

ISHAI SAGI

SharePoint® 2007

HOW-TO

SAMS



SharePoint® 2007 How-To

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Introduction

Overview of This Book

The aim of this book is to be your companion as you use Microsoft SharePoint 2007. It lists common tasks that you need to do when you use SharePoint as a working tool and shows how to accomplish these tasks in an easy step-by-step process.

This book is written for people who are unfamiliar with or are unsure how to approach tasks in Microsoft SharePoint 2007. It even covers advanced issues, such as managing sites and security, editing pages, and using some of the more complex functionality available in Microsoft SharePoint 2007. However, this book is not intended as an administration guide, a developer handbook, or a complete and comprehensive user guide. Instead, this book focuses on assisting you with the basics—covering the essentials and making sure you know where to go to do the most common day-to-day tasks that you will encounter as a Microsoft SharePoint 2007 end user.

How to Benefit from This Book

We've designed this book to be easy to read from cover to cover. It is divided into four parts designed to make looking up problems easy.

Part I, "Solutions for Readers," has the most common and basic tasks that do not involve changing anything in SharePoint, but just viewing, browsing, and finding information. This part includes

- ▶ Chapter 1, "About Microsoft SharePoint 2007"
- ▶ Chapter 2, "Finding Your Way Around a SharePoint Site"
- ▶ Chapter 3, "Solutions Regarding Files, Documents, List Items, and Forms"
- ▶ Chapter 4, "Searching in SharePoint"
- ▶ Chapter 5, "Personal Sites and Personal Details (Available Only in MOSS)"

Part II, “Solutions for Authors and Content Managers,” teaches you how to perform tasks that involve adding content to SharePoint or changing the way it looks. This part includes

- ▶ Chapter 6, “Creating and Managing Files, List Items, and Forms in SharePoint”
- ▶ Chapter 7, “Creating Lists and Document Libraries”
- ▶ Chapter 8, “Creating List Views”
- ▶ Chapter 9, “Authoring Pages”
- ▶ Chapter 10, “Managing Security”
- ▶ Chapter 11, “Workflows”

Part III, “Solutions for Site Managers,” has advanced tasks involved in creating and customizing SharePoint sites. This part includes

- ▶ Chapter 12, “Creating Subsites”
- ▶ Chapter 13, “Customizing a SharePoint Site”
- ▶ Chapter 14, “Managing Site Security”

Finally, in Part IV, “Appendixes,” you find shortcuts and links that will help you find your way and achieve some tasks faster.

This book is written with the firm belief that to learn, you must do. You can use this book as a reference tool when you are tasked with a certain job that you need help finding out how to perform, or you can use it as a learning guide if you have an environment to perform the tasks outlined in this book one by one. Whatever your choice, it is our hope that this book will be a helpful companion.

How to Continue Expanding Your Knowledge

This book does not claim to cover all of what you can do with SharePoint. If you find yourself in need of more information check out the SharePoint built-in help interface. Almost every page in SharePoint has a Help icon that will open the SharePoint help screen, enabling you to search for the topic you want. Additionally, you can find SharePoint manuals and help articles from Microsoft on the Microsoft help site at <http://tinyurl.com/mosshelp>.

If you cannot find what you want in the Microsoft help pages, plenty more help is available on the Internet from the SharePoint community, which is big and helpful both in blogs and discussion forums. To find solutions to problems, it is recommended to search using your favorite search engine. Many blogs and websites have information on how to achieve tasks in SharePoint.

If you have a question that you cannot find an answer for, the Microsoft forums are the best place to go to get answers. These forums can be found at <http://tinyurl.com/sharepointforum>.

CHAPTER 2

Finding Your Way Around a SharePoint Site

IN THIS CHAPTER

- ▶ Get to a SharePoint Site
- ▶ Log On with Different Credentials
- ▶ Change My Regional Settings
- ▶ Navigate Through a SharePoint Site
- ▶ Determine Whether a Site Is WSS or MOSS

This chapter shows you how to get around a SharePoint site, with some common tasks that you might want to do in every SharePoint site that you use. It explains the different navigation options in SharePoint sites and how to log on to a SharePoint site in the first place.

Get to a SharePoint Site

Scenario/Problem: You want to get to a SharePoint site and open it.

Solution: Getting to a SharePoint site depends on the location of that site. Most often, your system administrator gives you the location. Your company might have several sites, and the administrators should supply you with links to the sites you should be aware of.

Possible examples of such links are `http://portal` or `http://home` or `http://companyname`. This book uses `http://sharepoint` as the sample link.

NOTE SharePoint sites can have subsites, so if there is a subsite called “sample,” the path to the site would be `http://sharepoint/sample`.

To get to the site itself, just open the link supplied to you in an Internet browser such as Internet Explorer, Firefox, or other browsers.

