SPREP

Intranet Users Guide

Sharepoint Server 2003 & Windows Sharepoint Services

31 January 2008

INTRODUCTION 3

HOW DOES SHAREPOINT WORK FOR YOU? 3

Screen Shots 5

TYPES OF SHAREPOINT SITES 6

I want to share contact lists, event calendars, and announcements with my team, my customers, and my partners 6

I want to easily share a document with my team members for review 7

I want a Web site where I can manage my meetings 8

WORKING WITH SHAREPOINT SITES 9

Locating a Site 9

Browsing a Site 9
Top menu bar 9
Quick Launch menu 10
Main content 11

I want to search and find only the documents that are on my team site 12
Using a Predefined SharePoint Template **Error! Bookmark not defined.**
Modifying a Site **Error! Bookmark not defined.**
Personalizing a Site **Error! Bookmark not defined.**

I want to setup users to access my site 20

I want to be notified automatically whenever documents are changed 22

I want to share files between my Office application and Sharepoint 26

Glossary 27

Introduction

The SPREP Intranet is developed with Microsoft SharePoint.

SharePoint is Microsoft's document management technology, and has been in use under various product names for more than five years. Despite its longevity, many computer users are unaware of its existence and fewer still understand how the technology simplifies the network environment for end-users.

But every organization that generates content can benefit from using SharePoint. You can find out how easy it is for teams and individuals to create Web sites for information sharing, facilitate meetings and document collaboration. SharePoint sites allow users to work together on documents, tasks, contacts, events, and other information.

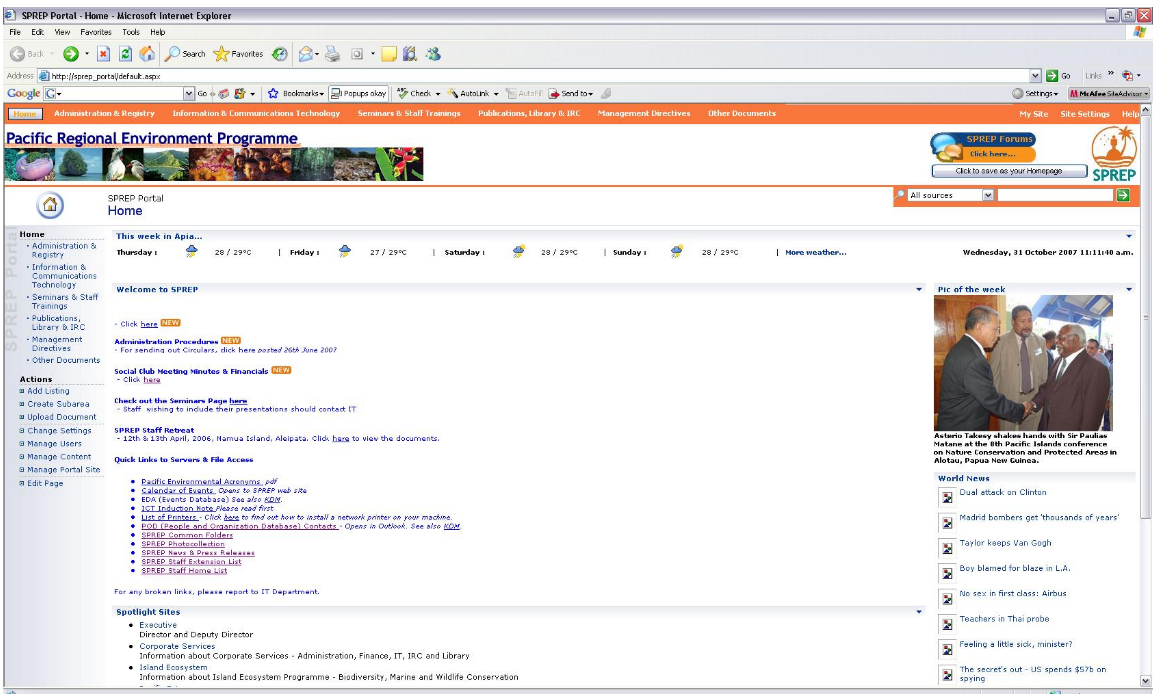


Figure 1-1, Main Intranet Page

How does Sharepoint work for you?

The purpose of the Intranet is to facilitate easy, connected collaboration across the organization. It enables people to work together on documents, projects, and tasks and to leverage best practices by using the combined collaboration features of Microsoft SharePoint Products and Technologies.

Some of the Intranet features include

- **Search** SharePoint Portal Server provides a search feature that finds all types of content — people, documents, sites, and other items on the portal site — based on keywords you enter. The results can be organized in different ways, such as by site, area, or date. For a more specific search, you can use the advanced search option to search by properties of items, to sort results by factors other than relevance, and to set other advanced search options.

- **Alerts** You can ask to be alerted when changes occur to the results for a specific search.

- **Areas** To make it easy for users to navigate, browse, and find what they need, you can divide portal site content into areas. Areas let you organize content — from documents to people to sites — into sets of related information even though the content can be stored in different sources and formats. To control all of the content in an area, the portal site administrator can assign a manager for the area. The manager can then control what content appears in the area and who has access to it.

- **User profiles** User profiles allow you to search for and connect with people within your organization based on information they publish about themselves. Index and search services use the profile information to improve search results.

- **My Site** My Site is a personal SharePoint site created in the portal site that provides personalized and customized information for you, including content targeted to you based on your membership in a particular audience.
- **Audiences** You can target content to a specific audience based on a user's job or task. For example, in an area called Human Resources, a site administrator or the manager of that area can choose to add a news item targeted to all new employees that directs them to the New Employee Benefits site.

You can add information to the SharePoint site, such as events, names and phone numbers of people with whom your team communicates, and to-do items.

You can also do the following:

- Post documents to share with other team members
- Hold newsgroup-style discussions
- Take a poll of the team to make a decision

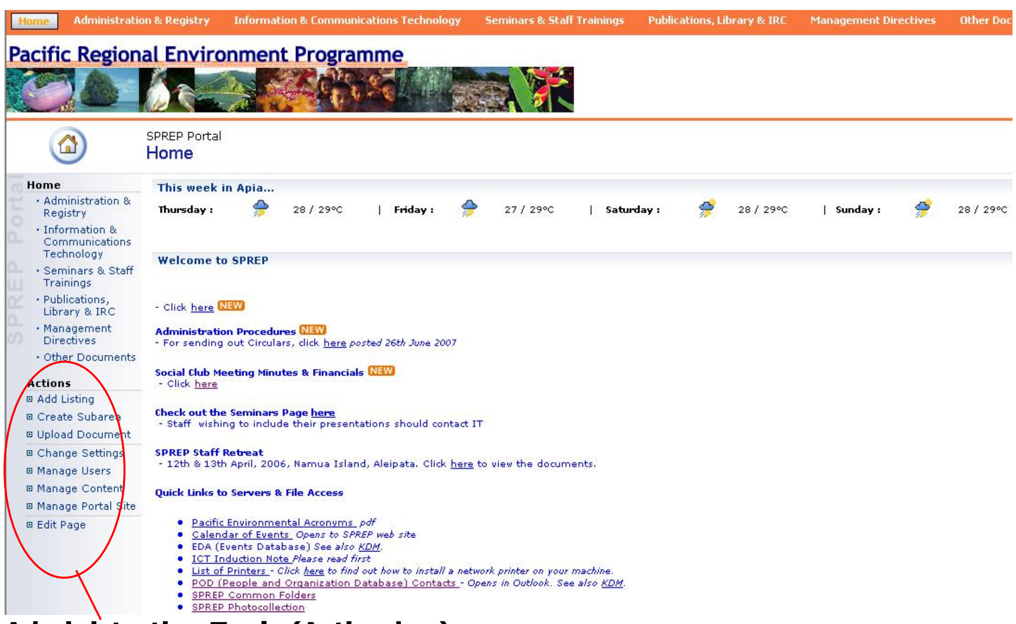
To get started with SharePoint, all you need is a Web Browser and Internet access.

Screen Shots

Navigation - Top Bar

Quick Launch Bar **Web Parts (Links, Events, Announcements, Photo etc.)**

Figure 1-2, Normal View



Administration Tools (Action bar)

Figure 1-3, Administrator View

Types of Sharepoint Sites

Within the context of Windows SharePoint, a *site* can be either a *team site* or a *workspace*.

Team sites provide users with a place where they can collaborate on projects.
Workspaces are designed to facilitate more specific tasks, such as reviewing documents or planning a meeting.

