaded, but not checked in - the other users **cannot see it.**
However, when you upload multiple files, you will not have this screen, so you cannot check in your documents. After uploading them you have to go inside the library, find the new uploaded files and check them in one by one.



3. As an implication, if other users upload new documents and do not check them in, nobody except themselves can see the documents - these documents will have no version checked in. **As an administrator, you can take ownership of these documents** so that you can check them in and make them available for other users. To do that you need to go into **Settings** Button-**Document Library Settings-Manage check out files. (see below)**

Manage Checked out files

1. Go inside the document library; click **Settings- Document Library Settings**. Under Permissions and Management, click on **Manage checked out files.**

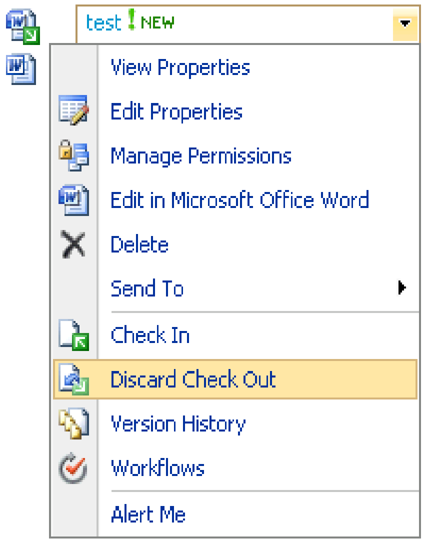
2. Be careful!! Here you can find only yours or other users' **new uploaded files. This is not the place where you can manage ALL checked out files.** Therefore, the list displayed here is the list of ***new*** uploaded documents **that have not any check in version**. This is o**nly possible when the library has mandatory check out** as an option as it implies that all new uploaded files are automatically checked out to you (see above). This should not happen often as, when uploading a single document, you are advised to check it in. **It normally happens if you upload multiple files at once, and then forget to check them in**.

3. When going to Manage Check out files, as an administrator, you can take ownership of these documents (that you would not normally see in the library). Taking ownership means that the documents are still checked out but they are checked out to you instead of the previous user that uploaded them. **If you take ownership, you can see these documents inside the library and you can check them in**.

4. **Tick the boxes** for the documents you would like to check in, click **Take Ownership of Selection**. Now all files appear to be checked out to you. **Go back to the library and check them in**.

Discard check out files

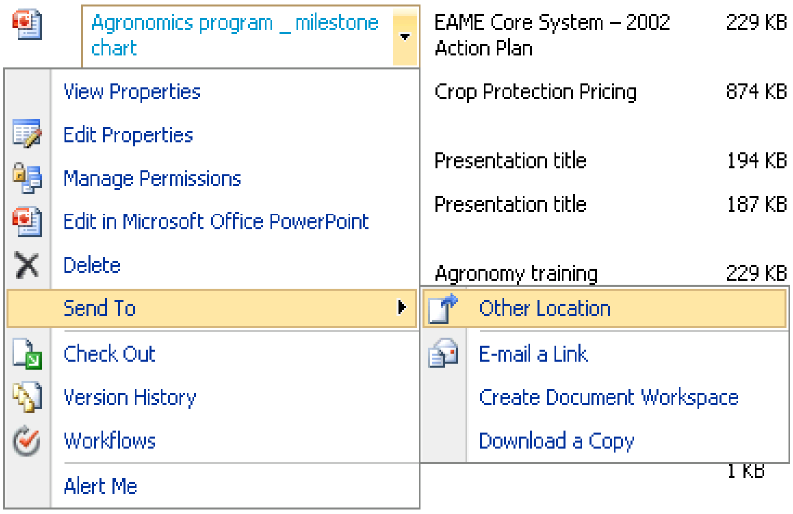
As an administrator, you have the rights to discard check out for the files in you libraries. If you or your users need the documents that are checked out for a while, you can override this by going to that document, click on the arrow to open the document function menu, and select discard check out.



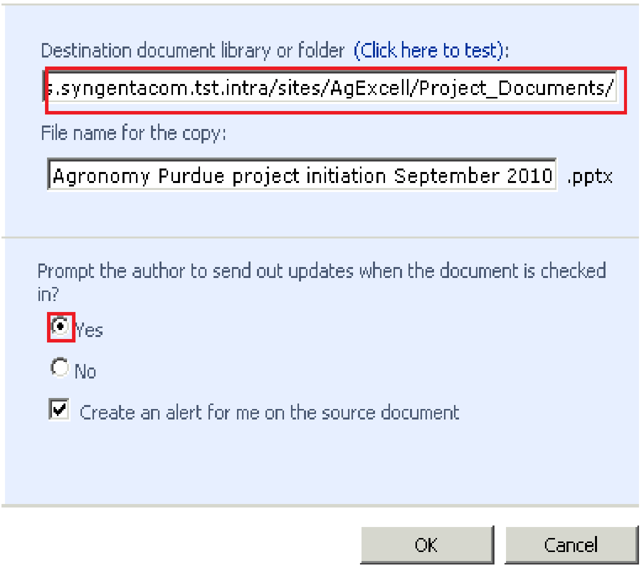
12. Creating and Managing copies of documents across libraries

In MOSS you now have the option to create copies of documents from one library to another, which gives you the possibility to manage all of these copies from within the original location of the document, where all of the copies locations will be displayed.

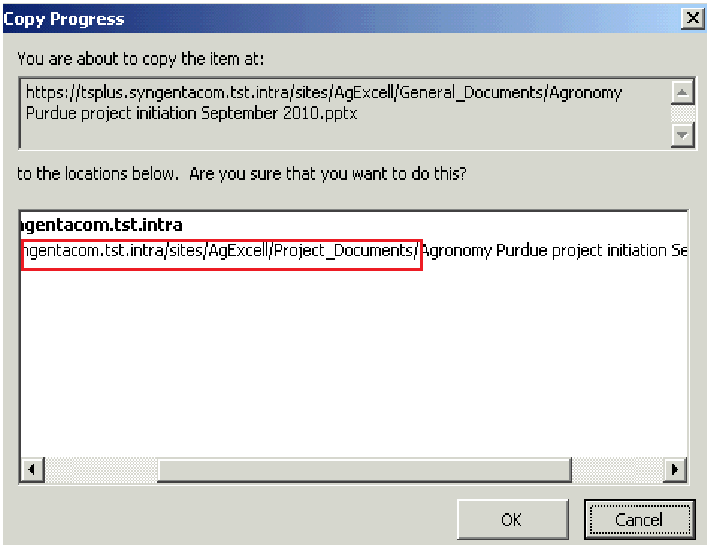
To copy a document from one library to another, follow these steps:
1. Go inside the library where your document is stored.
2. Click on the arrow next to the document to open the document menu.
3. Click **Send To,** and then select **Other Location**.



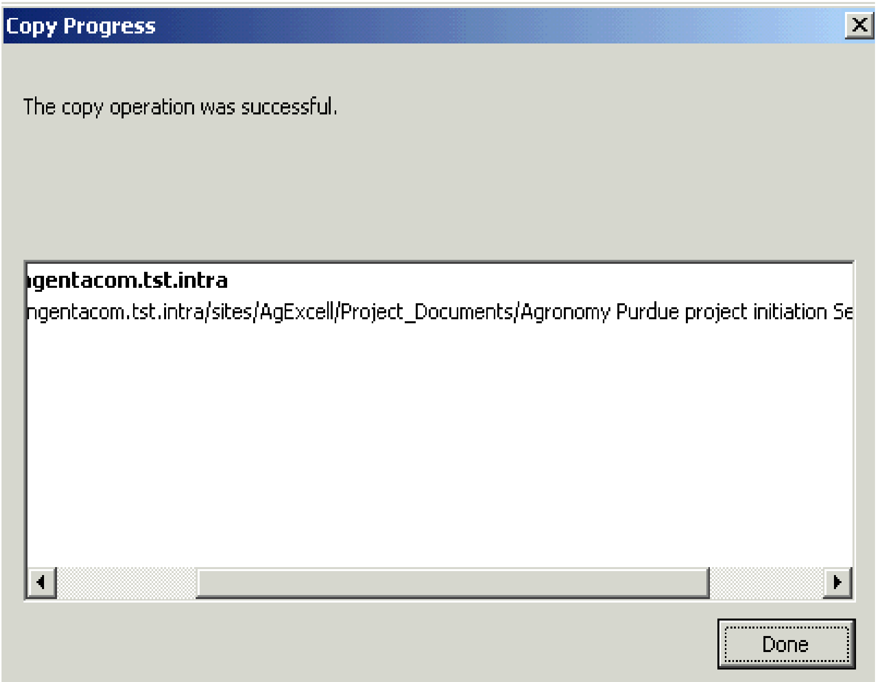
Paste the link of the destination library of your copy and then give the copy a name (by default it keeps the same name). **Make sure you delete the last part of the link from the destination library** ((/forms/name of view.aspx – see below).



4. We recommend to select **Yes** to promt the author to send out updates when the document is checked in after editing.
5. Click **OK.**
6. Then you have to reconfirm the locations. Click Ok.

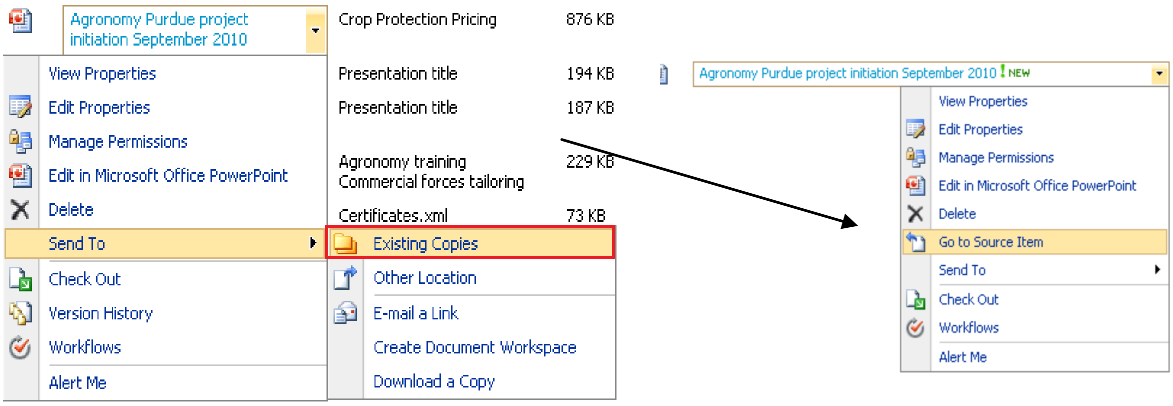


7. You Should receive a confirmation of your copy operation.



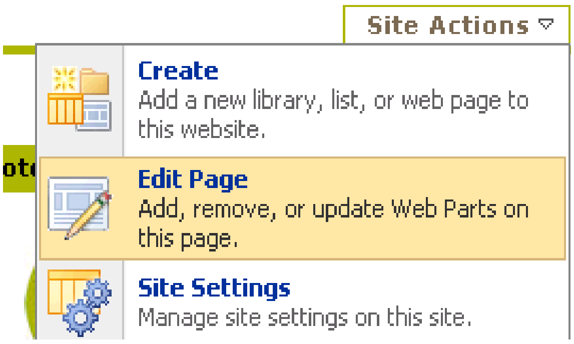
Note: If you have received an error message instead, double check and make **sure you deleted the last part of the link from the destination library** (/forms/name of view.aspx).

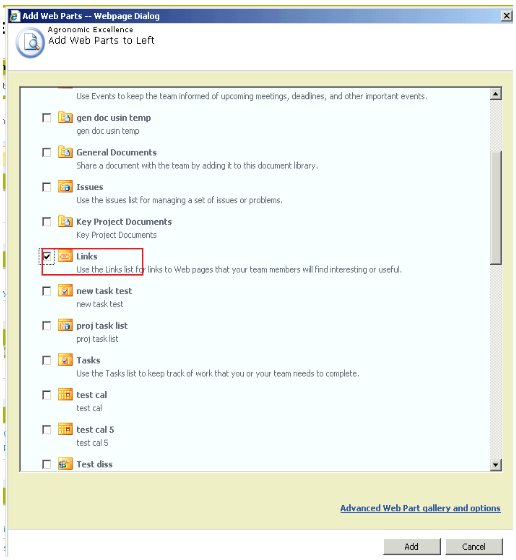
After performing this operation, you should be able to manage these copies more easily : you will have links from the copies to the original document for checks, and from the original document you will always have an evidence of all existing copies (see menus below).



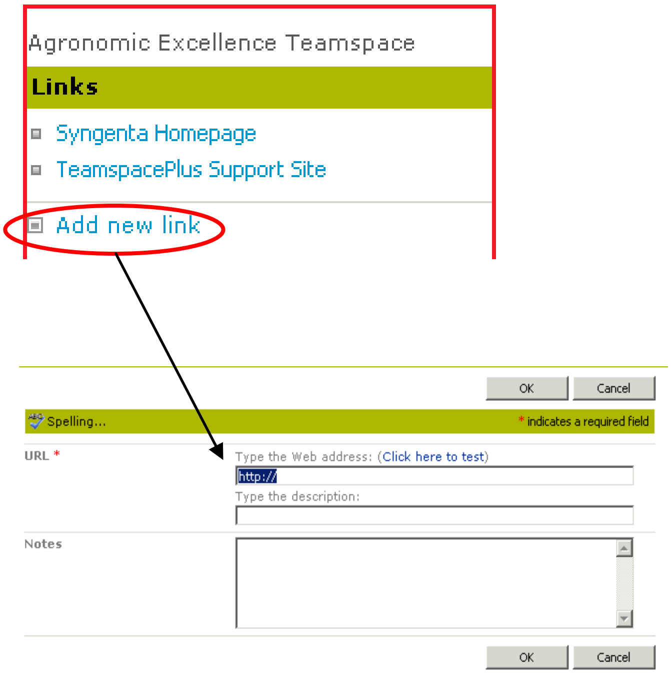
13. Links

To manage links in your Teamspace you need to use the Link Webpart and add this part the same way you would add other Webparts. It is not possible to store links in e.g a document library, you need to use this specific Webpart for this. Click on **Site Actions**, **Edit Page**, click on **Add a Web** part where you would like a **Links** section to appear. From the list that appears select the **Links** box then **Add**.





In the new Web Part, click on **Add New Link**, enter the URL you want to have listed, and use the description box to enter the title of this URL that will appear in the list on the homepage.

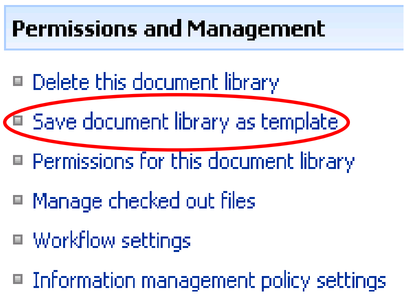


The contributors of the Teamspace can also add useful links, once the link list is created.

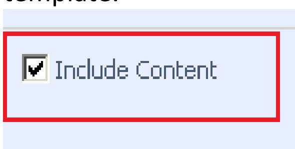
14. Saving a library as a template

When you are happy with a document library, you may wish to re-use it as a template for creation of other libraries. To do this you need first to save it as a library template. Do as indicated below:

1. Open the document library you would like to save as a template.
2. Go to **Settings, and then in the drop down box click Document library settings.**
3. Select **Save Document Library as template**



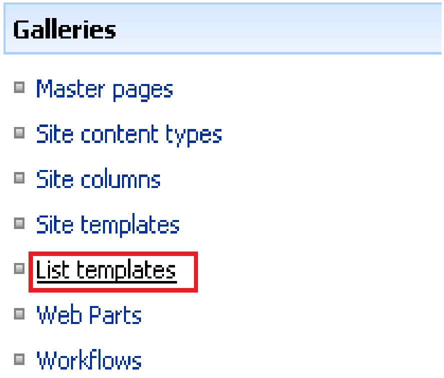
4. Fill-in the relevant boxes.
5. Tick the box for **include content** if you wish the content of the document to be saved with the template.



Including content can be an easy way to copy a library to some other location by saving it as a template with content. However, this can only be done for small libraries – **<u>you can only include content up to 10 MB.</u>**

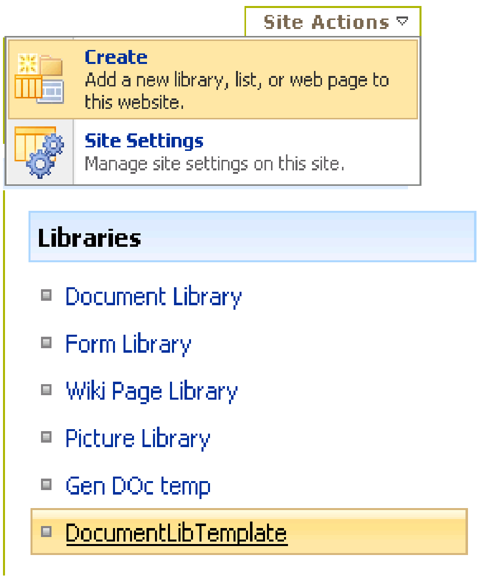
6. Click **OK** to save template.

