

SHAREPOINT 2010 POWER USER GUIDE

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SharePoint 2010 is a complex system that has many gadgets and functionality associated with it. As SharePoint 2010 is starting to be used more – the subject matter is becoming more technical and complex. Therefore, many users just need to use SharePoint 2010 for their daily jobs and thus this powerusers guide does that. It peels away the pure technical details and shows one step by step many key features and functionality for the casual SharePoint 2010 user. The following document was created using a local SharePoint Foundation version – as well as a SharePoint Enterprise edition.

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Overview of Users

SharePoint has several user bases which are worthy of an overview – these include:

Business Owner/Champion – this is typically the individual(s) in the organization whom make the decisions on what is needed for the business. They may suggest new features and functionality which should be implemented. They also will champion SharePoint as a platform in the various business meeting settings they partake in.

Power User/Site Owner – this is typically an individual(s) whom maintain a section of a SharePoint site and subsites on a daily basis. They are responsible for content creation and updates as well as layout and permissions to the site they manage.

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Site Collection Administrator – this is an individual(s) whom are responsible for the whole site and subsites. A site collection administrator has responsibility for additional features and functionality which usually involve customizations.

System Administrator – this is an individual(s) whom typically are responsible for the servers themselves and usually are in charge of backups of data and server maintenance.

Developer – this is an individual(s) whom typically write the code that encompasses custom features and functionality which are beyond out of the box techniques that are needed and asked for.

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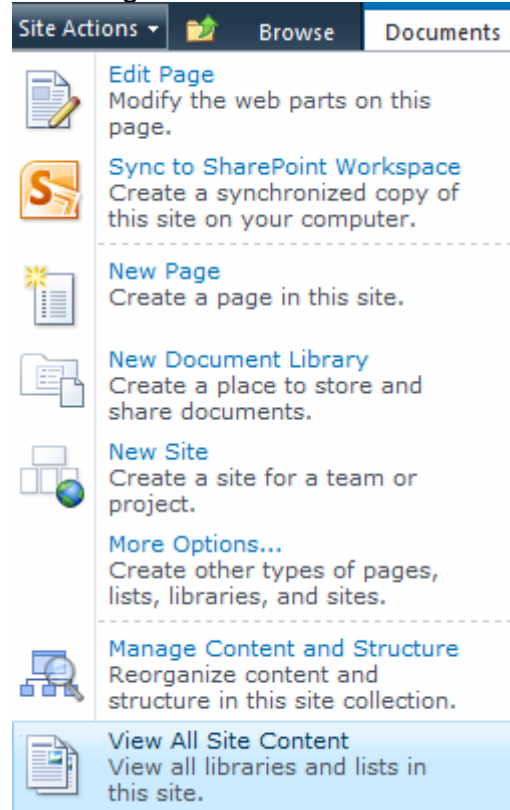
How to Add a Folder

Follow the steps below to add a new folder to a document library.

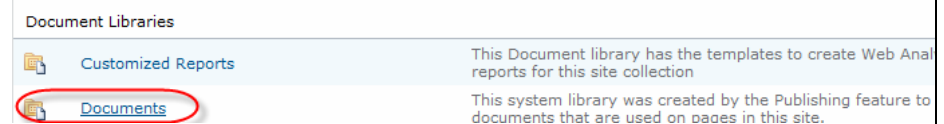
Folders can be nested – meaning one can have one folder inside another.

1. Navigate to the administrative side of the document library. This example shown requires a user have contribute access or greater.

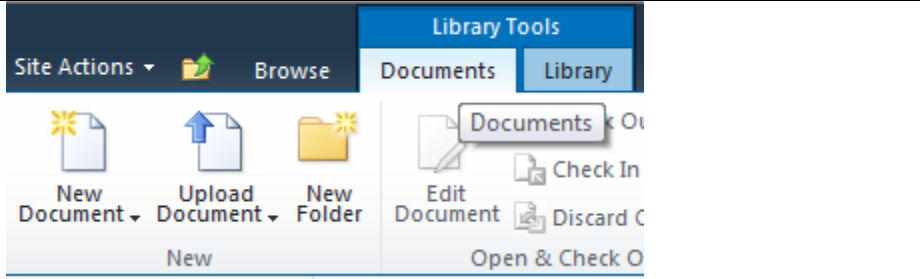
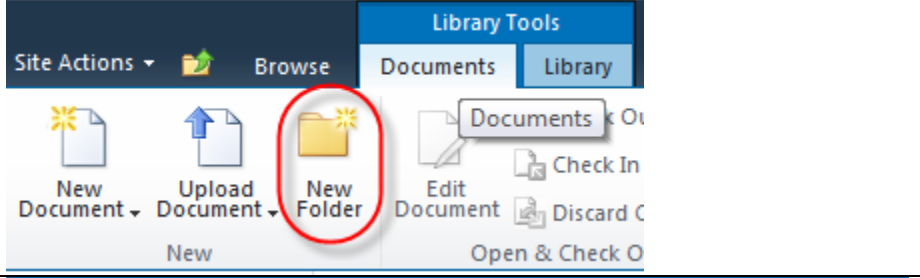
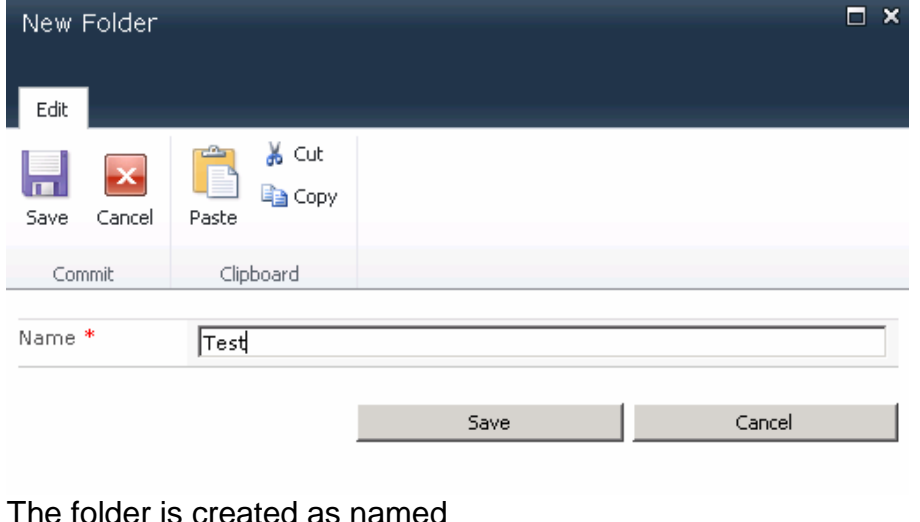
Typically this is done by selecting Site Actions -> View All Site Content – then selecting the desired document library see examples below:



Then in this case I've selected Documents




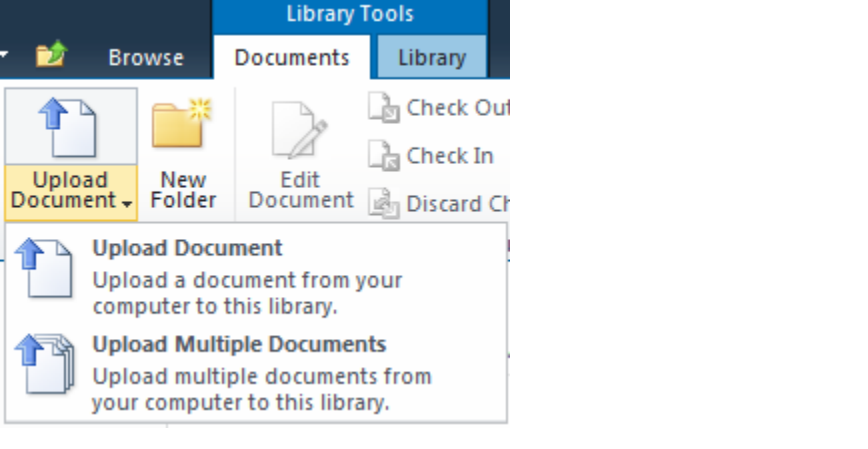
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<p>2. In the ribbon under Library Tools click the Documents tab</p>	 <p>The screenshot shows the SharePoint ribbon with the 'Library Tools' tab selected. The 'Documents' sub-tab is also selected. The 'New' group contains 'New Document', 'Upload Document', and 'New Folder'. The 'Documents' group contains 'Edit Document', 'Check In', 'Discard', and 'Open & Check Out'.</p>
<p>3. From the ribbon, select the "New Folder" option.</p>	 <p>The screenshot is identical to the previous one, but the 'New Folder' button in the 'New' group is circled in red.</p>
<p>4. Enter a name and click on the Save button.</p>	 <p>The screenshot shows the 'New Folder' dialog box. It has a title bar 'New Folder' and an 'Edit' button. Below are 'Save', 'Cancel', 'Paste', 'Cut', and 'Copy' buttons. There are also 'Commit' and 'Clipboard' buttons. A text field labeled 'Name *' contains the text 'Test'. At the bottom are 'Save' and 'Cancel' buttons.</p> <p>The folder is created as named</p>

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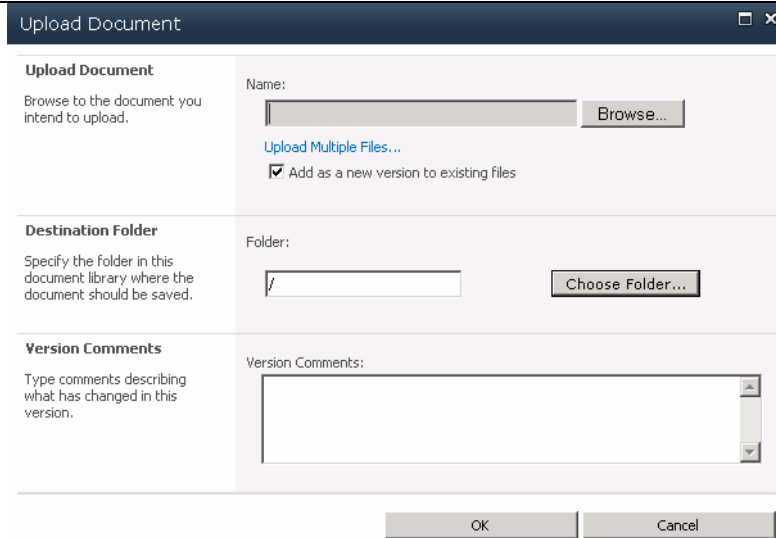
How to Add Documents

Follow the steps below to add new documents to a document library.

<p>1. From the site where the document library is located click Site Actions -> View all Site Content then under Document Libraries click on the desired name of the document library on the page to which content should be added.</p>	 A screenshot of the 'Document Libraries' page in a SharePoint environment. It shows two libraries: 'Customized Reports' and 'Documents'. The 'Documents' library is circled in red. The 'Documents' library description states: 'This system library was created by the Publishing feature to store documents that are used on pages in this site.' The creation time is '0 8 days ago'.
<p>2. To upload a document or documents, click on in the Ribbon from Library Tools -> Documents -> Upload Document and select to Upload Document or Upload Multiple Documents.</p>	 A screenshot of the 'Library Tools' ribbon in a SharePoint environment. The 'Documents' group is selected, showing options like 'Upload Document', 'New Folder', 'Edit Document', 'Check Out', 'Check In', and 'Discard'. The 'Upload Document' dropdown menu is open, showing two options: 'Upload Document' (Upload a document from your computer to this library.) and 'Upload Multiple Documents' (Upload multiple documents from your computer to this library.).

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3. Upload Document: Click on the Browse button to find the desired document, much like you would attach a document to an email and then click OK.



