About SharePoint Server 2007

SharePoint Server 2007 is an integrated suite of server applications that helps people and teams work together. At Microsoft, these sites are most commonly used for team collaboration. This Overview focuses on the team collaboration capabilities of SharePoint Server 2007.

What Is SharePoint Server 2007?

SharePoint Server 2007 is a collection of Web-based tools that make it easy to work on projects with other people. These tools consist mostly of pre-designed Web sites that teams or individuals use to store information and collaborate with others. These sites come with content authoring tools for site owners and members.

These sites use Web conventions—access through a browser, linked information, images as well as text—to create a fast and easy method of collaborating. These sites create a single point from which information can be shared.

SharePoint Server 2007 Sites

Use customizable templates for the creation of Web sites. A variety of templates are available—Team Site, Document Workspace, Meeting Workspace, Blog, Wiki Site—and each template is designed for a different purpose.

Each site comes with a predetermined number of Web Parts. Web Parts are content "containers" used to display information on a site. Site members can use Web Parts to arrange text, related links, calendars, images, document libraries, other Web pages, and more.

Each site has a Web Parts Gallery from which additional Web Parts may be added.

Web Part	Purpose
Announcements	Post messages on the home page.
Tasks	Keep track of project work details.
Calendar	Stay informed on team events.
Links	Post links of interest for site members.
Document Library	Share documents with site members.
Contact List	Post names and contact information of site members.
Image	Display pictures and photographs.

The Team Site template is one of the most frequently used templates. The following illustration shows a sample Team Site home page.

Sample Team Site Home Page

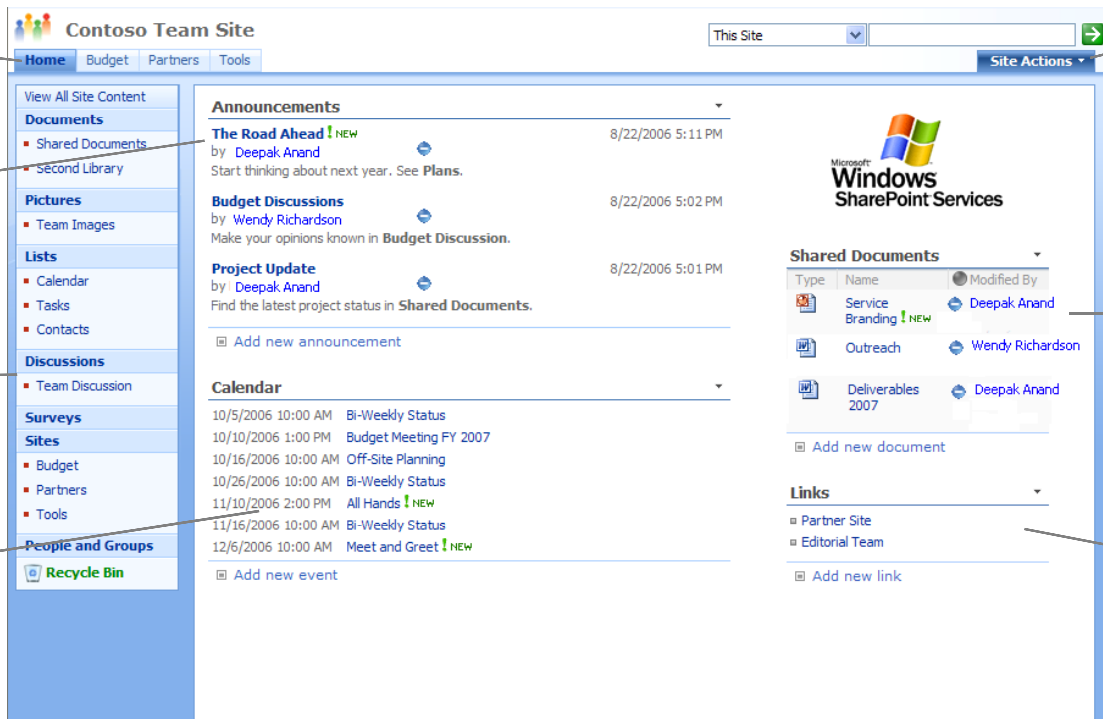
This sample site was built from a Team Site template.

Tabs
Display subsites and link to them.

Announcements
Post messages on the home page of the site.

Quick Launch
List key site pages on this navigation menu.

Calendar
Display important dates and events.



Site Actions
Show common commands for the site.

Document Library
Contain and display team documents.

Links
Post links of interest to site members.

Use Web Parts as building blocks for your site.

Conventions

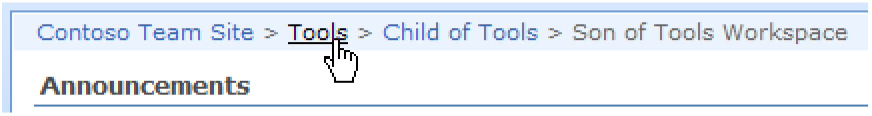
To get the most from your site, familiarize yourself with its conventions. These include navigation, file manipulation, and site permissions.

Navigation

There are three ways to navigate: the left navigation menu (Quick Launch), tabs, and a "bread crumb" trail.

- The left navigation menu is customizable, so its appearance may vary from site to site. However, in most cases, the pages on a site will be listed on its left navigation menu.
- Tabs across the top of the main window can also be used for navigation. A **Home** tab always appears. As subsites are created, new tabs generally appear for them, though this appearance is optional.

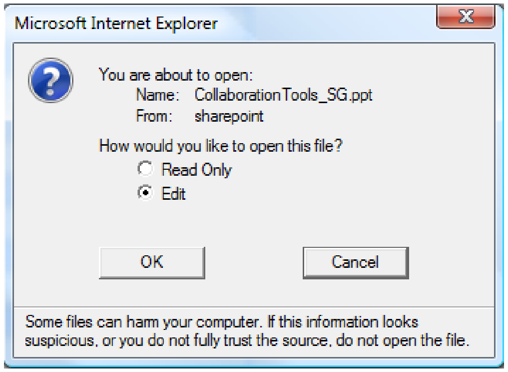
- A "bread crumb" trail is a series of links indicating your location on a site. In addition to showing location, bread crumbs offer links to locations between you and the parent site. Bread crumbs appear below the tabs, in the upper-left portion of the main window.



Note: Subsites live within an existing SharePoint Server 2007 site. The existing site is known as the top level site. Subsites may be created to appear completely independent of the top level site, but are rooted in the top level site

Editing Files

To edit a file, click the document name. In the Windows® Explorer window, click the **Edit** option, and then click **OK**.



Moving Files

Do not delete files in one location and upload them to another in order to move them. Instead, use Windows Explorer view to drag files from one location to another.

In a Document Library, on the **Actions** menu, click **Open with Windows Explorer**. Open a similar window in a different Document Library. Now resize the windows so you can see both, and drag files from one location to the other. Click your browser's **Back** button to return to the default view.

Restoring Files

The Recycle Bin is a temporary location where files await permanent deletion. You can restore files from the Recycle Bin, but you must restore them before automatic permanent deletion takes place. The default waiting period is 30 days, but this period can be customized. Ask a site administrator for details.

Permissions and Access

All sites come with permission options. The default setting prevents anyone from accessing the site. A site owner (typically the site creator) must give specific users and specific groups access to the site.

Site owners either add users to existing permission groups, or give specific permissions to specific users.

By default, there are three groups used for allowing access to a site: Visitor, Member, and Owner. When you add a user to one of these groups, the user is given the permission level associated with the group. The following table describes the three groups.