Depending on the setup of the site itself or the settings in your browser, you might or might not be prompted for a password. Because SharePoint is often configured to automatically identify you, it is very likely that you will not be prompted, and SharePoint will log you on with the username and password you used when you logged on to your computer. If you are prompted, fill in the username and password that your administrator advised you to use (see Figure 2.1).



FIGURE 2.1
Prompt for credentials when connecting to SharePoint.

If, for some reason, you do not have permissions to the SharePoint site you are trying to open, SharePoint displays an Access Denied page, telling you that you don't have permissions (see Figure 2.2). This page also enables you to sign in as a different user. By clicking that link, you are prompted for a username and password, which is used to log you on to the site again.

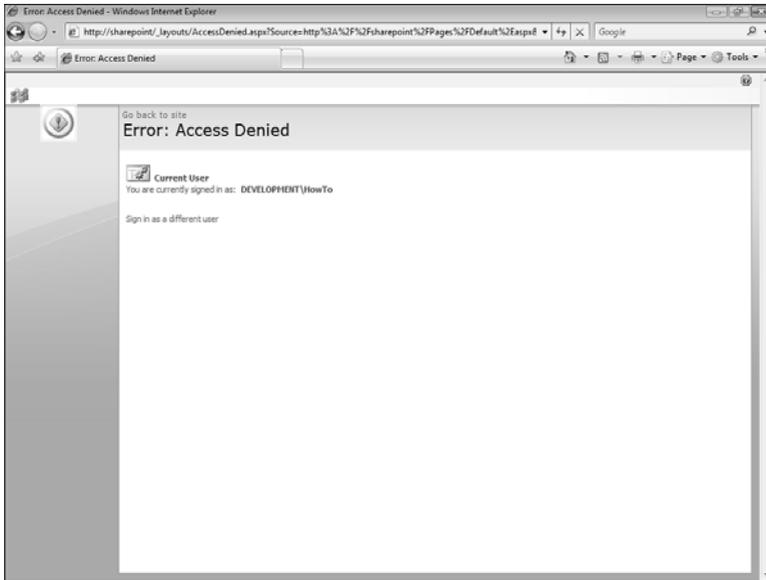


FIGURE 2.2
The Access Denied screen.

When you are logged on, the SharePoint site opens. Different SharePoint sites look different from one another, depending on the way the site manager set up the site. Figure 2.3 shows how such a site might look.

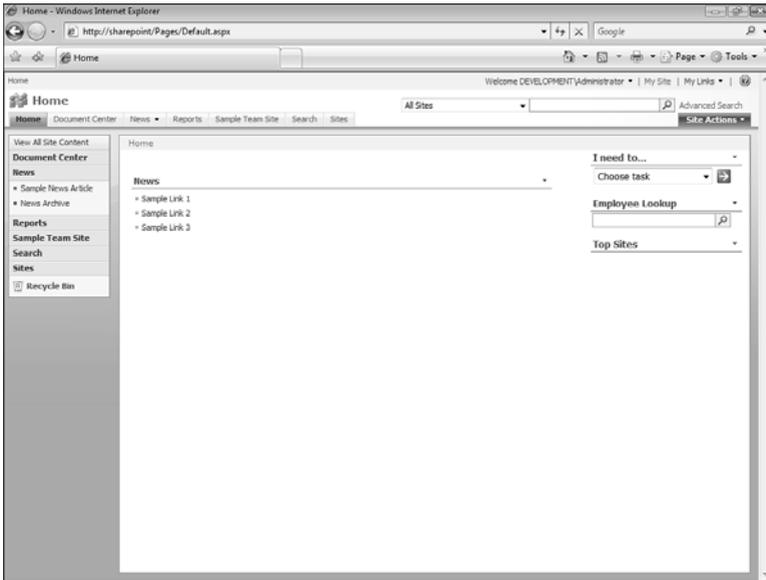


FIGURE 2.3
A sample SharePoint site.

Log On with Different Credentials

Scenario/Problem: Sometimes when you are viewing a SharePoint site, you want to log on as a different user. This might be required if you are logged on to the computer with one account but want to browse the SharePoint site as a different user.

Solution: After you have logged on to a SharePoint site, you might want to switch to a different user. You do so by clicking the Welcome [your name] link at the top of the page to open a drop-down menu and selecting Sign In as a Different User from the options (see Figure 2.4). After clicking that option, you are prompted for your username and password, as if you have not logged on to SharePoint before.

If you change your mind and want to log on again with the username and password that you used to log on to your machine, you can either type in the username and password or close the browser and open the site again.