Upload Document

Upload Document
Browse to the document you intend to upload.

Name:
[Text Field]

[Upload Multiple Files...](#)
 Add as a new version to existing files

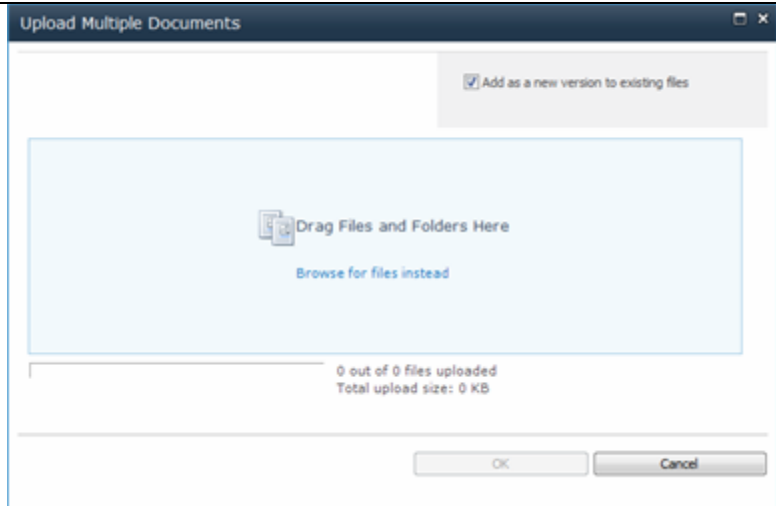
Destination Folder
Specify the folder in this document library where the document should be saved.

Folder:
[Text Field]

Version Comments
Type comments describing what has changed in this version.

Version Comments:
[Text Area]

4. Upload Multiple Documents: Drag the documents from the local PC or file share into the box that says 'Drag Files and Folders Here' Click OK.



Upload Multiple Documents

Add as a new version to existing files


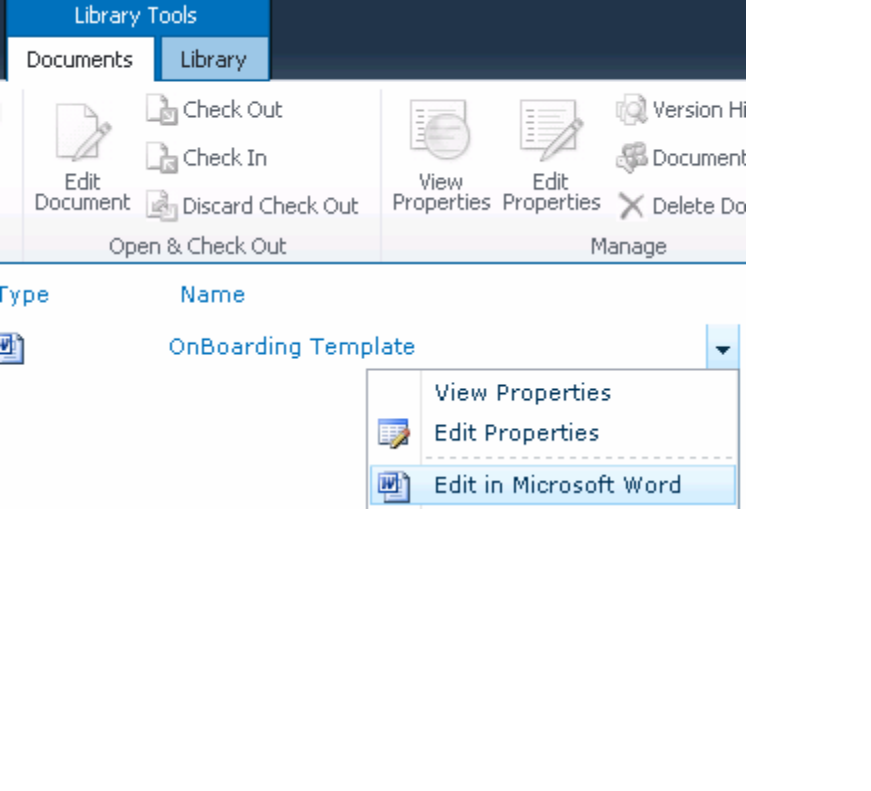
Drag Files and Folders Here
Browse for files instead

0 out of 0 files uploaded
Total upload size: 0 KB

NOTE: Documents must be located in an accessible location, such as a user's pc or a network file share or server. Also it is a good idea to not display more than 5000 items in a folder.

How to Modify Existing Documents

Follow the steps below to modify documents in a document library. These steps can also be used to change the name of a folder.

<p>1. From the site where the document library is located click Site Actions -> View all Site Content then under Document Libraries click on the desired name of the document library on the page to which content should be modified.</p>	 <p>The screenshot shows a 'Document Libraries' page with two libraries: 'Customized Reports' and 'Documents'. The 'Documents' library is circled in red. The 'Documents' library description states: 'This system library was created by the Publishing feature to store documents that are used on pages in this site.' The 'Customized Reports' library description states: 'This Document library has the templates to create Web Analytics custom reports for this site collection.'</p>
<p>2. From the Documents or Library view hover the mouse over the desired document. Click on the drop-down arrow that appears to the right of the document.</p> <p>From the menu, select the "Edit in Microsoft Office <application>" option.</p> <p>This option will change depending on the Office application that is</p>	 <p>The screenshot shows the 'Library Tools' menu with the 'Library' tab selected. The menu includes options: 'Edit Document', 'Check Out', 'Check In', 'Discard Check Out', 'Open & Check Out', 'View Properties', 'Edit Properties', 'Version History', 'Document Properties', 'Delete Document', and 'Manage'. A document titled 'OnBoarding Template' is shown with a dropdown menu open, highlighting the 'Edit in Microsoft Word' option.</p>

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<p>related to the document.</p> <p>The document will open in the correct application. Make any necessary changes and click the save button. Changes will be saved to the site.</p>	
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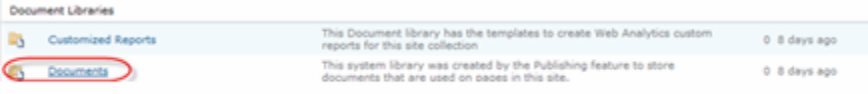
NOTE: If a user simply clicks on a document, the document will open and the user will be able to make changes, but the changes will not be saved to the site. When a user opens a document by simply clicking on the document, they open a Read-Only copy of the document. They can save their changes to their desktop, file share or network server but the changes will not be saved into the document library for others to see.

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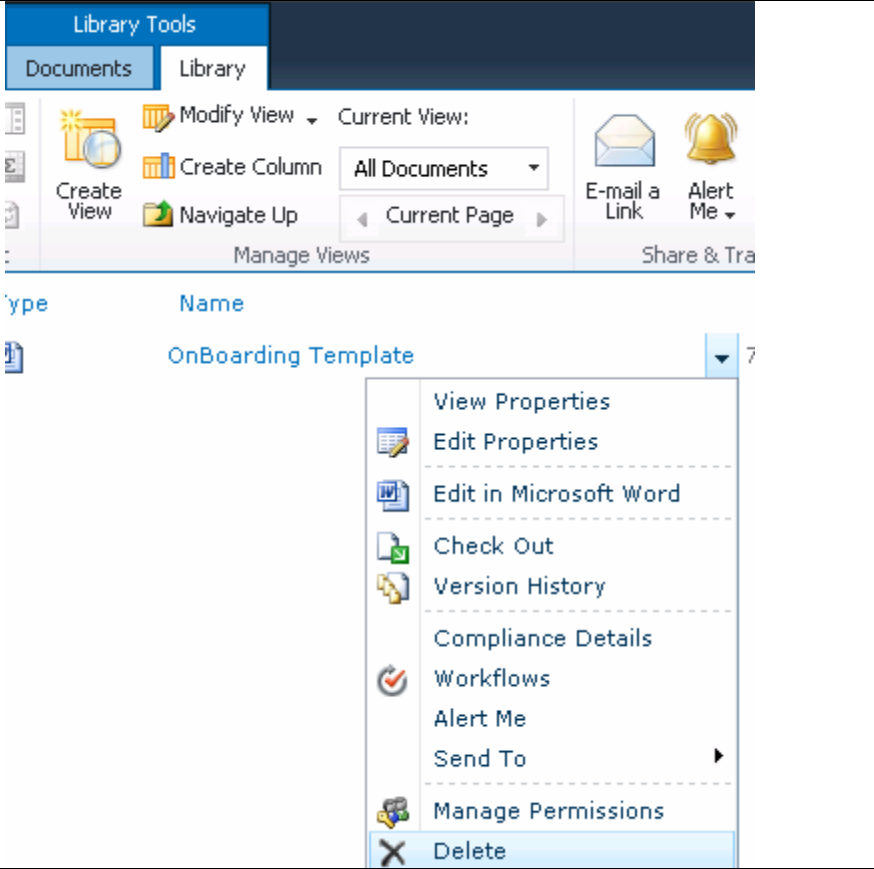
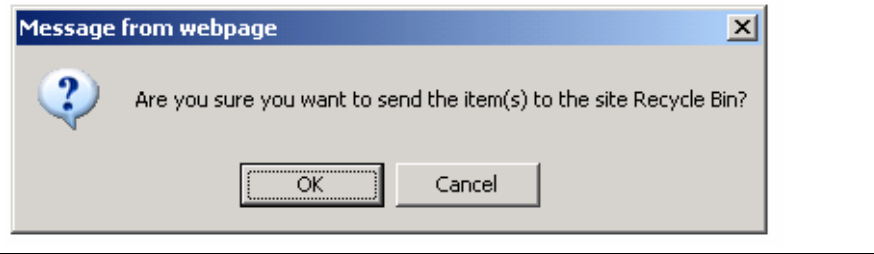
How to Delete Documents

Follow the steps below to delete a document from the document library.

These steps can also be used to delete a folder. NOTE: If a folder is deleted, everything under the folder will also be deleted.

<p>1. From the site where the document library is located click Site Actions -> View All Site Content then under Document Libraries click on the desired name of the document library on the page to which content should be deleted.</p>	 <p>The screenshot shows a 'Document Libraries' section with two entries. The first entry is 'Customized Reports' with a description: 'This Document library has the templates to create Web Analytics custom reports for this site collection' and a date '0 8 days ago'. The second entry is 'Documents' with a description: 'This system library was created by the Publishing feature to store documents that are used on pages in this site.' and a date '0 8 days ago'. The 'Documents' entry is circled in red.</p>
<p>2. From the Documents or Library view, hover the mouse over the desired document.</p>	
<p>3. Click on the drop-down arrow that appears to the right of the document.</p>	

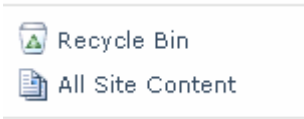
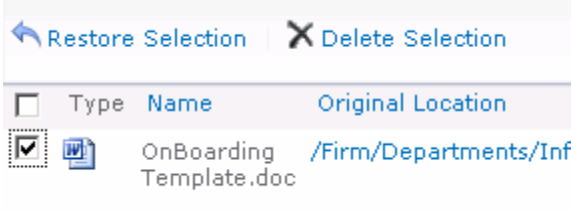
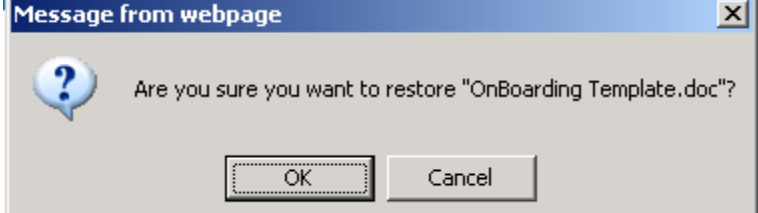
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<p>4. From the drop-down list, select the Delete option.</p>	 <p>The screenshot shows the 'Library Tools' ribbon in SharePoint. The 'Library' tab is active. The 'Manage Views' group contains 'Create View', 'Modify View', 'Create Column', and 'Navigate Up'. The 'Current View' dropdown is set to 'All Documents'. The 'Share & Tra' group contains 'E-mail a Link' and 'Alert Me'. Below the ribbon, a table lists items with columns 'Type' and 'Name'. The item 'OnBoarding Template' is selected, and its context menu is open, showing options like 'View Properties', 'Edit Properties', 'Edit in Microsoft Word', 'Check Out', 'Version History', 'Compliance Details', 'Workflows', 'Alert Me', 'Send To', 'Manage Permissions', and 'Delete'.</p>
<p>5. A pop-up will appear to verify that the document should be deleted. Click OK if the document should be deleted.</p>	 <p>The screenshot shows a 'Message from webpage' dialog box. It contains a question mark icon and the text: 'Are you sure you want to send the item(s) to the site Recycle Bin?'. There are two buttons: 'OK' and 'Cancel'.</p>
<p>6. The document will be deleted from the system.</p>	<p>(This cell is empty in the original image, indicating the final state after deletion.)</p>

Recycle Bin

If a document or folder is deleted from the document library by accident, the user by default has 30 days to recover the document. This is done by using the Recycle Bin option on the site.