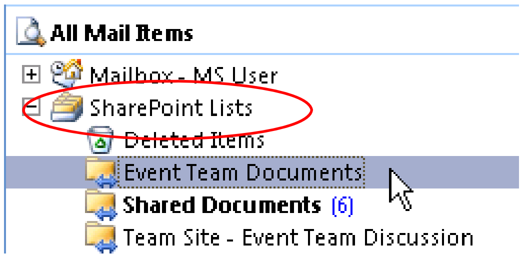
This group	Provides this permission level
Visitor	Read: user can view site content.
Member	Contribute: user can view and edit site content.
Owner	Full Control: user can view and edit site content, and modify site settings.

By default, permission levels applied to the Home page of a site automatically apply to all pages within the site. Site owners may also apply different permission levels to different pages and subsites.

Integration Features in SharePoint Server 2007

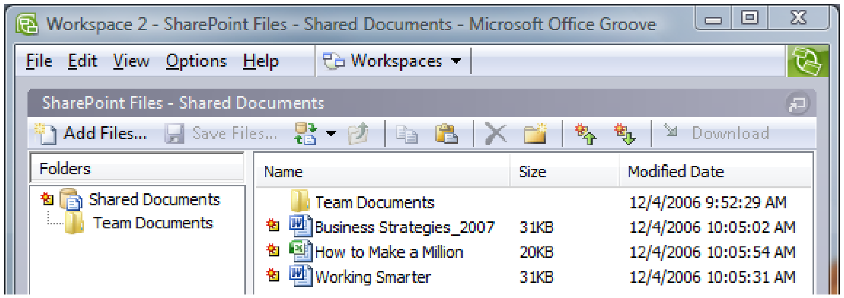
Integration with Microsoft® Office Outlook 2007

Create SharePoint Server 2007 resources for team collaboration and connect them to Outlook 2007. Team members can then use Outlook 2007 to collaborate with the SharePoint Server 2007 resources. In Outlook 2007, the SharePoint Server 2007 resources appear in the **SharePoint Lists** folder. You access them the same way you access your e-mail messages.



Integration with Microsoft® Office Groove® 2007

Collaborate with other team members by adding the files to a Groove 2007 workspace. Workspace members access the files, edit them, and then synchronize the changes with SharePoint Server 2007.



Groove 2007 workspace

Integration with RSS (Really Simple Syndication)

Distribute content on a site through RSS, using Outlook 2007 as an RSS reader. This way, site members receive the most current content as it becomes available.

You can also display RSS content using the RSS Viewer Web Part.

About SharePoint Server 2007 Sites and Workspaces

SharePoint Server 2007 helps you store and collaborate on information using Web sites and workspaces hosted on the corporate network. No specialized knowledge is needed to create a site or workspace. Use this guide to determine which sites or workspaces are best for your needs.

	Sites (long-term use)		**Workspaces (short-term use)**	
	My Site	**Team Site**	**Document Workspace**	**Meeting Workspace**
Purpose	Individuals share public information; organize daily activities; store private files.	Teams store and display information; coordinate activities; collaborate on projects.	Groups collaborate on documents related to a specific project or purpose.	Groups manage meeting agenda items, materials, and follow-up actions.
Best Uses	• Share business-related information about yourself with your coworkers. • Store private files or collaborate on shared files.	• Centralize and coordinate team activities. • Store, organize, and display team files.	• Collaborate on documents without using e-mail. • Store multiple documents. • Display information related to document review.	• Post meeting agendas. • Track action items. • Store documents and other files associated with a meeting.
Key Features	• Stores private and shared documents. • Enables control of private information versus public information. • Allows for site customization and supports multi-purpose use.	• Enables collaboration on Microsoft Office system files. • Includes document check in/check out and version control . • Allows site customization and supports multi-purpose team use.	• Enables use of SharePoint Server 2007 features directly from Microsoft Office system applications. • Includes document check in/check out and version control. • Connects to a Team Site or My Site.	• Enables workspace creation in Outlook 2007 when sending a meeting invitation. • Supports one-time or recurring meetings. • Connects to a Team Site or My Site.
Challenges	• Public section is viewable to all users with corporate network access.	• Keeping content current and useable may require a site manager.	• Review and editing of documents requires corporate network access.	• Meeting participants must be aware of the site and its location.

Site and Workspace Comparison	My Site	Team Site	Document Workspace	Meeting Workspace
Your Own Work Web Site	•			
Best for Team Collaboration		•		
Best for Document Collaboration			•	
Best for Managing Meetings				•
Supports Search Function	•	•	•	•
Multi-purpose, Longer-term Use	•	•		
Single-purpose, Shorter-term Use			•	•
Provides Public and Private Sections	•			
Use Directly from Office 2003 Applications			•	
Create Using Outlook 2003			•	•
Control User Access and Privileges	•	•	•	•
Requires Corporate Network Access	•	•	•	•

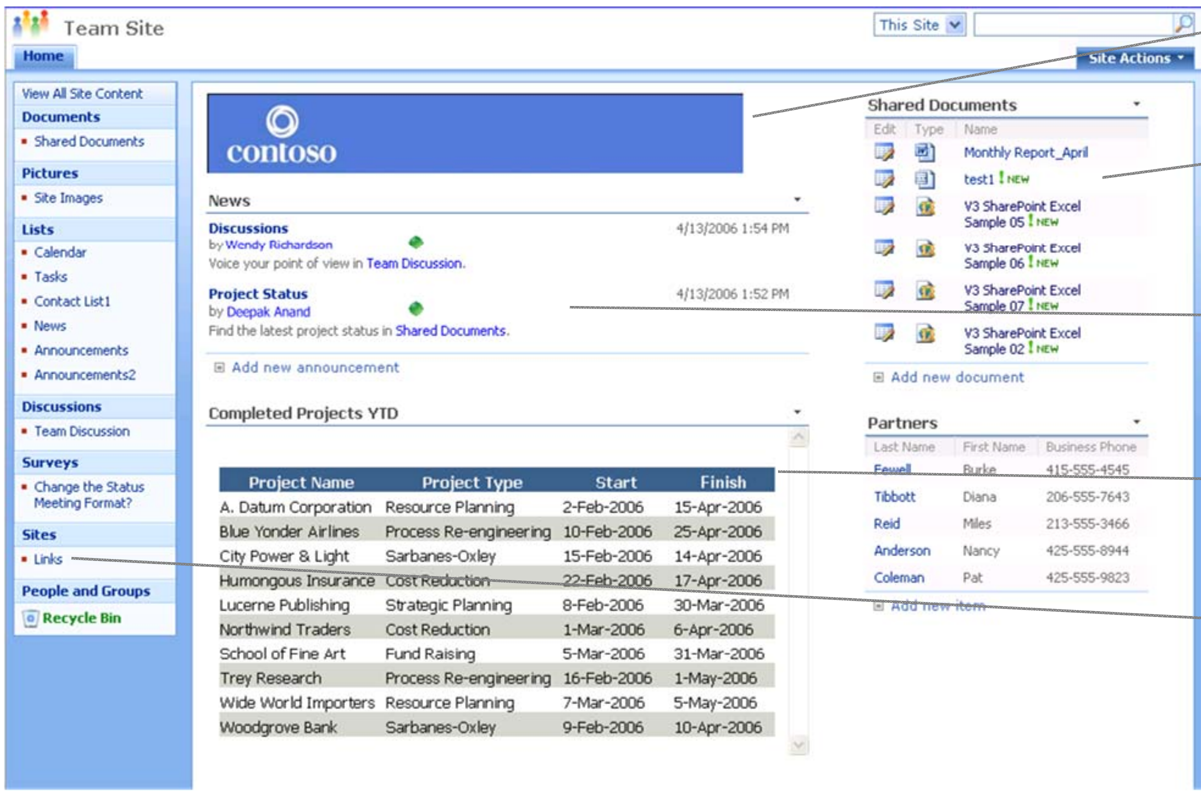
Extranet Sites—Collaborate with External Partners and Customers

Want to use a SharePoint Server 2007 site to collaborate with external business partners, vendors, or customers? Create a SharePoint Extranet Team site. Because Extranet sites are accessed through the Internet, external users can access the content and collaboration features.