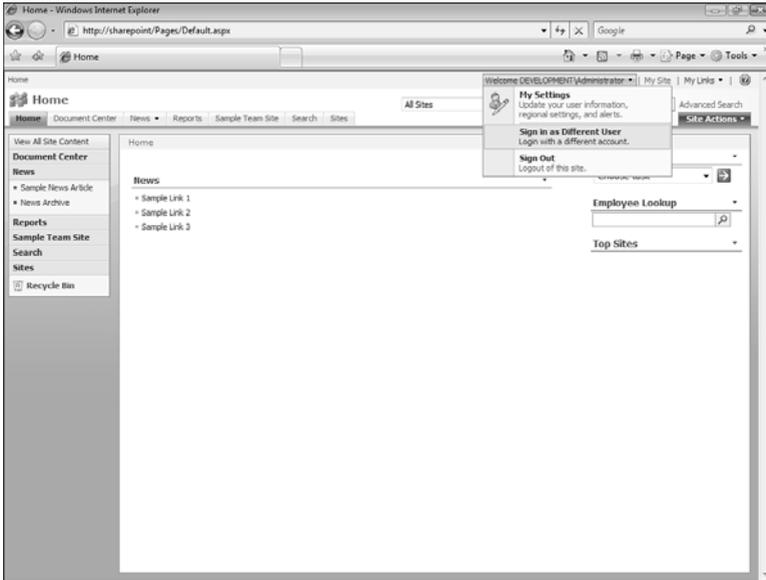


FIGURE 2.4
Signing in as a different user.

Change My Regional Settings

Scenario/Problem: While working in an environment that has sites from all over the world, you want to define in a specific site that you want the date formatting to appear in the way you are used to (have the month before or after the day in a date, for example) and to show time data in your time zone, and not in the time zone for which the site manager set it. For example, when viewing a list of events, you might see an event scheduled to start at 9:00 in the morning, but if the site was created by someone in Japan and you are in America, you need to know if that time is based on the time zone in Japan or in your time zone.

Solution: To set the date formatting, set your regional settings for the site. Depending on the configuration of the site, you might be able to define in that site your own regional settings, which would change how the site is presented to you without affecting anyone else who is viewing the site.

Changing the regional settings lets you define the way you want dates and number formats shown to you, the default sort order used for you in the site when you are viewing lists, the calendar format you want to see, and the way you define your workweek days.

Figures 2.5 and 2.6 show a calendar list of events with two different regional settings. Australian settings are shown in Figure 2.5.

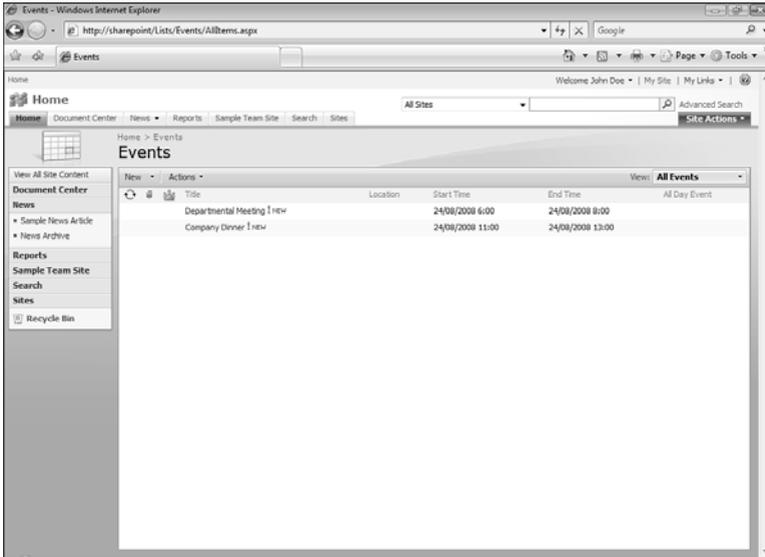


FIGURE 2.5

A list viewed using the Australian regional settings. Notice how the start and end time show the day before the month.

Figure 2.6 shows the American settings.

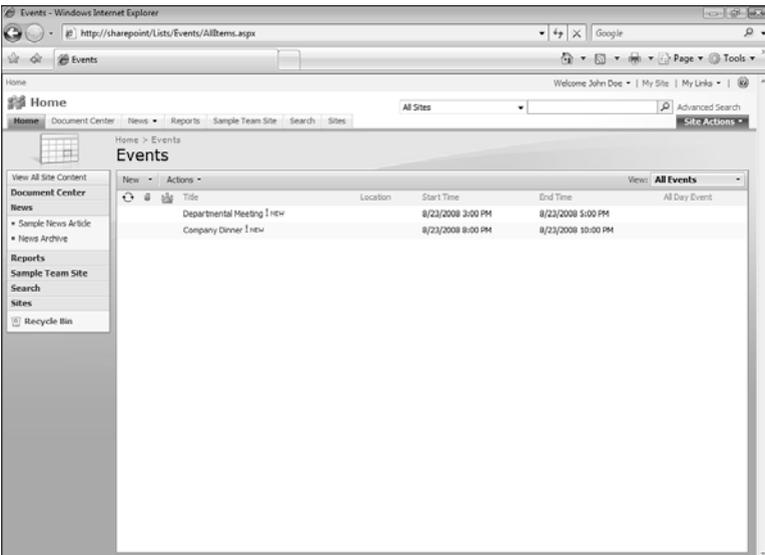


FIGURE 2.6

A list viewed using the American regional settings. Notice how the start and end time show the month before the day and how the times are different because of a different time zone setting.