I want to share contact lists, event calendars, and announcements with my team, my customers, and my partners

A basic SharePoint site is known as a team site. When you install SharePoint, a default top-level team site is automatically created. This first team site provides you with a starting point for creating additional team sites or workspaces.
A basic team site incorporates many individual collaboration tools, or *Web Parts*, including:

Lists
Lists form the heart of a SharePoint site and can be used for many things, from storing documents to creating alerts to creating discussions and surveys.

Document libraries
Document libraries let you store documents in a SharePoint site. You can apply access rights to grant or deny users access to specific document libraries. Also, you can use version control to document each change a user makes to a document.

Picture libraries
Picture libraries allow you to store, manipulate, and control image files in many formats, including *.bmp*, *.gif*, and *.jpg*.

Discussions
A SharePoint discussion is a built-in message board that allows the team to discuss issues in an interactive way.

Surveys
A survey is an interactive form that allows team members to provide feedback in an organized fashion. Every item in this list is a Web Part. Web Parts are reusable components that you can add to team sites and workspaces. Web Parts provide most of the functionality within any SharePoint site.

A team site increases team productivity by giving team members a central web site for document management, team discussions, surveys, alerts, tasks, and lists.
Note that the team site is divided into several distinct content zones, allowing for easy navigation and organization. Each content zone contains related elements. For example, the left-most zone is colored blue and contains navigation links, whereas the middle zone contains two Web Parts (Announcements and Events). You can organize your site in the manner that best suits your particular team.

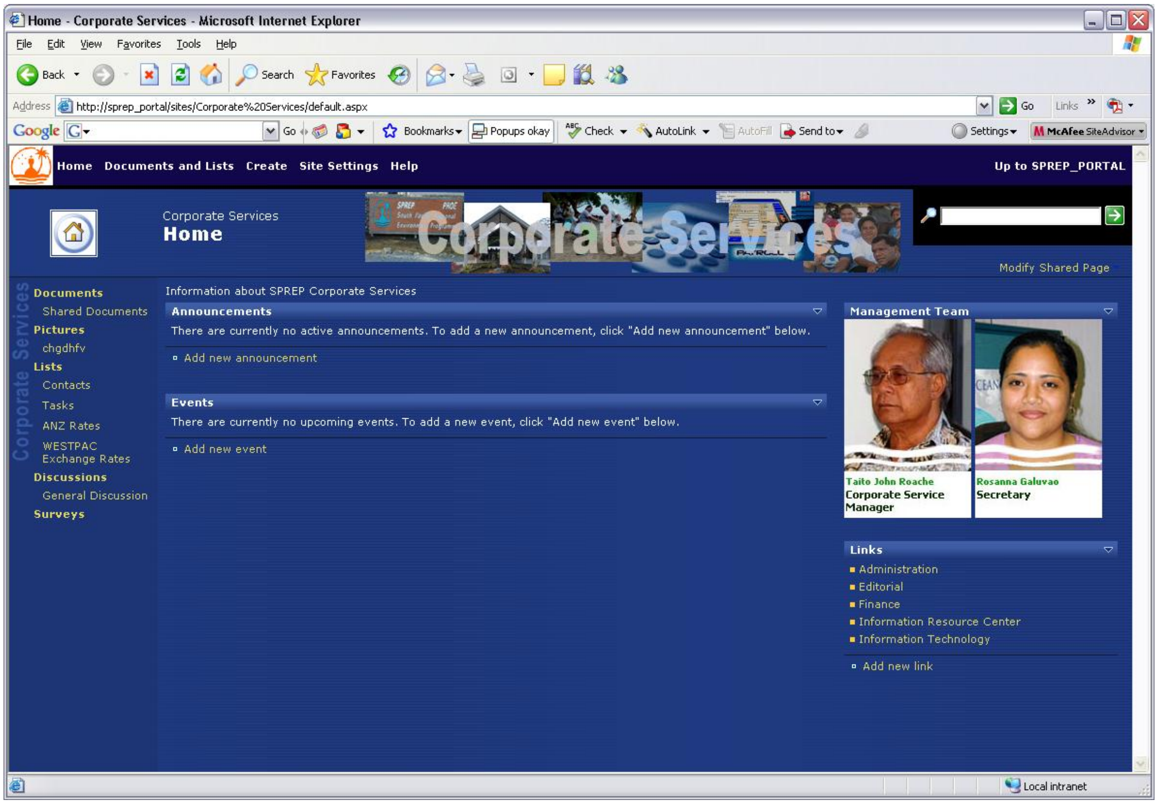


Figure 1-4. Team site

I want to easily share a document with my team members for review

There are several ways you can easily share documents with your team. You can either upload documents in the shared documents library under your team site for all team members to access or create a document workspace if you don't want your entire team access to the documents. A *document workspace* is a specialized team site designed to facilitate collaboration on shared documents. A document workspace lets you create:

- Lists
- Document libraries
- Discussions
- Surveys

Naturally, you can add any other Web Parts that you might need to the site as well.
Document workspaces look very much like team sites. If the members of your team use Office 2003, they can also access and work with the documents in a document workspace using Office applications such as Excel, Word and PowerPoint.

To create a document workspace:
1. In your team site, click **Create** on the top bar
2. Select **Sites and Workspaces** at the bottom of the **Create Page**
3. Enter the **Title, description** and **URL** for your document workspace
4. Make sure to select **use unique permissions** if you intend to include only a certain group of people access to your workspace. Click **Create**

5. Select **Document Workspace** from the list of templates
6. Click **OK** to create your new document workspace.
7. Now you can add/upload documents and assign access permission to team members.

I want a Web site where I can manage my meetings

A meeting workspace is used to create and manage meetings. Meeting workspaces provide users with the ability to:
• Use document libraries
• Display meeting attendees
• Create meeting agendas
• Set meeting objectives
Meeting workspaces use a different structure than document workspaces and team sites. By reducing the navigation and the options for displaying content, meeting workspaces make organizing and discussing a meeting easier for participants. Note that the meeting workspace lacks the left navigation bar and the middle and right content zones found at a team site. Instead, the workspace is designed specifically for presenting information about a meeting, including the attendee list, directions to the meeting, the meeting agenda, a "things to bring" list, and other meeting-specific content.

To create a meeting workspace:
1. In your team site, click **Create** on the top bar
2. Select **Sites and Workspaces** at the bottom of the **Create Page**
3. Enter the **Title, description** and **URL** for your meeting workspace
4. Make sure to select **use unique permissions** if you intend to include only a certain group of people access to your workspace. Click **Create**
5. Select **Meeting Workspace** from the list of templates
6. Click **OK** to create your new meeting workspace.
7. Now you can add/upload meeting documents, objectives, agenda, and assign access permission to team members.

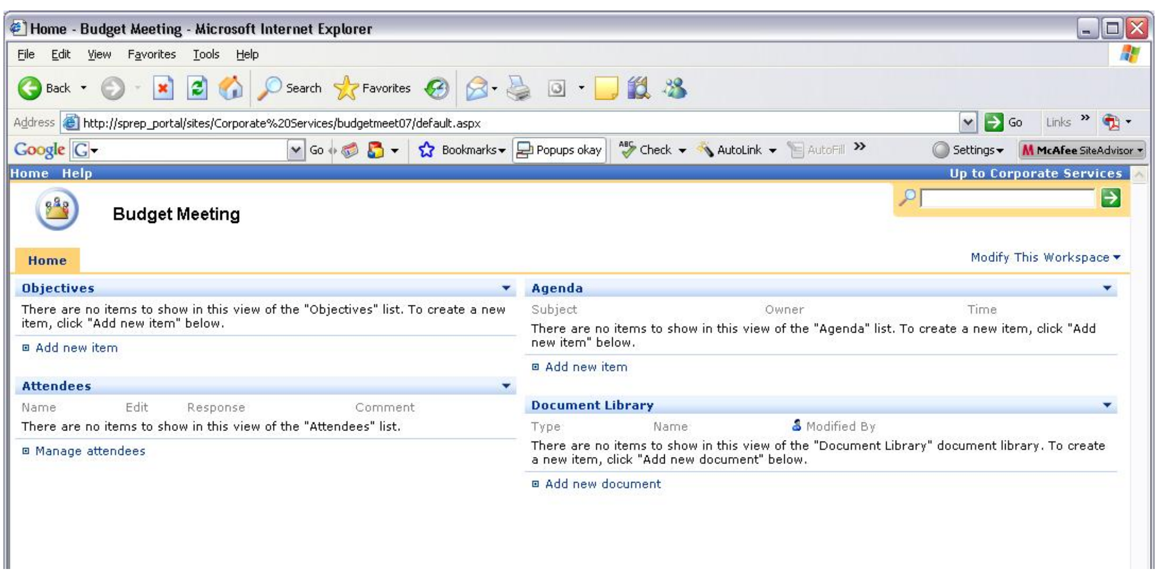


Figure 1-5, Meeting Workspace

I want to be able to discuss a topic with team members online and interactively

Sharepoint provides this functionality through Discussion boards. Discussion boards provide a forum for conversing about topics that interest your team. Team members can post comments and reply to others' comments, reducing the need for widely distributed e-mail threads.
By default, your site comes with a built-in discussion board named General Discussion, which is listed on the Quick Launch Bar as well as on the Discussion Boards page.