Note To determine if SharePoint Server 2007 Extranet Sites are available in your enterprise, check with your Site Administrator.

About Customizing a SharePoint Server 2007 Site

Modify the structure and appearance of your SharePoint Server 2007 site to best suit the needs of your group. Use the tools and methods described in this guide to customize your site. **Note** This guide assumes you already have a site created. For illustration purposes, a Team Site is used as an example.



Create a Unique Look for Your Site with an Image Web Part.

Display Other Content on Your Site including shared documents, partner names, alerts, RSS feeds, and more to aid collaboration with others.

Customize Announcements on Your Site to create a better experience for your readers.

Display a Microsoft® Office document on Your Site to immediately share information with users.

Customize Your Left Navigation Menu by adding or removing site links.

Create a Unique Look for Your Site

Change the look of your site with a theme. Themes combine color schemes and design elements to give your site a cohesive look and feel. Then place a banner, team logo, or other image on your home page using an Image Web Part. For example, see the "Contoso" banner on page 1 of this guide.

Tip Though bold colors are striking, they can also make text hard to read. If you use a theme to change the look of your site, always keep your audience in mind.

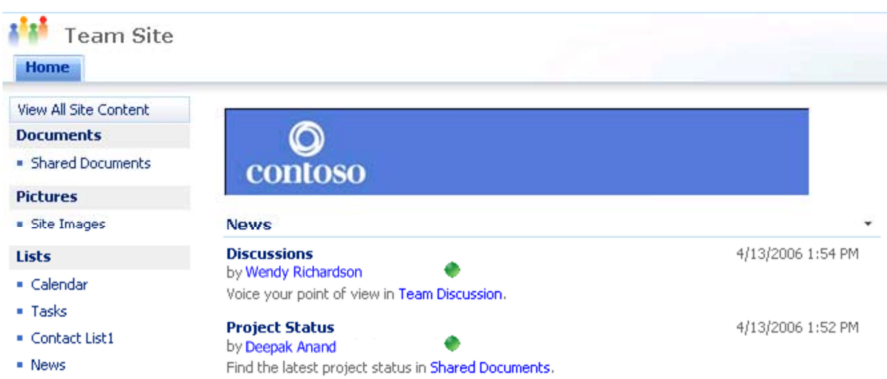
Change the Look and Feel of Your Site with a Theme

1 On the **Site Actions** menu, click **Site Settings**.

2 Under **Look and Feel**, click **Site theme**.

3 Select a theme from the list, and then click **Apply**.

The image below shows the Simple theme. Compare this to the Default theme featured on page 1 of this guide.



Add a Banner or Picture to Your Site

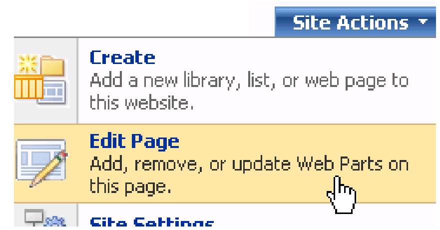
1 Go to a Picture Library, and then click **Upload.**

Note To see all your picture libraries, click **View All Site Content** at the top of the left navigation menu (Quick Launch).

2 Browse to the picture, click **Open**, and then click **OK**. If desired, update the picture properties, and then click **OK**.

3 With the picture in **All Pictures** view, click the picture. Right-click the preview picture, and then select **Copy Shortcut**. This gives you the image address.

4 From your SharePoint Home page, on the **Site Actions** menu, click **Edit Page**.



5 At the top of the column where you want to add the picture, click **Add a Web Part**. In the **Add Web Parts to [column]** list, select the **Image Web Part** check box, and then click **Add**.

6 In the **Image Web Part**, click **open the tool pane.**

7 In the tool pane, under **Image Link**, enter the image address you copied in step 3. Test the location by clicking **Test Link**. If the link works, click **OK**.

8 When you have finished, on the **Site Actions** menu, click **Exit Edit Mode** to return to normal view.

Notes

- Use the tool pane to adjust picture alignment, appearance, and layout. To open the tool pane, click the arrow to the right of the Image Web Part title, and then click **Modify Shared Web Part**.

- Never use a copyrighted image in your site without obtaining permission from the copyright holder.

Display Other Content on Your Site

Use Web Parts to customize your site. Web Parts are content "containers" used to display information. Use Web Parts to arrange text, related links, calendars, images, document libraries, other Web pages, and more.

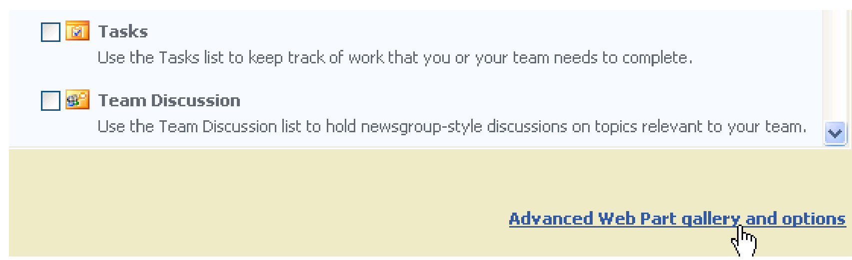
There are Web Parts for almost every kind of content. With a little creativity, you can use existing Web Parts for almost any new content need. In the table below are some examples of existing Web Parts:

To Display This Content	Use This Web Part
Messages to site users	Announcements
A list of site users	Site Users
An Office document or a Web page	Page Viewer Web Part
A list of high priority tasks for site users	Tasks

1 From your Home page, on the **Site Actions** menu, click **Edit Page**.

2 At the top of the column where you want to add the Web Part, click **Add a Web Part**. In the **Add Web Parts to [column]** list, select the check box of the Web Part that you want, and then click **Add**.

Note If you don't find the Web Part you're looking for in the **Add Web Parts to [column]** list, click **Advanced Web Part gallery and options**.



3 To arrange Web Parts on the page, click a title bar and drag the Web Part to the position you want, keeping within the column markings.

4 When you have finished, click **Exit Edit Mode** to return to normal view.

Display a Microsoft® Office Document on Your Site

Display any Microsoft Office document or Web page by using the **Page Viewer** Web Part. Displaying a document in this way makes it simple to share information. See the Completed Projects YTD spreadsheet on page 1 of this guide for an example of how such a document looks.

Note To ensure access to the document by all visitors, you must store it on your site. For best viewing, it should be saved as a Web page before uploading it to the site. (**File**>**Save as Web Page**.)

1 Go to a Document Library, and then click **Upload**.

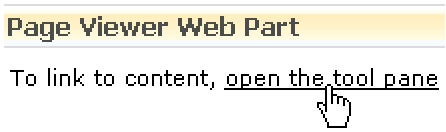
Note Click **Documents** at the top of your site to see all your Document Libraries.

2 Browse to the document, click **Open**, and then click **OK**. After the document has been uploaded, right-click the document icon (view the file in **All Documents** view), and then click **Copy Shortcut**. This gives you the document address that you will use in step 6.

3 From your Home page, on the **Site Actions** menu, click **Edit Page**.

4 At the top of the column where you want to add the Web Part, click **Add a Web Part**. In the **Add Web Parts to [columns]** list, select the **Page Viewer Web Part** check box, and then click **Add**.