To achieve this, click the Welcome [your name] link at the top of the page to open a drop-down menu and select My Settings, as shown in Figure 2.7.

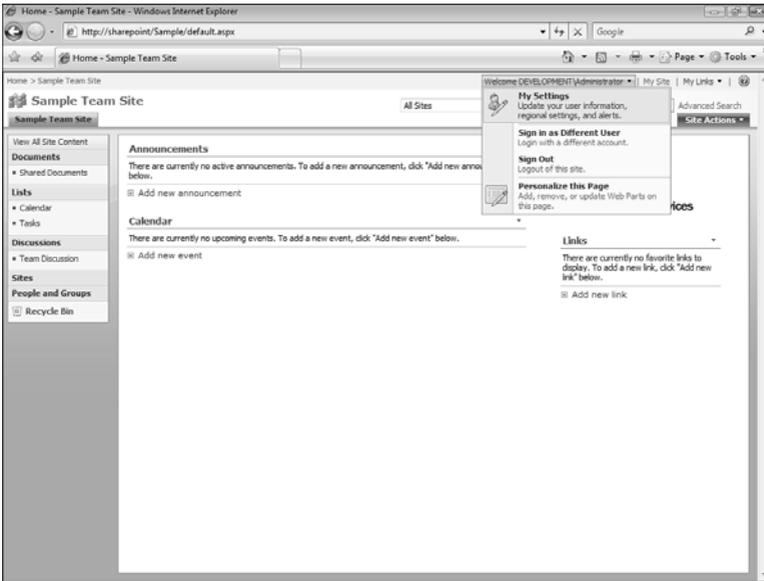


FIGURE 2.7
Selecting your own settings.

Selecting this option opens a page showing your details as they are saved in the system. Click My Regional Settings, as shown in Figure 2.8.

Selecting this option opens the Regional Settings configuration screen (see Figure 2.9). In this screen you can choose to customize the regional settings for you by clearing the Always Follow Web Settings check box. This means that the content of the site will be displayed using different settings from the ones that are defined for the site by the site manager. If you select this option, the page will allow you to define the following settings:

- ▶ **Locale:** Sets the formats of dates, numbers, and sorting order.
- ▶ **Time Zone:** Sets your time zone so that times (for example, time for a meeting) will be displayed to you in your time zone.
- ▶ **Set Your Calendar:** Allows you to select a different calendar format (for example, the Jewish or Arabic calendars) to be displayed instead of the default one.
- ▶ **Alternate Calendar:** Allows you to select an alternative calendar format that will be displayed in addition to the default one.
- ▶ **Define Your Work Week:** Allows you to select your work week and working hours (which will change how calendars are displayed to you).
- ▶ **Time Format:** Allows you to select whether the time format should be 12-hour format (01:00 PM) or 24-hour format (13:00).

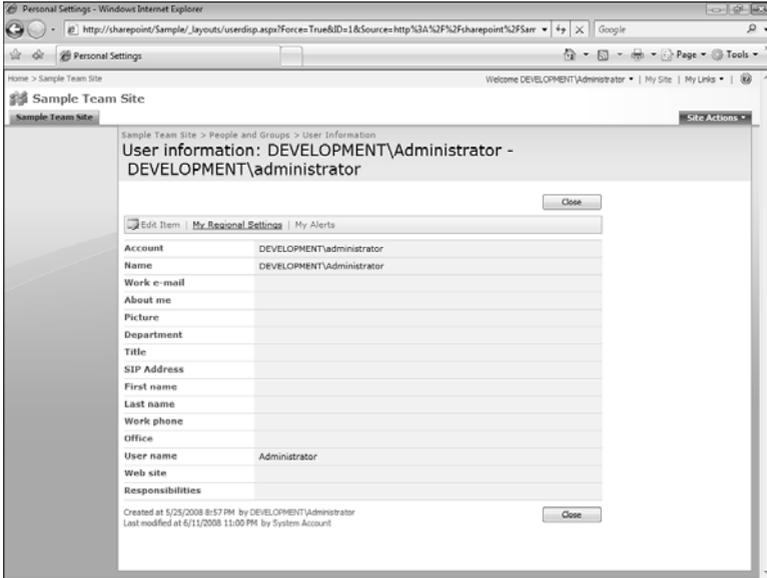


FIGURE 2.8
Changing the regional settings.