7. The library template will be saved and you can find it under Site **Settings/Galleries/List Templates.**



15. Importing a List or Library

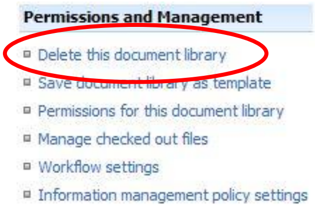
You can re-use a library or a list that you have customized in one Teamspace as a template in **another** Teamspace. Please note that this is only possible if the Teamspace is based on the same site definition (project, functional,…).
First you need to save the list or library as a template as described above. Then go to **Site Settings/Galleries/List Templates**. Right click on the link for the template file you have just created and select **Save target as**, and save to your My Documents (file extension is .stp). Go to the new Teamspace where you want to import this Webpart template, to **Settings/Galleries/List Templates** and upload the stp file from your MyDocuments: click **Upload** on top, and then **Browse.** As from now this template is available for creation of a new library on this new Teamspace.
Once the template is in the Site Settings/Galleries/List templates, you can create a library based on that template, just as you would normally do. Click **Site Actions Button/Create,** and then under Libraries select the template that you have saved or uploaded.



Custom libraries templates

16. Deleting a Document Library

Select the document library you would like to delete. **Click Settings**, then **Document Library Settings**. Here you can click **Delete this document library**. When you delete your library, it will be sent to the recycle bin where it can be recovered or permanently deleted.



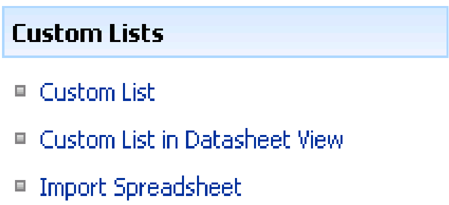
17. Working with Custom lists

Teamspaces allow you to create all sorts of lists that could be useful to support collaboration for a given team. This functionality can be quite powerful to organize the work of a team, but need careful thoughts for an effective implementation

- You can create new lists according to the needs of the Teamspace. →See Creating lists
- You then need to make them accessible by adding a corresponding Webpart on any existing page for Issue/Discussions/Task lists.→See Adding Webparts. If this list is particularly important for the team, it may be useful to also add a Webpart to the home page so that access is quick.

18. Creating Custom Lists

- On the top left, click on **Site Actions**, then select **Create**.
- On the Create Page, look at the option **Custom Lists**. Depending on the type of list you want to create select the most appropriate from the list displayed.

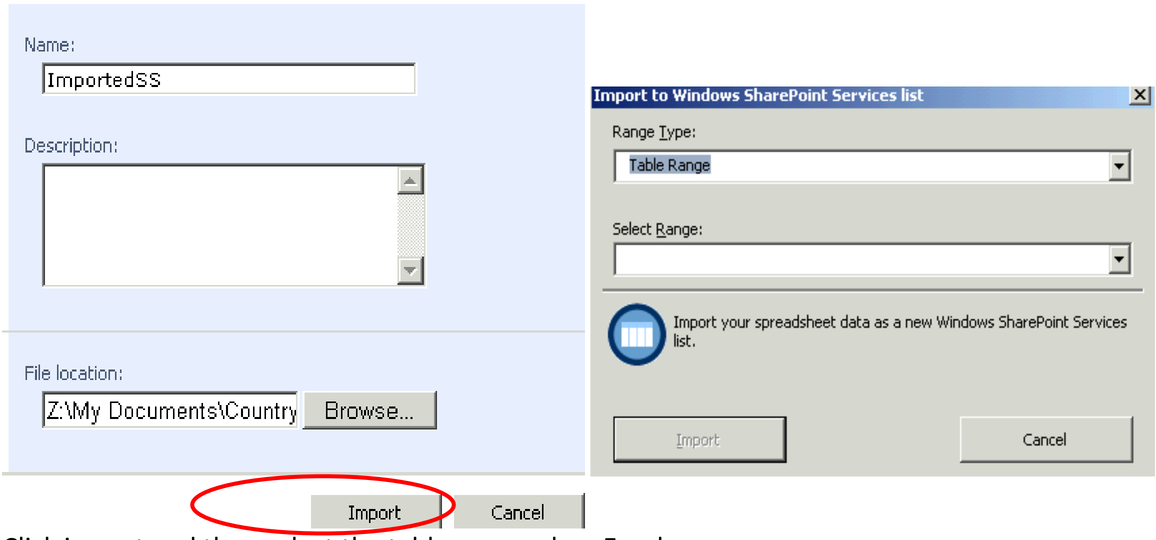


Customs lists are to be selected when you want to create your own columns and don't need any of the columns contained by default in the current Teamspace lists. Refer to Customizing Libraries to see how to go about creating columns and/or views.

When creating/using lists containing numbers be very careful to check the Regional settings selected for the Teamspace (**Locale** on home page) as this impacts the format of numbers (decimal separator and thousand separator).

Please note that the **Import Spreadsheet** option allows you to import an existing table that you would like to use as a Teamspace list.

If you select **Import Spreadsheet,** be aware that formulas will not be imported; only the values will be captured. It may happen that some cells contain non-supported characters and prevent you from importing; you may have to convert these.



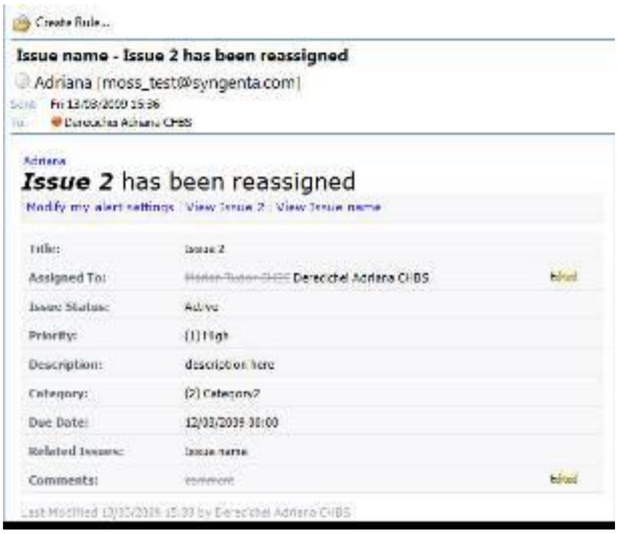
Click import and then select the table range when Excel opens.

19. Working with issue lists

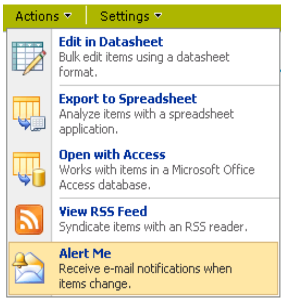
- Issue Lists have a very useful feature: you can set them up so that when an Issue is assigned to one person an e-mail is sent to this person. Task lists have the same useful feature and they work similarly. To enable this, go inside the Issue list, click on **Settings, and** from the drop down box click **List Settings.** Under General Settings heading, click on **Advanced Settings.**

- Tick the radio button corresponding to e-mail notification.

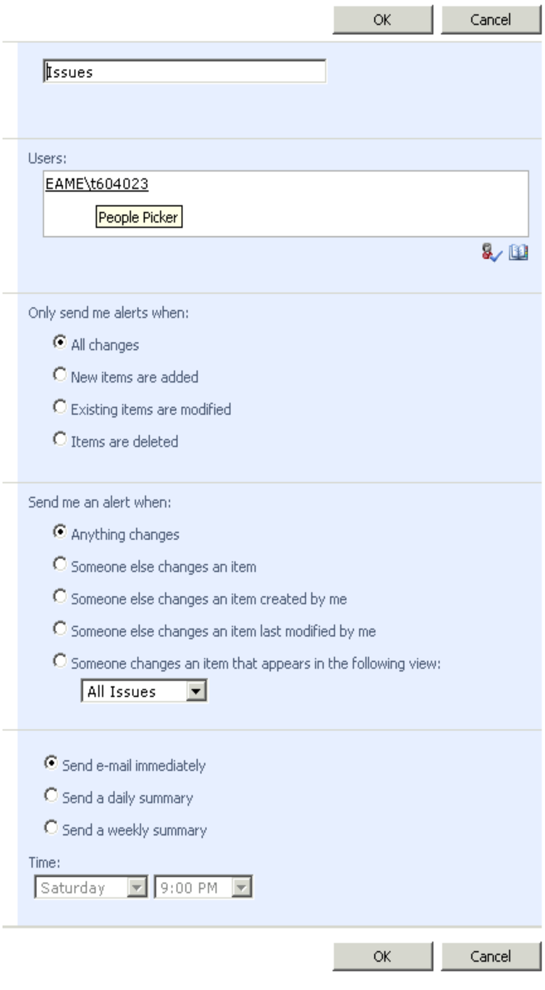
- Then the owner of an issue should receive an email when an issue is assigned to them.



- Item modifications can also be notified by using **Alert me** options from the **Actions** drop down at the top of the issue list. However, Alerts can also be set by the users themselves only for individual users, while the e-mail notifications are set by the Administrator so that the owner (whoever might this be) of the issue gets informed of his responsibilities.

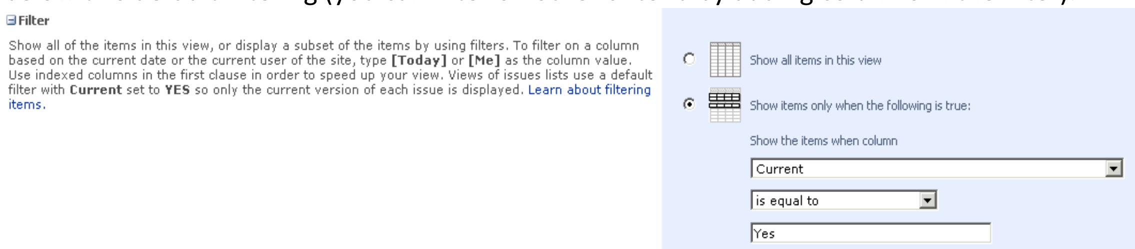


After selecting Alert me, the user has to make the alert settings on her own. Then click **OK.**



- **<u>Customizing issue lists</u>** : when creating new views for such lists you should be careful not to inadvertently modify the filtering view that allows the list to display only the Active **(current) issues** (and not their history : every time you update an issue an ID number is given to the previous version of the item, but the current version keeps the original ID number thus allowing to always talk about the same issue. This also means that the issue list will not be sequential).

See below this default filtering (you can filter on other criteria by adding columns in the filter).



20. Hints & Tips about Libraries and Lists

Listing Instructions

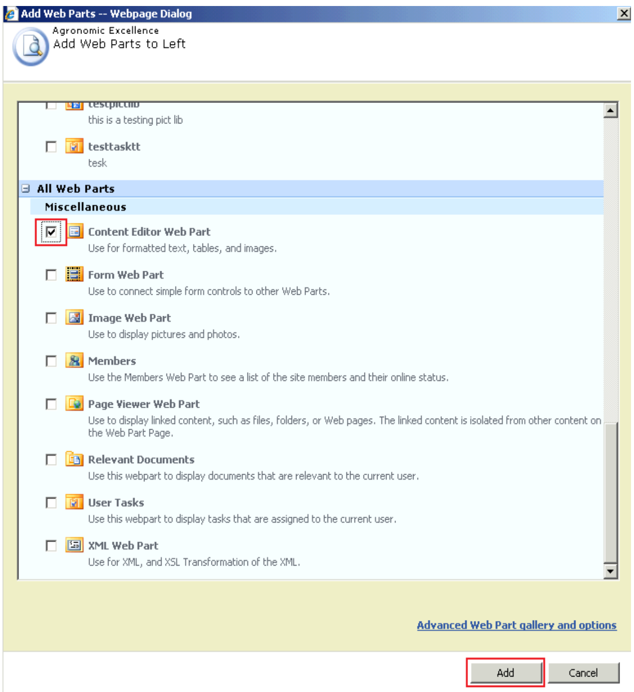
You may want your users to do things in a specific way either by posting documents in a certain library or by using attributes in an agreed way. There are 2 places where you can capture these special instructions:

- **Within a library** (**or a list**), below the page name, **as a description.**

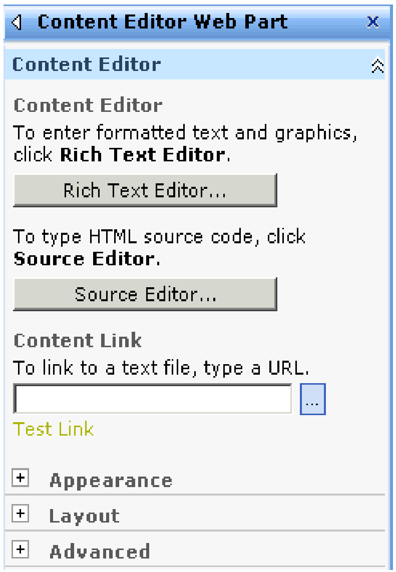
To do this, go to **Settings**, then **Document library settings** and enter your instructions in the **Description** box found after clicking on **Title, description and navigation**.

- On the Documents page (or any other list page), follow the steps below
- Click on Site Actions-Edit Page
- Click on Add a web part on the side of the page that you want your instructions to be displayed.

Select **Content Editor Web part** under **Miscellaneous.**



- Click on **open tool pane**, and then click on **Rich Text Editor**



- Enter the instructions you want to add

<u>Hints & Tips about other Lists- Discussion</u>

If the team members plan to use Discussions and want to be alerted on things like new postings for a selected discussion (not for all discussions), you will need to add a Discussion Board for each discussion. Otherwise, they could only set alerts for themselves to the whole discussion board or to the modifications to the initial item in each discussion (thus missing replies for instance).

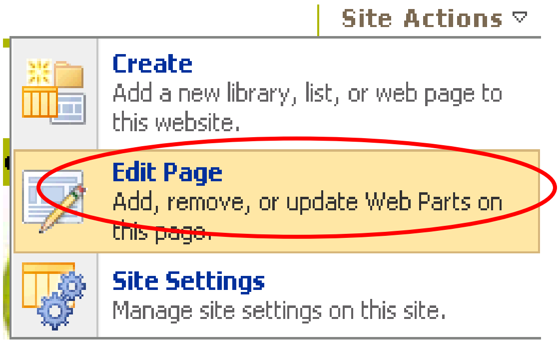
21. Modifying pages

You can modify several things within a page:

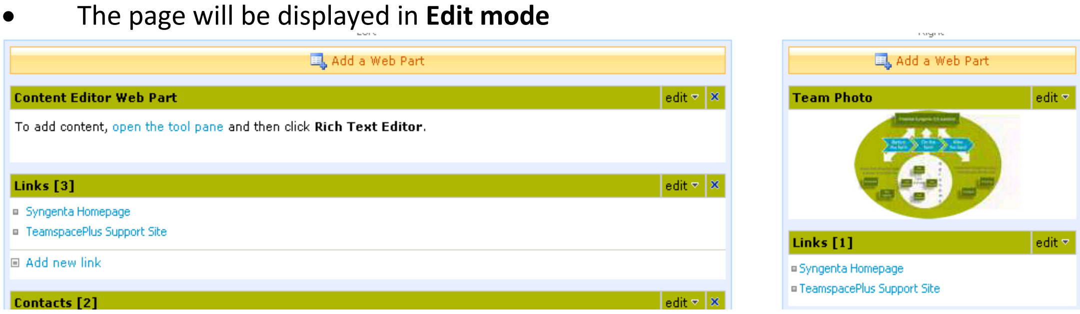
- You can Add/Delete Webparts according to the needs of the Teamspace users. See → <u>Adding Webparts</u> and <u>Deleting Webparts</u>.
- You can change the position of Webparts on the page. → See Positioning Webparts
- You can customize the Webparts to display the content in a more appropriate way for your users. See → <u>Customizing Webparts</u>.

22. Adding Webparts

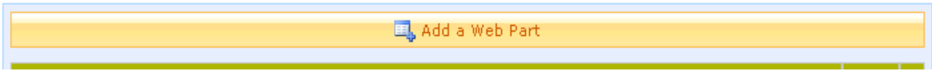
- Go to the page on which you want to add Webparts
- Click in the upper part of the Teamspace on **Site Actions, Edit Page.**



- The page will be displayed in **Edit mode**



- Select **Add Web part** where you want to add the section.



- This will display the list of the various lists and libraries currently available on the Teamspace that you can display as a Webpart.

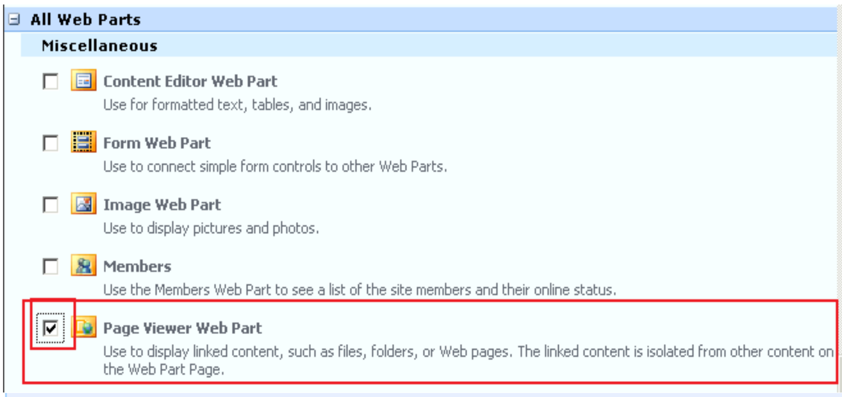
- Webparts can be added in several places on both the left and right hand sides.

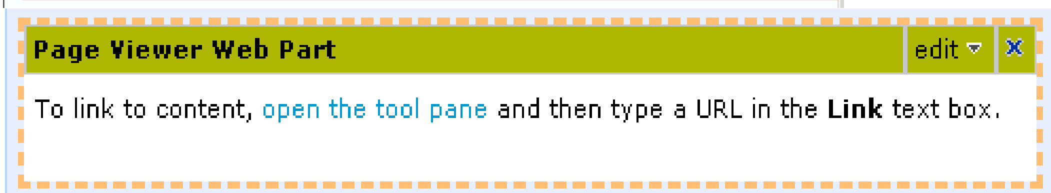
- You can now customize this Webpart. It is recommended to cancel the possibility for users to close the Webpart
- After you have added your Web Part simply click **Exit edit mode** on the top bar.