Working with SharePoint Sites

SharePoint helps you locate a site by providing navigation links, a search framework, and standardized site layouts. These features help increase the productivity of your team and other users by reducing the time spent trying to locate a site or master the details of a new site layout.

Locating a Site

In order to work with a SharePoint site, you must first know how to get to it from a web browser. Without knowing its direct link, finding the site can be challenging. SharePoint solves this problem by providing a page that lists all available sites. This would be the SPREP Portal home page.
The SharePoint administrator would provide you the URL to your intranet home page.

Some customization has been made to the SPREP portal homepage with team sites listed under the Spotlight sites web part (Web parts will be discussed later in the following chapters) for easy navigation by staff.

Browsing a Site

Once you have found a specific site, you can click the title of the site, which will forward you to the home page. Figure 1-4 displays a typical team site home page, in this case the site used by the writers of this book.
SharePoint separates a site into three distinct navigation areas. While the content in these areas may change, their location will usually remain the same.

Top menu bar

The top menu bar remains the same across all sites and workspaces unless advanced customization tactics are used. The top menu bar provides links to the following areas:
Home
A link back to the home page of the site.

Documents and Lists
A link to the Documents and Lists main page. From here, you can manage all documents and lists within the site.
Create
A link to the Create page. From here, you can create new Web Parts, including:
• Document libraries
• Picture libraries
• Lists
• Custom lists
• Discussion boards
• Surveys
• Web pages
Each of these items is described further in the following chapters. You must have appropriate access rights to create any of the above items.
Site Settings
A link to the Site Settings main page. From here, you can manage your personal information and the site settings you have permission to modify.
Help
A link to the Help main page. Help appears in a new window, and allows the user to browse for help while still accessing the site.
Up to <SharePoint Main Site Name>
A link back to SharePoint's main site.

Quick Launch menu

The Quick Launch menu is found on the navigation bar located on the lefthand side of a SharePoint page and provides most of your navigation needs for accessing libraries and lists. Any library or list can be added and removed from the Quick Launch menu. This provides you with full control over the contents in the menu.

The Quick Launch menu is organized into five categories on the home page:
Documents
Quick links to all document libraries.
Pictures
Quick links to all picture libraries.
Lists
Quick links to all lists.
Discussions
Quick links to all discussions. Although the Web parts are called discussion boards, the quick launch bar always references these parts as Discussions.
Surveys
Quick links to all surveys. When you browse a SharePoint team site, the links on the Quick Launch menu change depending on the page being viewed. For example, when you select the Documents link on the Quick Launch menu, the menu changes to display the Select a View and See Also links.

The biggest change to the Quick Launch menu occurs with meeting workspaces. A meeting workspace does not have a Quick Launch menu. Instead, the workspace has tabs that provide the navigation for the site.

Main content

With the top and the lefthand side of a page devoted to site navigation, the remaining part of the page contains the main content of the site. The main content of a site is always changing, depending on which page you are viewing.

The home page main content area provides sections that a user typically needs to access immediately. For example, in a meeting workspace, the main page contains sections for attendees, agendas, objectives and documents. With sufficient privileges, you can add and remove these sections in your personal view or for all users. Customization is discussed later in this chapter.

From the home page, you can navigate to pages that display a single item or Web Part. For example, from a "Island Ecosystems" site, you might link to a page displaying a discussion on a particular invasive species project, as shown in Figure 1-6.

Single-item pages display a limited set of choices. For example, on the discussion board page, you can only perform tasks that relate to the discussion, such as viewing an existing thread or creating a new discussion.

Other secondary pages contain Web Parts that have a wider range of choices. Figure 1-7 shows a Documents and Lists page. This page displays the libraries and lists that are available to users. Once you select a specific library or list, you will see a new page that looks more like a single-item page.

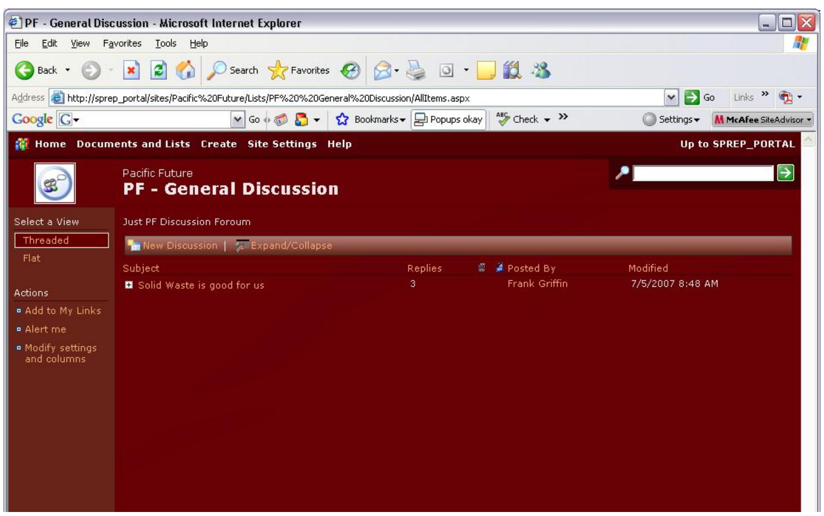


Figure 1-6. A page displaying a discussion board item

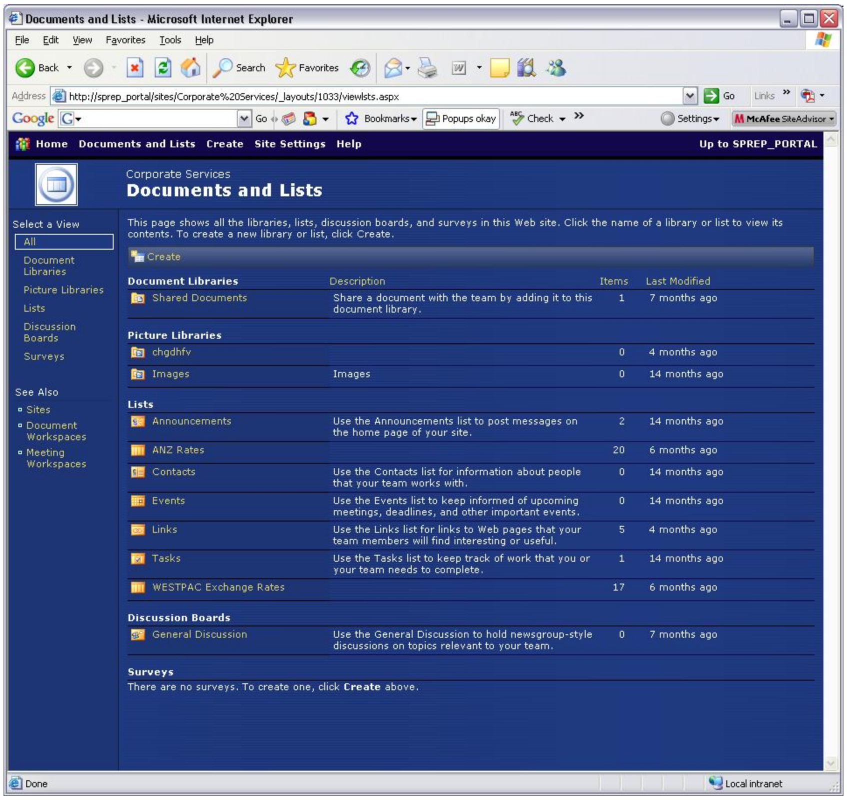


Figure 1-7. Options available on the Documents and Lists page

Not only can you select a specific library or list, you can also sort the items in each section by description, number of items, or last modified date. Searching a Site Previous versions of SharePoint handled searching using Internet Information Services (IIS) catalogs. IIS catalogs index documents within a file system, limiting your search to those documents rather than all of the content in the site. To fix this limitation, Windows SharePoint Services stores all content, documents, and settings in a database. Now, instead of using IIS catalogs to search, SharePoint uses the full-text searching capabilities of the database. Searching the database ensures that all content, documents, and settings are searched.
Search is limited to installations of SharePoint using Microsoft SQL Server 2000 as the database. Microsoft SQL Server Desktop Engine 2000 (WMSDE) does not support searching.