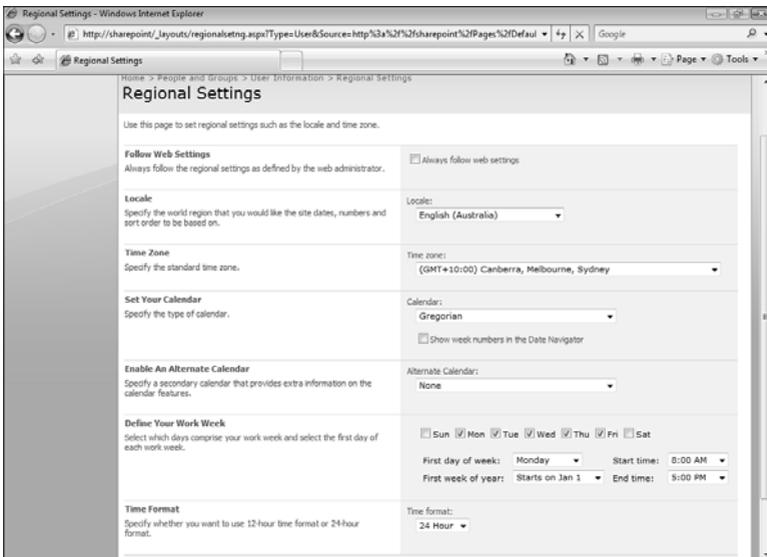


FIGURE 2.9
Changing settings on the Regional Settings screen.

Navigate Through a SharePoint Site

Scenario/Problem: You want to find what information is available in a SharePoint site.

Solution: The following section explains the different mechanisms that help you navigate through a site. A standard SharePoint site has two navigational aids that help you find your way in the site. These navigation bars are usually at the top and left sides of the screen. The site manager can change them to show different links to different parts of the site, and they should be your primary source of information to what you can view in the site.

Figure 2.10 shows a sample site with both navigation bars configured to show the same information.

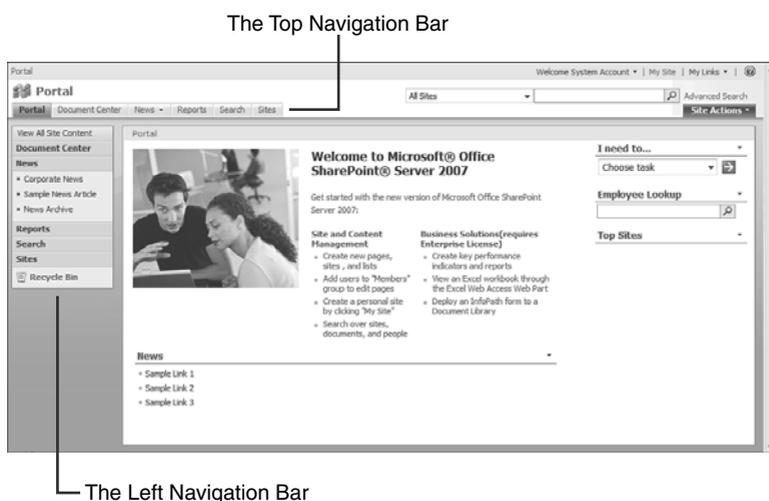


FIGURE 2.10

A sample site with two navigation bars.

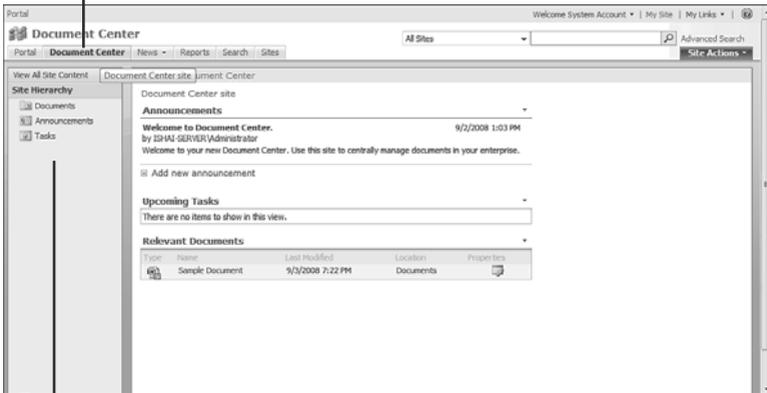
As you can see in the image, both navigation bars show links to subsites that exist under the current site and some of the actual content in one of those sites (the News site has two news items in it: Sample News Article and News Archive, which are pages in the News site). The top navigation bar exposes those articles as flyouts that show only when you hover the mouse cursor over the News menu item (see Figure 2.11).