5 In the **Page Viewer Web Part**, click **open the tool pane**.



6 In the **Tool Pane**, click **Web Page**. Under **Link**, paste the document address you copied in step 2. Test the location by clicking **Test Link**. If the link works, click **OK**.

Customize Announcements on Your Site

By default, sites include an Announcements Web Part on the Home page. With this Web Part, you can post news and updates to your site. By becoming familiar with this tool, you can customize how news and updates are displayed. Take a look at the News section on page 1 of this guide to see how the Announcements Web Part might be customized.

1 Click **Announcements** in the title bar of the Web Part.

2 Click **All items**, and then click **Modify this View**.

3 On the **Edit View** page, in the **Columns** section, use the **Display** check boxes to determine which columns will appear in the Announcements Web Part. Use the **Position from Left** boxes to determine their order of appearance.

4 Use the remaining sections of the **Edit View** page to:

- **Sort** items to appear in a different order.
- **Filter** content to prevent some items from appearing.
- **Group** columns.
- Display **Totals** if you are using columns with numbers.
- Apply a **Style** to the Announcement content.

  Note See the shaded style and the changed title in the picture on page 1 of this guide for an example.
- Group items inside **Folders** rather than viewing the items in one long list.
- Set the **Item Limit** to determine how many items will display.
- Adjust **Mobile** settings for the view.

5 When you have finished, click **OK**, and then return to the Home page.

6 At the end of the **Announcements** title bar, click the arrow, and then click **Modify Shared Web Part**.

7 In the Tool Pane, in the **Selected View** box, select **All Items**. In the warning box, click **OK**.

8 At the bottom of the Tool Pane, click **OK**.

Customize Your Left Navigation Menu

The left navigation menu (Quick Launch) is the list of site links found on the left side of your Home page. By default, new links are automatically added when lists and libraries are added to the site. In addition, you can customize the left navigation menu by manually adding or removing site links and headings.

Add a Site Link or Heading in the Left Navigation Menu

1 On the left navigation menu, click **View All Site Content**.

2 Right-click the site link or heading that you want to add, and then select **Copy Shortcut**. This gives you the site address that you will use in step 4.

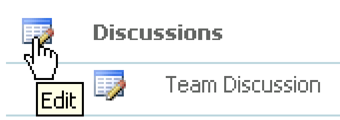
3 On the **Site Actions** menu, click **Site Settings**. Under **Look and Feel**, click **Quick Launch**.

4 Click **New Link** or **New Heading**, and then paste the site address you copied in step 2. Type the description of the new link or heading (if it's a new link, also select a **Heading** to put it under), and then click **OK**. The new link or heading appears on the left navigation menu.

Remove a Site Link or Heading from the Left Navigation Menu

1 On the **Site Actions** menu, click **Site Settings**. Under **Look and Feel**, click **Quick Launch**.

2 Click the edit icon next to the link or heading you want to remove, and then click **Delete.**



About Site Access and Storage

Manage access and storage on your SharePoint Server 2007 sites.

Manage Access
Limit access to sensitive business information. Topics in this section:

- Give Users Access to Your Site
- Manage Access to a Document Library
- Approve Requests for Access to Your Site
- Change the Administrator Who Receives Requests for Access

Manage Storage
To avoid outdated content and to maximize your space, delete old documents, workspaces, meeting spaces, and lists. Topics in this section include:

- Locate and Delete Unused Workspaces and Sites
- View Traffic to Your Site
- View Detailed Storage Space Information
- View All Sites Created Under Your Main Site

Before You Begin

Some procedures in this guide require site collection administration permissions. If you are unable to access pages or links mentioned in the procedures, contact the site creator or a site collection administrator to request the appropriate permissions.

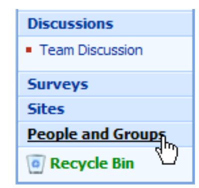
Give Users Access to Your Site

Using groups is the most efficient way to manage site access.

By default, there are three groups with associated permission levels: Visitor, Member, and Owner. When you add a user to a group, the user is given the permission level associated with that group.

To grant this permission level	Add users to this group
Read: User can view site content.	**Visitor**
Contribute: User can view and edit site content.	**Member**
Full Control: User can view and edit site content, and modify site settings.	**Owner**

1 From within the site, on the left navigation menu (Quick Launch), click **People and Groups**.



2 On the **People and Groups** page, at the top of the left navigation menu under **Groups**, click the group with the permissions you want to grant to your users.

3 On the **New** menu, click **Add Users**. On the **Add Users** page, in the **Users** text box, type the alias of the user you want to add. To add more than one user, separate each alias with a semicolon.

4 Click **Add users to a SharePoint group**. The group you previously specified is selected.

5 Select the **Send welcome e-mail to the new users** check box to send an e-mail alerting users they have been added to your site. You may also add a personalized message. Click **OK**.

Note You can also add users individually and assign them individual permission levels. To assign specific permission, on the **Add Users** page, click **Give users permission directly**, and then select the check box for the appropriate permission.

Manage Access to a Document Library

In addition to managing access to your entire site, you can also set access levels for a Document Library or list.

1 From within the site, on the left navigation menu, click **Documents**.

2 On the **All Site Content** page, under **Document Libraries**, click the Document Library for which you want to manage access.

3 On the Document Library page, on the **Settings** menu, click **Document Library Settings**.

4 On the **Customize [library]** page, under **Permissions and Policies**, click **Permissions for this document library**.

5 On the **Actions** menu, click **Edit Permissions**, and then click **OK**.

6 On the **Permissions** page, select the check boxes of the users or groups whose permissions to this document library you want to change.

7 On the **Actions** menu, click **Edit User Permissions**, select the check boxes for the permissions you want to apply, and then click **OK**.

Note This procedure also applies to lists and other content.

Approve Requests for Access to Your Site

If you are a site administrator, you may receive requests for access to a site via e-mail. To approve these access requests:

1. In the **Access request for a site** e-mail, click **Grant [User] access to the site**.

2. On the **Add Users** page, under **Give Permission,** do one of the following:

   Click **Add users to a SharePoint group**, and then on the list click a permissions group.

   -OR-

   Click Give users permission directly, and then select the check box for the appropriate permission.

3. Select the **Send welcome e-mail to the new users** check box to send an e-mail alerting users they have been added to your site. You may also add a personalized message. Click **OK.**

Change the Administrator Who Receives Requests for Access

1. On the **Site Actions** menu on the upper right, click **Site Settings**.

2. On the **Site Settings** page, under **Users and Permissions**, click **Advanced permissions**.

3. On the **Permissions** page, on the **Settings** menu, click **Access Requests**.

4. On the **Manage Access Requests** page, select the **Allow requests for access** check box. Type the e-mail address of the person who will receive the access requests. This person must be an Administrator. Click **OK**.

5. In the **Send all requests for access to the following e-mail address** box, type the e-mail address of the person who will receive the access requests, and then click **OK**. This person must be an Administrator.

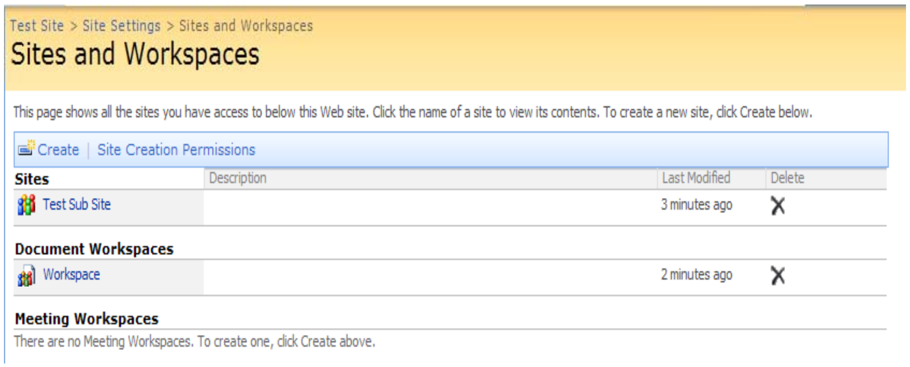
Note Site collection administrators can see who the administrators are for their sites by going to the **Site Actions** menu. Click **Site Settings**, and then under **Users and Permissions** click **Site collection administrators**.