I want to search and find only the documents that are on my team site

With searching enabled, a new search text box appears on the top right of all site pages. To execute a search, enter a search string in the text box and click on the arrow button. Figure 1-8 shows the results of a search on the Search Results page.
You can click on any result to access the returned item. If you performed the search within a subsite, you can search for additional results by clicking the “Search for <search string> on <main site title>” link. This will expand your search to include all the sites within SharePoint.

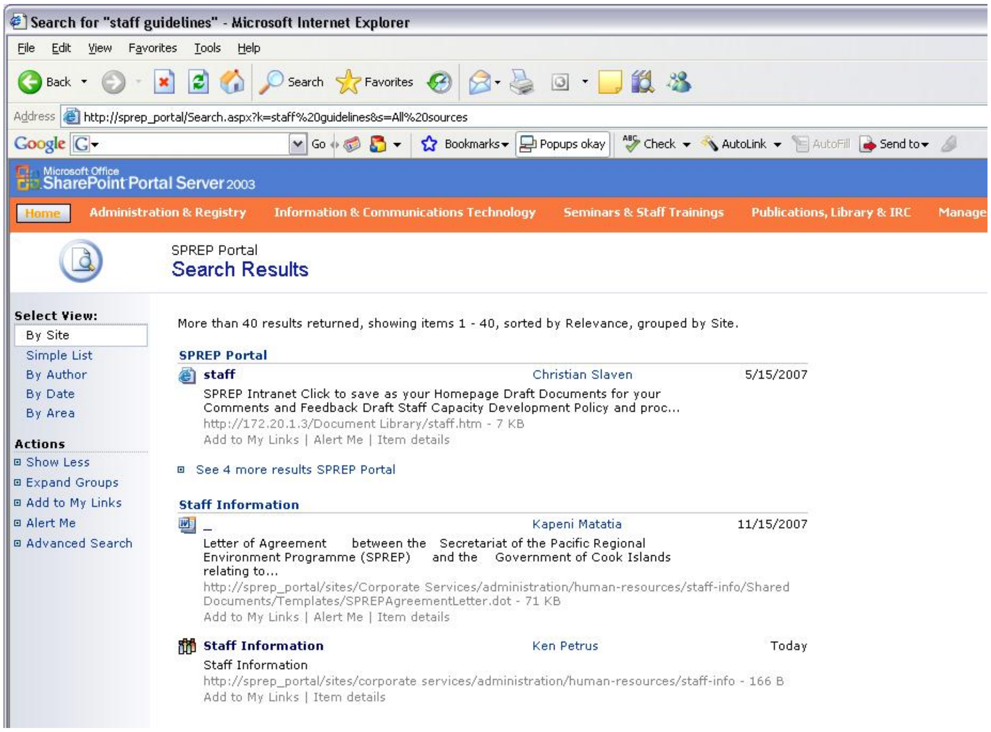


Figure 1-8. The Search Results page

Once a team site has been created for your company or group, you can create additional sites and workspaces. SharePoint places no restrictions on the number of sites you create; however, you may be limited by the quality of the hardware on which the site resides. Larger, more powerful computers with more memory can host more sites than smaller, less powerful machines.

When you create your own site, you will usually choose a *site template* that automatically generates a predefined layout. Once the site is in place, you can modify it by adding additional Web Parts, rearranging its layout, or performing other customizations.

I want to create a new team site

A site template provides a default structure and starting point for creating a team site. Some companies use a site template to ensure that a consistent style is maintained throughout all of its SharePoint sites. Even after a template is implemented, you can still make modifications to the site by adding additional Web Parts or by changing the site layout.

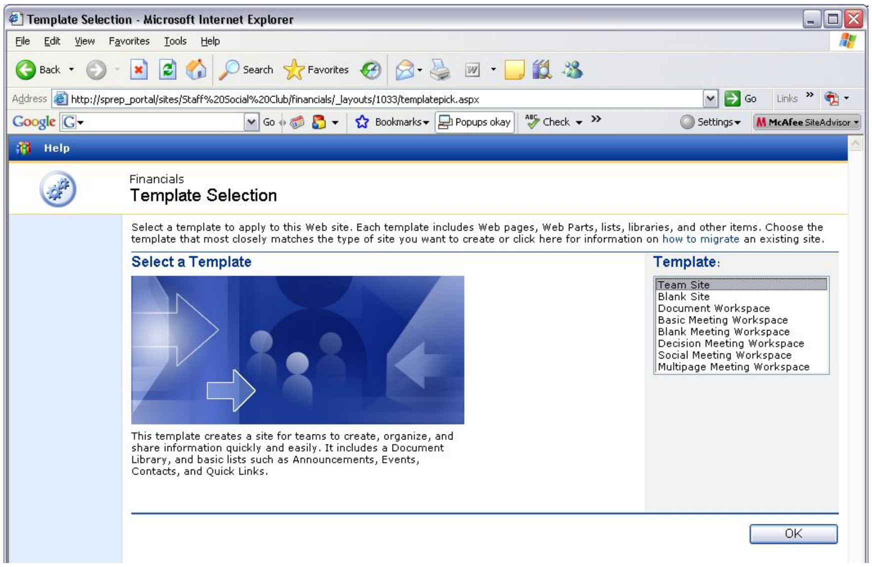


Figure 1-9. Template Selection screen

A SharePoint team site comes equipped with eight predefined templates.
You can use any of these templates for your own site, or you can create a new site template for your own use. Windows SharePoint includes the following default site templates:

- ***Team site***
  Includes both document libraries and lists teams can use to manage information.
- ***Blank site***
  Using a web page editor, you can add SharePoint Services features to your site. This option leaves you with a blank site with no features on its home page.
- ***Document workspace***
  Provides everything necessary for managing documents, including a document library, a task list, and a links Web Part.
- ***Basic meeting workspace***
  Provides the basic skeleton for a meeting, including a document library and the list items attendees, agenda, and objectives Web Parts.
- ***Blank meeting workspace***
  Similar to a blank site, a blank meeting workspace gives you full customization over the meeting site.
- ***Decision meeting workspace***
  Provides everything necessary to manage decisions, including everything in a basic meeting workspace with the addition of the decisions list Web Part.
- ***Social meeting workspace***
  Provides everything necessary to manage social occasions, including picture library, attendees, discussions, directions, images, and things to bring Web Parts.
- ***Multipage meeting workspace***
  Provides a basic meeting skeleton, including agenda, attendees, and objectives, and two blank pages for customization. Anyone with permission to create a new site can create one with a site template.

To implement a site template:
1. Click on the Create link on the top link bar.
2. Select Sites and Workspaces.
3. Enter the following information:
   - The title of the site
   - The description of the site

- The URL of the site
- The user permissions mode

4. Click the Create button.
5. Select a template from the Template list on the righthand side. Figure 1-9 shows the Template Selection page.
6. Click OK.

I want to modify our team site

Once you have created your own SharePoint site, you can modify it through its Site Settings page. The modifications you can make will depend on your permissions on the site. For example, if you are assigned to the web developer group, you will be able to make many different modifications. However, if you are assigned to the reader group, you won't be able to make any changes. To modify a site, select the Site Settings link on the top menu bar of the site page, as shown in Figure 1-10.