To recover a deleted document or folder, follow the steps below.

1. Click on the "Recycle Bin" link that is located in the left hand column of the site.	
2. Find the document or folder in the list.	
3. Mark the document by placing a check in the box next to the document.	
4. Click the "Restore Selection" option.	
5. A pop-up dialog box will be displayed. Click on the OK button if the correct document has been selected and should be restored.	

File and URL Administrative Notes

- Document URL Length

The maximum length of a URL for a file is 260 characters. This includes the folder structure above the file. Thus a folder name and a file name cannot be more than 128 characters. It should be noted that in SharePoint if a file or folder has a space – it will be shown with a %20 in the URL.

If a file is attempted to be uploaded that has a combined URL that is too long an error will be displayed:

“The specified file or folder name is too long. The URL path for all files and folders must be 260 characters or less (and no more 128 characters for any single file or folder name in the URL). Please type a shorter file or folder name.”

- Allowed Document Types

The following document types are commonly allowed to be added to a Document Library.

- Microsoft Word (.doc)
- Microsoft Excel (.xls)
- Microsoft PowerPoint (.ppt)
- Microsoft Project (.mmp)
- Microsoft Visio (.vsd)
- Adobe Acrobat (.pdf)
- Text (.txt)
- Rich-Text document (.rtf)

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- Images (.jpg, .gif, .bmp)
- HTML page (.htm, .html)
- URL

- Special Characters/Restricted Characters

The following characters cannot be used when naming folders or files (<document name>.extension).

- / - forward slash
- \ - back slash
- : - colon
- * - asterisks
- ? – question mark
- " – double quotes
- < - less than
- > - greater than
- | - pipe
- # - pound
- <TAB>
- { - left bracket
- } – right bracket
- % - percentage
- ~ - tilde
- & - ampersand

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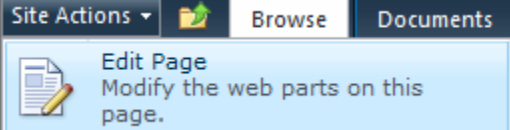
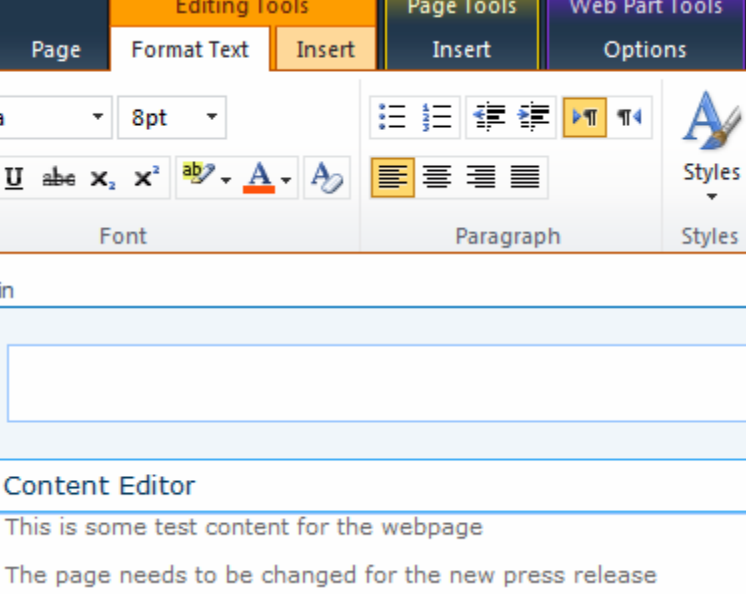
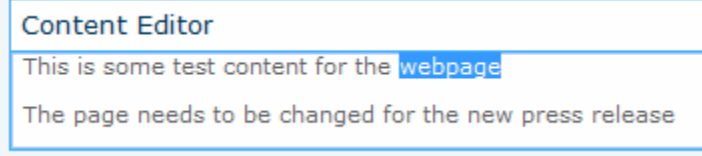
PERSONAL NOTES:

WEBSITE: [HTTP://WWW.KMO.NAME](http://www.kmo.name)
E-MAIL: ONEILLWEBSITE@VERIZON.NET
USE ALL COMMANDS AT OWN RISK

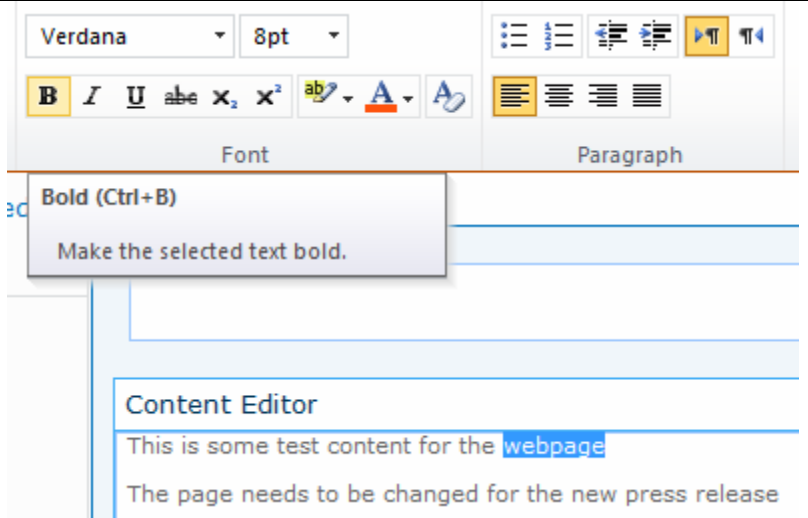
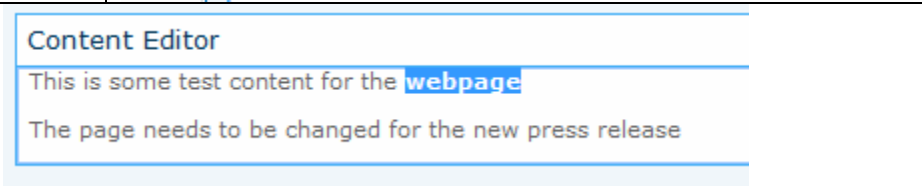
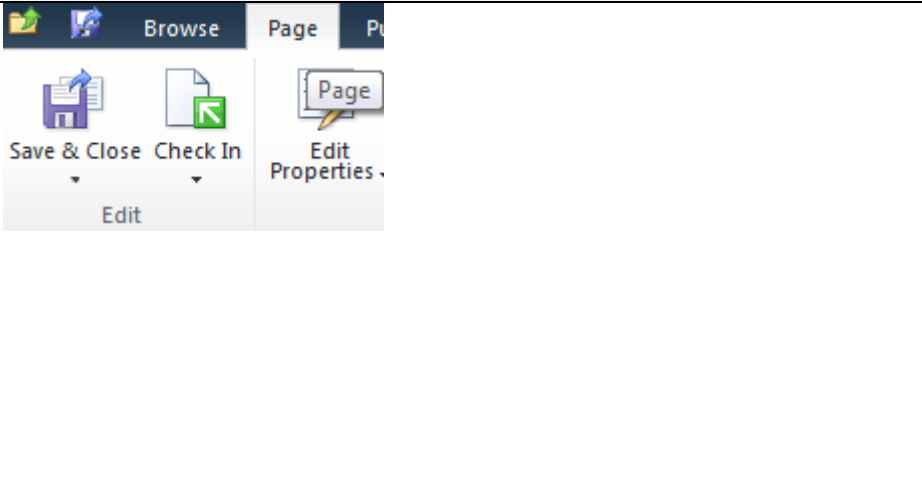
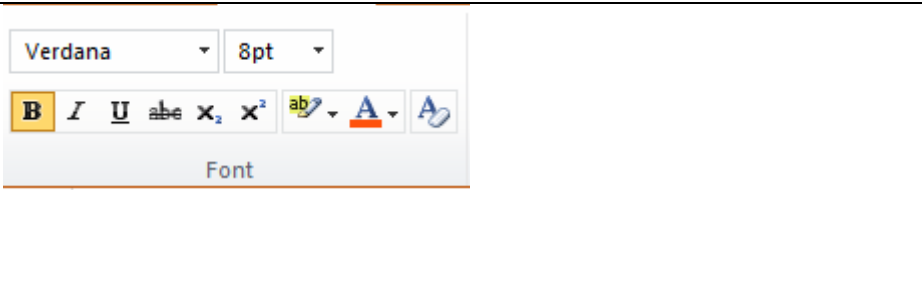
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Content Editing

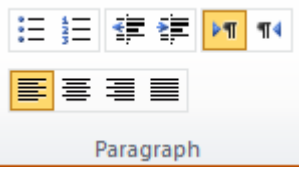
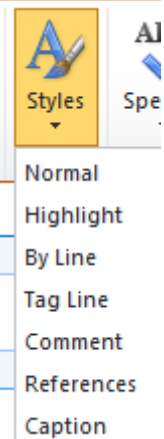
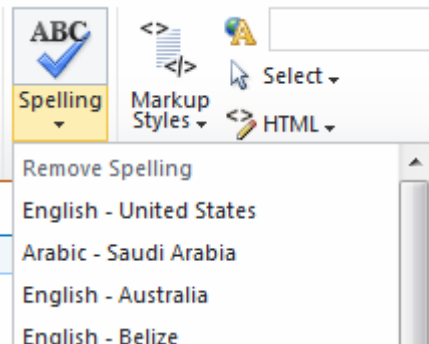

Follow the steps below to edit existing content on the site or team site you manage or add content to.