Locate and Delete Unused Workspaces and Sites

1 On the parent site home page, on the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Administration**, click **Sites and workspaces**.

3 On the **Sites and Workspaces** page, find the site or workspace you want to delete, and then in the **Delete** column, click .

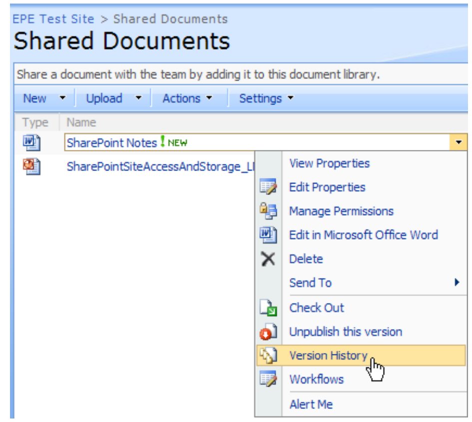


Delete Outdated Document Versions

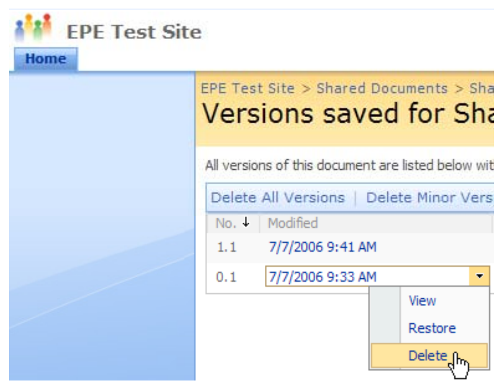
With Version Control activated, you can keep a history of changes to a file. Version Control can be helpful, but keeping multiple copies of a document takes up space and counts against your site's storage limit. If you do not need multiple versions of a file, consider deleting them.

1 In the document library, click the arrow to the right of the document, and then click **Version History**.

Note If Version Control is not activated, you will not see this option. By default, Version Control is not activated.



2 To delete a version of the document, click the arrow to the right of the document version, and then click **Delete**.



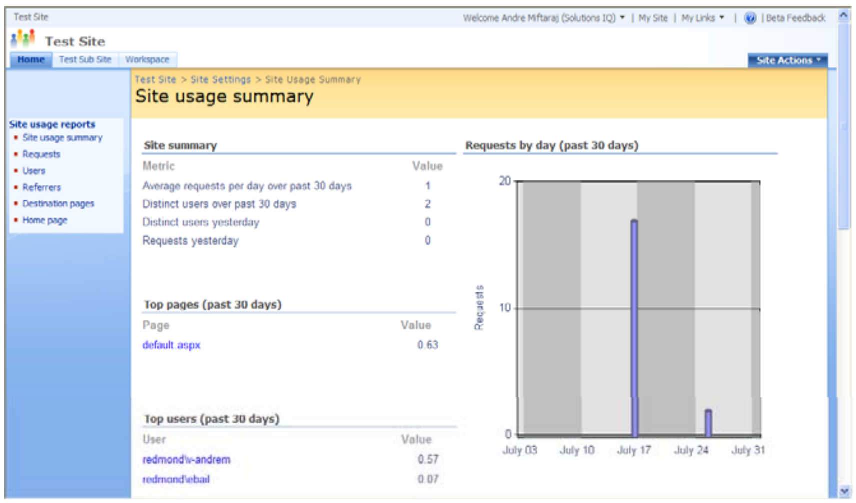
View Traffic to Your Site

The Site Usage Report provides information about how many page requests your site has received and also lists details on users and browser type.

1 On the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Administration**, click **Site usage data**.

3 On the **Site usage summary** page, to view a particular report, click the report from the **Site usage reports** list in the navigation menu on the left side of the page.



Use Recycle Bins

SharePoint Server 2007 has two recycle bins: the end user recycle bin and the site collection recycle bin. The recycle bins give you two levels of protection against accidentally deleting parts of your site or important data. Deleted items can be restored from either recycle bin.

You can delete documents, libraries, lists—almost anything, except an entire site. Deleted material is initially placed in the end user recycle bin. When you delete the contents of the end user recycle bin, they are placed in the site collection recycle bin.

Important

- After you empty the site collection recycle bin, the deleted material cannot be recovered.
- The recycle bins are automatically emptied every 30 days. Until that time, you can safely restore a deleted item.

Restore Deleted Items from the User Recycle Bin

1 On the left navigation menu, click **Recycle Bin**.

2 Select the check boxes of the items to be restored, click **Restore Selection**, and then click **OK**. The restored items are returned to the location from which they were deleted.

Note If you restore an item that originally resided in a folder that has since been deleted, the folder is recreated in its original location, and the restored item is placed in the folder.

Important The remaining procedures in this guide require that you have site collection administration permissions. If you do not have these permissions, you will not have access to the necessary controls and links to perform these tasks. To get site collection administrator permissions, contact the site creator or a site collection administrator.

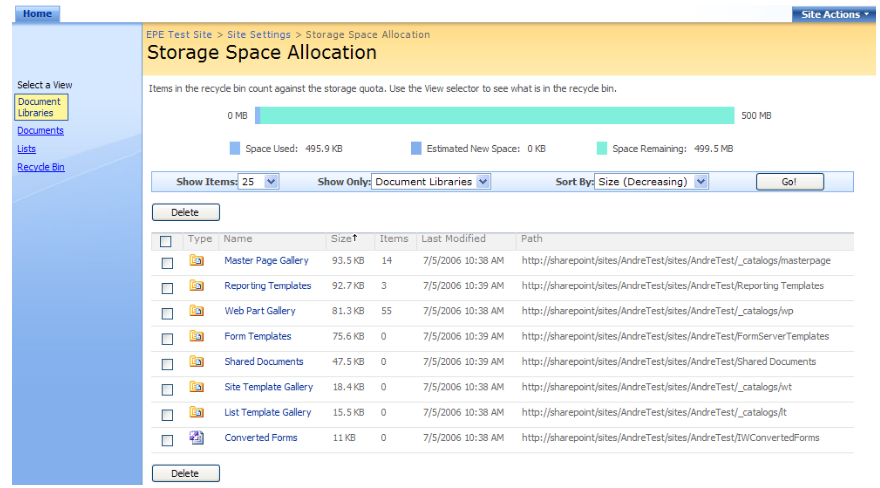
Restore Deleted Items from the Site Collection Recycle Bin

1. On the **Site Actions** menu, click **Site Settings**.
2. On the **Site Settings** page, under **Site Collection Administration**, click **Site collection recycle bin**.
3. On the **Site Collection Recycle Bin** page, on the left pane under **Select a View**, click **Deleted from end user Recycle Bin**. The list now shows you items that were first deleted by users and then deleted from the end user recycle bin.
4. Select the check boxes of the items to be restored, click **Restore Selection**, and then click **OK**.

View Detailed Storage Space Information

The Storage Space Allocation view displays the sizes and locations of Document Libraries, documents, and lists.

1. On the **Site Actions** menu, click **Site Settings**.
2. On the **Site Settings** page, under **Site Collection Administration**, click **Storage space allocation**.
3. In the left navigation menu, click the view you prefer—**Document Libraries**, **Documents**, or **Lists**.