FIGURE 2.11
Accessing fly-out menus in the top navigation bar.

To navigate to a subsite, you can click the links to that subsite in either navigation bar. Most likely (depending on how your administrator set up the navigation), the subsites show the same top navigation bar but a different left navigation bar, as shown in Figure 2.12.

The Document Center tab is highlighted because that is the current subsite you are watching.



The left navigation bar shows items in the current site.

FIGURE 2.12
The left navigation bar might show different navigation links than the top navigation bar.

However, the administrator can choose that a subsite will display the same left navigation bar as the top site. This setup makes it look as if you are still in the same site, except for the fact that the top navigation bar highlights the current site you are on, as shown in Figure 2.13.

In the News subsite, the navigation menus are the same as in the root site but highlight that you are currently in the News site.



FIGURE 2.13

The left and top navigation bars might show the same navigation links.

Use the Left Navigation Bar

The quick launch left navigation bar, also known as *Current navigation*, is usually used to show content that exists in the current site and sometimes content from subsites, sites that exist under the current site (see Figure 2.14). The content is usually (but not always) lists and libraries, and is (usually) grouped so that document libraries are shown under a Documents header, lists under a Lists header, discussions under a Discussions header, and so on.

The left navigation bar highlights where you are in the navigation, but only when you are on a page that is shown in the navigation (see Figure 2.15).

This navigation bar is meant to be used as a “quick launch” bar—a useful list of links in the current site and sometimes the sites under it. It might even contain links to content that isn’t in SharePoint—for example, an Internet site.

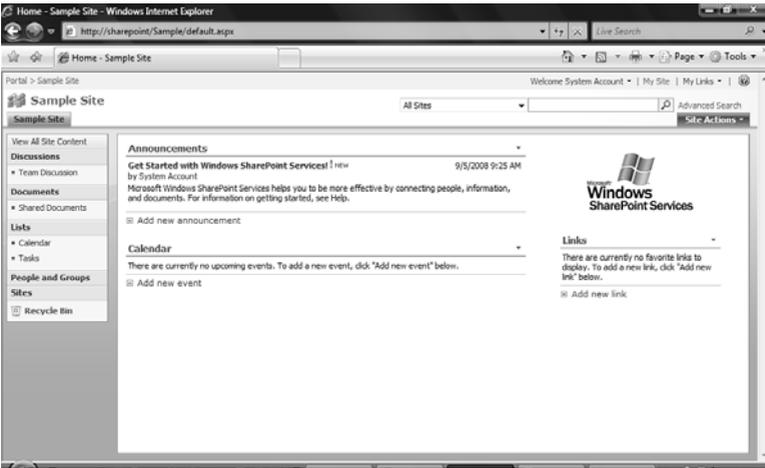


FIGURE 2.14 A site with a left navigation bar showing links to content in the current site.

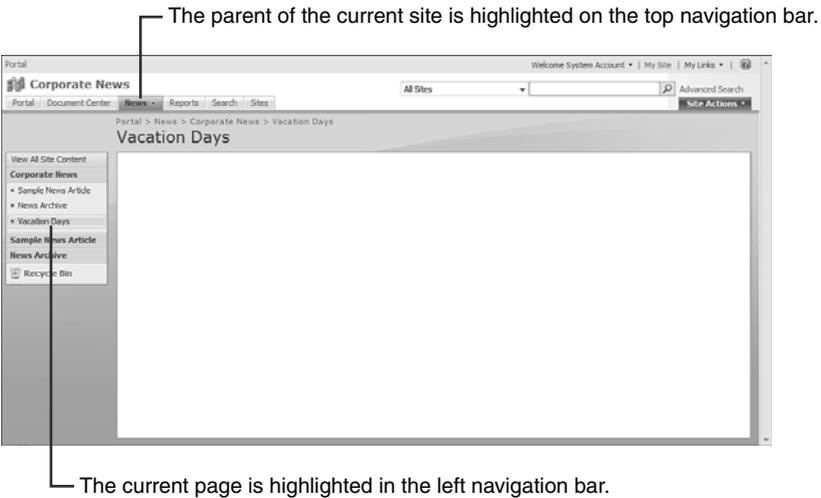


FIGURE 2.15 A site with a left navigation bar highlighting the current page.

TIP Some sites do not have a left navigation bar. If that is the case, you must rely on the information on the page to find your way in the site.