To move the Webpart simply go in to page edit mode and drag the Webpart to a new position by clicking and dragging the Webpart title bar.

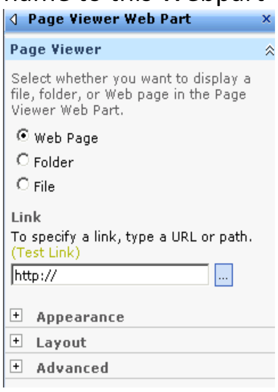
__Hints & Tips about Webparts :__
You may be customizing a Teamspace for a group with special requirements such as viewing an intranet page or application directly in their Teamspace. This is possible by adding a Webpart called a **Page Viewer Webpart**.

When you click Add a web part in Edit mode, you can find the **Page Viewer Web Part** in the list of Webparts, under the **Miscellaneous** heading.





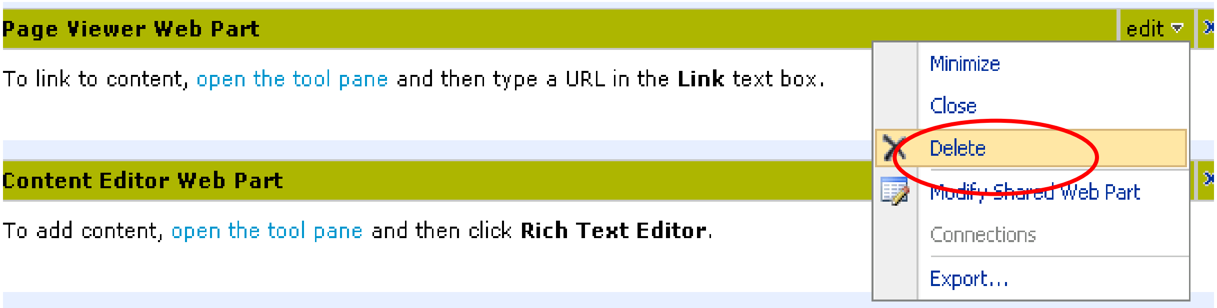
Once you have added this new Webpart you need to click in the new box on **Open the tool pane** to be able to enter the URL or path to what you want to display. Also, remember to give an appropriate name to this Webpart



The process is similar to add an Image Webpart (to display the team identification photo), but you just need to add a Image web part and paste the link to a photo that you previously uploaded in your Teamspace.

23. Deleting Webparts

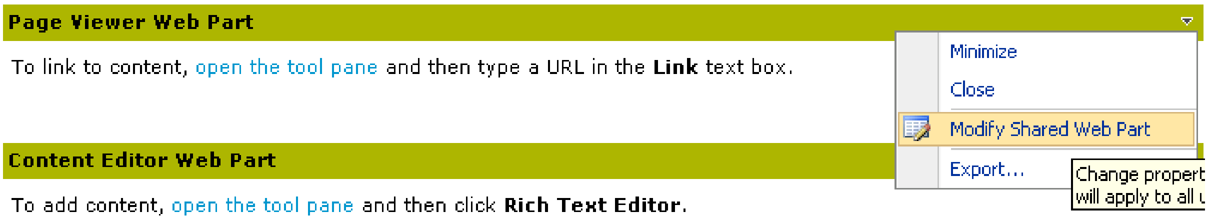
- Go to the page on which you want to delete Webparts
- Click on **Site Actions,** then **Edit.**
- Select the Webpart you want to delete and click on the arrow in the colour bar. You can now select **Delete.** **<u>Please note that the deletion of the Webpart does not mean you also delete the corresponding list or library.</u>**



24. Customizing Webparts

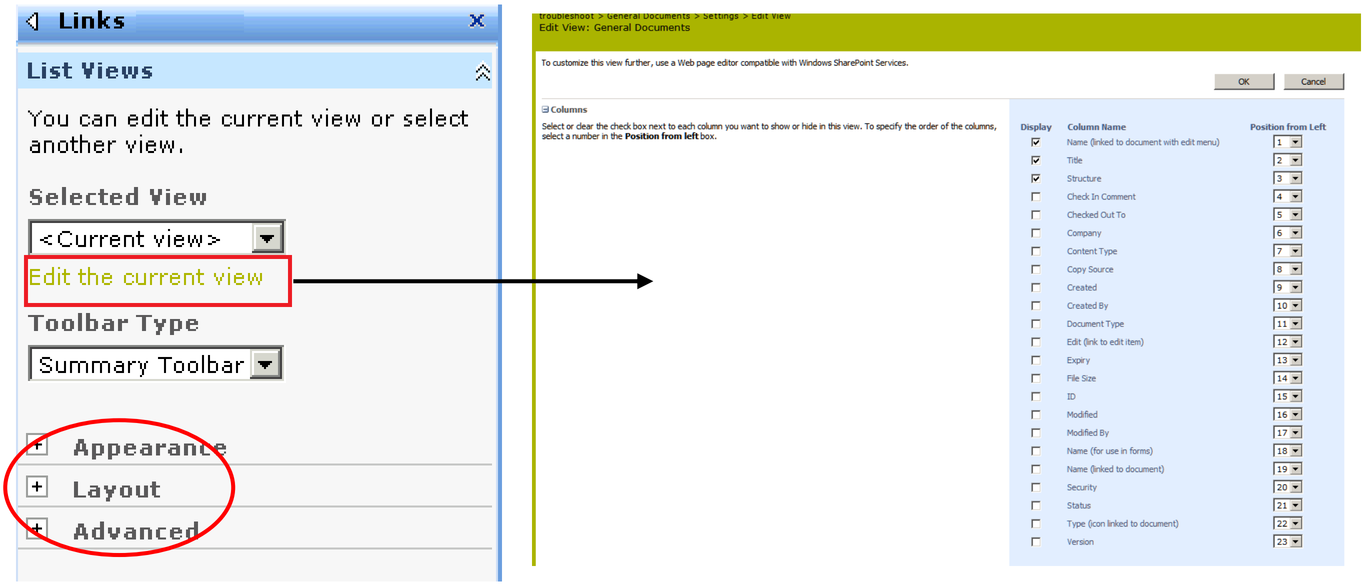
It may prove useful to customize the Webparts displayed on some pages to fit better with the way of working for users. You can modify the way item are displayed and/or the number of items displayed.

- Go to the page on which you want to modify Webparts
- Click in the upper part of the Teamspace on **Site Actions.**
- Click on **Edit Page** and select the Webpart you want to modify.
- To customize the content of the web part click on the **Edit Button**, then on the **Modify shared web part**



- You can modify a view as you would modify any view. It can be useful for instance to modify the number of items displayed.

In order to modify a view, click on modfiy shared webpart and then select Edit the current view.



This shall then provide the settings for the view which the wbepart uses to show data. Changes made here will only affect the webpart and NOT the view of the library.

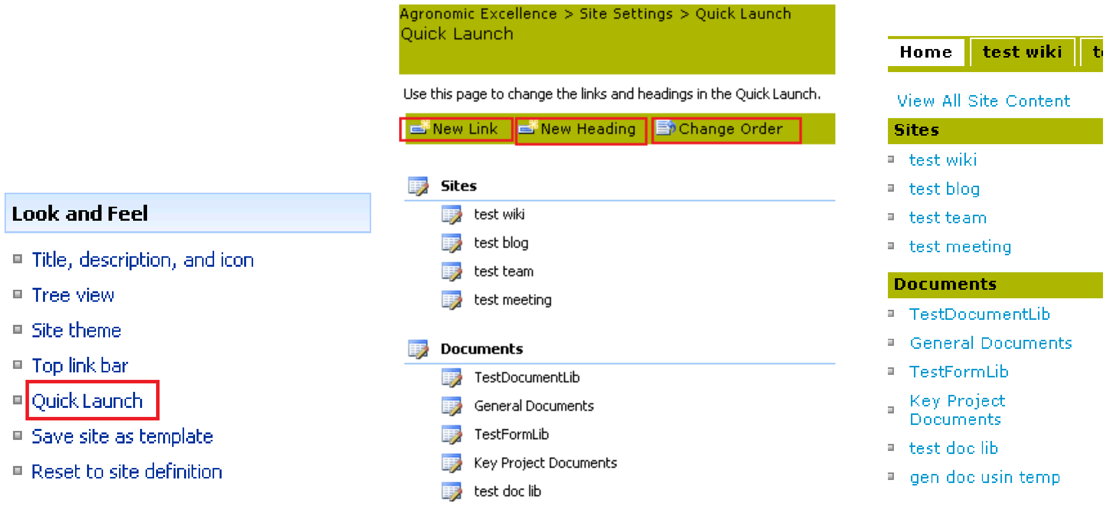
- You can also customize the appearance and layout by clicking on the appropriate buttons.
- **Layout** will allow you to modify the positioning of the Webpart in the page (Left/Right, rank from top)
- The **Advanced** option manages specific functionalities. Please avoid ticking the box **Allow close** as this would create unnecessary problems with users (users could “lose” this Webpart when they would only try to close it)

25. Managing the Quick Launch Bar

Quick Launch Bar: rename site pages (the old tab renaming), add or remove other links

The Quick Launch is a new display in MOSS to facilitate navigation throughout the Teamspace. When creating any list or library you can choose to display them on the Quick Launch for easy access. You can also amend these settings for the already created lists by going into their General Settings. Make sure, though, you do not display too many items on the Quick Launch as it might become quite messy and it loses the purpose of quick navigation.
However, the display on the Quick Launch can be modified and can be customized to your needs

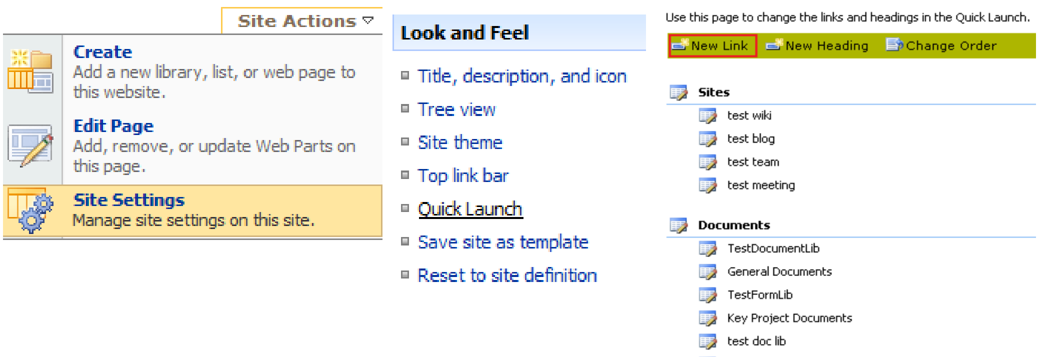
To modify the display on the Quick Launch, go to **Site Settings,** under **Look and Feel**, click on **Quick Launch**. You can add new links to the Quick Launch, change the order, or create new headings for a collection of you links.



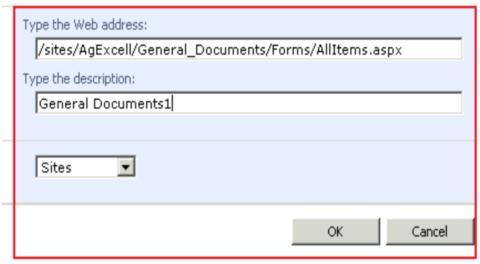
How to Rename a Link under Site Pages

You can rename the links by selecting **Site Actions/Site Settings** and then,

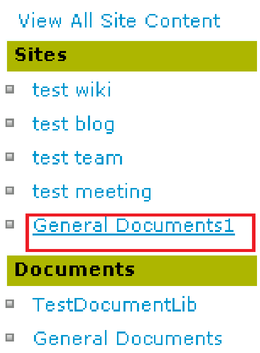
under *Look and Feel* click on **Quick Launch**.



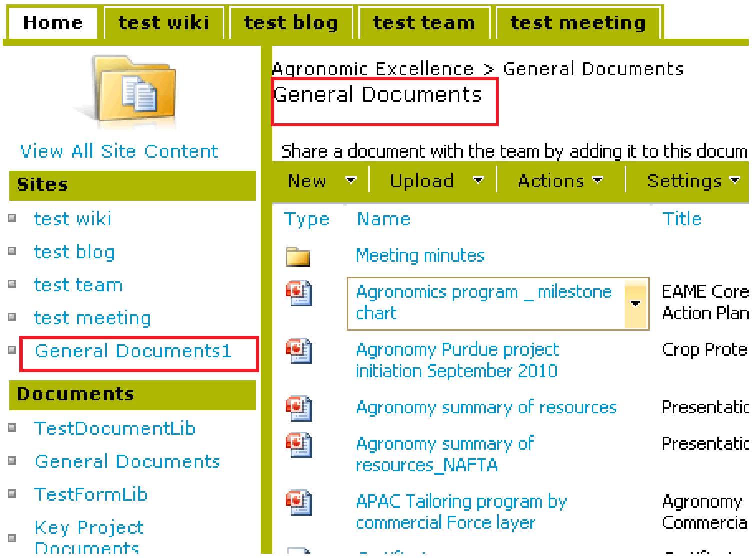
This action will open a window where you can edit the links and change the link Description.



As soon as you change the description, the new text will be visible on the Quick Launch

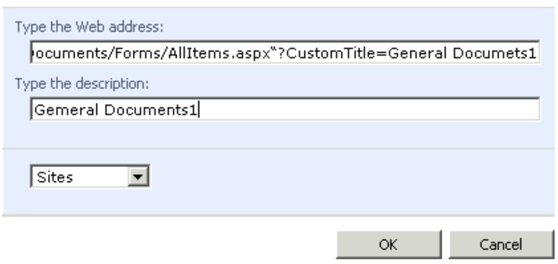


This does not changes however the actual name of the page, only the name of the link on Quick Launch.



In some cases, perhaps we want to have different names, but in others, we would like that the page gets the same name than the link.

How to change the title of the page When you are renaming the link of the Quick Launch, you can add a parameter: **"?CustomTitle=*pagename*"** as part of the URL that will allow you to define a new title on the page.



Note:

Now, the Quick Launch is visible and everything that has been created and chosen to be displayed on the Quick Launch will be listed there.

Although you might not be aware, all the items listed on the Quick Launch have this option enabled. To modify this, you need to go inside each library, go to **Settings-Document Library Settings-General Settings-Title,description,navigation.** In this section, you can choose to display or not your library/list on the Quick Launch.

26. Introduction to Access and Permission Management

Basic concepts

In MOSS the three basic concepts for managing access to your Teamspace are : **users**, **groups**, and **Permission Levels.**

Users are the individual Syngenta employees that you add to the teamspace so that they have access to the different content areas of your Teamspace.

Permission Levels are the ones that indicate the type of access, the actions that are allowed to be performed by the users who are given access to one teamspace : whether they can only read, edit, delete, whether they can customize a page, create personal views, manage lists, and so on.

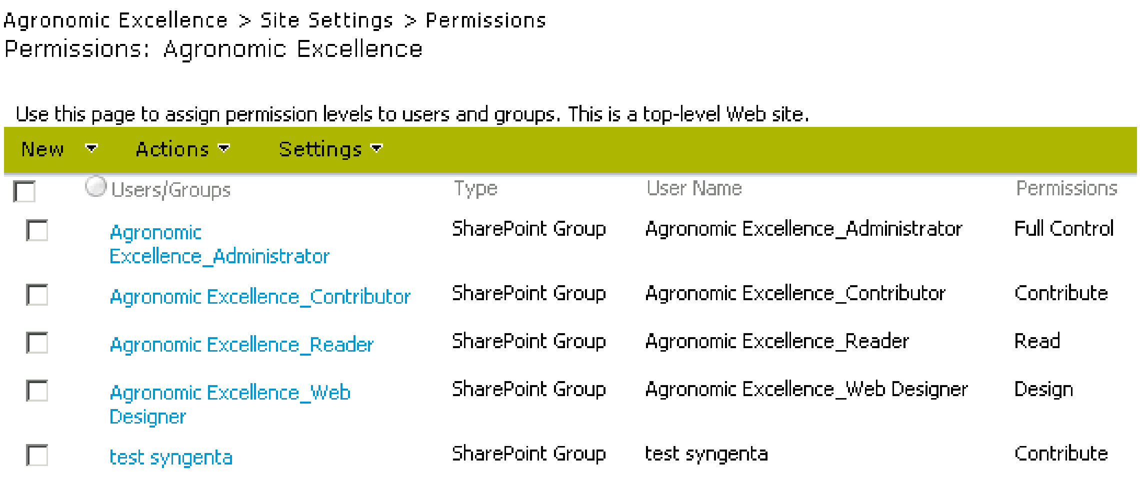
Groups are a collection of users that share the same type of permission level.
Groups are different from Permission levels! A ***group*** is there to make user management easier by grouping users with the same access requirements in one entity. Then, to define the type of access, you need to assign ***Permission levels*** to the groups you create.

The reason for using groups is that it is much easier to manage access : let's say you have 20 users who need the same type of access; if you make a group for them, you only need to work with this one group when you need to change the permission levels, restrict libraries or lists, and so on. If you do not use a group, everytime you need changes, you would need to edit permissions, add, or remove from lists all 20 users ***one by one***.

Default Permissions Levels and Groups

At creation, every Teamspace has standard default Permission Levels and Groups. These should be present in every teamspace if it has not been customized or removed by administrator.

The **default Permission levels in MOSS** are : **Full Control, Design, Contribute, Read** (see description below).


Agronomic Excellence > Site Settings > Permissions
Permissions: Agronomic Excellence

Use this page to assign permission levels to users and groups. This is a top-level Web site.