4. To filter your view, click the options you want from the **Show Items**, **Show Only**, and **Sort by** lists, and then click **Go**.

Note To delete documents, document libraries, and lists from the **Storage Space Allocation** view, select the check box next to the documents, Document Libraries, or lists. Click **Delete**.

View All Sites Created Under Your Main Site

The **View Site Hierarchy** page displays workspaces and other sites created on your main site.

1 On the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Collection Administration**, click **Site hierarchy**.

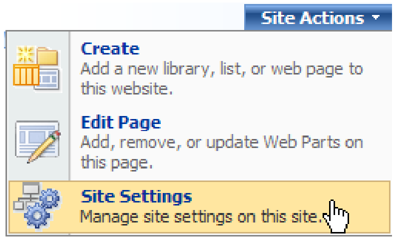
On the **View Site Hierarchy** page, a list of all sites under your main site appears. To go to the **Site Administration** page of a particular site, click **Manage**.

View Available Storage Space

Use the site collection usage summary page to view the space currently being used on your site and the remaining available space. To see details on how much space a particular Document Library, document, or List occupies, see "View Detailed Storage Space Information" earlier in this guide.

1 On the **Site Actions** menu, click **Site Settings**.

2 On the **Site Settings** page, under **Site Collection Administration**, click **Storage space allocation**.



About Team Sites

SharePoint Server 2007 Team Sites are Web sites created from a template and designed for team collaboration. They are hosted on the corporate network. Team Sites are a great way to coordinate team activities with document collaboration and storage.

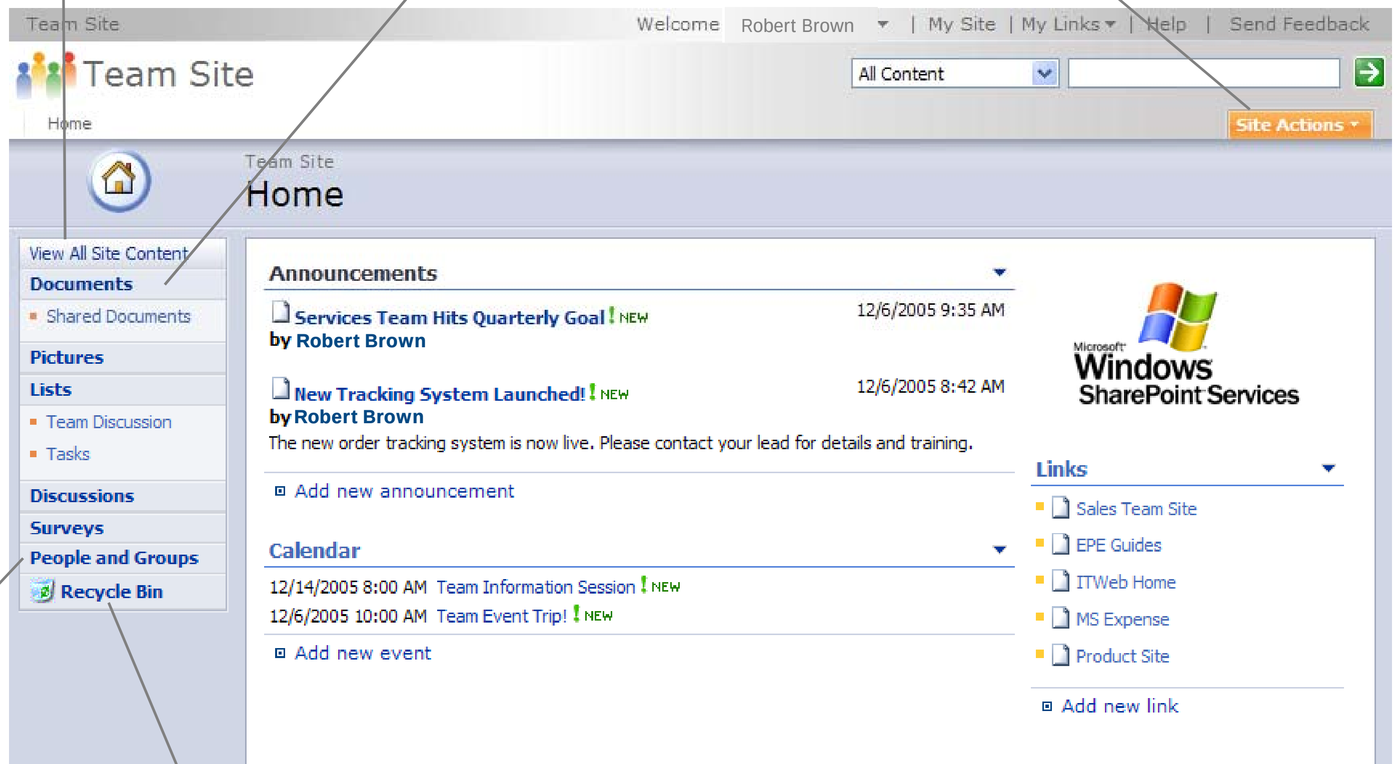
Topics in this guide include:

- Create a Team Site
- Add Content
- Upload Documents
- Edit Documents
- Create a New Document Library
- Allow Access to Your Site

Site Content
Gain quick access to all content on the site.

Document Libraries
Store team documents and collaborate on them.

Site Actions
Gain quick access to Team Site actions, including Create Content, Edit Page, and Site Settings.



People and Groups
Control who can access your site and what content they can view and edit.

Recycle Bin
Restore or permanently remove deleted items.

Create a Team Site

Create a new, stand-alone Team Site or create one within an existing site.

Create a a Stand-Alone Team Site

1 Go to *insert URL here*.

2 On the **SharePoint Site Request** page, click **Create a Team Site** for the region where most of your users are located.

3 On the **Local Search** page, read the information, scroll to the bottom, and then click the link.

4 On the **New SharePoint Site** page, complete the form, select the **Team Site** template, and then click **Create**.

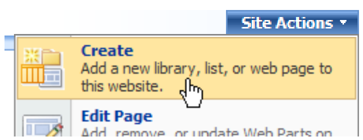
Note The URL you select cannot be changed after you create the site.

5 On the **Set Up Groups for this Site** page, add the Visitors, Members, and Owners of this site, and then click **OK**.

Create a Team Site Within an Existing Site

You must be the site owner, or have permissions from the site owner, to create a Team Site within an existing site.

1 Click **Site Actions**, and then click **Create**.



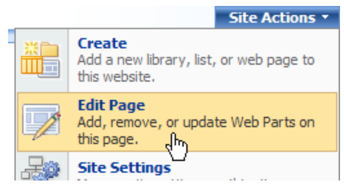
2 On **Create Page**, under **Web Pages**, click **Sites and Workspaces**.

3 On the **New SharePoint Site** page, complete the form. Next to **Template Selection**, be sure to click **Team Site**. Click **Create**.

Add Content

Add content to your site by using Web Parts. Web Parts are content “containers” used to display and arrange content on your site. Adding the correct Web Part to a page enables you to display text, related links, calendars, images, document libraries, other Web pages, and more.

1 Click **Site Actions**, and then click **Edit Page**. The page changes to Design Mode.



2 At the top of the column you want to add a Web Part to, click **Add a Web Part**.

3 In **Add Web Parts to [zone]** dialog box, select one or more Web Parts, and then click **Add**.

4 To add content to each Web Part, click **Add new *x*** at the bottom of the Web Part or follow the instructions in the Web Part.

5 When you have finished, in the upper-right section of the page, click **Exit Edit Mode**.

Lay Out Content

Arrange Web Parts on the page so that information is easy to find.