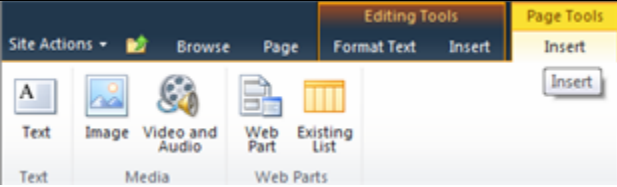
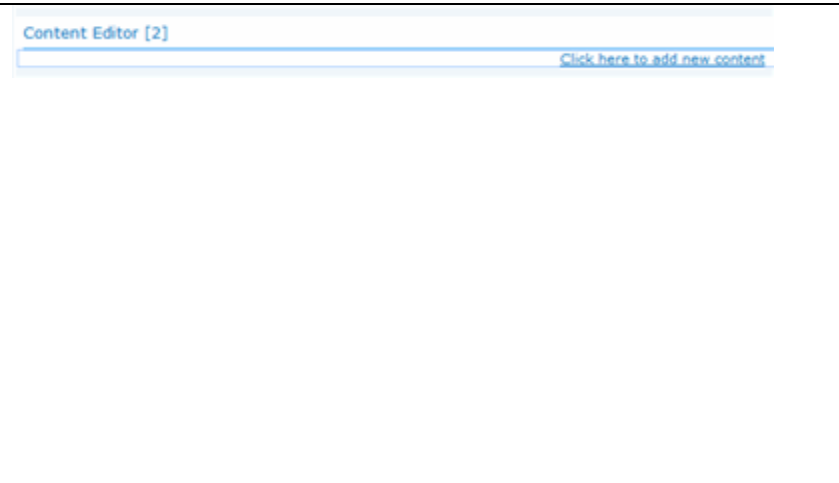
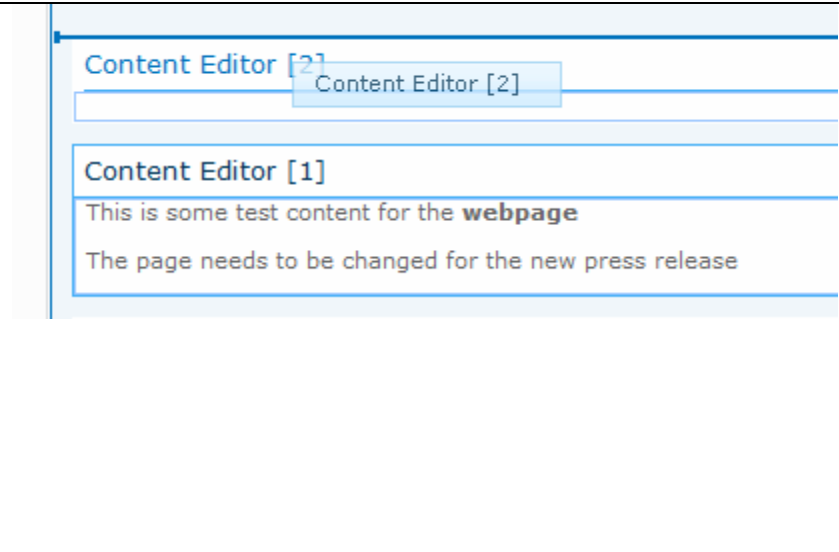
<p>1. From the page that content is to be edited select Site Actions -> Edit Page.</p>	 <p>The screenshot shows the 'Site Actions' dropdown menu. The 'Edit Page' option is highlighted, with a sub-menu description: 'Modify the web parts on this page.'</p>
<p>2. Likely a Content Editor web part will house the content that needs changed. Therefore place the cursor in the text block that needs changed or highlight the area that needs changed and make the desired edit(s) as you would while using any text editor.</p>	 <p>The screenshot shows the 'Content Editor' web part interface. It includes a ribbon with 'Editing Tools', 'Page Tools', and 'Web Part Tools'. The 'Editing Tools' ribbon has 'Format Text' and 'Insert' tabs. Below the ribbon are 'Font' and 'Paragraph' toolbars. The main content area contains the text: 'This is some test content for the webpage' and 'The page needs to be changed for the new press release'.</p>
<p>3. In the example here the text webpage has been highlighted.</p>	 <p>The screenshot shows the 'Content Editor' web part with the text 'webpage' in the first line highlighted in blue.</p>

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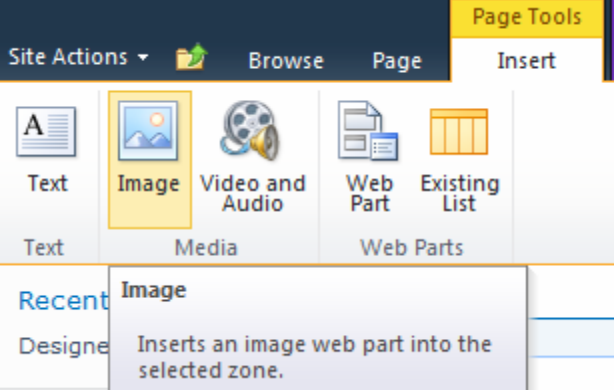
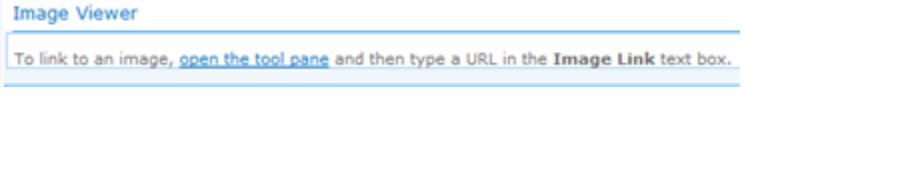
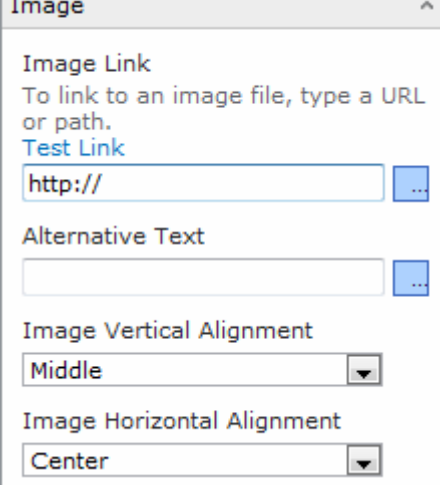
<p>4. In the Font menu the Bold is then selected and using the live preview the text is shown right away bolded.</p>	
<p>5. On the right the text is now bolded.</p>	
<p>6. If this were the only change to be made to the page an editor would then select the Page tab then Save and Close – which would then essentially publish the page.</p>	
<p>7. If further edits to the page were so desired other font elements from the Font menu could be selected.</p>	

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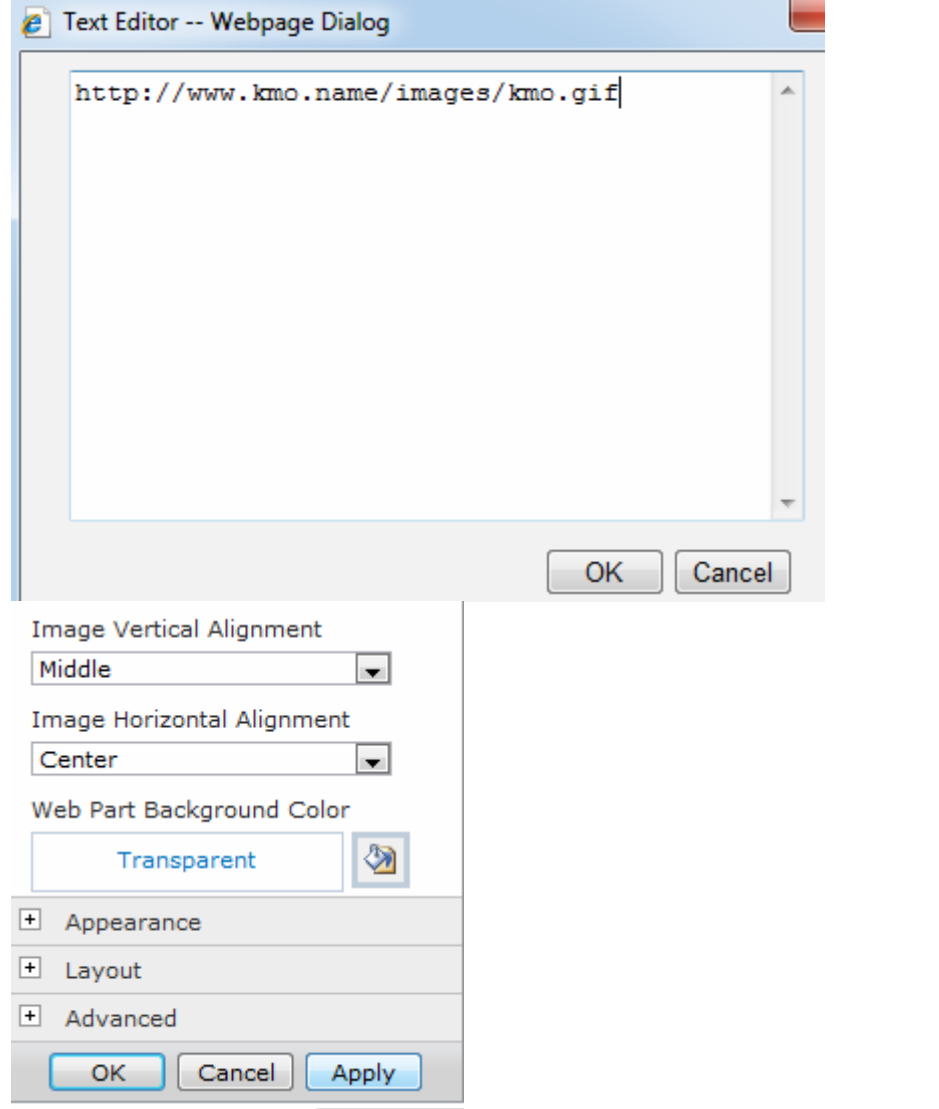
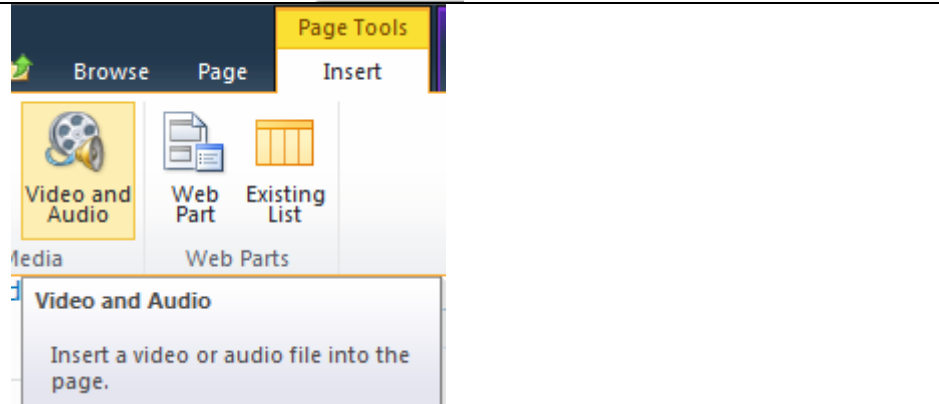
<p>8. Additionally other edits to the page could be done by using the Paragraph menu.</p>	
<p>9. Selecting the Styles menu allows for content font Styles to be set.</p>	
<p>10. To spell check a page select the Spelling selection and the language that the content is written in.</p>	
<p>11. To add a desired markup select the Markup Styles selection then the desired selection.</p>	

<ul style="list-style-type: none">• Page Tools/Web Parts <p>12. To add new sections or media type content select from the Page Tools tab -> Insert.</p>	
<p>13. To add a new Text block to a page select that option. The Content Editor will appear on the page – to add content click the link that says ‘Click here to add new content’.</p>	
<p>14. To move the text editor to a different location on the page simply select the editor and move it to the desired area. This same process can be followed for any of the Page Tools set.</p>	