New Actions Settings

Users/Groups	Type	User Name	Permissions
Agronomic Excellence_Administrator	SharePoint Group	Agronomic Excellence_Administrator	Full Control
Agronomic Excellence_Contributor	SharePoint Group	Agronomic Excellence_Contributor	Contribute
Agronomic Excellence_Reader	SharePoint Group	Agronomic Excellence_Reader	Read
Agronomic Excellence_Web Designer	SharePoint Group	Agronomic Excellence_Web Designer	Design
test syngenta	SharePoint Group	test syngenta	Contribute

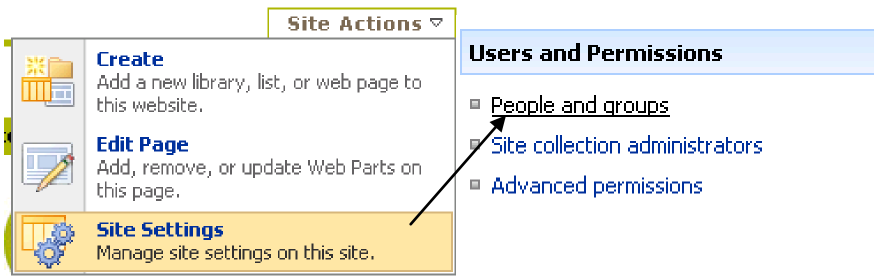
The default Groups are: **Owners, Members, and Visitors** (see below correspondence). Every group has a permission level associated to it.

<u>**Note**</u> : These new groups will be available for all ***newly created*** teamspaces . **For migrated teamspaces, all the old site groups will be transferred as they were created**.

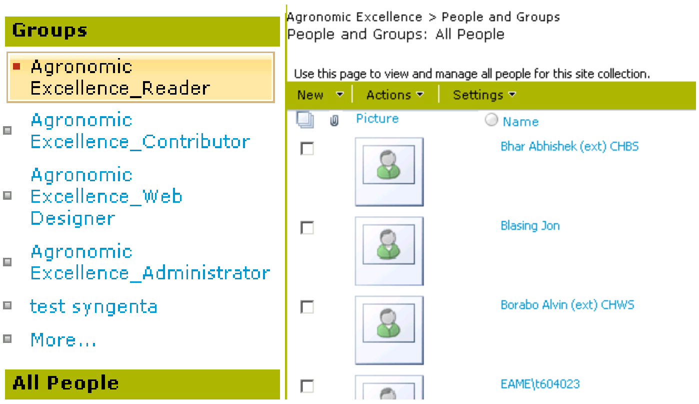
MOSS Default Groups	Permission levels associated	Old Default Groups
Owner	Full control	Administrator
Member	Contribute	Contributor
Visitor	Read	Reader

Manage Users and Permissions

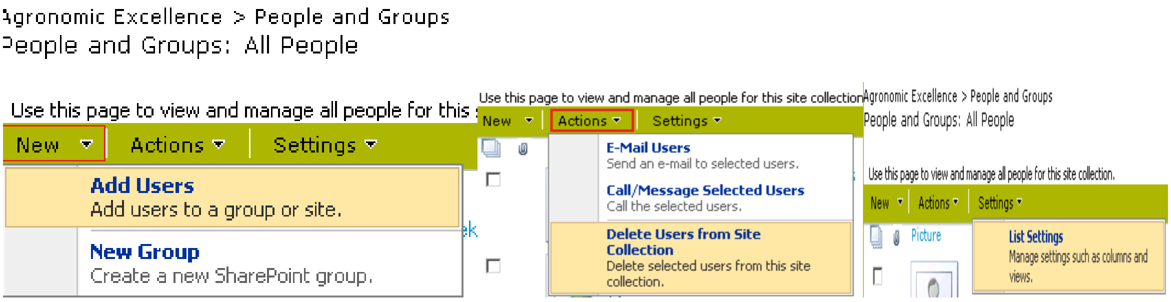
The place to Manage Users and Permissions at top (site) level is **Site Settings - Users and Permissions.**



1.People and groups will take you to the individual user list (**All people)** - it is a simple list with all the users with no indication of permissions. You will get there **whole usage list**.



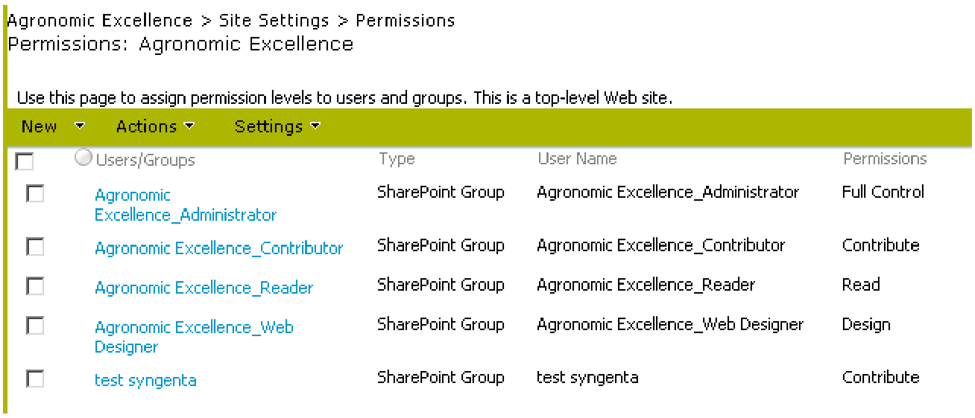
The **actions and settings** that can be performed in this area are listed below.



- Under **New, you can add users and Groups.**
- Under **Actions : you can select several users and you can send communication (email and messages) or delete selected users.**
- Under **Settings : you can customize the list which displays users by adding more columns or views.**

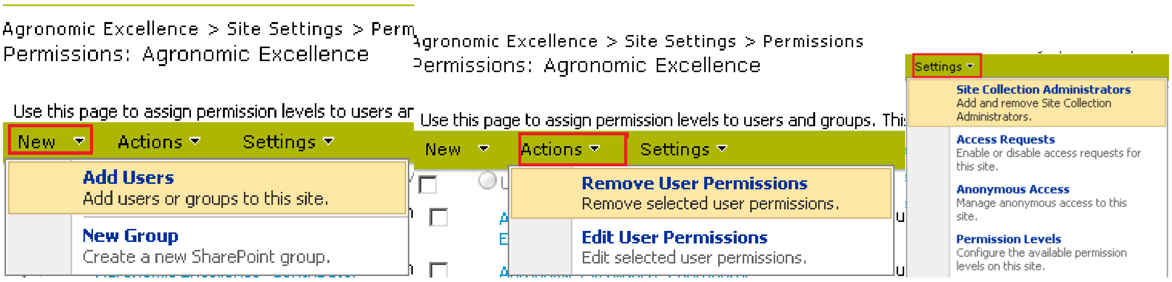
-By clicking on one user, you can edit user details (department,email, or remove the user, **but you cannot edit permissions for existent users! For this you need to go to the Site permissions page.**

2. Advanced permission will take you to the **Site Permission** page - users and groups are listed here with their permission levels.

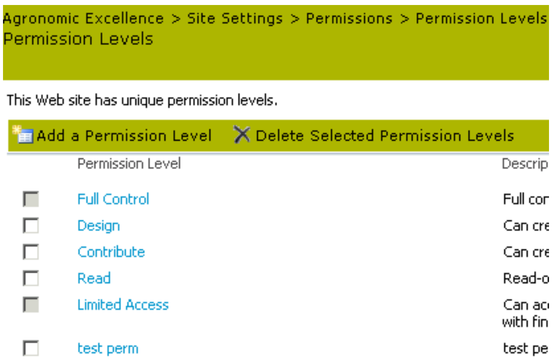


If a user has been added directly at a list or library's level, his name will be listed here, showing limited access in the permissions columns. Best practice is to add users in groups.

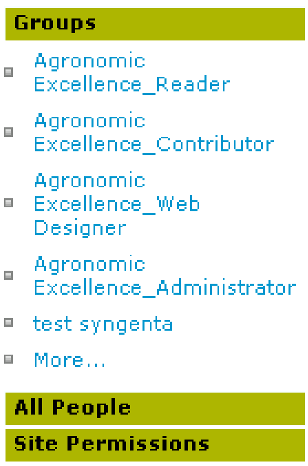
The **actions and settings** that can performed on this page are listed below:



- Under **New** : the same as before, **adding users or groups**.
- Under **Actions**: you can now **remove permissions, but also edit permissions for users and groups**.
- Under **Settings:** you can **add or remove** **Site Collection Administrators** (only if you are a Site Collection Administrator yourself), **enable or disable access request** (allow or not users to send email requests for access or change the email address where these requests are sent), **create new permission levels (should NOT modify default ones)**.

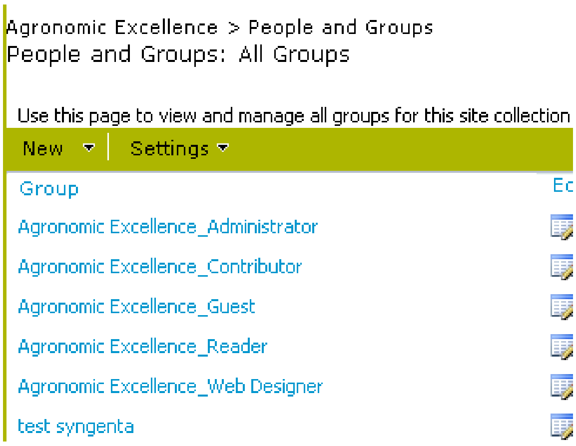


From both pages you can navigate to **the different Permission sections** which are displayed on the Quick Launch: **Groups, All people and Site Permissions**

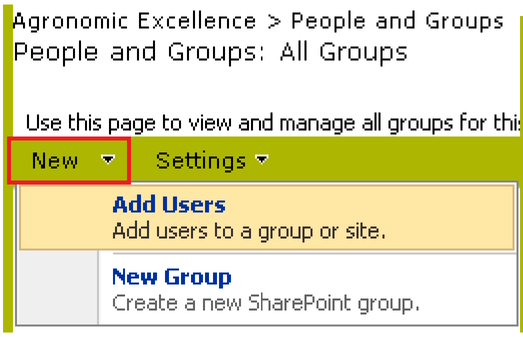


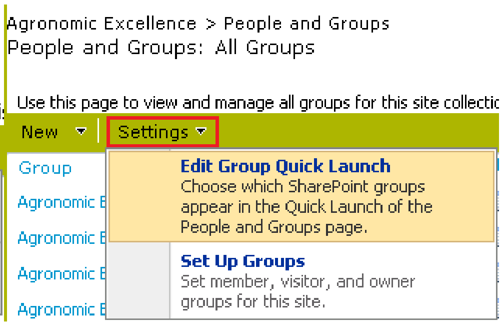
All People and Site Permission tab are the same as the two pages described above
All People Tab - leads you to the user list (see 1. above)
Site Permissions - leads you to the same page as 2 above (advanced permissions).

Groups tab will lead you to a page listing the existent Groups (both **SharePoint Groups** and **Domain Groups**).



The **actions and settings** that can be performed on this section are listed:



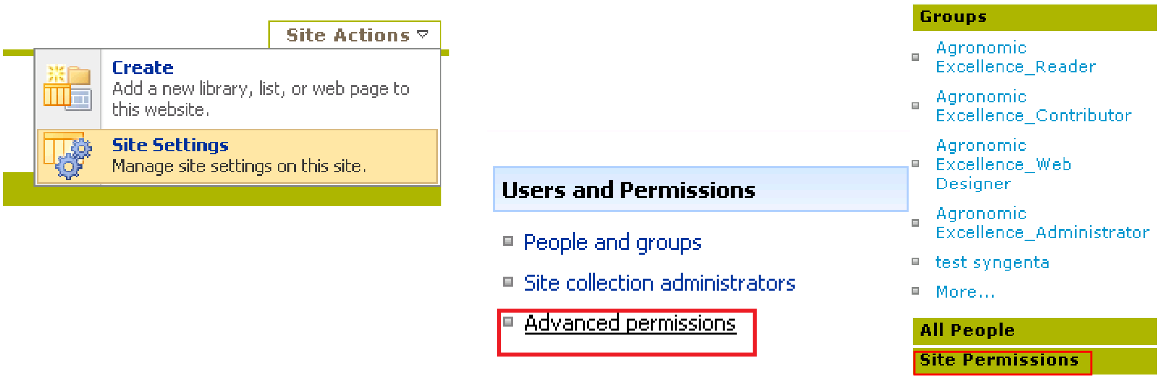


- Under **New:** as before **adding users or groups**.
- Under **Settings**: you can add **some of the groups on the Quick Launch** for easy access or set up groups with pre-defined permission levels (owners, members,visitor).

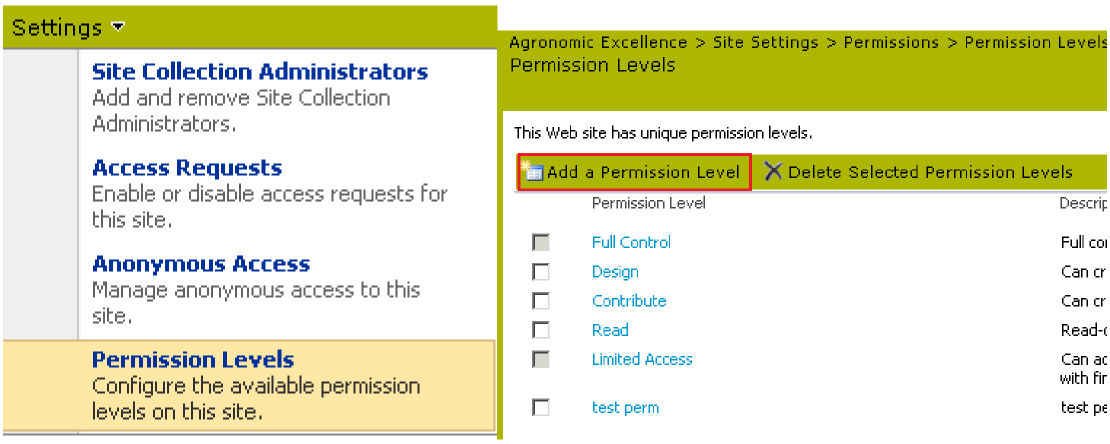
27. Create or copy a new permission level

If the default permission levels (Full Control, Design, Contribute, and Reader) do not cover the access type you need, you can create new permission levels. **You should NOT modify default permission levels.**

1. Go to **Site Settings- Advanced Permissions.** If you are already in the Permission area, you can click on **Site Permissions** on the Quick Launch.



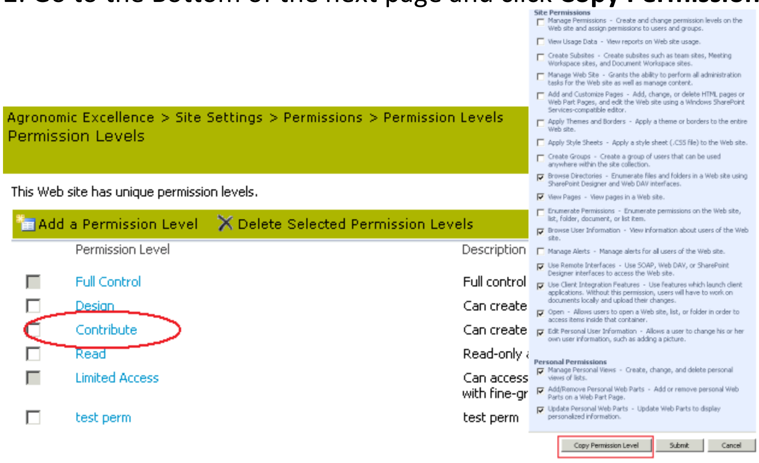
2. Go to **Settings Button-Permission Levels**
3. Make sure that the existent permission levels do not cover your requirements before creating a new one - check the description or click on them to see the detailed description of the actions that are allowed under the existent permission levels.
4. Click **Add a Permission Level** to add a new one and then choose what type of actions you want this permission level to cover.



Copy an existent permission level

Often you would only need slight adjustments to already existent permission levels. For instance contribute permissions allow to view add,edit,delete, but you would not like to give the permission to delete for some libraries or lists. In this case you can start from the existent permission of Contribute, copy it, and then adjust it to your requirements by removing the permission to delete.

1. Click on the Permission level you want to copy.
2. Go to the Bottom of the next page and click **Copy Permission Level**.



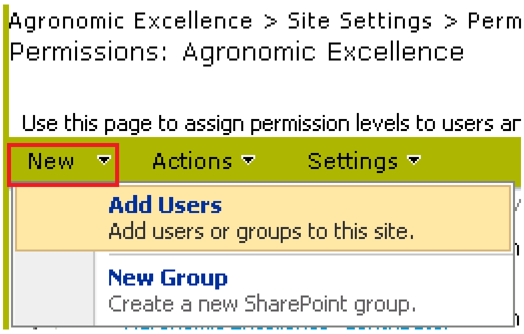
3.On the next page give another name to the copied group and a description and make your modifications. Click **Create** on the end of the page.