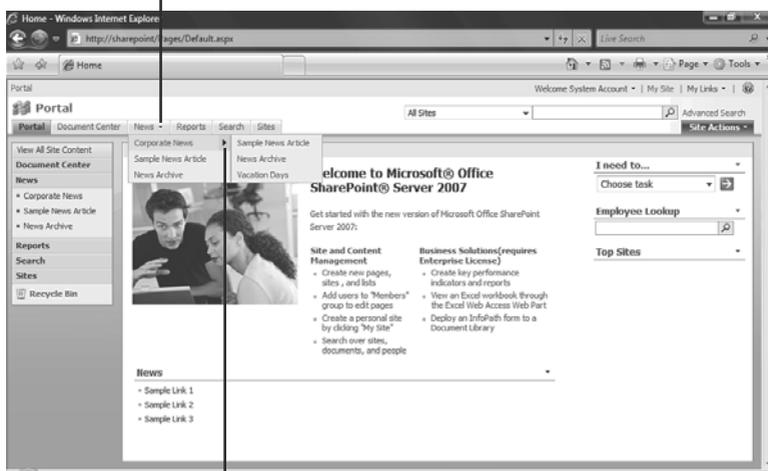
Use the Top Navigation Bar

The top navigation bar, also known as *Global navigation*, is usually used to show links to sites that are at the top level of the site hierarchy. This feature enables you to quickly see what important sites are available globally that the site administrator wants you to see.

This menu bar can support *flyout* menus. These menus become visible when you hover the mouse cursor over the parent menu items. You can usually know when a menu has flyout menus as children: it is marked with a triangle pointing to the direction in which the flyout menu will open.

In Figure 2.16, you can see a two-level flyout menu. The first level shows that under the News site, there is another site called Corporate News and also two articles. The second level (on the right of the first level) shows that there are three articles under the Corporate News site.

The arrow pointing down signifies that there is a flyout menu that will open down from the News link.



The arrow pointing right signifies that if you hover the mouse cursor on Corporate News, you will see a flyout menu to the right.

FIGURE 2.16

Opening the flyout menus using the top navigation bar.

TIP You can customize the top navigation bar to show many levels of sites and sometimes other links. If you see the small triangles or arrows, hover the mouse cursor over them to find out what navigation item is under them.

Use the Breadcrumbs

Breadcrumbs are a common mechanism to navigate in any website. They show you where you are in the site and what parents this site has so that you can go up the hierarchy to any of the parents easily and quickly.

In SharePoint, there are two built-in breadcrumbs in each page: global and local. The global breadcrumbs are usually at the top left of the screen and track where you are when switching between sites that do not share the same navigation bars (see Figure 2.17).

The global breadcrumbs show that Sample Site is under Portal.

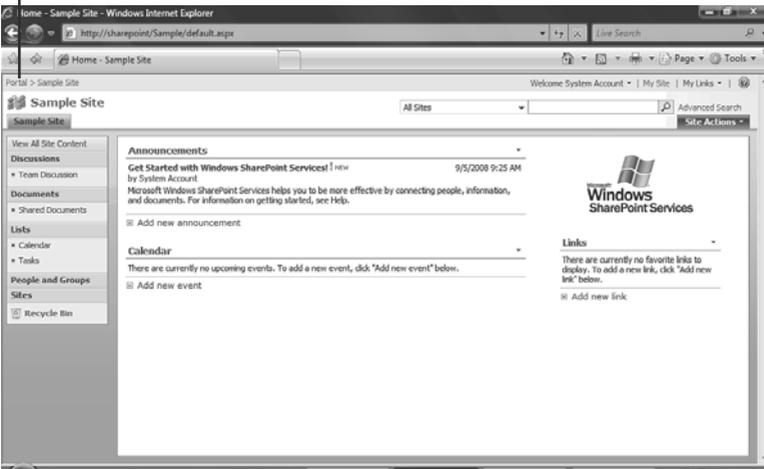


FIGURE 2.17

Using the global breadcrumbs.

The local breadcrumbs are usually right under the top navigation and show you where you are in relation to the current site hierarchy (see Figure 2.18).

To use the breadcrumbs, just click the link of the parent you want to navigate to.

TIP When you are in a document library that has folders, using breadcrumbs is the best way to go back to the parent folder of the one where you are currently working.

The local breadcrumbs show that you are in the article Vacation Days, which is under Corporate News, under News, under Portal.

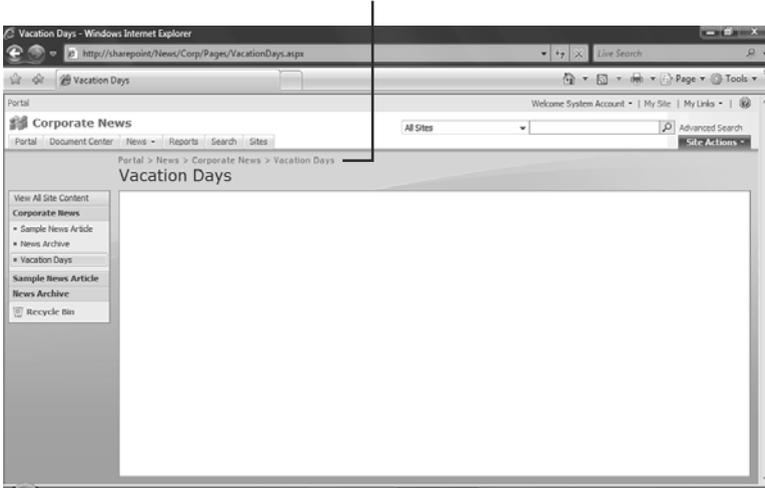


FIGURE 2.18
Using the local breadcrumbs.