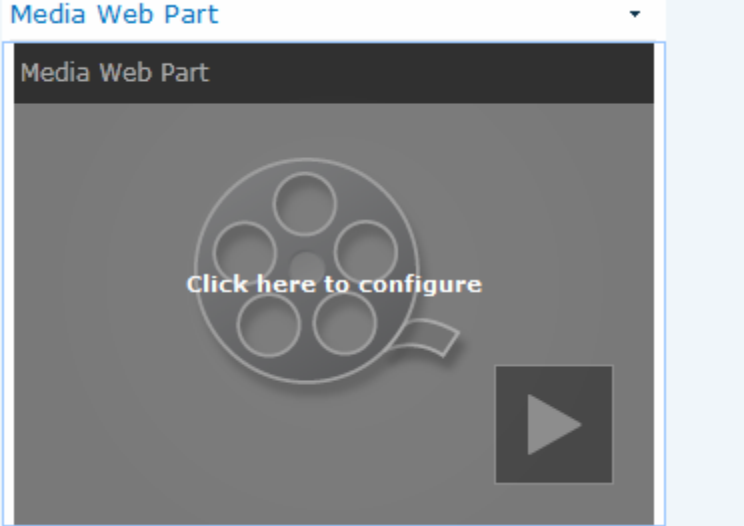
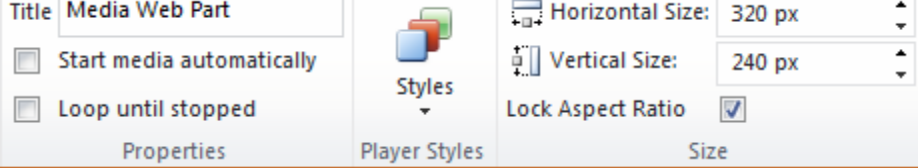
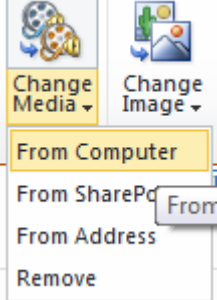
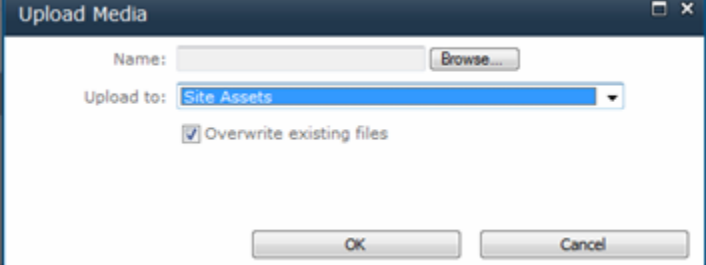
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<p>15. To add an image select from the Page Tools tab -> Insert -> Image.</p>	 <p>The screenshot shows the 'Page Tools' ribbon in SharePoint. The 'Image' option is highlighted in the 'Media' group. A tooltip for the 'Image' option is visible, stating: 'Inserts an image web part into the selected zone.'</p>
<p>16. The part is added to the page as an Image Viewer object.</p>	 <p>The screenshot shows the 'Image Viewer' web part. It contains a text box with the instruction: 'To link to an image, open the tool pane and then type a URL in the Image Link text box.'</p>
<p>17. In the Image web part box that appears to the right click the ... of the http:// item and enter in the URL of where the desired image is located and click OK. It is then recommended to click the Test Link link to make sure the image is typed correctly. Enter in other Alternative Text and select desired Alignments before clicking Apply -> OK.</p>	 <p>The screenshot shows the configuration pane for the 'Image' web part. It includes the following fields and options:</p> <ul style="list-style-type: none">Image Link: To link to an image file, type a URL or path. Includes a 'Test Link' link and a text box containing 'http://' with a blue ellipsis button to its right.Alternative Text: A text box with a blue ellipsis button to its right.Image Vertical Alignment: A dropdown menu set to 'Middle'.Image Horizontal Alignment: A dropdown menu set to 'Center'.

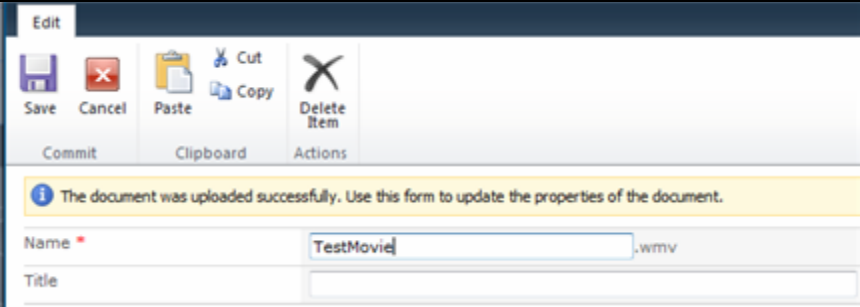
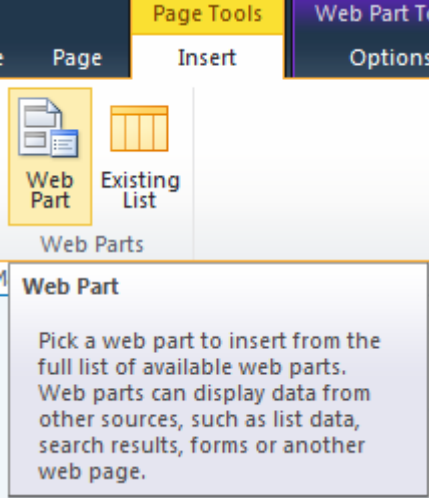
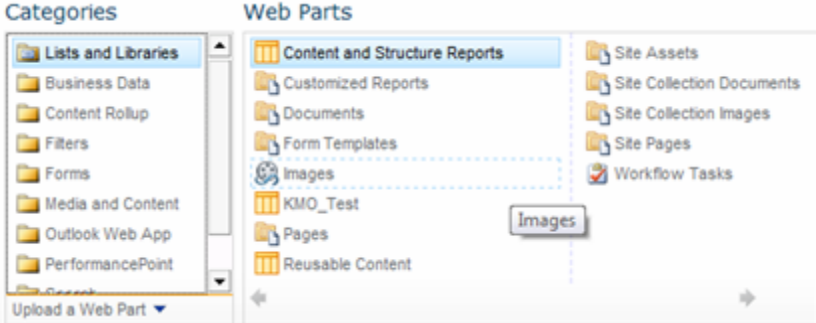
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<p>18. To add a media item select from the Page Tools tab -> Insert -> Video and Audio.</p>	

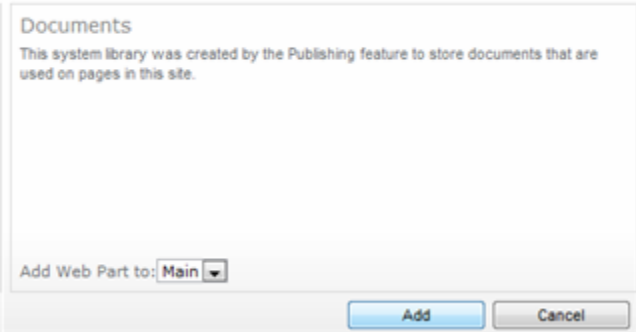
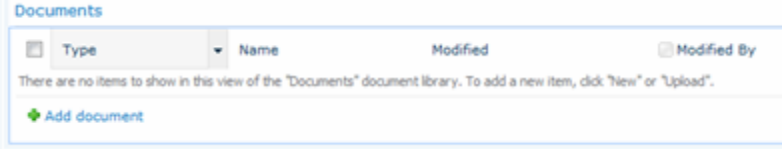
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<p>19. The Media Web Part is added. Where it says 'Click here to continue' do so. NOTE: This is a Silverlight Control.</p>	
<p>20. Select the desired Properties, Player Styles and Size.</p>	 <p>The configuration pane is divided into three sections: Properties, Player Styles, and Size. The Properties section includes checkboxes for 'Start media automatically' and 'Loop until stopped'. The Player Styles section has a 'Styles' dropdown menu. The Size section includes 'Horizontal Size' (320 px), 'Vertical Size' (240 px), and a 'Lock Aspect Ratio' checkbox which is checked.</p>
<p>21. Select the Change Media selection then select where the desired media is located.</p>	 <p>The 'Change Media' dropdown menu is open, showing options: 'From Computer', 'From SharePoint', 'From Address', and 'Remove'. The 'From Computer' option is highlighted in yellow.</p>
<p>22. In this example From Computer was selected – and thus selecting Browse then selecting the media to be uploaded and where it is to be uploaded should be followed and click OK when</p>	 <p>The 'Upload Media' dialog box is shown. It has a 'Name' field with a 'Browse...' button. The 'Upload to' dropdown is set to 'Site Assets'. There is a checked checkbox for 'Overwrite existing files'. At the bottom are 'OK' and 'Cancel' buttons.</p>

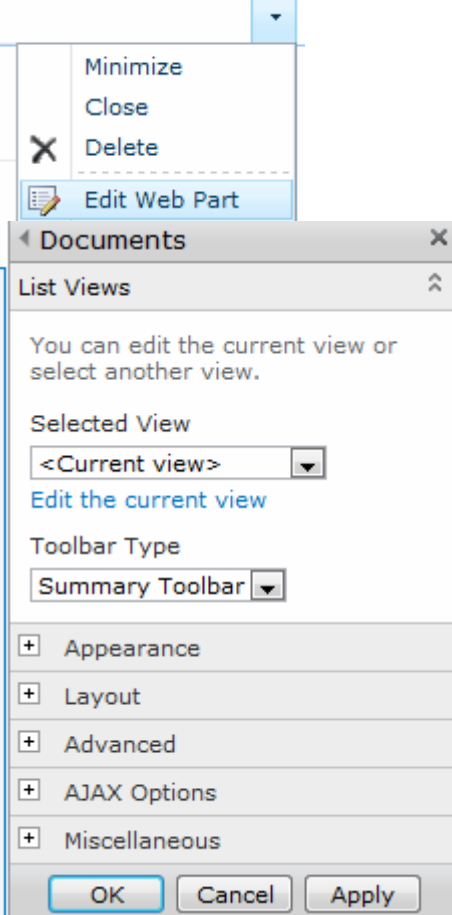
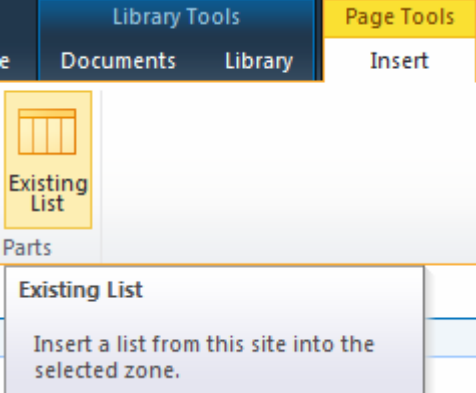
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<p>done.</p>	
<p>23. If the media item is uploaded with success a message as shown is displayed and at this point one can add a Title for the media item and then click Save.</p>	
<p>24. To add a web part item select from the Page Tools tab -> Insert -> Web Part.</p>	
<p>25. Select from the Categories menu on the left hand side then from Web Parts on the right hand side the desired selection.</p>	