28. Adding Users

Adding a new user

1. Click **Site settings** and then **Advanced permissions**, under Users and Permissions.

2. Click **New/Add User** from the toolbar (for groups See → Using DLs):

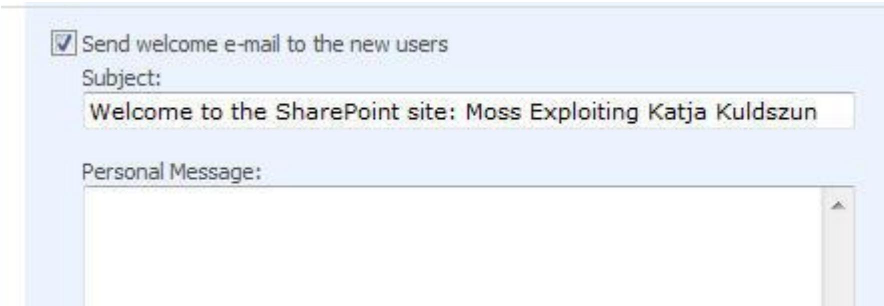


3. You can now enter users by either their user name (domain\user name) or e-mail address*. Separate multiple users with a semi-colon (';'). You can select these users from the GAL (button below)

4. Then you have the possibility to add the user to an **existing Site Group** (See Creating site groups) or **give permissions directly**: Full control, Design, Contribute, Read, View Only, **but it is not recommended to give permissions directly – you should always add users to a Site Group.**

   Make sure that the e-mail address that appears if you have created the user from the GAL is in the format firstname.lastname@syngenta.com

   You will only be allowed to add a group or person if the user's email address is correct.



* Another way of adding users to the site is to add them by their username in the form of DOMAIN\username (e.g. EAME\digglro2).
If external collaborators need to be added, then the username would be in the format SYNGENTAEXT\username (e.g. SYNGENTAEXT\balwinder.salaria)

It is seldom that you will ever use anything but Members (Contribute permissions) or Owners (Administrator or Full control permissions).

Members (previously Contributors) access enables a user to **create/edit/delete** any items such as documents and lists whilst **Owners (previous Administrators) access** has all this plus the ability to **add/remove users**, customize, access Teamspace usage statistics, etc.

Note : when you go back to your list of users check that they all appear correctly as **it may happen that the users are created with an erroneous user name such as xxxx_adm** (when the users also have an admin user ID). In this case, you would need to re-create the user by using the standard user ID.

29. Using DLs to add existing teams

You may need to give permission to all members of an existing team. In the previous version of SharePoint, such groups will have a **Distribution List in Outlook**, and this may help you speed up the permission process.

Now in MOSS Teamspaces, **only some DLs are showed on the Directory Service Address Book**. Only the DLs that are Security Groups as well are presented.

To help you in the process to grant permissions to members of a DL follow this:

- Open the DL in Outlook (in an email)
- Expand the DL
- Select the users from the expanded list
- Copy them (Ctrl+c)
- Add the users to the site: paste them (Ctrl+v)

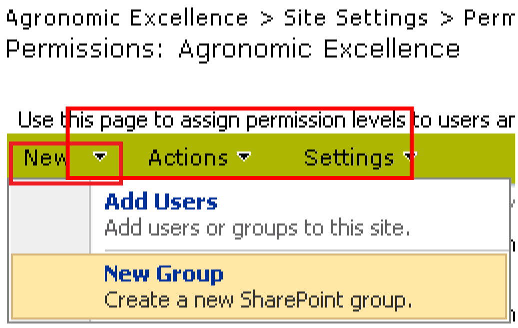
If the DL you need appears in the Address Book, then just select it. You won't need to maintain it.

Any change on the DL will be reflected in MOSS Permissions. And this is because it is a Security Group acting as a DL too. In the case of use of DLs, you won't be able to see their members in MOSS permission groups, only the DL name.

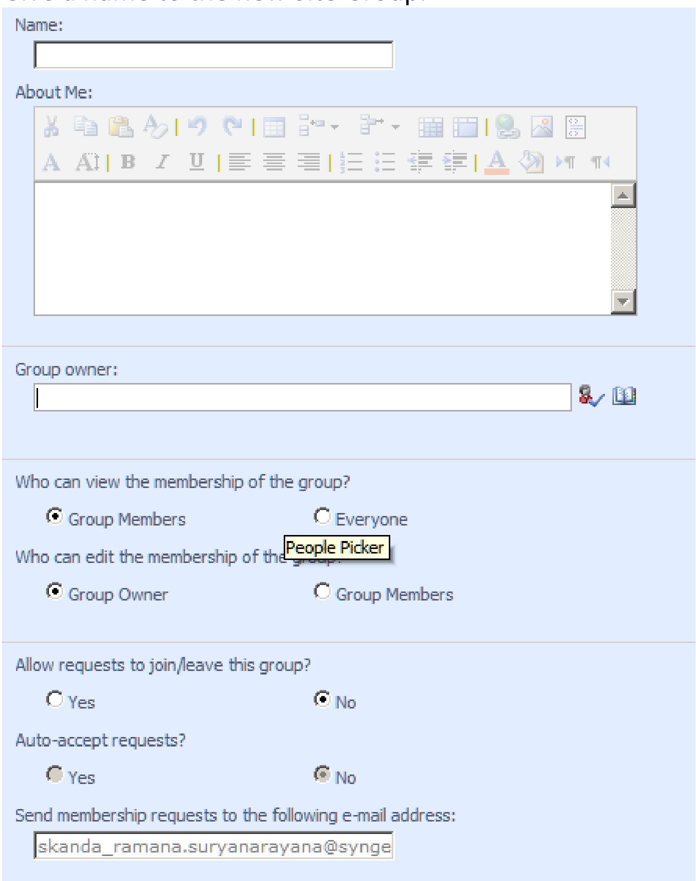
30. Creating site groups

You may need to **create specific site groups** to handle specific requirements about permissions (for instance allowing people to post documents but not to modify and delete.). Creating user groups facilitates the management of library permissions.
You can create a user group from scratch by clicking on:

- **Site Actions**, then **Site Settings**.
- From here click on **Advanced Permissions**, then **Arrow** next to **new** and select **New Group** in the drop down menu.



- Give a name to the new Site Group.



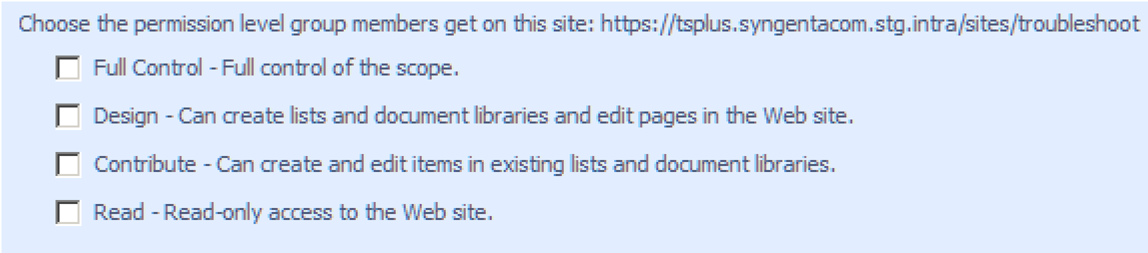
- Give a relevant name to your group; for instance if you have a library "Strategy" restricted only to the Global members of your team, which will have Contributor rights, you should name that group of users Strategy Global Contributors. So, as a best practice **name your group** following the simple rule **Library/ list name + type of permission** (Reader, Contributor, Administrator).

- You also need to add users for the group (**see adding users**).
- The default owner will be you.

- If you wish to create a group for someone else you can change the owner in the **Group Owner box**, and can use the GAL to find the name. you can also paste the name of the Owner's group, so as all

administrators of the Teamspace can modify the group's settings if needed.

- **Select the permissions** that it will cover by ticking the appropriate box or boxes.



- Click on **Create** at the bottom of the page.

<u>Hints & Tips about Users :</u>

The **Visitor (Reader) group should not be deleted in the Site Settings > manage users** section because then, even the homepage of your Teamspace will be closed to all users.

If you have not informed your colleagues that the Teamspace has been created, do not use the automatic message. Better to **communicate the link** when the Teamspace **is launched by the Teamspace owner during a team meeting** for example.

In each Web Part (library or list) you will be able to easily adapt the permissions (**open the library or list,** click **Settings, Document library settings** then go to **Permissions for this library/list)**

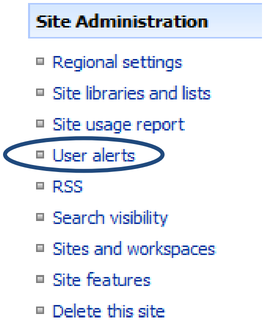
Keep it simple! Do not create too many libraries and user groups as it can create mistakes and is difficult to maintain!

<u>Hints & Tips about permissions :</u>

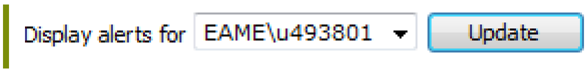
When you delete a team member, you also need to **clean-up the alerts** for this person, as the system does not do it automatically.

You must be a member of the Administrator site group to delete other users' alerts.

1. Go to **Site Actions/Site Settings/Site administration/User Alerts**



2. In the menu, click the name of the site user with an alert that you want to delete, and then click **Delete selected alerts**.

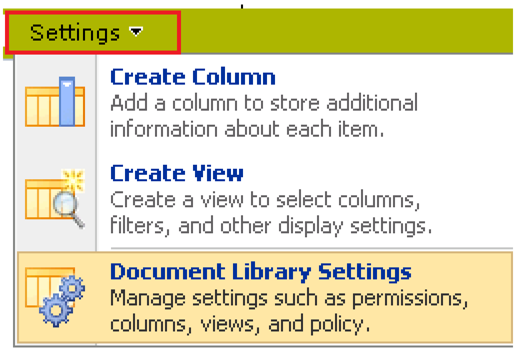


3. When you are finished click **Update**.

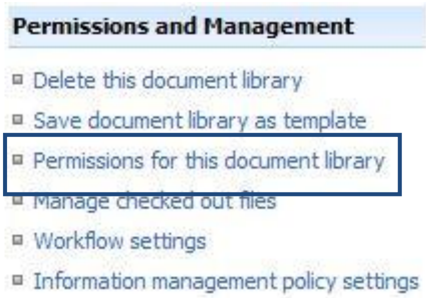
31. Changing permission settings for a list or library

You can set **specific permissions** for a user or a group **for any list** or **library**. To do this, open the list or library for which you want to change permissions, then follow the steps below:

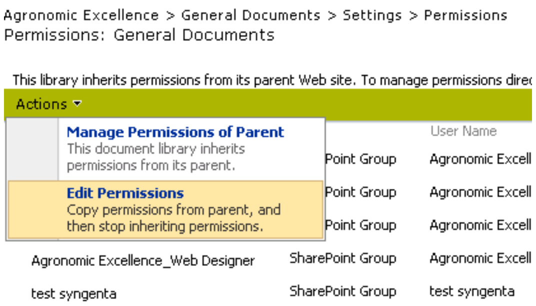
Settings /Document library settings



- Now click **Permissions for this document library**



- Set the permissions appropriately – by selecting the **Actions Button**, and then **Edit or Remove Users Permissions**; here you should remove all the users/groups that should not have access to the library, and then add the group(s) that you want to have access. The owners (Administrators) have full control on the site and **cannot be restricted**.



- **Inherit Permissions** means that your library will have the same Permissions as the whole site. Click on it to retrieve all User Groups created in your Teamspace, and then **make sure the Reader group** (all **Syngenta** users) **is not listed for a restricted library**.
- You can eventually add **add a new user** or Site group to your library permission list by clicking on **New. But generally users should be added at site collection level, in site groups.**
- Type in the name of the site group, or the user you want to add (or click on the Address Book to search for a particular user); then, choose the appropriate permission level. It is **best practice to add only already existent user groups at a library/level** to manage access easier from the central permission settings.

You can also add users as shown in section Adding Users and Creating User Groups but **it would be more complex to manage**.

In list permissions, you cannot see who are the members of a group, this is why it is advised to clearly name and describe new user groups.

To access the list of users in a group, you need to go back in Site Settings > People and Groups.

32. User and Permissions Best Practices and Recommendations

What's the best way to manage permissions?

- User permissions have to be based in groups
- Reduce at the maximum the number of new groups
- Create new groups as image of the existing ones
- Respect the naming convention recommended
- Provide a proper description that helps to identify the group

Don't...

- Give users permission directly
- Modify permissions on the default groups
- Modify default permissions levels

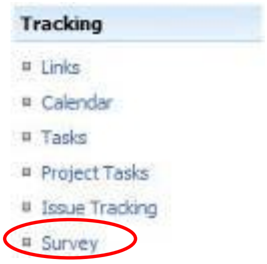
Do...

- Add users to specific created groups
- Manage permisions centrally
- Use the description of the group to clearly specify the purpose of the group
- Revise user permissions from time to time

33. Using surveys

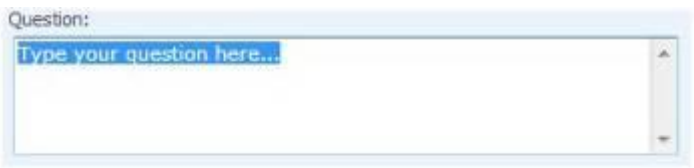
In MOSS Teamspaces there are several types of survey, and you should be able to find one that suits your needs. Before you create a survey, it is a good idea to map out the questions that you want to ask and the type of answers that you want to receive. For example, do you want someone to respond with their own words, enter a dollar amount, or choose from a list? You should also decide whether questions are required or optional. You can add branching logic to specific questions, so that the remaining questions in the survey are relevant to the respondent. For example, you can specify that questions about home repairs appear only for people who say they own a home. Other respondents who do not own a home do not see those questions.

- To add a survey, go to **Site Actions**, then **Create.**
- Click on **Survey.**

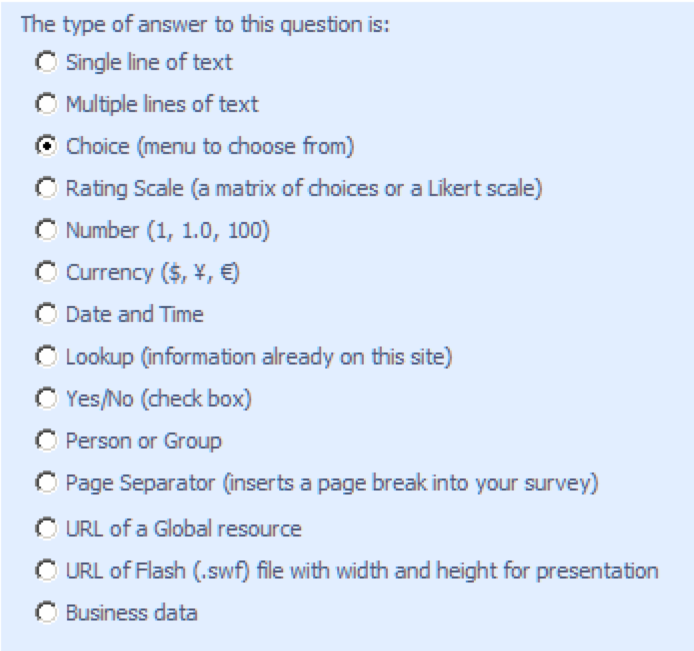


- Enter a **title** and a **description** of the survey and make a decision if this is going to be an anonymous survey or not.

- Click **Next**
- Write your question in the **Question** box.

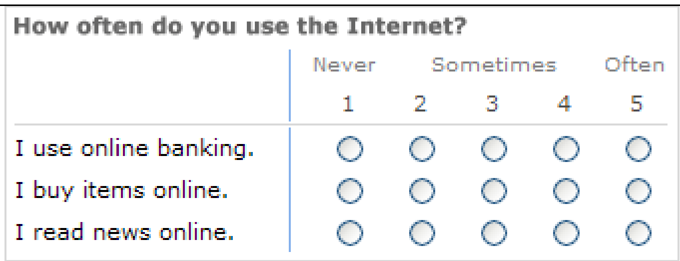


- Select the format of the answer you would like participants to answer with.

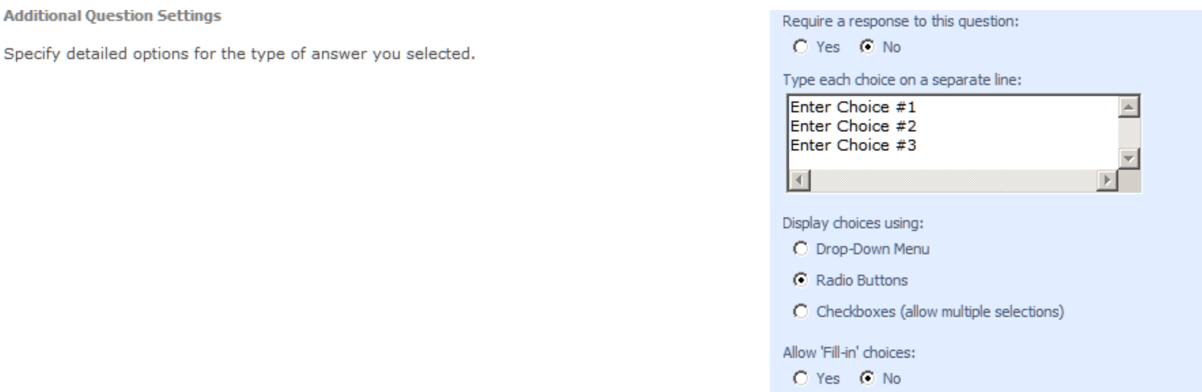


Find here an overview about the different types of questionnaires.

Single line of text	Use this type when you want people to type a word or a few words for their answer. You can specify a character limit and a default answer.
Multiple lines of text	You can specify the number of lines for the response, and whether the response is in plain text, formatted text, or formatted text that is also enhanced with pictures, tables, and hyperlinks.
Choice	This question type enables people to choose from a predefined list of choices. You can allow users to fill in their own text; in addition to the choices they are offered. The choices can appear as a drop-down menu, radio buttons, or check boxes. To enable users to select multiple options, use check boxes.
Rating scale	This question type provides a summary question with detailed questions and responses that are rated on a scale. You can define the range of the scale, such as 1 to 5 or 1 to 10, and provide text to explain the meaning of the scale.