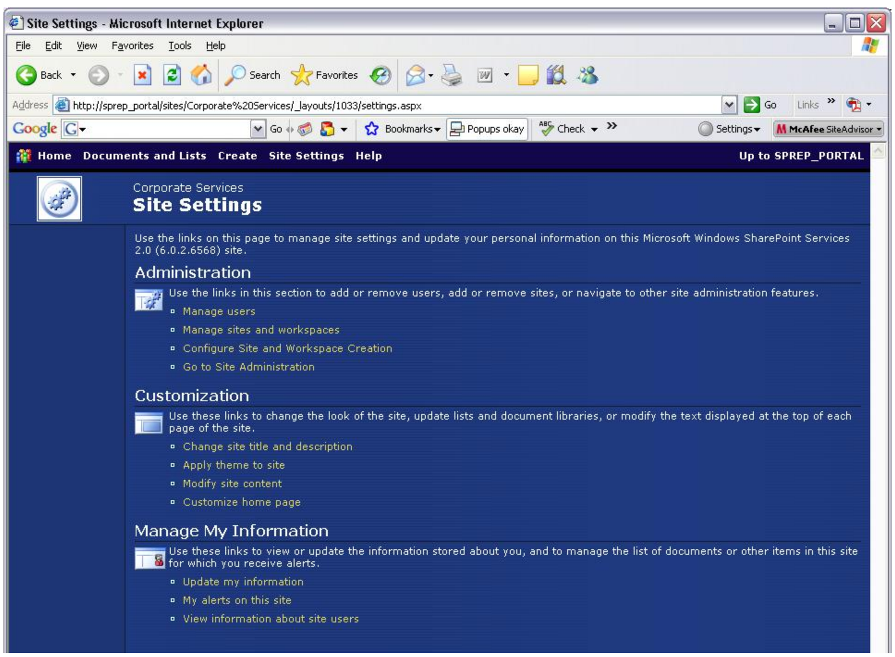


Figure 1-10. A Site Settings page

The following options are available under the Customization section:

Change site title and description

To change the title and description of a site:

1. Select "Change site title and description."
2. Enter the title of the site in the Title text box and the description of the site in the Description text box.
3. Click OK.

Apply theme to site

Themes are special color packages that can drastically change the look and feel of a site. Themes are discussed in more detail in the section "Personalizing a Site."

To apply a theme to a site:

1. Select "Apply theme to site."

2. Select a theme from the theme list box.
3. Click the Apply button.

Modify site content
To modify the content of a site:
1. Select "Modify site content."
2. The screen shows all the lists, document libraries, discussion boards, and surveys that are available. From this screen, you can customize any of these Web Parts or create a new content item.
3. Click on an existing content item to modify the item.
4. Click "Create new content" to be brought to the Create Page section.

Customize home page
In design mode, you can modify the Web Parts on the site home page, including their appearance and layout. Any changes made here will be applied for all users.
1. Select "Customize home page," which will take you to the site home page in design mode.
2. In order to change the home page for your personal view, see the section "Changing the Arrangement of Web Parts on a Page" later in this chapter.

I want to personalize my site

For a user, the layout and design of a site is just as important as the content. A user will want the ability to make the site his own by choosing a layout and styles that suit his personality. SharePoint supports personalization that allows users to:

- Modify a site
- Move Web Part locations
- Apply themes
- Add alerts

Some or all of these personalization features may be limited by the user's specific permission level within a specific site.

Changing the Arrangement of Web Parts on a Page
Through your personal view you can change the layout of Web Parts on a team site page. Whenever you view the page, you will see it displayed the way you have specified. Other users who view the page will either see their own personal view, or the default view.
SharePoint allows you to:

- Delete Web Parts
- Add new Web Parts
- Change the location of Web Parts on the screen

To modify the layout of a page:
1. Click on the link Modify My Page. If you belong to the web designer or administrator site group for the site, the link may say Modify Shared Page. Click on the link and select Personal View before selecting Modify My Page.
2. Select the option "Design this page" in the menu that appears. Share-Point changes the page to design mode.
3. Drag and drop Web Parts from one location to another to create your personal view. Remove Web Parts from the screen by clicking the X button.

Figure 1-11 shows a team site home page displayed in design mode. Notice that while in design mode, the main content is surrounded by two frames: Left and Right. You can move any Web Part from the Right side to the Left side by simply dragging and dropping.

Modifying the Settings of a Web Part
In design mode you can also modify the settings of a Web Part. If you have the proper site permissions, you can change the appearance, layout, and custom features of any Web Part.

To modify a Web Part:
1. Click on the down arrow inside the Web Part title bar.
2. A list of options appears. Select Modify My Web Part.
3. The screen changes to resemble Figure 1-12.
4. On the righthand side of the screen you can specify the modifications to the Web Part. In this section, you can change the appearance, layout, and custom options for the Web Part.
5. Click OK.
All the modifications you make are only visible when you view the page. None of your personal modifications will change the view other users see.