Determine Whether a Site Is WSS or MOSS

There is no way to actually know whether a site is hosted on a server that has Microsoft Office SharePoint Server (MOSS) installed by just looking at it. As you learned in the explanation of Windows SharePoint Services (WSS) and MOSS, the differences are mostly behind the scenes and are not visible to users. Customizations that your company might have developed may cause a WSS site to look as if it has some extensions that come with MOSS or might cause a MOSS site to look simpler—by removing the MOSS-specific links that would help you identify a site as MOSS.

There are two things you can look for in any SharePoint site and be fairly sure that your site is MOSS or WSS. The first is to look for the My Site link at the top of the screen. If you have that link, it means you are viewing a site that is running on a server with MOSS (see Figure 2.19). Not having the link does not necessarily mean that the site does not have MOSS because the administrator can choose to disable that functionality.

The second way you can tell is by looking for the Advanced Search link. WSS sites (unless customized) do not have that link, so having that link means you probably are viewing a site that is running on a server with MOSS (see Figure 2.20). Another related way to test this is to open the search screen (perform a search) and see whether you have the option from that screen to switch to advanced search.

The My Site link appears only on sites that have MOSS installed.

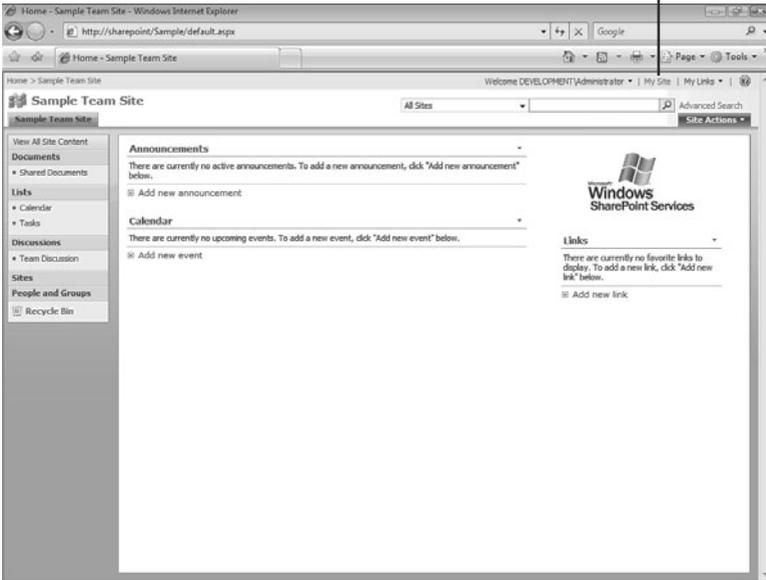


FIGURE 2.19
Viewing a MOSS site with the My Site link.

The Advanced Search option appears only on MOSS sites.
The My Site link appears only on MOSS sites.

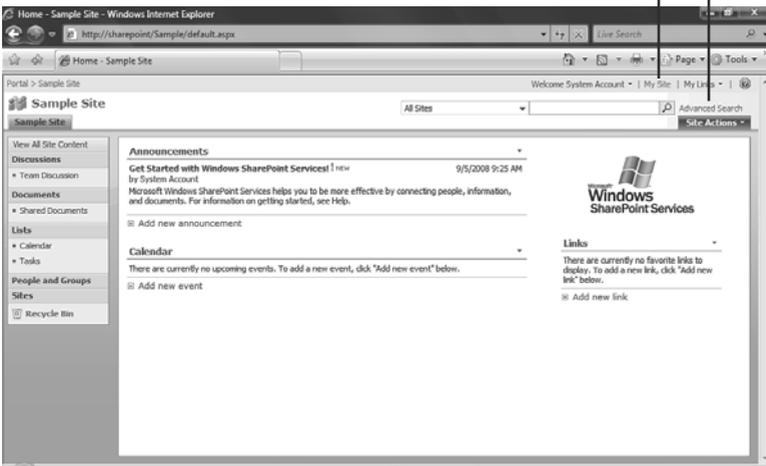


FIGURE 2.20
Viewing a MOSS site with the Advanced Search link.

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