	
Number	You can specify integers, decimals, or percentages, as well as a maximum and minimum range.
Currency	You can specify maximum and minimum values, the currency format, and other settings.
Date and time	You can specify that the answer is a date or both date and time. The answer displays a box with a calendar that helps people to choose a date.
Lookup	This type of question offers answers that are stored as a column in another list. With a lookup question, the choices offered are the same as the contents of the corresponding list.
Yes/no	This question appears as text followed by a single check box. A selected check box is considered Yes. The words Yes or No do not actually appear. If you want Yes or No to appear with your question, create a Choice question and then enter Yes and No as the choices.
Person or group	This option enables respondents to browse or search the directory service for values to use as answers. For example, if the answer to the question should be the name of a person in your organization, the respondent can select that person's name from your directory service.
Business data	Not enable yet
Page separator	You can add a page break between questions by adding a page separator to your survey.

- In the Additional Question Settings area you can modify the answer you are giving participants to answer. The fields will differ depending on which type of answer you would like participants to give.



You can add different answer types throughout the survey. For instance if your first question is 'Please briefly outline your role in XXXX project?' then you would use either Single line of text or Multiple Lines of text. But your next question might be 'How many times did you travel for business in the XXXX project last month?' then a number answer would be more appropriate.

Your survey can have as many questions as you like. Be aware that page breaks can be useful to focus the attention of participants on particular questions. A page break will mean the next questions will appear on a different page automatically.

- To see the responses of the survey, click on the **survey**.
- Click on **View: Overview**

- Here you can choose to see all responses or a graphical summary of responses.

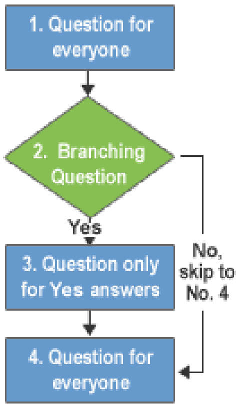
(This option also appears on the survey overview page after you select the survey)

Branching logic – new feature

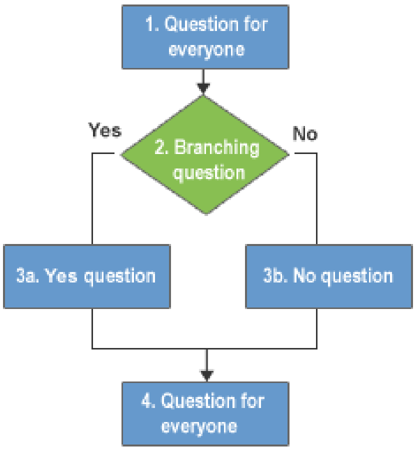
When you add branching logic to a survey, you can ensure that only the relevant questions are displayed to the appropriate respondents.

By default, every question in a survey appears in numerical order, but you can enable questions to be skipped if they don't apply, or make multiple sets of questions appear, based on the response to a branching question.

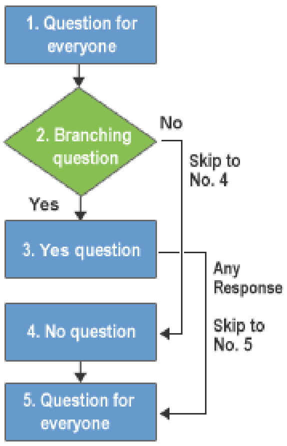
For example, you may want to direct questions about a specific part of training only to people who participated in it. You can ask people if they participated in part X of the training, and if the answer is Yes, the questions about quality and length appear. If the answer is No, the survey can skip to the next set of questions.



You can offer multiple sets of questions and use more complex branching to guide people through your survey. The following image shows the logic for multiple branches.



You can make the survey jump to another question, regardless of the answer. This returns people from a branch of a survey to the main part of the survey, if the survey has multiple branches. The following image shows how to implement the logic for multiple branches.



To create a survey, you start by determining the logic that you want to use for the branching. You may want some questions to appear only if someone chooses a specific answer to a question, or you may want to offer two or more sets of questions based on the answer.

If your survey is large or complex, consider sketching out the questions and their logic first. After that, you create the survey, add your questions, and then specify where and how the survey branches.

How to apply branching
Before you begin adding branching logic, create your survey and enter all the questions that you want.

1. On the **Settings** menu 

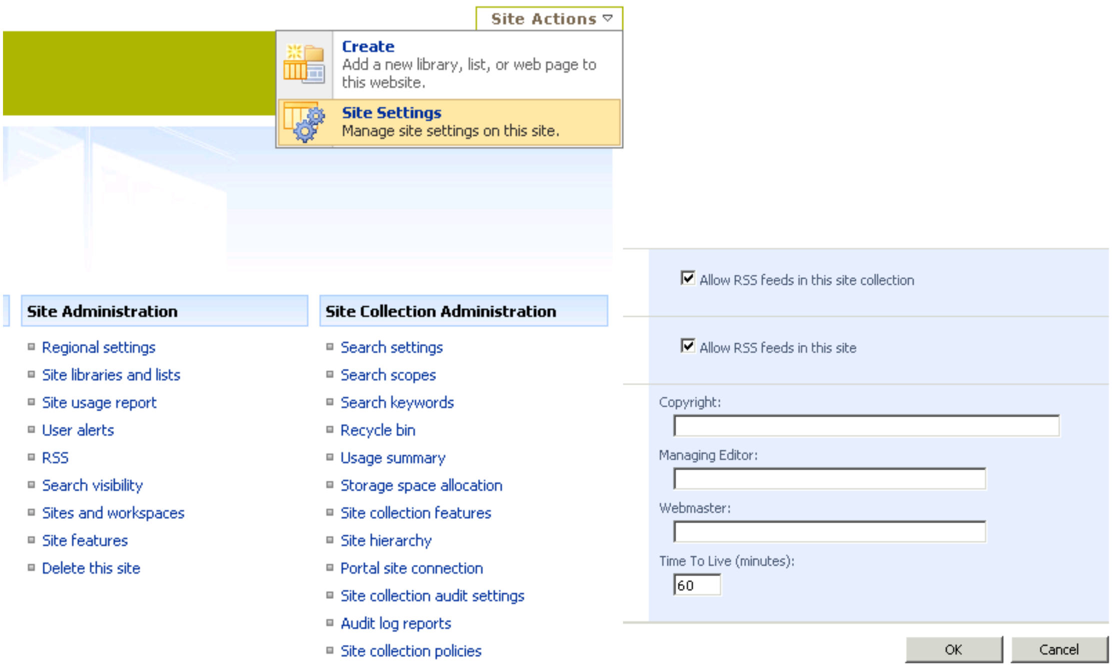
, click **Survey Settings**.
2. Under **Questions**, click the question to which you want to add branching logic.
3. Under **Branching Logic**, for each possible response to the question, select the question that you want to branch to.
4. Click **OK**.

5. To insert additional branches to your survey, repeat above steps.

34. Using RSS feed

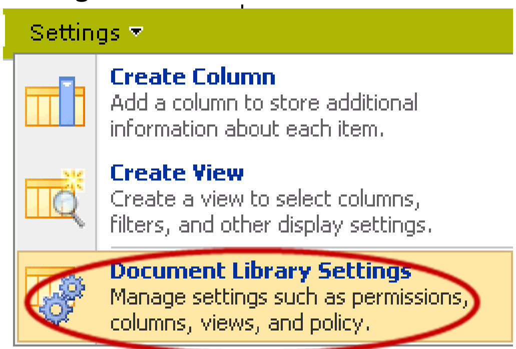
MOSS allows users to set up **RSS (Really Simple Syndication)** feeds linked to particular areas. They allow users to keep updated on changes in the MOSS environment and are less intrusive than **Alerts.** Another difference is also that you are not only notified about any changes but also about what exactly has been changed.

Allow RSS feed at site level
If RSS feeds settings are not visible, **your Site Collection Administrator** needs to allow it at site level, before you can enable them at list level. (The site collection Administrator is the one listed in the Site Details on the Home Page).
Go to Site Settings and click on RSS under Site Administration and tick the box to allow RSS feeds at site level.

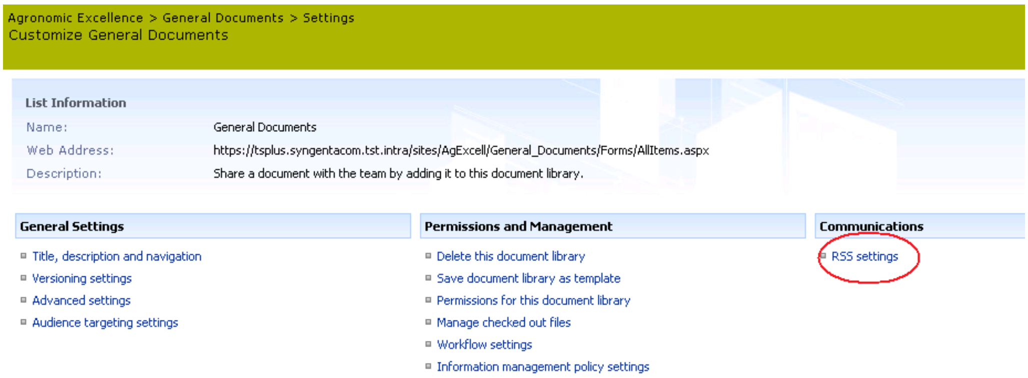


Enable RSS at list/library level

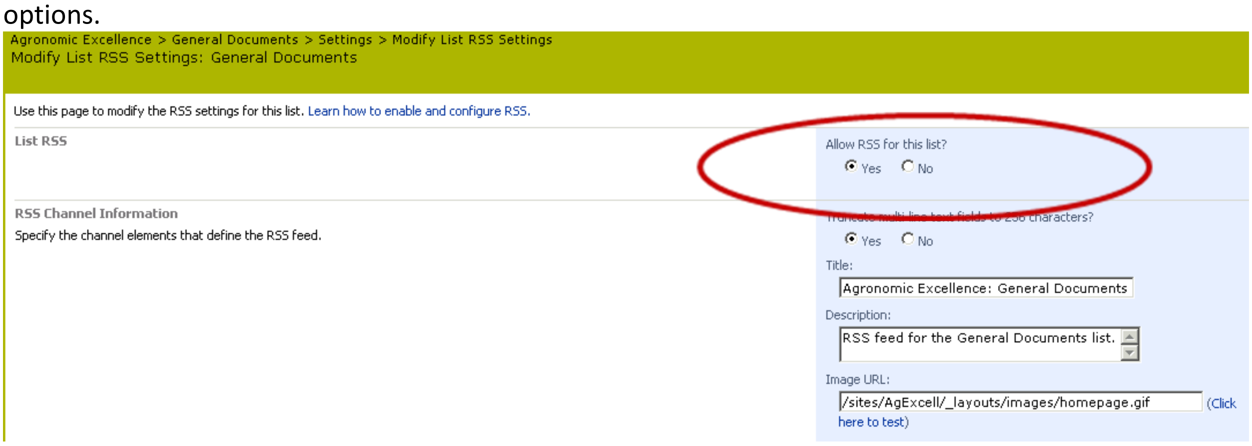
You need to go inside the library/list, and then click on Document Library/List Settings from the **Settings Button**.



Click on **RSS settings under Communications**. If this does not appear, you need to enable them at site level (see above).

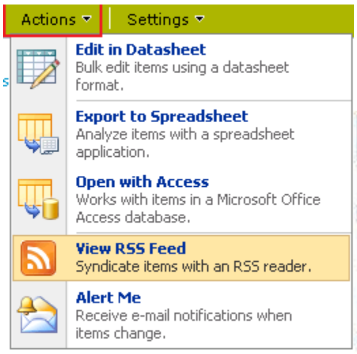


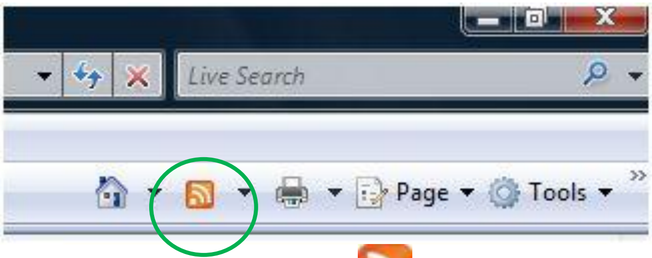
Select **YES** to allow users to subscribe to feeds for that library/list. You can configure some of the options.



To set up an RSS feed for a particular area you should enter the area. For instance, the "announcements" area is a useful area to keep updated with.
Click on **Announcements** (either the Web part on the home page or under All Site Content).

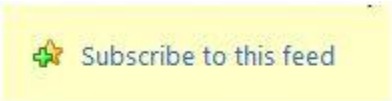
The Announcement section will open.





To set up an RSS feed to these announcements click on the  icon in the Internet Explorer toolbar. Alternatively, you can click on **Actions button** and then **View RSS feeds**

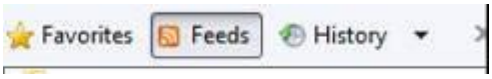
A new page will open, asking if you would like to subscribe to this feed.



Click **Subscribe to this feed**. An option box will appear.

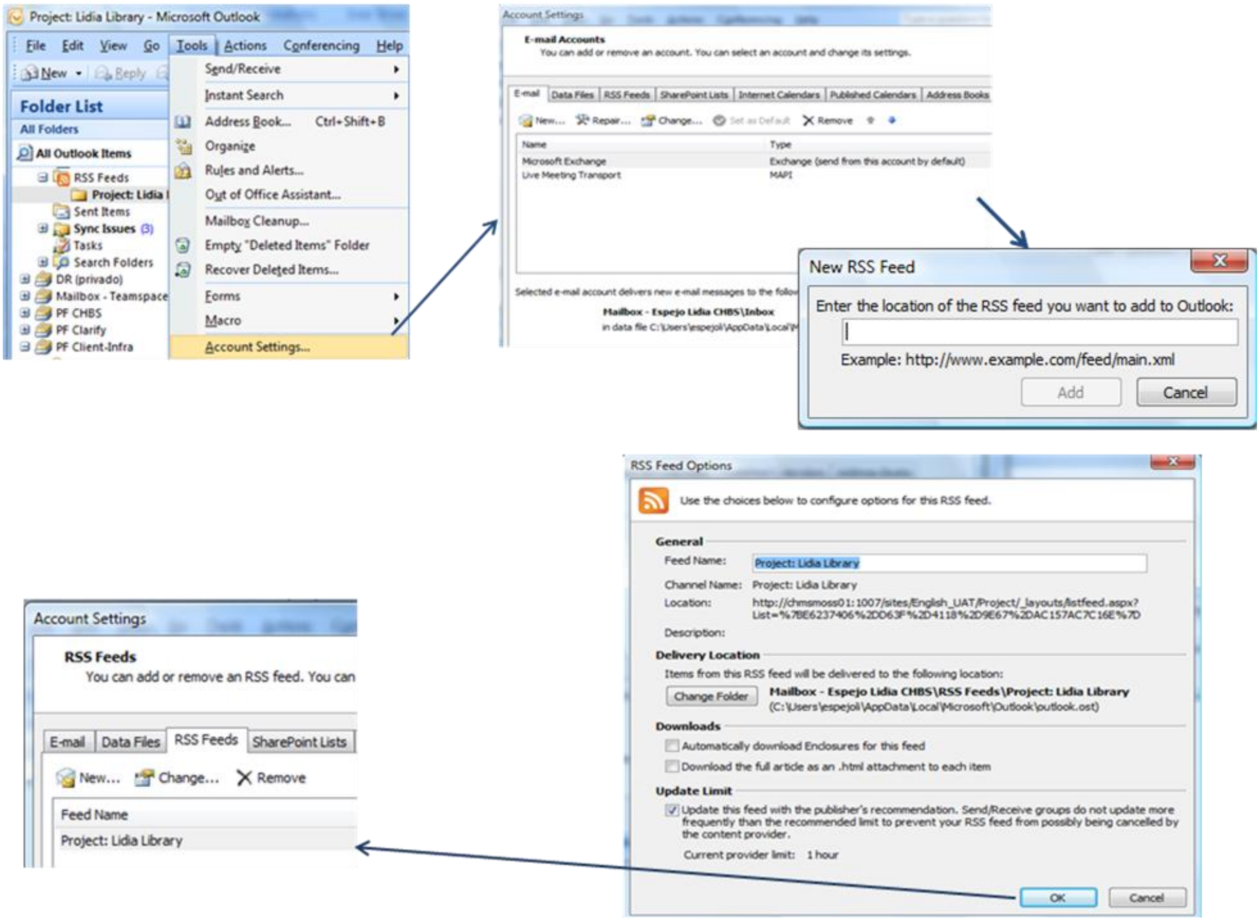
If you select subscribe the RSS feed will be saved and you will be able to access it .

You can check your RSS Feeds by clicking on the RSS button in Explorer 7 when you are inside the Library.



Alternatively, you can find it in your RSS folder in your Outlook.

If the RSS does not automatically appear in the RSS folder of your Outlook, you need to configure it. In outlook, **go to Tools**, **Account Settings**...,**RSS Feeds**, **New**, enter the link of your feed, give it a name; Then it should appear in Outlook. (see steps below).



RSS on your desktop

Microsoft Windows Vista supports RSS feeds as gadgets. The gadgets can be found on the right hand side of your desktop.

Right click here to **add a gadget**.
A box will appear with a list of available gadgets. Double click to add RSS viewer.

An RSS viewing gadget will appear in your gadget sidebar.
RSS feeds you have subscribed to should already be there. If they are not you need to add them.
Click on the icon of a spanner in the top right hand corner of the viewer.