1. Click **Site Actions**, and then click **Edit Page**. The page changes to Design Mode.
2. Drag any Web Part by its title bar to a new location.
3. Click edit ▾ on the Web Part title bar to see additional options, including **Minimize**, **Delete**, and **Modify Shared Web Part**. Click × to close the Web Part.
4. When you have finished, click **Exit Edit Mode**.

Add New Pages

Organizing site content on separate pages helps team members find information. On these new pages, you can display document libraries, lists, discussion boards, and more.

1. Click **Site Actions**, and then click **Create**.
2. On **Create Page**, under **Web Pages**, click **Web Part Page**.
3. On **New Web Part Page**, type the name of your page, and then click a layout template.
4. Click a Document Library as a location to save the page, and then click **Create**.
5. To add Web Parts to the page, click **Add a Web Part**. In the **Add Web Parts to [zone]** dialog box, select the check box of the Web Part you want, and then click **Add**. When you have finished, click **Exit Edit Mode**.

Re-Order Navigation links

The left navigation menu (Quick Launch) has a default structure, and grows automatically as you add pages or other content to your site. Follow the procedure below to manually re-order the position of the links.

1. Click **Site Actions**, and then click **Site Settings**.
2. On the **Site Settings** page, under **Look and Feel**, click **Quick Launch.**
3. On the **Quick Launch** page, click **Change Order**.
4. On the **Top Link Bar** page, complete the form to specify the order of the Quick Launch links.
5. When you have finished, click **OK**.

Upload Documents

The first step in collaboration is to upload documents to the site.

1. Navigate to the appropriate Document Library, and then click **Upload**. (The name of the default Document Library is "Shared Documents.")
2. On the **Upload Document** page, click **Browse.**
3. Select the file in the **Choose file** window, click **Open**, and then click **OK**.

Edit Documents

Before making changes to a document, use the Check Out feature to prevents others from editing the document while you are working on it.

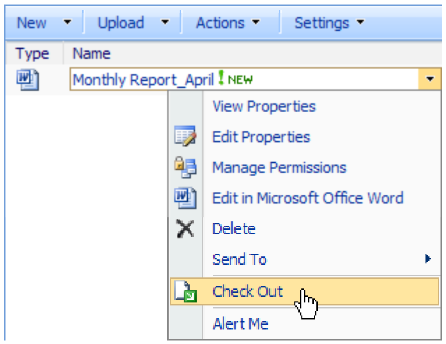
1 Navigate to the Document Library where the file is stored.

Tip If you have trouble finding the right library, go to the Quick Launch, and then click **Documents** to view all document libraries.

2 Point to the document, click the arrow next to it , click **Check Out**, and then click **OK**.

A dialog box asks if you want to work with a local copy of the file. This is the default behavior.

The Word icon changes to to indicate that the file is checked out.



3 Click the file name of the document, and then click **OK**.

4 When you have finished editing the document, save it and close the file, and then click **Yes**.

5 In the **Check In** dialog box, enter any comments, and then click **OK**.

Notes

- After you check out and edit a document, be sure to check it back in.
- If you edit a local copy of a file, you must check it in before others can see your changes.

Save Versions of Documents

To save a copy of the document each time a change is made, activate Version Control. This way, you can review changes made in each version and return to a prior version if necessary.

Note Version Control is turned off by default.

1 Navigate to the document library, click **Settings**, and then click **Document Library Settings**.

2 Under **General Settings**, click **Versioning settings**.

3 On the **Document Library Versioning Settings: [document library]** page, under **Document Version History**, click **Create major versions**, and then click **OK**.

Notes

- Saving multiple versions of a document uses more space on your site.
- To view previous versions of your documents, click the arrow next to the file name, and then click **Version History**.

Delete Prior Versions of Documents

If you have Version Control activated, a new copy of your document is saved every time it is changed. Because multiple copies take up more space on the site, it is good practice to delete versions you no longer need.

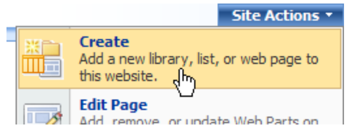
1 Navigate to the Document Library, point to the file name, click the arrow, and then click **Version History**.

2 On the **Version Saved for [file name]** page, click **Delete All Versions**. All prior versions of the document are deleted. The most recent version is retained.

Create a New Document Library

Creating additional document libraries is a good way to consolidate a set of documents related to a specific topic or project.

1 Click **Site Actions**, and then click **Create**.



2 On **Create Page**, under **Libraries**, click **Document Library**.

3 On the **New** page, complete the form, and then click **Create**.

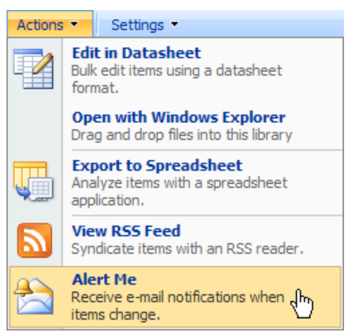
Create an Alert for a Document Library

Have messages sent to you when changes are made to library documents.

1 Navigate to the Document Library you want to receive alerts about.

Tip To find the right library, go to the left navigation menu, and then click **Documents** to view all document libraries.

2 On the **[library name]** page, click **Actions**, and then click **Alert Me**.



3 On the **New Alert** page, complete the form, and then click **OK**.

Give Access to Your Site

By default, there are three groups used for allowing access to a site: Visitor, Member, and Owner. When you add a user to a group, the user is given the permission level associated with the group.

To grant this permission level	Add to this group
Read: User can view site content.	**Visitor**
Contribute: User can view and edit site content.	**Member**
Full Control: User can view and edit site content, and modify site settings.	**Owner**

1 From within the site, on the left navigation menu, click **People and Groups**.

2 On the **People and Groups** page, at the top of the left navigation menu under **Groups**, click the group with the permissions you want to grant to your users.

3 On the **New** menu, click **Add Users**. On the **Add Users** page, in the **Users** text box, type the alias of the user you want to add. To add more than one user, separate each alias with a semicolon.

4 Click **Add users to a SharePoint group**. The group you previously specified is selected.

5 Select the **Send welcome e-mail to the new users** check box to send an e-mail alerting users they have been granted access to the site. You may also add a personalized message. Click **OK**.

Note To assign specific permissions instead of the permissions associated with a group, on the **Add Users** page, click **Give users permission directly**, and then select the check box for the appropriate permission.

Restore Deleted Items

Items in the Recycle Bin are permanently deleted after 30 days. Until that time, you can safely restore a deleted item.

1 On the left navigation menu (Quick Launch), click **Recycle Bin**.

2 Select the check box for one or more items, and then click **Restore Selection**. The restored items return to the section of the site from which they were deleted.

About Meeting Workspaces

A Meeting Workspace is a SharePoint Server 2007 Web site for creating and storing agendas, minutes, documents, and other information about your meetings. You create a Meeting Workspace at the same time you create an Microsoft® Office Outlook® 2007 meeting request.

Topics in this guide:

- Create a Meeting Workspace
- Link a Meeting Request to an Existing Workspace
- Change Workspace Permissions
- View an Existing Workspace
- Apply Agenda Items Across All Meetings
- Delete a Workspace

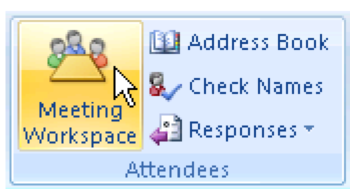
Create a Meeting Workspace

When you create a Meeting Workspace from within an Outlook 2007 meeting request, SharePoint Server 2007 gives your attendees access to the workspace.