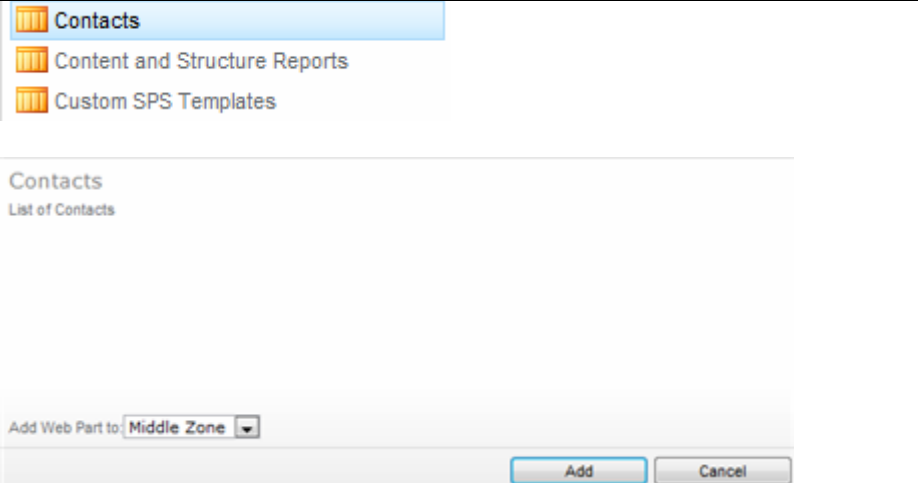
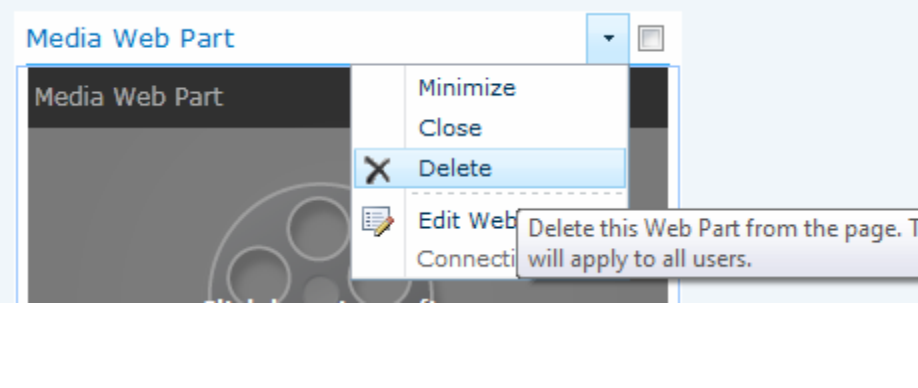
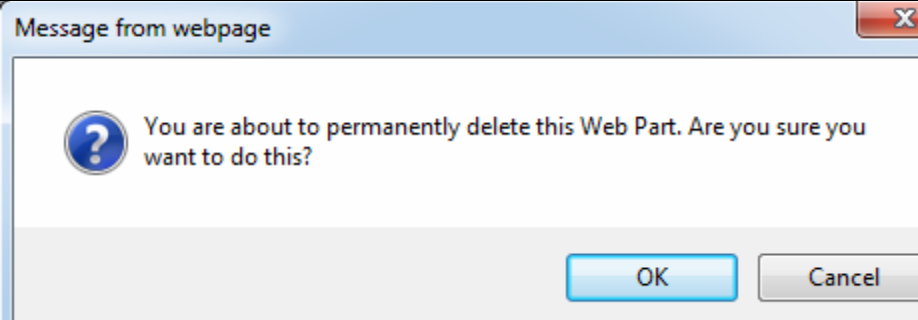
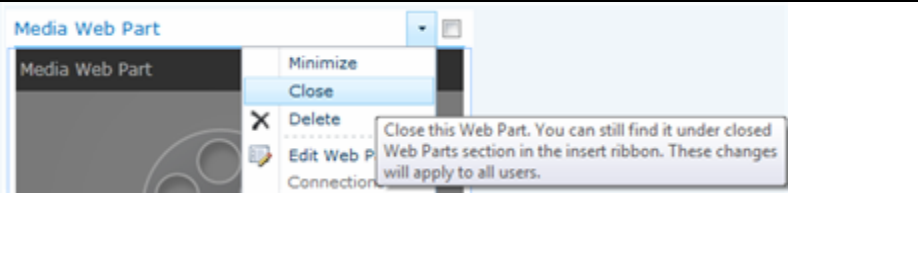
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<p>26. On the far right hand side a short description of the web part is given and if so desired where it says Add Web Part to – make a selection which in most cases will be Main which is the center of the page. Click Add to add the web part to your page.</p>	 <p>The screenshot shows a dialog box titled "About the Web Part" for a web part named "Documents". The text inside reads: "This system library was created by the Publishing feature to store documents that are used on pages in this site." Below the text is a dropdown menu labeled "Add Web Part to:" with "Main" selected. At the bottom right are "Add" and "Cancel" buttons.</p>
<p>27. The web part is added to the page.</p>	 <p>The screenshot shows a document library view titled "Documents". It has a table header with columns: "Type", "Name", "Modified", and "Modified By". Below the header, it says "There are no items to show in this view of the 'Documents' document library. To add a new item, click 'New' or 'Upload'." There is an "Add document" button with a green plus icon.</p>
<p>28. Common attributes of web parts are the following:</p>	<p>Appearance – the title bar and height and width of the web part Layout - how the webpart is positioned on the page. Advanced – how the user interface will be displayed.</p> <p>Under Appearance there are several items of interest: Title – the title of the webpart that is displayed. Height and Width – the actual height and width in pixels of the webpart. Chrome State – if selected this indicates if the web part is displayed minimized or maximized. Chrome Type (Title and Border) – the default is that there is not a title bar or border, or a title only, border only and title and border.</p> <p>Under Advanced there are several of interest: Allow close – allows for the ability to have users close or not close the web part – if a check box is checked or not. Allow editing in Personal View – if checked only site owners and designers can customize the web part.</p>

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	<p>Title URL – Adding a URL makes that URL a clickable item that users will go to when clicked.</p> <p>Help URL – If a URL is added then a help button is depicted.</p> <p>Title Icon Image URL – Allows if a URL is added for an image to be displayed in the title bar.</p>
<p>29. To change the properties of the added web part click in the upper right of the web part the drop down arrow and select Edit Web Part. On the right hand side make any adjustments then click Apply -> OK.</p>	
<p>30. To add a list item select from the Page Tools tab -> Insert -> Existing List.</p>	

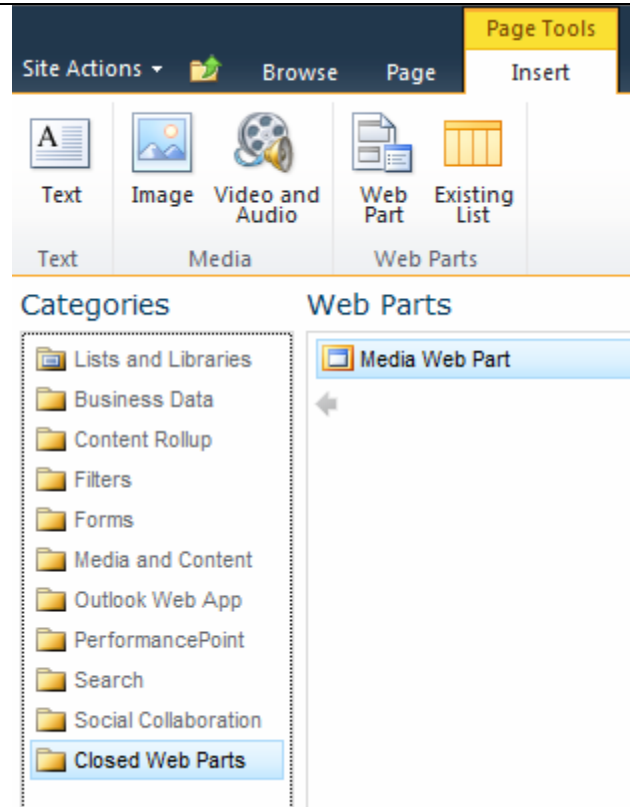
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<p>31. Select the already existing list from the left hand side Web Part menu. Then on the right hand menu in the About the Web Part select the Add button and the list is added to the page.</p>	 <p>The screenshot shows the SharePoint Web Part gallery. On the left, a list of web parts is displayed: 'Contacts', 'Content and Structure Reports', and 'Custom SPS Templates'. The 'Contacts' web part is selected. On the right, the 'About the Web Part' pane is visible, showing the title 'Contacts' and a description 'List of Contacts'. At the bottom of this pane, there is a dropdown menu labeled 'Add Web Part to:' with 'Middle Zone' selected, and two buttons: 'Add' and 'Cancel'.</p>
<p>32. If a web part is added accidentally it can easily be deleted. Assuming one is in edit mode select the web part properties and click Delete.</p>	 <p>The screenshot shows a 'Media Web Part' on a page. A context menu is open over the web part, with the 'Delete' option selected. The menu also includes 'Minimize', 'Close', 'Edit Web Part', and 'Connect to Content'. A tooltip is visible over the 'Delete' option, stating: 'Delete this Web Part from the page. These changes will apply to all users.'</p>
<p>33. Click OK when prompted</p>	 <p>The screenshot shows a dialog box titled 'Message from webpage'. It contains a question mark icon and the text: 'You are about to permanently delete this Web Part. Are you sure you want to do this?'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.</p>
<p>34. Another option to be aware of is if a web part holds information that is sometimes needed (for example a</p>	 <p>The screenshot shows a 'Media Web Part' on a page. A context menu is open over the web part, with the 'Close' option selected. The menu also includes 'Minimize', 'Delete', 'Edit Web Part', and 'Connect to Content'. A tooltip is visible over the 'Close' option, stating: 'Close this Web Part. You can still find it under closed Web Parts section in the insert ribbon. These changes will apply to all users.'</p>

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message for new yearly benefits or a holiday message) – the web part and its information can be closed from view for all users, assuming one is in edit mode select the properties of the web part and select Close. The web part is then closed.

35. To re- add the web part to the page at a later time – from edit mode select the Page Tools tab -> Insert -> Closed Web Parts. On the right hand side select the we part that was previously closed then on the right hand side select Add.



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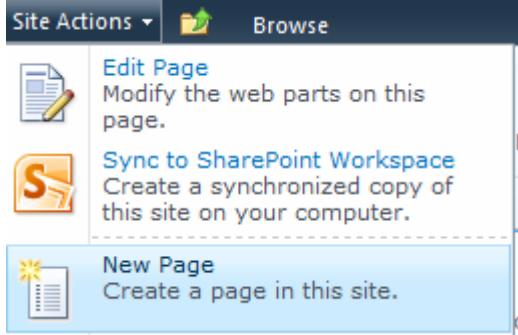
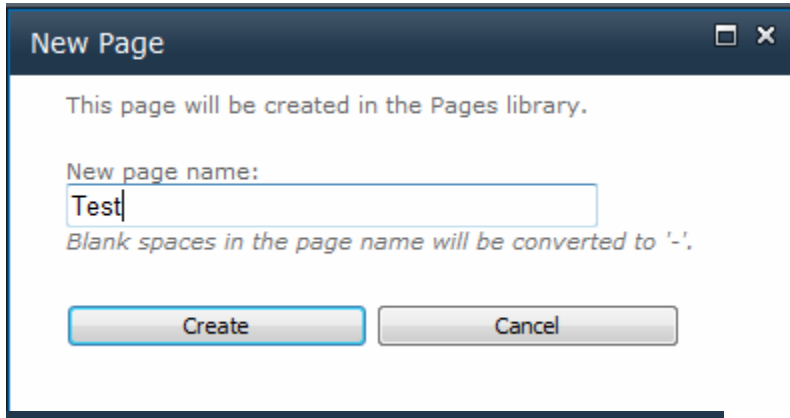
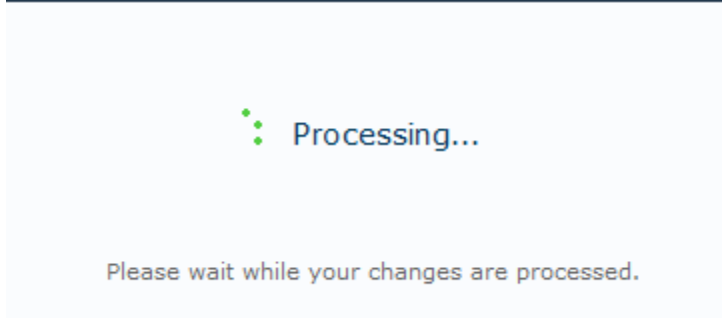
Add

Cancel

NOTE: It is not recommended to have too many closed web-part on a said page as resources in loading the closed web parts will be utilized which may slow page optimization.