A box will appear. Under Display this feed: Select the feeds you have already saved.
Click OK. You can now monitor your MOSS announcements or any other feeds from your desktop.

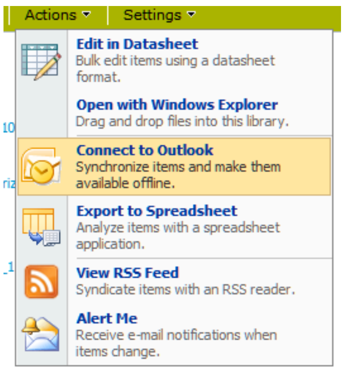
<u>Alerts and RSS feeds- similar, but not the same</u>

Alerts	RSS feeds
Alerts are notifications - they tell you when something has changed.	RSS is a news feed – they tell you **what has changed**.
You can create an alert on just about anything in SharePoint Server, including search query terms.	You can create an RSS news feed on just about anything that can be stored in a list e.g. news lists, document libraries…
Alerts can be set up on a item level e.g you can get alerts about a specific document.	The detailed you can get with your **RSS feed is on a list level** – you can't e.g set up a RSS feed for a document.
As Administrator, you can **also set up alerts for other people.**	RSS feeds **can't be set up for other people**.
An alert should be just that - it alerts you. Something has changed and you need (or want) to take notice of it, either immediately or at some point in the future.	A news feed is just that - it feeds you news. Content has changed and you may or may not choose to take notice and read it, usually depending on how busy you are

35. Connecting lists to outlook

Note: If you have a migrated library from a 2003 version of Sharepoint that has been customized, this functionality might not work; once you complete the steps below, your library will be displayed in Outlook, **but with no content.**
This can only happen for libraries/lists created in the 2003 version, for all new created libraries in MOSS, this functionality should work.

This feature enables mobile users to take advantage of convenient **offline synchronization** capabilities. Users can access content of Sharepoint Lists offline, by connecting these lists to Outlook. It is recommended that this is used oly to perform read operations and not editing of documents when working in offline mode.

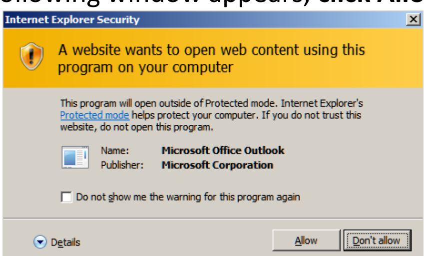


1. Go inside the List you want to connect to outlook (e.g. Shared Documents)

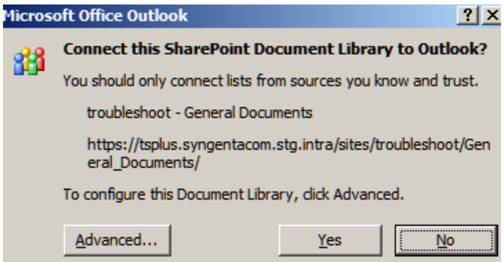
2. Click **on Action Button** below the list name.This Opens Menu for choices of Actions

3. Click on **Connect to Outlook**

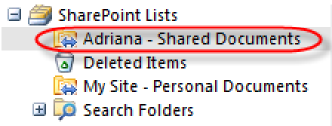
4. If the following window appears, **click Allow**



5. Outlook will open with the following message - Click **YES**



6. The process is now complete and the List content will be displayed under your Mailbox folders in Outlook, under the general folder **SharePoint Lists.**



If you only want to access **to read** offline the files in the libraries you connected to Outlook, this is all you need.

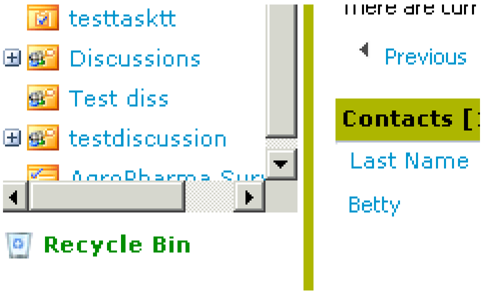
For more details please check the Web cast session regarding Working offline, available on Know How, MOSS teamspaces.

36. Recycle Bin

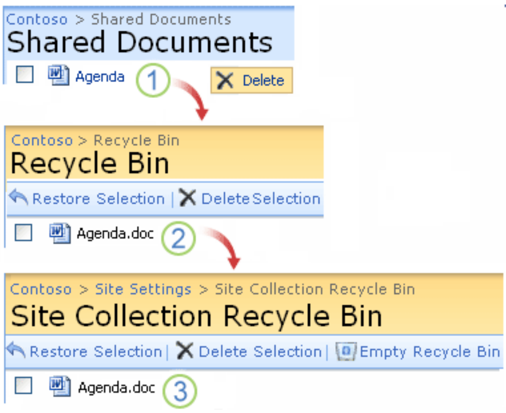
The Recycle bin allows users to restore deleted items or choose to permanently delete them. This can stop documents being accidentally lost.

1. When you delete a document from a document library, it is moved to the Recycle Bin for the site, where people can **either restore it** or **delete it**. **You have 30 days to restore your deleted documents, after that they will be permanently deleted.**

2. If you click **Recycle Bin** on the Quick Launch, you can see all of the items that you've deleted from your site.



3. If the file is deleted from the **site Recycle Bin**, it is sent to **the Site Collection Recycle Bin**, where an Administrator can restore it or delete it permanently



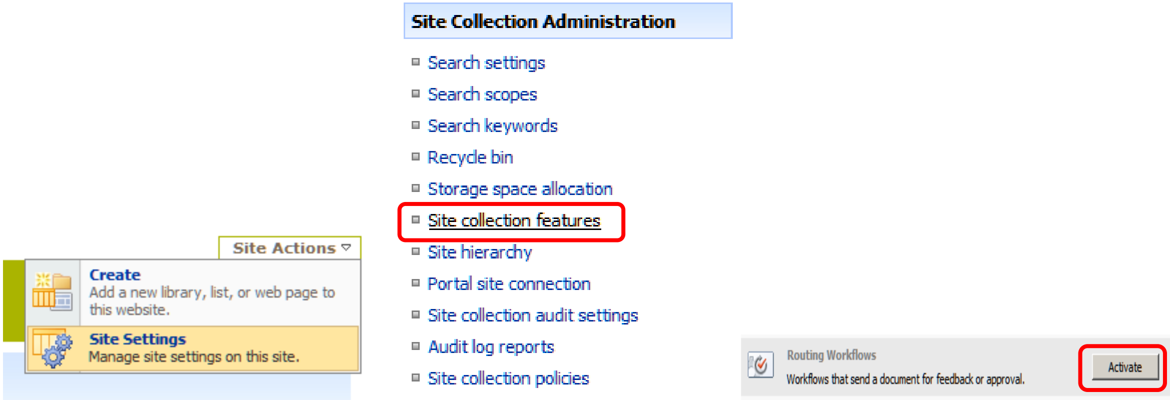
Items in the Recycle Bin remain there until you decide to permanently delete them from your Teamspace, or until the items are permanently deleted **after 30 days.**

Note: **When recovering a library/list, you need to publish it again!** That means that the Web Part for that library is not recovered automatically; also it will not be displayed on the Quick Launch even though you previously made the settings this way. You can find your library if you click on All Site Content. To publish it as a web part, you need to go to the page you wanted in and follow the steps for adding new Web Parts.

37. Workflows

Workflow is sometimes described as a series of tasks that produce an outcome. In the context of MOSS, workflow is defined more narrowly as the automated movement of documents or items through a sequence of actions or tasks that are related to a business process. Workflows can be used to consistently manage common business processes within an organization by enabling the organization to attach business logic to documents or items in a SharePoint list or library. Business logic is basically a set of instructions that specifies and controls the actions that happen to a document or item.

If workflows are not available on the site, then please go to the site collection features and activat the "Routing Workflows" feature.

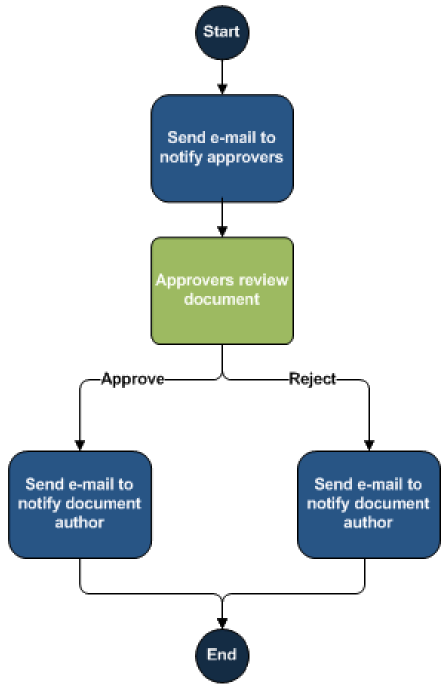


Workflows available in the Sharepoint 2007 version are-

Approval This workflow routes a document or item to a group of people for approval. By default, the Approval workflow is associated with the Document content type, and thus it is automatically available in document libraries. A version of the Approval workflow is also associated by default with the Pages library in a publishing site, and it can be used to manage the approval process for the publication of Web pages.

- **Collect Feedback** This workflow routes a document or item to a group of people for feedback. Reviewers can provide feedback, which is then compiled and sent to the person who initiated the workflow. By default, the Collect Feedback workflow is associated with the Document content type, and thus it is automatically available in document libraries.
- **Collect Signatures** This workflow routes a Microsoft Office document to a group of people to collect their digital signatures. This workflow must be started in a client program that is part of the 2007 Office release. Participants must complete their signature tasks by adding their digital signature to the document in the relevant Microsoft Office program. By default, the Collect Signatures workflow is associated with the Document content type, and thus it is automatically available in document libraries. However, the Collect Signatures workflow appears for a document in the document library only if that document contains one or more Microsoft Office Signature Lines.
- **Disposition Approval** This workflow, which supports records management processes, manages document expiration and retention by allowing participants to decide whether to retain or delete expired documents. The Disposition Approval workflow is intended for use primarily within a Records Centre site.

- **Three-state** This workflow can be used to manage business processes that require organizations to track a high volume of issues or items, such as customer support issues, sales leads,



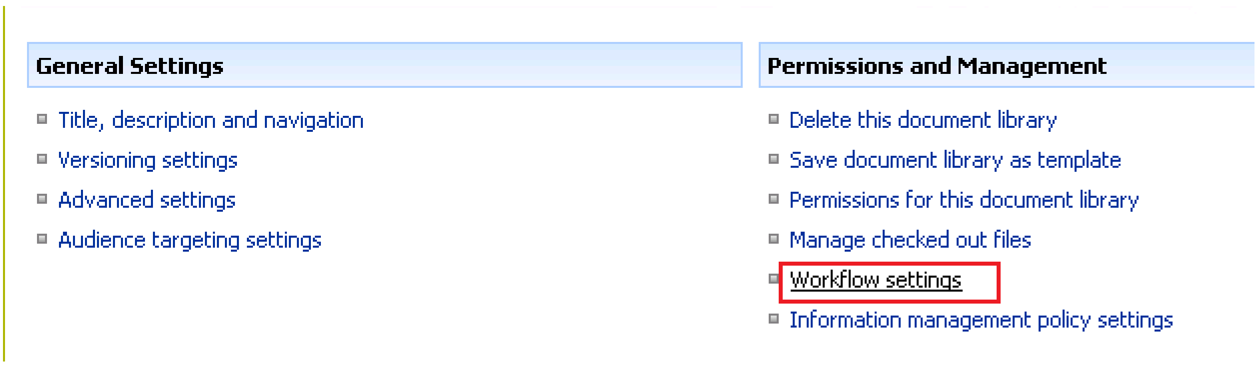
or project tasks.

For instance, the actions in the **approval workflow** follow the process displayed below:

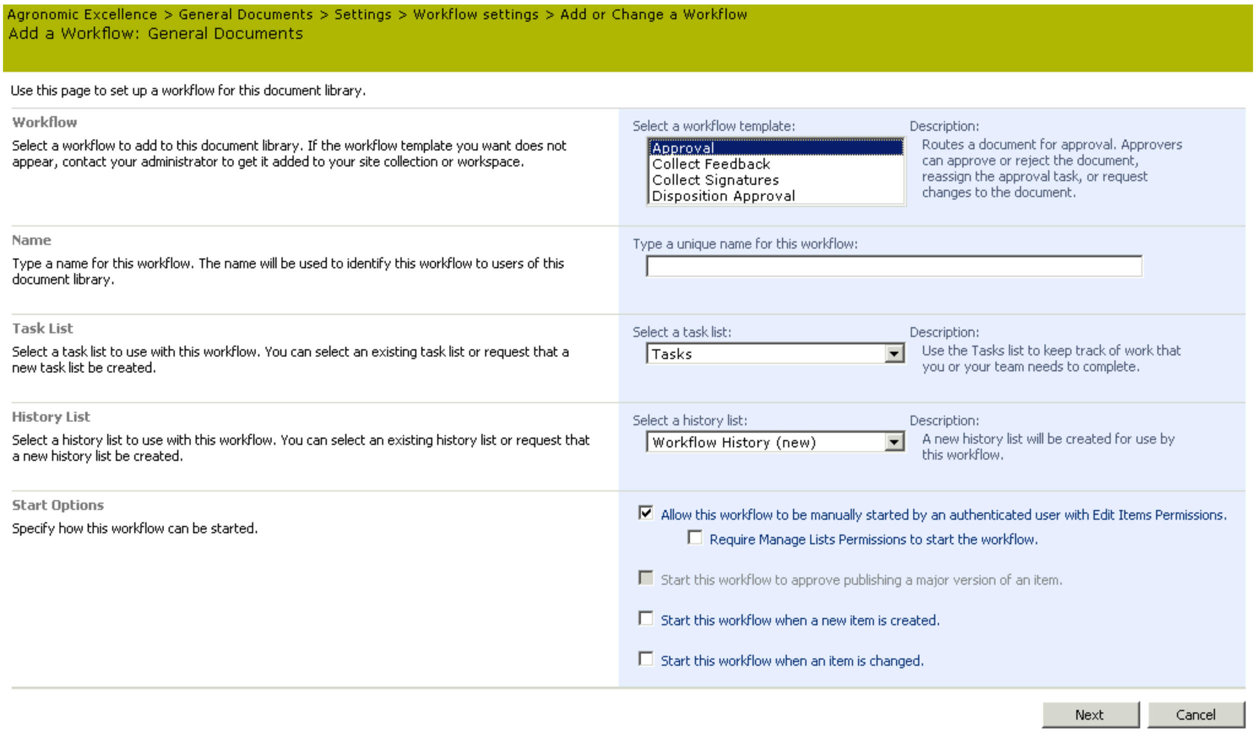
An example on how to set up an approval workflow:

1. Go inside a library or a list and click on the **Settings button** and then on **Document Library/List Settings.**

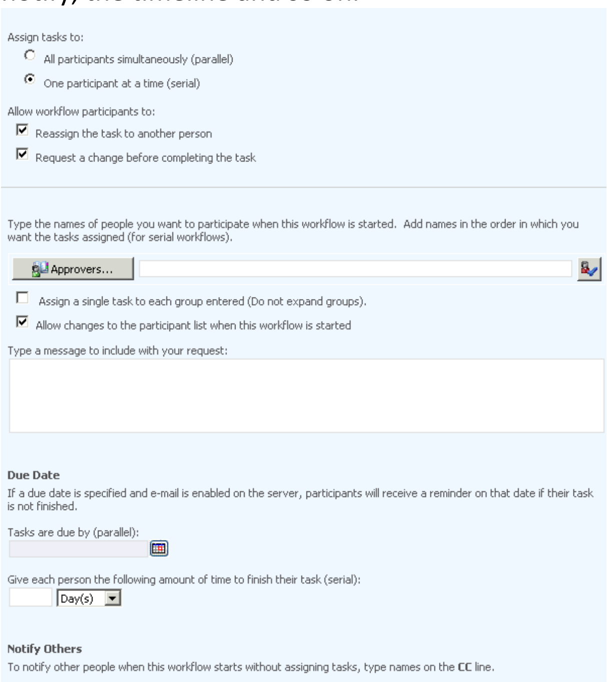
2. Click on **Workflow settings** under **Permissions and Management**

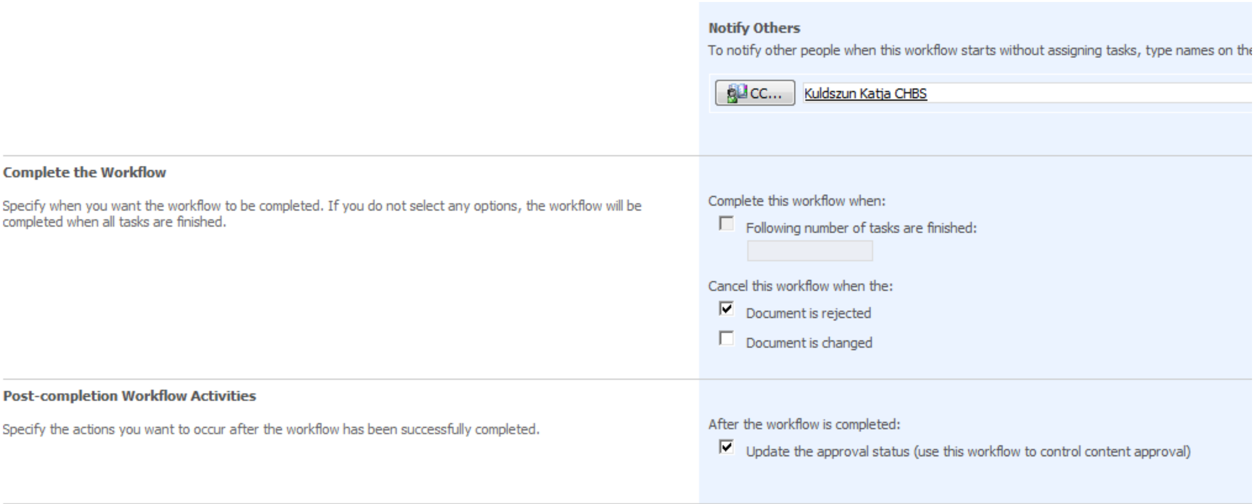


3. Follow the instructions and fill in the fields. Select Approval from among the different workflow templates, give it a name, select a task list or create a new task list associated with this workflow. Decide whether you want to start a workflow when a new item is created or when an item is changed. **You cannot have the same workflow for both added and changed items. If you do want approvals for both, you need to create <u>2 separate workflows</u>.**



4. Then, make the particular settings for your process: the approvers, the persons needed to notify, the timeline and so on.