Note To create a workspace from a meeting request, you must have Site Owner permissions (Full Control) to the site where you create the workspace. The default location for your workspace is your My Site.

1 In Outlook 2007, create a meeting request.

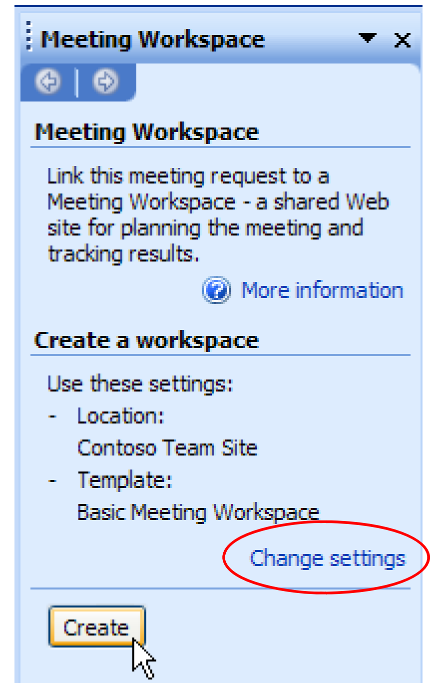
2 On the **Meeting** tab of the meeting request, in the **Attendees** group, click **Meeting Workspace**.



3 In the **Meeting Workspace** task pane, review the default settings for the new workspace. You'll see where the workspace will be located and what type of site template will be used.

- To accept the default settings, click **Create**.
- To change the default settings, click **Change settings**. In the **Select a location** list, click the site to put your Meeting Workspace on. If your meeting is a recurring team meeting, you may want to put the Meeting Workspace on your Team Workspace on your Team Site. If your Team Site is not listed, click **Other**, and then type the URL of your Team Site. **Note** Do not include .aspx.

In the **Select a template type** list, click the template you want. The Basic Meeting Workspace contains standard items to start with. Click **OK**, and then click **Create**.



4 In the meeting request, type a message if necessary, and then click **Send**. The meeting request is sent with a link to the Meeting Workspace.

5 To add content to the Meeting Workspace, go to it by right-clicking the meeting on your calendar, and then clicking **View Meeting Workspace**.

Link a Meeting Request to an Existing Workspace

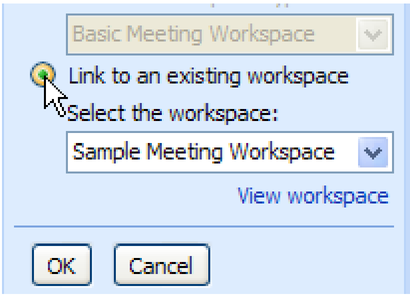
If you already have a Meeting Workspace, you can link it to an Outlook 2007 meeting request.

1 Open a new or existing meeting request. On the **Meeting** tab, in the **Attendees** group, click  .

2 In the **Meeting Workspace** task pane, under **Create a Workspace**, click **Change settings**.

3 Under **Select a Location**, click a site.

4 Under **Select a workspace**, click **Link to an existing workspace**.



5 In the **Select the workspace** list, click a workspace, and then click **OK**.

6 Under **Link to a workspace**, click **Link**.

Notes

- To find a Meeting Workspace on a Team Site, go to the left navigation menu (Quick Launch), and look under **Sites**. Meeting Workspaces should be listed there. If your Workspace is not listed, at the top of the navigation pane, click **View All Site Content**. Meeting Workspaces are listed under **Sites and Workplaces**.
- To find a Meeting Workspace on a My Site, go to the left navigation menu and click **View All Site Content**. Meeting Workspaces are listed near the bottom of the page.

Change Workspace Permissions

Meeting organizers are automatically added to the Attendees list and they are assigned Full Control permissions to the Meeting Workspace. Other attendees are assigned Contribute permissions. Organizers may change attendee permissions at any time.

1. On the **Meeting Workspace** home page, under **Attendees**, click **Manage attendees**.
2. On the **Attendees** page, under **Settings**, click **List Settings**.
3. On the **Customize Attendees** page, under **Permissions and Policies**, click **Permissions for this list**.
4. On the **Permissions: Attendees** page, under **Actions**, click **Manage Permissions of Parent**.
5. On the **Permissions: *[workspace name]*** page, select the check boxes of the users or groups for whom you want to change permissions.
6. Under **Actions**, click **Edit User Permissions**.
7. On the **Edit Permissions: *[workspace name]*** page, assign new user or group permissions. When you have finished, click **OK**.

View an Existing Workspace

Access a Meeting Workspace from a meeting request, from a meeting reminder, from your Outlook calendar, or from a SharePoint site.

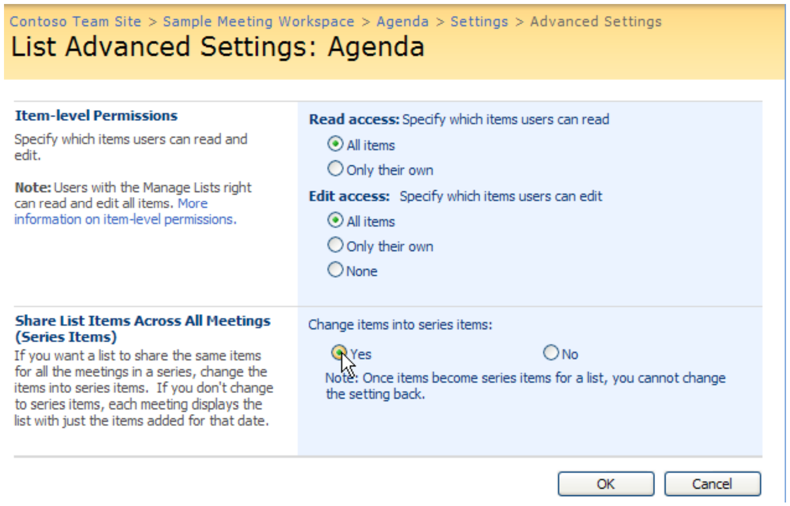
To access from	Do the following
A meeting request	Click the link to the Meeting Workspace.
A meeting reminder	On the **Meeting Services** list, click **View Meeting Workspace**.
An Outlook 2007 calendar	Right-click a meeting or appointment, and then click **View Meeting Workspace**.
A SharePoint Server 2007 site	In the left navigation menu (Quick Launch), click **View All Site Content**. On the **All Site Content** page, under **Sites and Workspaces**, click your Meeting Workspace.

Apply Agenda Items Across All Meetings

To have the same agenda items appear from meeting to meeting, change them into series items.

1. On the **Meeting Workspace** home page, on the **Agenda** title bar, click **Agenda**.
2. Under **Settings**, click **List Settings**.
3. On the **Customize Agenda** page, under **General Settings**, click **Advanced settings**.

4 On the **List Advanced Settings: Agenda** page, next to **Share List Items Across All Meetings**, click **Yes**, and then click **OK**.



Delete a Workspace

1 Under **Site Actions**, click **Site Settings**.

2 Under **Site Administration**, click **Delete this site**.

3 On the **Delete Web Site** page, click **Delete**.

Notes

- Deleting a Meeting Workspace deletes all information on the Meeting Workspace site. It does not delete meeting information contained in Outlook 2007. To do this, open the meeting request in Outlook 2007.
- Canceling or deleting a meeting in Outlook 2007 does not delete the Meeting Workspace associated with it.
- To recreate a deleted meeting request with a link to a Meeting Workspace, you must manually re-establish the link. See "Link a Meeting Request to an Existing Workspace" earlier in this guide for information on how to do this.
- Don't cancel a meeting request in order to send a new one with changed details. Instead, send an updated meeting request to attendees. This maintains the existing link between the meeting request and the Meeting Workspace.