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Follow the steps below to create new pages on a SharePoint site. The New Page section covers how to create a single web page. The New Site section covers how to create a whole new site which thus can have web pages off of the main sites page which are typically all interrelated by subject matter.

<ul style="list-style-type: none">• New Page<ol style="list-style-type: none">1. Navigate to the site where a page is needed to be added. NOTE: To add a new page to a site a user needs designer level access or better. Select Site Actions -> New Pages	 <p>The screenshot shows the 'Site Actions' dropdown menu in SharePoint. The 'New Page' option is highlighted in blue. The menu items are: 'Edit Page' (Modify the web parts on this page.), 'Sync to SharePoint Workspace' (Create a synchronized copy of this site on your computer.), and 'New Page' (Create a page in this site.).</p>
<ol style="list-style-type: none">2. Under New page name: Enter in a desired name in this case here I have entered in Test. Click Create after naming the page.	 <p>The screenshot shows the 'New Page' dialog box. It contains the text: 'This page will be created in the Pages library.' Below this is a text input field labeled 'New page name:' with the word 'Test' entered. A note below the field states: 'Blank spaces in the page name will be converted to '-'.' At the bottom are 'Create' and 'Cancel' buttons.</p>  <p>The screenshot shows a 'Processing...' screen with a green loading icon and the text: 'Please wait while your changes are processed.'</p>







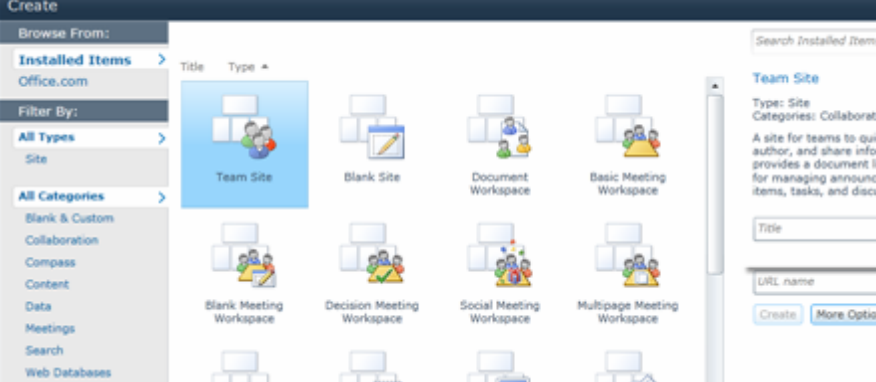
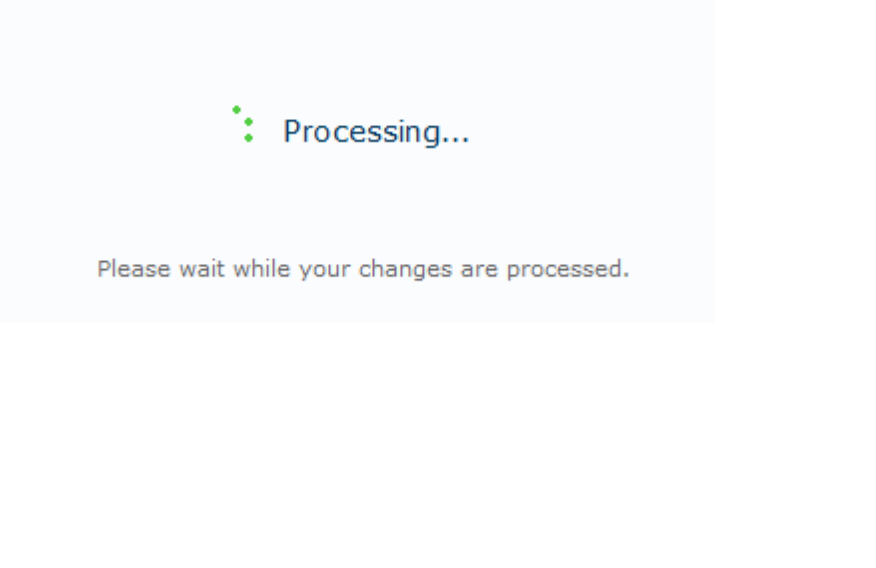
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3. The page is created and the content entry screen will look as such.

At this point adding new content can be added following the information presented in the Content Editing section.

The screenshot displays a content entry interface. At the top, there is a 'Title' field containing the text 'Test'. To the right of the title field, there are two light blue buttons, each labeled '0 0 days ago'. Below the title field is a 'Page Content' area, which is currently empty and outlined with a dashed border.

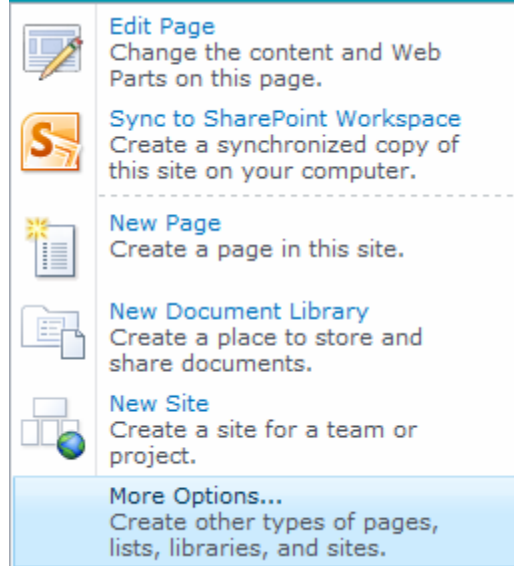
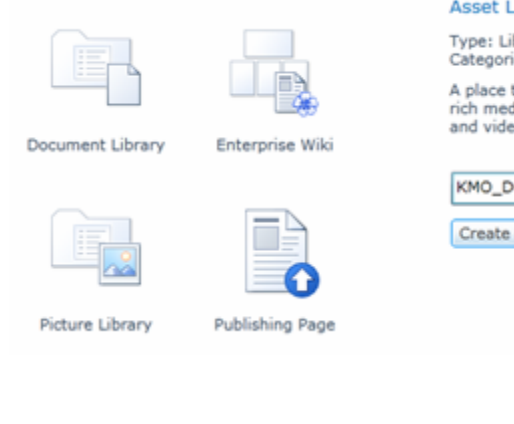
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<ul style="list-style-type: none"> • New Site <p>1. In this section creating a whole new site is presented – thus to start click Site Actions -> New Site</p>	 Edit Page Change the content and Web Parts on this page.  Hide Ribbon Hide the page status and ribbon for this page.  Sync to SharePoint Workspace Create a synchronized copy of this site on your computer. -----  New Page Create a page in this site.  New Document Library Create a place to store and share documents.  New Site Create a site for a team or project.	
<p>2. Select the desired installed template. Enter in a Title and URL name and then Click Create. In this example here a Team Site type has been selected. NOTE: That each template that is available has a description that when selected is shown on the right hand side – so thus selecting the template for the deemed purpose is a</p>	 <p>The screenshot shows the 'Create' page in SharePoint. On the left, there are navigation menus for 'Browse From' (Office.com), 'Filter By' (All Types, Site), and 'All Categories' (Blank & Custom, Collaboration, Compass, Content, Data, Meetings, Search, Web Databases). The main area displays a grid of site templates: Team Site, Blank Site, Document Workspace, Basic Meeting Workspace, Blank Meeting Workspace, Decision Meeting Workspace, Social Meeting Workspace, and Multipage Meeting Workspace. The 'Team Site' template is highlighted with a blue border. On the right, a preview for the 'Team Site' is shown, including its type (Site), categories (Collaboration), and a description: 'A site for teams to quickly author, and share information, provides a document library for managing announcements, tasks, and discussions.' Below the preview are input fields for 'Title' and 'URL name', and 'Create' and 'More Options' buttons.</p>	 <p>The screenshot shows a 'Processing...' status message. It features a green three-dot icon followed by the text 'Processing...'. Below this, a message reads: 'Please wait while your changes are processed.'</p>


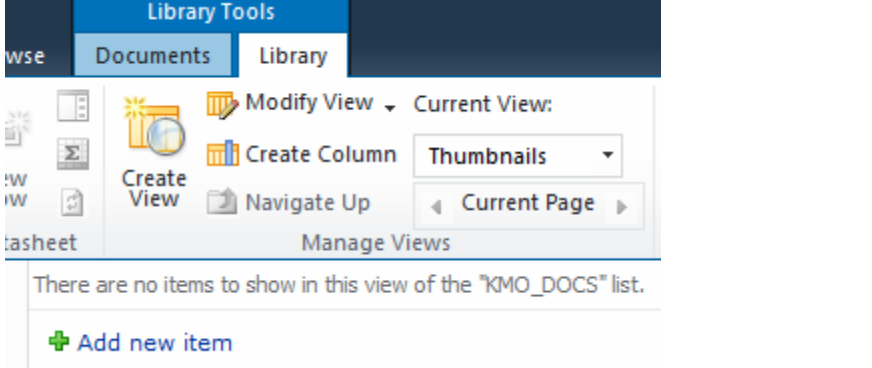
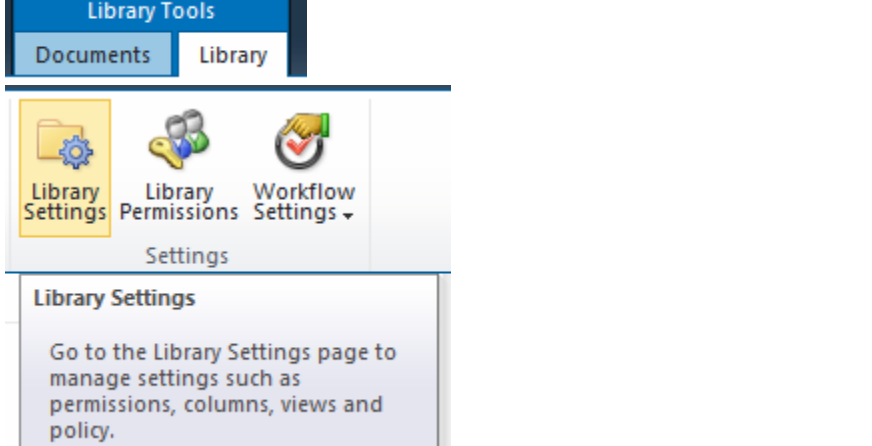
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reality.	
3. At this point adding new content can be added following the information presented in the Content Editing section.	