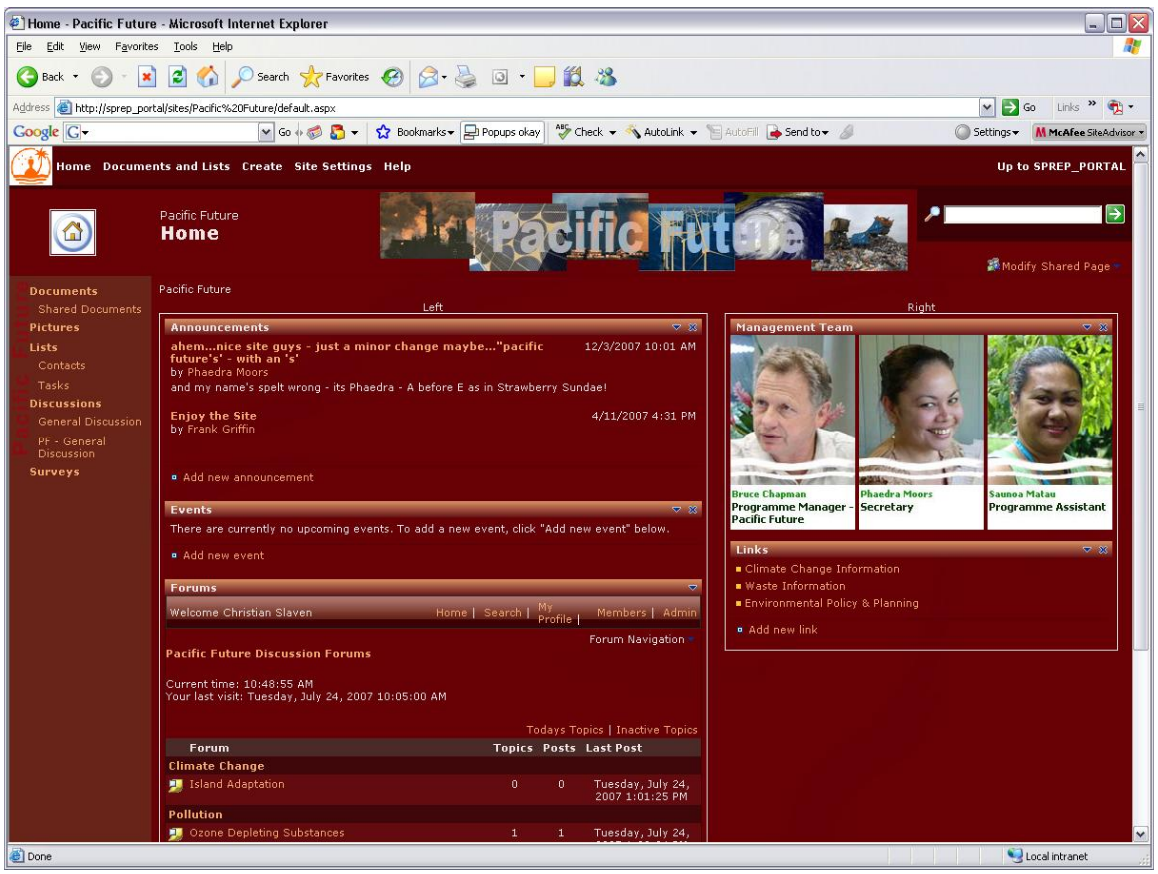


Figure 1-11. Page layout modification mode

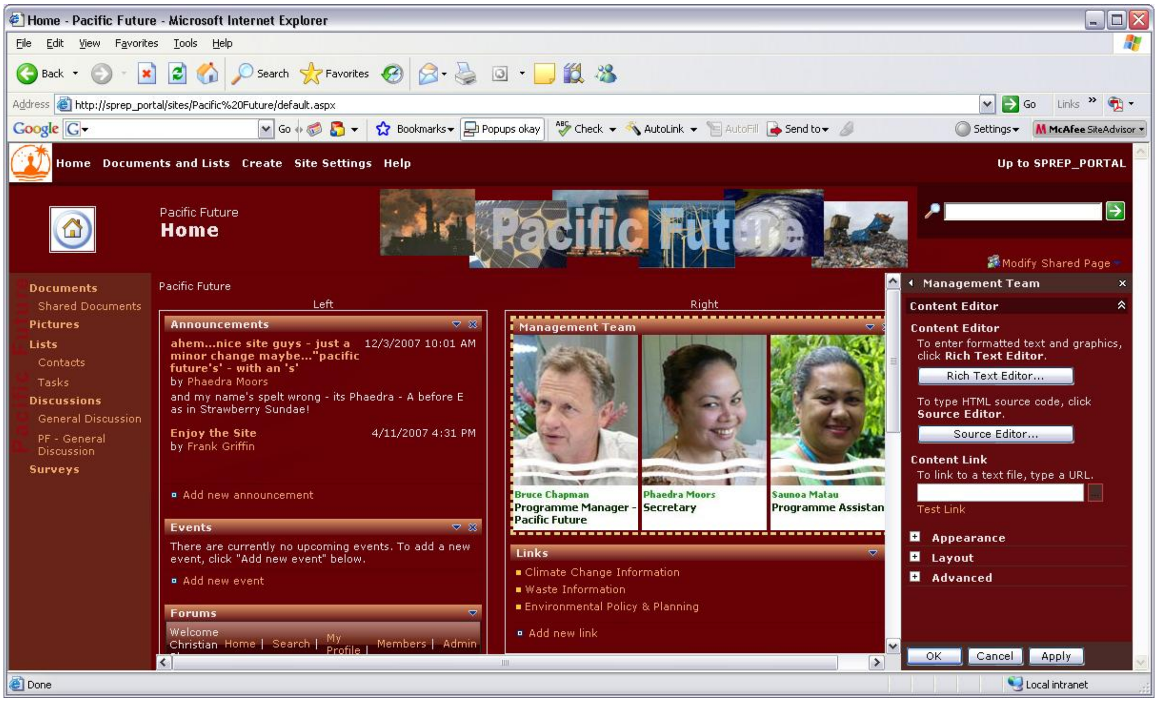


Figure 1-12. Web Part modification

Add or remove Web Parts from a page

To customize the appearance of the portal site, you can add or remove Web Parts from a page. To add or remove Web Parts from a page, you must be a member of the Administrator site group on the portal site. You can add or remove Web Parts only from some pages. You can add or remove Web Parts for the Home, News, Topics, Sites, and My Site pages. You cannot edit any of the pages in Site Settings or SharePoint Portal Server central administration, because these pages do not use Web Parts.
You can add or remove Web Parts from the shared view, or from your personal view:

To see the shared view of a Web Part Page, click **Modify My Page** at the top of the page, and then click **Shared View**.

To see the personal view of a Web Part Page, click **Modify Shared Page** at the top of the page, and then click **Personal View**.

Adding Web Parts

1. On the page that you want to edit, click **Edit Page** in the **Actions** section of the action pane.
2. At the top of the page in the shared view, click **Modify Shared Page** to modify the shared view.
3. To add Web Parts to your personal view without affecting the view of other users, click **Modify My Page** from the personal view.
Note The text for the link at the top of the page changes depending upon whether you are looking at the shared view or the personal view.
4. Select **Add Web Parts**.
5. To add a Web Part from an existing Web Part library, click **Browse**.
The page opens in design mode, and the **Add Web Parts** pane appears.
6. In the **Add Web Parts** pane, click the library you want to browse.
7. In the **Web Part List**, find the Web Part you want. Click **Next** to view more Web Parts.

8. To find the Web Part you want without browsing through all of the Web Part libraries, click **Search** after selecting **Add Web Parts**.
9. In the **Search text** box that appears in the **Add Web Parts** pane, type a word describing the Web Part for which you are looking, and then click **Go**.
A list of Web Parts matching the search appears in the **Add Web Parts** pane.

To switch between Browse, Search, and Import views of the **Add Web Parts** pane, click the current view just under the title of the pane, and then click the view that you want.

10. From the available Web Parts, click the one you want to add.
11. Click the zone to which you want to add the Web Part, and then click **Add**.
You can also drag the Web Part to the desired location on the page.
12. To close the **Add Web Parts** pane, click the **X** in the upper right corner of the pane.

Removing Web Parts
You can remove a Web Part from a page at any time. Removing a Web Part from a page does not delete the Web Part. It is still available for use on other pages from the Web Part library.
1. On the page that you want to edit, click **Edit Page** in the **Actions** list.
2. Rest the pointer over the title of the Web Part you want to remove, and then click the arrow that appears.
3. Click **Close** on the menu that appears.

Applying Themes
Themes allow you to apply a uniform site style across an entire site. Only users assigned to the web designer or administrator site group can create a theme and apply it to a site. When a theme is applied to the site, every user will see the same theme.
Themes are custom style sheets that, when applied to a site, change the colors, fonts, and overall appearance of the site. SharePoint ships with twenty default themes that you can choose from. You can also create a custom theme through Microsoft FrontPage and add it to the list of available themes.

To apply a theme to a SharePoint team site, perform the following actions:
1. Click the Site Settings link on the top link bar.
2. Select "Apply theme to web site" under the Customization section. Figure 1-13 shows the Apply Theme to web site page.
3. Select one of the themes on the righthand side. The team site will preview on the lefthand side with the new theme.
4. Click the Apply button to assign the theme to the site.

To remove a theme, follow the first two steps mentioned above. At Step 3, select No Theme (Default) and click the Apply button.

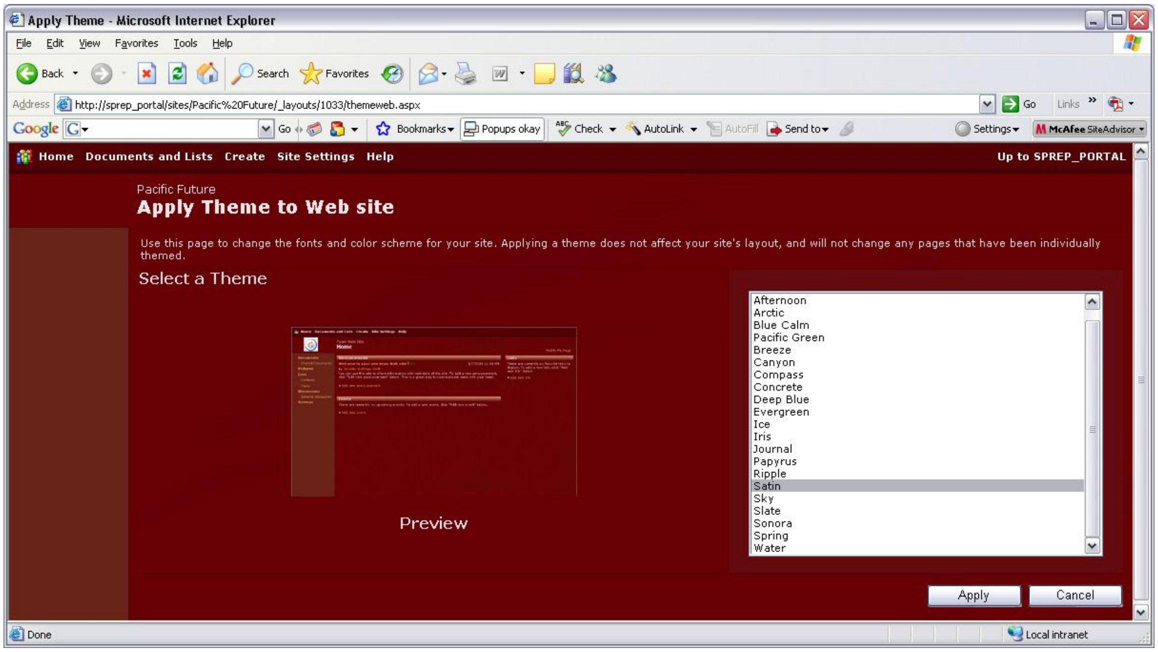


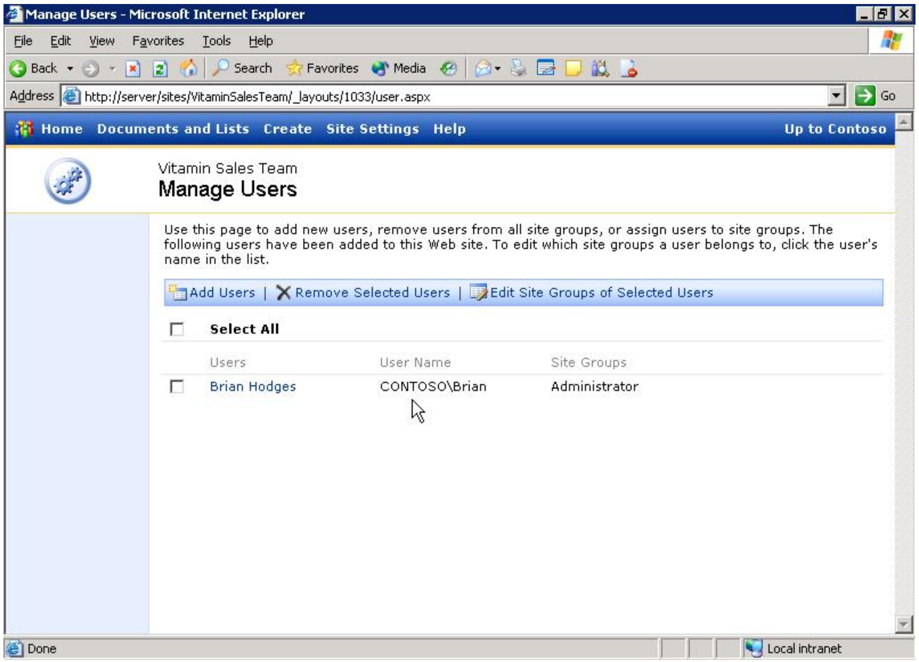
Figure 1-13. Applying a theme

I want to setup users to access my site

SharePoint sites use *site groups* to help manage security. Users are assigned to site groups to grant them a customizable set of rights appropriate to the tasks they need to perform. For example, the *Reader* group is for users who can view content on the site, but should not be allowed to edit it. The *Contributor* group is for users who are allowed to edit content, but do not have total administrative control over the site.