Notify Others

To notify other people when this workflow starts without assigning tasks, type names on the

CC... Kuldszun Katja CHBS

Complete the Workflow

Specify when you want the workflow to be completed. If you do not select any options, the workflow will be completed when all tasks are finished.

Complete this workflow when:

☐ Following number of tasks are finished:

Cancel this workflow when the:

☑ Document is rejected

☐ Document is changed

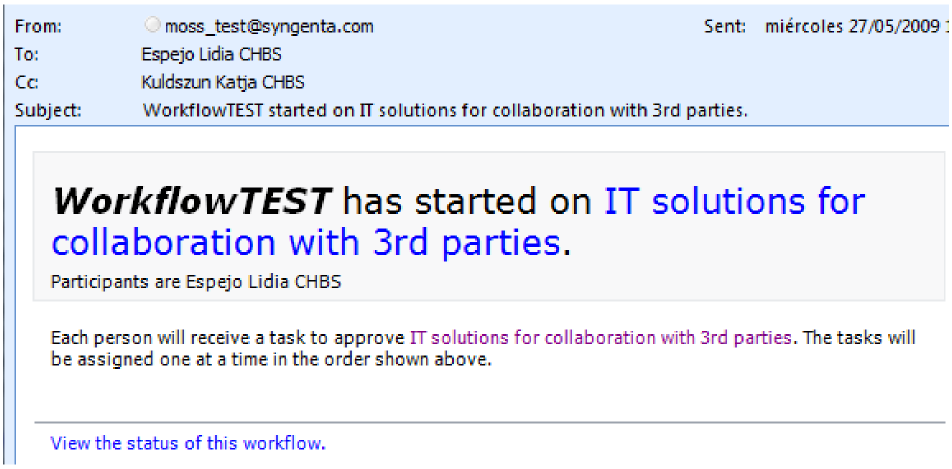
Post-completion Workflow Activities

Specify the actions you want to occur after the workflow has been successfully completed.

After the workflow is completed:

☑ Update the approval status (use this workflow to control content approval)

After designing an approval workflow, for instance for added items, when an item is added the approvers and the persons listed in cc for notification will all receive a notification email about the creation of the workflow and its type.



From: moss_test@syngenta.com Sent: miércoles 27/05/2009

To: Espejo Lidia CHBS

Cc: Kuldszun Katja CHBS

Subject: WorkflowTEST started on IT solutions for collaboration with 3rd parties.

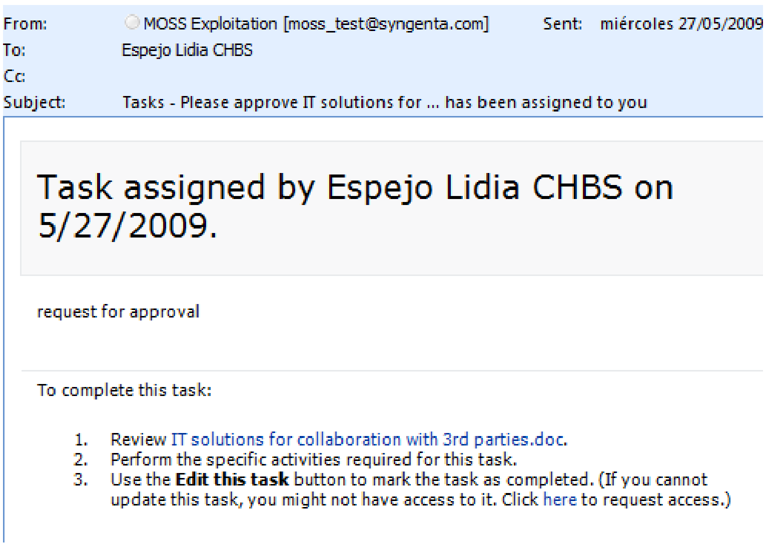
WorkflowTEST has started on IT solutions for collaboration with 3rd parties.

Participants are Espejo Lidia CHBS

Each person will receive a task to approve IT solutions for collaboration with 3rd parties. The tasks will be assigned one at a time in the order shown above.

View the status of this workflow.

The approvers will also receive an email with the details regarding their approval task and the process they have to follow to complete the task. The task will appear as assigned by the person who added the document.



From: MOSS Exploitation [moss_test@syngenta.com] Sent: miércoles 27/05/2009

To: Espejo Lidia CHBS

Cc:

Subject: Tasks - Please approve IT solutions for ... has been assigned to you

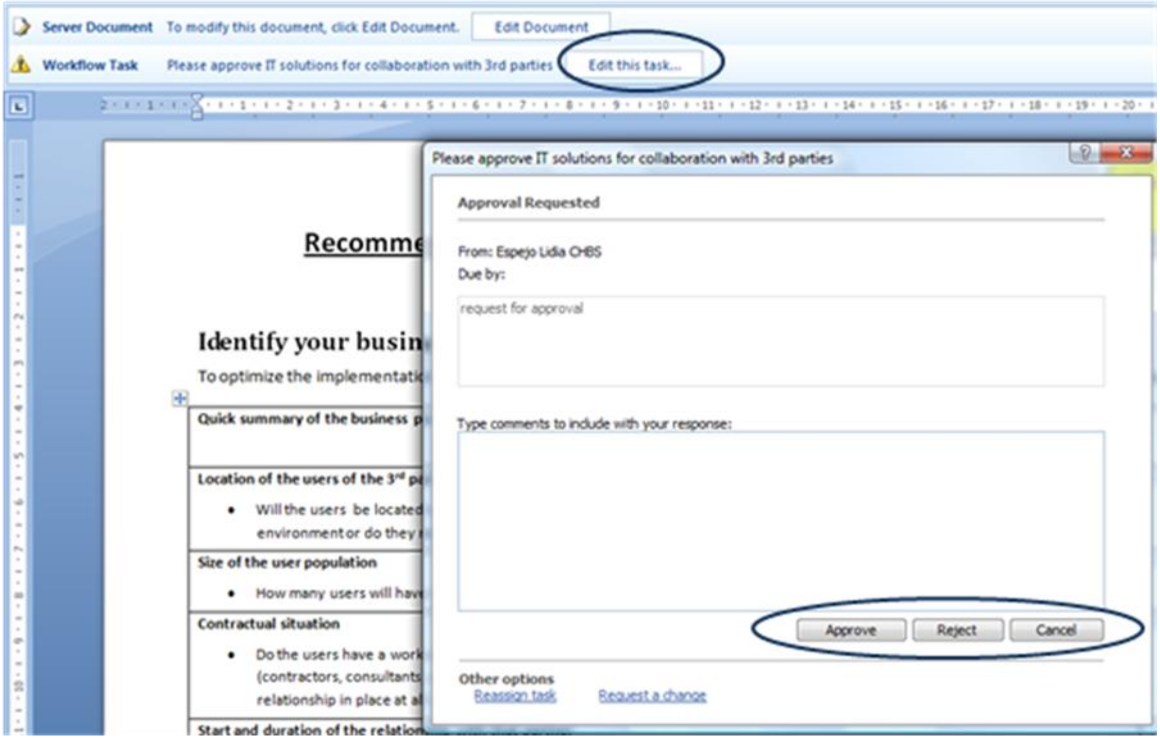
Task assigned by Espejo Lidia CHBS on 5/27/2009.

request for approval

To complete this task:

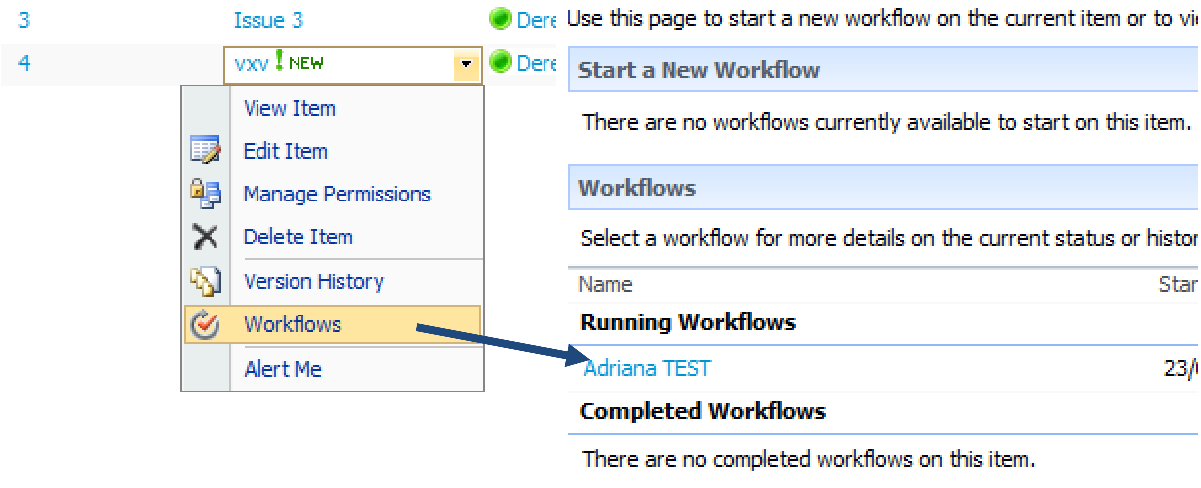
1. Review IT solutions for collaboration with 3rd parties.doc.
2. Perform the specific activities required for this task.
3. Use the **Edit this task** button to mark the task as completed. (If you cannot update this task, you might not have access to it. Click here to request access.)

As approver, you need to follow the steps, by clicking on the link from the email to open the document. The document will open and after reading it and checking what you need you will notice the **Edit this task...** button on top. This will open the following window where you can approve or reject the document.

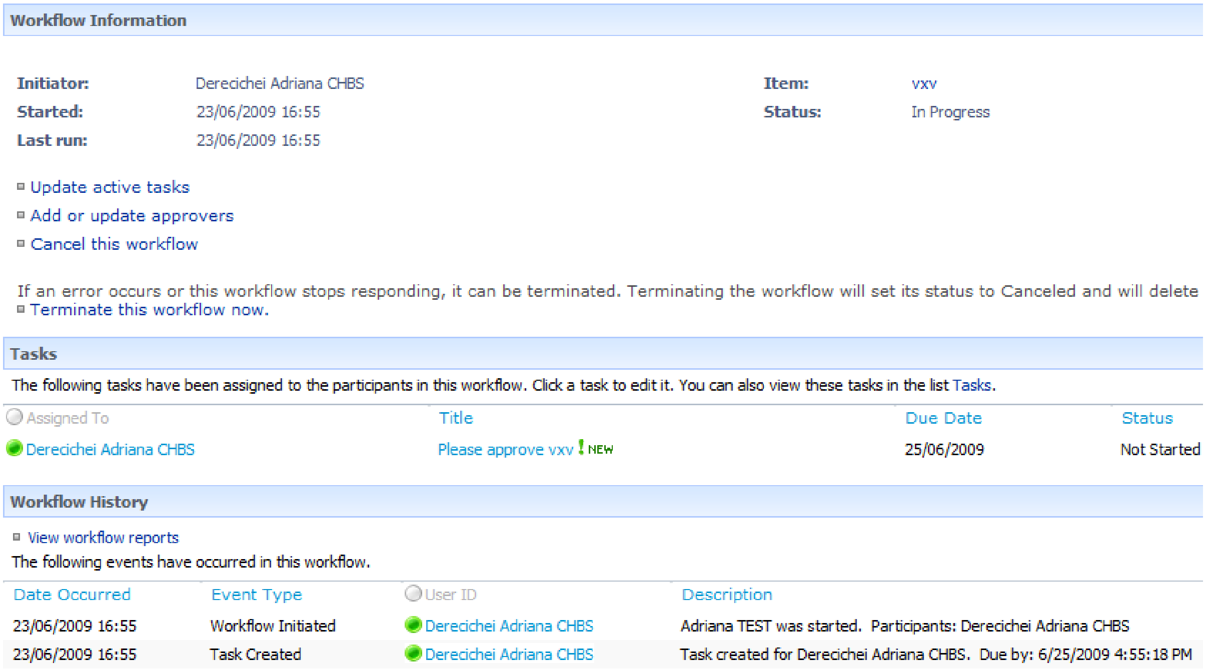


Check status of workflows

Go to that document/item and click on Workflows from the item function menu (see below)



See what the running workflows for that document are and click on them to check status.



When the workflow has completed the person who demanded it will receive a notification email.

38. Quota Increase Process

When a Teamspace is going to run out of space, the TS Administrator receives an email alerting that the TS size has to be increased before it reaches the maximum allowed size. When this happens, the TS is blocked and no changes are allowed (create webparts, modify existing web parts) and files can't be uploaded or items can't be created.

The Quota increase request is a duty of the TS administrator. It is recommended to follow the Best Practices on the Quota increase process before the TS is out of space. There are a few things that you should be doing when the email alert is received:

- Clean up your TS regularly from old versions.
- Archive Libraries that are just used in read mode

- Check Site Recycle Bin content and don't forget the Site Collection Recycle Bin. Empty them if possible.
- Check Storage space Allocation (Site Actions/Site Settings and under Site Collection Administrator, select Storage space Allocation). It will present the current size of the TS, how much is used, which is the free space, how much space the versions are taking, which is the size per libraries etc.

If after cleaning the TS, the Quota increase is needed, then contact your KA who is the person with access rights to request for it in Webadmin tool. The request form the KA will generate a case that goes to HP who performs the increase at server level.
An email to the TS Administrator (and Owner) will confirm that the increase has been done. You, as a Site Collection Administraotr can check it under Storage space Allocation.

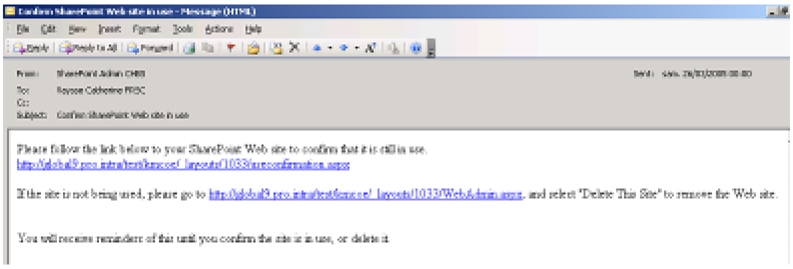
39. What you should not be doing

There are a few things that you should not be doing even if it is possible with our current version of Teamspaces:

- **<u>You should not create sub-sites</u>** : sub-sites are currently not supported. There are several risks associated to sub-sites. There is currently no process for restoring them in case of erroneous deletion. You may lose control of your Teamspace especially if you give Administrator permission for the sub-site to somebody who can then create further sub-sub-sites. Remember that sub-site use part of your overall Teamspace capacity.
- **<u>You should not create Document Workspaces and Event Workspaces</u>**: users will be quickly confused about where to find documents. In the case of Event Workspaces people may not be able to retrieve easily documents corresponding to a past event.
- **<u>You should not manage the library content inside Folders</u>**: Replace folders by columns and group them.
- **<u>You should not have views in lists and libraries with more than 5000 items</u>**
- **<u>You should not overcome the max number of lookup columns allowed (8)</u>**
- **<u>You should not manage permissions individually but in groups.</u>**

40. Managing your site

If your site is not used for a period of time you will receive an e-mail asking you to confirm that this site is still in use. By clicking on the link provided in the message, you will maintain your site in use for a new period of time. If the site is no longer needed it is recommended to delete it (link provided in the next paragraph of the message) after archiving the content that is worth keeping.



<u>For large functional teams or projects</u>: it may appear that your team needs more than one Teamspace to handle the large range of activities of sub-teams or sub-projects. In this case, it is recommended to request several Teamspaces that can be customized to better fit the needs of each group. In this case it is good practice to analyse the overall way of working and to decide accordingly how best to link the Teamspaces. See below **a few hints & tips**:

Decide which Teamspace will be the “mother” Teamspace and the “daughter” ones

Decide which documents will be posted where (the documents that need to be accessible to all should be on the “mother” Teamspace)

Decide how you are going to use the Event Calendar (for a large project it is better to run only one calendar and to use an attribute to display by sub-project, then on each sub-project Teamspace only post a link to the specific view of the general calendar).

Solution	**Pros**	**Cons**
Team calendar on TS+ site main site, with attributes allowing to create Views for sub-teams or by type of meeting or …	Single calendar for all Allows to see conflicts and/or overlaps	Does not allow use of Filtered Views (to link events, documents, issues, …) for the sub-teams
Team calendars on each sub-team Teamspace and only links to these calendars on TS+ main site	Each sub-team can use Filtered Views on their Teamspace (mostly needed for teams which activity is driven by meetings)	Not convenient to manage conflicts and/or overlaps

41. Requesting creation of a new TeamspacePlus site

This is done through a Knowledge Advisor filling-in a request on WebAdmin at the following address http://syngenta1.pro.intra/webadmin

Asking for increased size: contact your Knowledge Advisor.