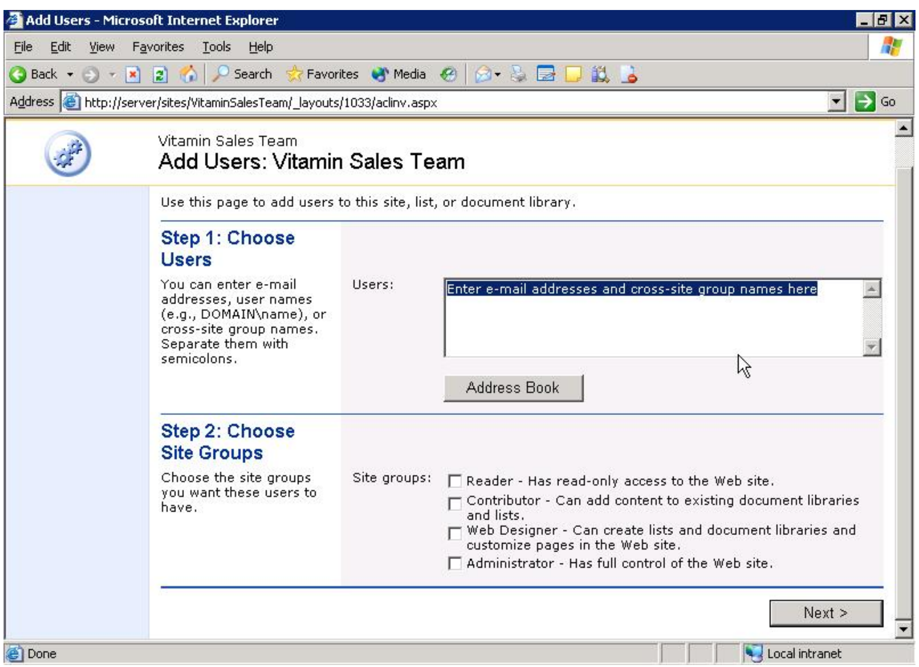
Note You can add users to only one site group at a time. In this exercise, add only users who will be in the same site group. You can add users to additional site groups later.

1. On the top-level toolbar on your SharePoint site home page, click **Site Settings**. The Site Settings page opens.
2. In the **Administration** section, click **Manage users**.



Managing users on a SharePoint site

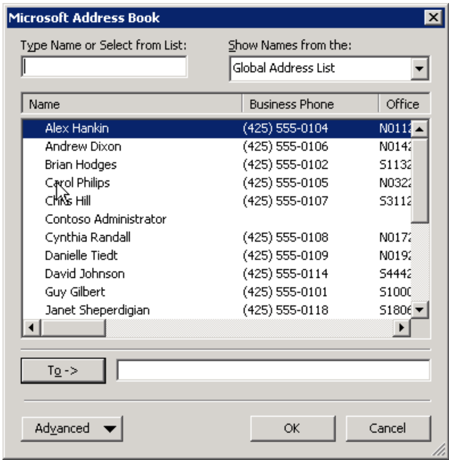
3. You can add, remove, and manage users on the Manage Users page. To add users, click **Add Users**.



Adding users to a SharePoint site

4. You can add users—singly or in groups—on the Add Users page. Type the user names or group names of those you want to add to your site. If you have any questions about which users and groups you can add to your site, contact your IT department.

5. If Microsoft Office Outlook® 2003 is installed on your computer, you can also use your Outlook address book to find and add users. To do this, complete the following steps:
   a. On the Add Users page, click **Address Book**.
   b. If you are prompted to select an Outlook profile, select the appropriate profile, and then click **OK**.
   c. In the **Microsoft Address Book** dialog box, add users by double-clicking their names. Their names appear in the **To** box.



Adding users to a SharePoint site with Address Book

   d. When you finish, click **OK**.
   e. You may see a security warning. If you do, select the **Allow access for** check box, select **1 minute** from the list, and then click **Yes**. The e-mail addresses you selected appear in the **Users** box.
6. When you add users, you must choose in which site group to include them. Site groups provide similar rights to groups of users. Each site group includes a short description next to it. Specify the access level you want to give these users by selecting the appropriate check box under **Site groups**, and then clicking **Next**.
   Note You can add users to only one site group at a time. You can add users to additional site groups later.
7. You can now confirm the users you want to add and send them an introductory e-mail. First, in the **Confirm Users** section, ensure that the users and groups listed are those you want to add to the site. If not, click **Back** and make any necessary changes.
8. If you want to send an introductory e-mail, follow these steps:
   a. In the **Send E-mail** section, select the **Send the following e-mail to let these users know they've been added** check box.
   b. Type an appropriate subject line in the **Subject** box.
   c. Type a message in the **Body** box. This message should explain to which site the users have been added, why they have been added, and how to find the site.
9. When you are done, click **Finish**. The new users are listed on the Manage Users page.
10. To add users to other site groups, repeat these steps for the each additional site group.

I want to be notified automatically whenever documents are changed

As a user, you can set an alert to notify you by email if a particular piece of content changes. You can create an alert to track the following items:
• Document libraries

• Documents
• Picture libraries
• Images
• Lists
• List items
• Discussion boards
• Discussion messages
• Surveys

For example, a user may decide to sign up for an alert on a discussion board. If any other user posts a response to a discussion item, or creates a new item, the first user receives an email notification. This feature is particularly useful for discussion board moderators.
The only drawback to alerts relates to security. If you delete a user or remove a user's access rights from content in Share-Point, the user will continue to receive alerts that he created on that content. To fix this situation, the administrator must remove all alerts that the user originally created on the content.

Creating an alert

The procedure you follow to create an alert is similar for all content, regardless of whether you are creating the alert for a document, list, discussion, or image. You will need to fill in three main areas of a form to create an alert:

Send Alerts To - The email address where the alert will be sent
Change Type - Which modification to the item will create an alert
Alert Frequency - How often to be notified

To add an alert to an item such as a document library, perform the following steps:
1. Click on the document library to which you want to add the alert.
2. Select the Alert Me link on the lefthand side. Figure 1-14 shows the New Alert page that is displayed after clicking the Alert Me link.
3. Your email address is pulled from the SharePoint configuration information. You should always verify that the email address is correct. If your email address is incorrect, click on the "Change my e-mail address" link to change your email address.
4. Select the type of changes that you want to be alerted to under the Change Type section. The alert type options include:

All changes - Whenever a change is made, you are alerted.
Added items - Whenever a new item is added, you are alerted.
Changed items - Whenever an item is modified, you are alerted.
Deleted items - Whenever an item is deleted, you are alerted.
Web discussion updates - Whenever a web discussion based on this library is updated, you are alerted.

5. Select how often you want to receive alerts under the Alert Frequency section. The alert frequency options include:

Send e-mail immediately - At defined intervals (five minutes is the default), SharePoint sends out immediate alerts. You will receive an email at the default interval time whenever any change is made.
Send a daily summary - You will receive a daily email summarizing all changes. If no changes occurred during a day, you won't get an email.
Send a weekly summary - You will receive an email once a week summarizing all changes. Once again, if no changes occurred during the week, you won't get an email.

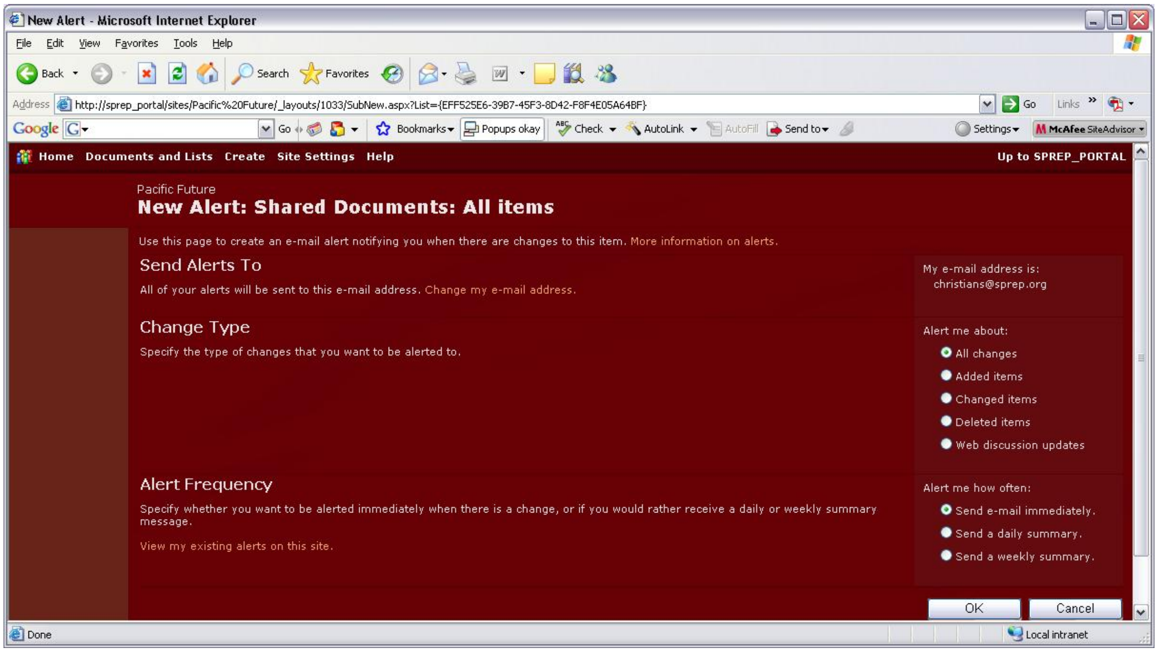


Figure 1-14. Adding an alert to a document library

Viewing your alerts

Once you have created an alert for yourself, you may need to delete the alert or change the settings of the alert. SharePoint lists all of your alerts for a site on the My Alerts page. To view your alerts for a site:

1. Click on the Site Settings link on the top menu bar.
2. Select "My alerts on this site" under the Manage My Information section. After selecting "My alerts on this site," the My Alerts on this Site page is displayed. Figure 1-16 shows the My Alerts on this Site page.

On this page, you can add, edit, and delete your alerts.

Deleting an alert

To delete an alert or a group of alerts from your My Alerts page:

1. Select the checkbox beside each alert that needs to be deleted.
2. Click the Delete Selected Alerts button.
3. Select OK when the message box appears to confirm the deletion.

Adding an alert

To add an alert to your My Alerts page, click the Add Alert button.

1. Select which list or document library for which you wish to create an alert. Alternatively, you can view the items in the list or document library to add an alert for an individual item.
2. After selecting the list or document library, click Next.
3. Follow Steps 3–5 in the section "Creating an alert" to fill in the form, then select OK.

To edit the settings of an alert:

1. Click on the name of the alert you wish to edit.
2. You can modify the same options that you set during the creation processed outlined in the section "Creating an alert."
3. Click OK to save the changes or Delete to delete the alert.

Create a list of announcements, contacts, events, tasks, issues, or links

1. In the top link bar, click **Create**.
2. On the Create Page page, click one of the following for the kind of list that you want to create:
   - **Links**
   - **Announcements**
   - **Contacts**
   - **Events**
   - **Tasks**
   - **Issues**
3. In the **Name** box, type a name for the list. This field is required.
4. In the **Description** box, type a description of the purpose of the list. This field is optional.
5. In the **Navigation** section, if you want a hyperlink to this list to appear on the Quick Launch bar, click **Yes**.
6. Click **Create**.

You can open the new list by clicking **Documents and Lists** on the top link bar and then clicking the list name in the **Lists** section. If you chose to add the list to the Quick Launch bar, you can also click the list name there to open it.

Note If the site is a Meeting Workspace site, ignore step 1. Instead, from the Modify This Workspace menu, click Add Web Parts. At the bottom of the task pane, click Show More Lists. Follow the remainings steps for the settings that apply to the Meeting Workspace site.

Create a custom list

1. In the top link bar, click **Create**.
2. On the Create Page page, click **Custom List**.
3. In the **Name** box, type a name for the list. This field is required.
4. In the **Description** box, type a description of the purpose of the list. This field is optional.
5. In the **Navigation** section, if you want a hyperlink to this list to appear on the Quick Launch bar, click **Yes**.
6. Click **Create**.

You can open the new list by clicking **Documents and Lists** on the top link bar, and then clicking the list name in the **Discussion Boards** section. If you chose to add the list to the Quick Launch bar, you can also click the list name there to open it.

Add columns to your list

1. On the page that displays the list, click **Modify settings and columns**.
2. In the **Columns** section, click **Add a new column**.
3. In the **Name and Type** section, in the **Column name** box, type a name for the column.
4. Select the type of information you want to display in this column.
5. In the **Optional Settings for Column** section, specify the settings that you want.
6. At the bottom of the page, click **OK.**
7. Repeat these steps to add additional columns.

I want to share files between my Office application and Sharepoint

Saving files to a document Library

If you use a Windows SharePoint -compatible client program, such as Office 2003, you will have integrated functionality between the client program and your site.

For example, you can use an Office 2003 program to open a template in a document library, and when you save the file, it is saved back to the document library by default. If custom properties are defined for the library, the Save As dialog box displays a form in which you can fill out the information.

Using a spreadsheet program to link to, import, or export lists

If you use a Windows SharePoint -compatible spreadsheet program, such as Office Excel 2003, and Internet Explorer 5 or later, you can link data between an existing spreadsheet and a list in your site.

You can also export any list from your site to the spreadsheet program. For example, if you export a list to Office Excel 2003, you can create PivotTables and charts to analyze the information or apply text formatting. In Excel, the exported list is a Web Query that stays updated with changes to the original list in your SharePoint site.

Copying items between calendars or address books and the Intranet

If you use a Windows SharePoint-compatible calendar program, such as Office Outlook 2003, you can link events between the intranet and your calendar.

If you use a Windows SharePoint-compatible address book program, such as Office Outlook 2003, that supports vCard files, you can link your address book information with a intranet contacts list. You can also export contacts to the Intranet.

Glossary

Lists

Your team can fill the following built-in lists with information and customize the lists if desired. You can also create a new list that is either based on a built-in list or custom-designed.

If you have a Windows SharePoint Services-compatible spreadsheet program, such as Microsoft Excel 2002, and Microsoft Internet Explorer 5 or later installed, you can create lists that are based on spreadsheets.

- **Announcements** The announcements list is a place to post information for the team. By default, a view of the announcements list appears on the home page of each programme website.
- **Contacts** The contacts list stores information such as name, telephone number, e-mail address, and street address for people who work with your team. By default, a hyperlink to the contacts list appears on the Quick Launch bar.
- **Events** The events list is a place to post important dates. By default, a view of the events list appears on the home page of each programme website.
- **Links** The links list displays hyperlinks to Web pages of interest to team members. By default, a view of the links list appears on the home page of each programme website.
- **Tasks** The tasks list provides a to-do list for team members. By default, a hyperlink to the tasks list appears on the Quick Launch bar.

Libraries

Document, picture, and form libraries are collections of files that you share with team members.

A library appears on a page that lists each file and its properties, as well as a hyperlink to the file.

You can set up a template for a document library so that all files created in a library share common features.

By default, your site comes with a built-in document library named **Shared Documents**, which is listed on the Quick Launch bar as well as on the Document Libraries page.

Discussion Boards

Discussion boards provide a forum for conversing about topics that interest your team. Team members can post comments and reply to others' comments, reducing the need for widely distributed e-mail threads.

By default, your site comes with a built-in discussion board named General Discussion, which is listed on the Quick Launch bar as well as on the Discussion Boards page.

Surveys

Surveys provide a way of polling team members. All you need to do is specify the questions and define how team members will enter their answers.