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<ul style="list-style-type: none">• More Options<ol style="list-style-type: none">1. In this section creating other types of assets is reviewed – this includes document libraries, lists etc.	 <p>The screenshot shows a vertical menu with the following items:</p> <ul style="list-style-type: none">Edit Page: Change the content and Web Parts on this page.Sync to SharePoint Workspace: Create a synchronized copy of this site on your computer.New Page: Create a page in this site.New Document Library: Create a place to store and share documents.New Site: Create a site for a team or project.More Options...: Create other types of pages, lists, libraries, and sites.	
<ol style="list-style-type: none">2. On the left hand side in this example Document Library was selected. KMO_DOCS was placed in the name field and then the Create button was selected.	 <p>The screenshot shows the 'Asset Library' creation interface with four options:</p> <ul style="list-style-type: none">Document LibraryEnterprise WikiPicture LibraryPublishing Page	<p>Asset Library Type: Library Categories: Content A place to share, browse and manage rich media assets, like image, audio and video files.</p> <p><input type="text" value="KMO_DOCS"/></p> <p><input type="button" value="Create"/> <input type="button" value="More Options"/></p>

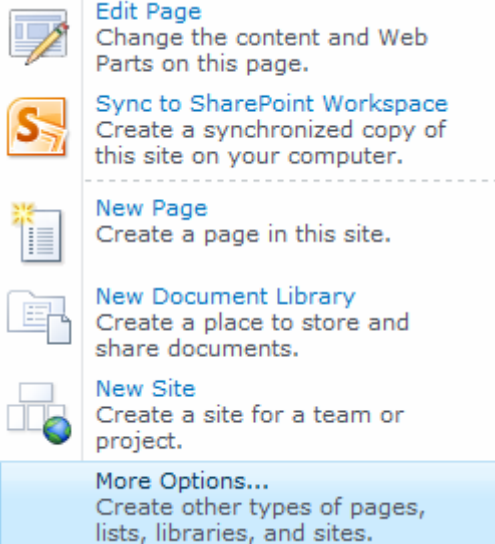
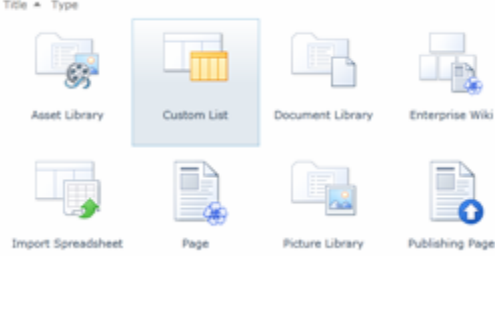

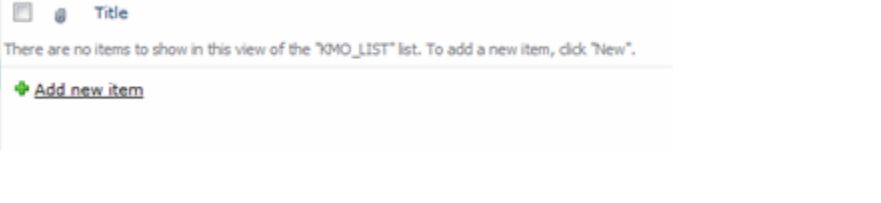
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<p>3. The result is processed.</p>	
<p>4. The document library is created and displayed and thus items can be added to the library by clicking the Add new item link.</p>	
<p>5. If changes to the Library settings are desired to be made from the Library Tools select Library then in the far right hand corner select Library Settings</p>	

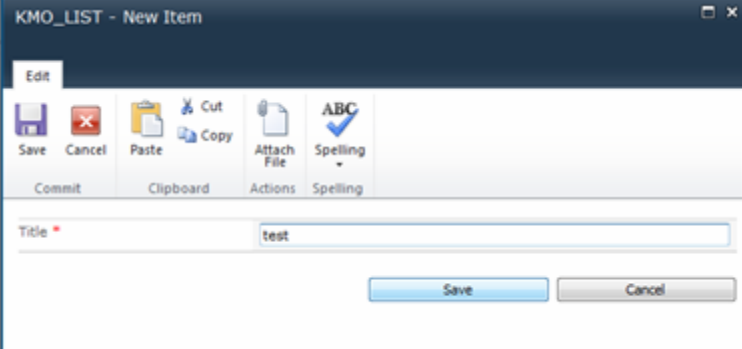

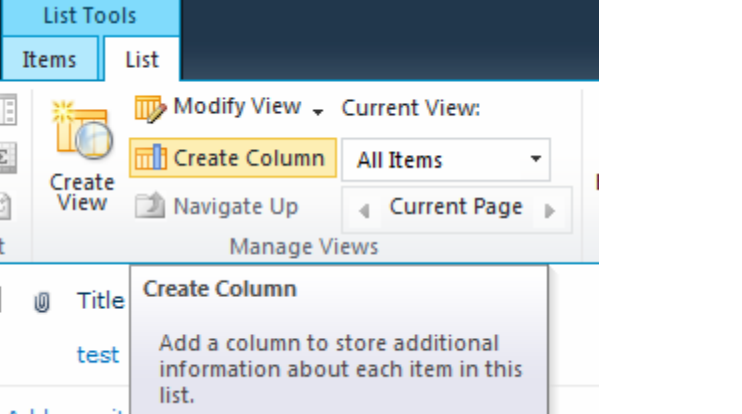
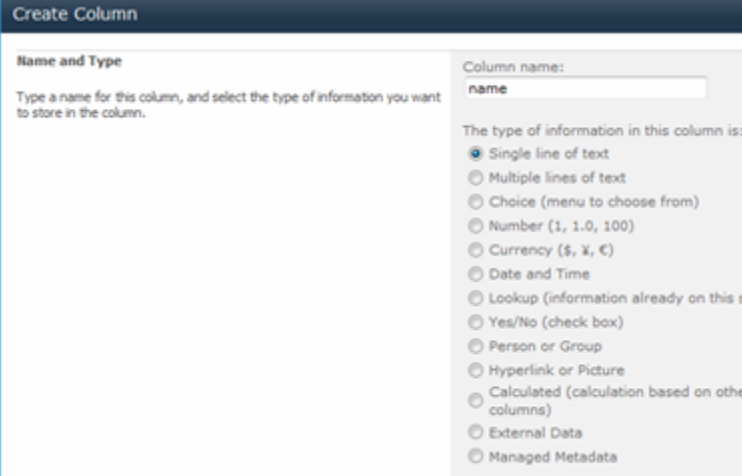
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<p>6. Here a user can perform many useful operations such as changing the name of the document library under the Title, description and navigation link, deleting the document library and setting the permissions for the document library amongst other items</p>	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p>General Settings</p> <ul style="list-style-type: none"> Title, description and navigation Versioning settings Advanced settings Validation settings Column default value settings Manage item scheduling Rating settings Audience targeting settings Metadata navigation settings Per-location view settings Form settings <p>Content Types</p> <p>This document library is configured to allow multiple content types. Use content types to specify the information you other behavior. The following content types are currently available in this library:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Content Type</th> <th style="text-align: left;">Visible on New Button</th> </tr> </thead> <tbody> <tr> <td>Image</td> <td style="text-align: center;">✓</td> </tr> <tr> <td>Audio</td> <td style="text-align: center;">✓</td> </tr> <tr> <td>Video</td> <td style="text-align: center;">✓</td> </tr> </tbody> </table> <p>Add from existing site content types</p> <p>Change new button order and default content type</p> </div> <div style="width: 48%;"> <p>Permissions and Management</p> <ul style="list-style-type: none"> Delete this document library Save document library as template Permissions for this document library Manage files which have no checked in version Workflow Settings Enterprise Metadata and Keywords Settings Information management policy settings </div> </div>	Content Type	Visible on New Button	Image	✓	Audio	✓	Video	✓
Content Type	Visible on New Button								
Image	✓								
Audio	✓								
Video	✓								
<p>7. Other options in More Options can be created as desired. Note: Do not name different asset types with the same name – thus creating a list and a document library with the same name will result in errors being thrown.</p>	<div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p>Error</p> <p>A list, survey, discussion board, or document library with the specified title already exists in this Web site. Please choose another title.</p> </div>								

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<ul style="list-style-type: none"> • Lists <p>8. In this section creating lists and libraries is reviewed. To create a list select Site Actions -> More Options.</p>	 <p>Edit Page Change the content and Web Parts on this page.</p> <p>Sync to SharePoint Workspace Create a synchronized copy of this site on your computer.</p> <hr/> <p>New Page Create a page in this site.</p> <p>New Document Library Create a place to store and share documents.</p> <p>New Site Create a site for a team or project.</p> <p>More Options... Create other types of pages, lists, libraries, and sites.</p>	
<p>9. Select Custom List and on the right hand side name the list – in this case it's been named KMO_LIST. Click Create when done.</p>	 <p>Title Type</p> <p>Asset Library Custom List Document Library Enterprise Wiki</p> <p>Import Spreadsheet Page Picture Library Publishing Page</p> <p>Custom List Type: List Categories: Blank & Custom A blank list to which you can add your own columns and views. Use this if none of the built-in list types are similar to the list you want to make.</p> <p>KMO_LIST</p> <p>Create More Options</p>	
<p>10. The request is processed.</p>	 <p>Processing...</p> <p>Please wait while your changes are processed.</p>	
<p>11. The list shell is shown and to add items to the list one should select Add new item</p>	 <p>Title</p> <p>There are no items to show in this view of the "KMO_LIST" list. To add a new item, click "New".</p> <p>Add new item</p>	

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<p>12. One can then enter in the content of the list then select the Save button</p>	
<p>13. The item(s) are then displayed.</p>	
<p>14. If additional data is to be stored in the list – a user can select from the List Tools tab -> list -> Create Column</p>	
<p>15. A user would then select the name of the column in this example; it has been called name and the type of information to collect. They would then scroll down</p>	

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16. Additional Column Settings which include if the information is required, allows for unique values, maximum number of characters, a default value as well as if the column should be added to the default view should be entered and selected. A user would click OK when done entering in the desired information.

The screenshot shows a dialog box titled "Additional Column Settings" with the instruction "Specify detailed options for the type of information you selected." The dialog is divided into two sections. The top section contains the following options: "Description:" with a text input field; "Require that this column contains information:" with radio buttons for "Yes" and "No" (selected); "Enforce unique values:" with radio buttons for "Yes" and "No" (selected); "Maximum number of characters:" with a text input field containing "255"; "Default value:" with radio buttons for "Text" (selected) and "Calculated Value"; and a checked checkbox for "Add to default view". The bottom section is titled "Column Validation" and is currently empty. At the bottom right of the dialog are "OK" and "Cancel" buttons.

17. The column is then displayed in the list. If content is desired to be entered into the existing item – that item should be selected and the Edit Item selected. Content can then be entered into the new column and saved.

The screenshot shows a list view with a table. The table has a header row with "Title" and "name". Below the header, there is a row with the value "test" in the "Title" column. A context menu is open over the "test" row, displaying the following options: "View Item", "Edit Item" (highlighted), "Compliance Details", "Manage Permissions", and "Delete Item".

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<p>18. If changes to the List settings are desired to be made in the far right hand corner of the screen in the Settings options select List Settings.</p>																
<p>19. Here a user can perform many useful operations such as deleting the list, setting the permissions for the list as well as create columns and change the order display of existing columns.</p>	 <table border="1"> <thead> <tr> <th>Column (click to edit)</th> <th>Type</th> <th>Required</th> </tr> </thead> <tbody> <tr> <td>Title</td> <td>Single line of text</td> <td>✓</td> </tr> <tr> <td>name</td> <td>Single line of text</td> <td></td> </tr> <tr> <td>Created By</td> <td>Person or Group</td> <td></td> </tr> <tr> <td>Modified By</td> <td>Person or Group</td> <td></td> </tr> </tbody> </table>	Column (click to edit)	Type	Required	Title	Single line of text	✓	name	Single line of text		Created By	Person or Group		Modified By	Person or Group	
Column (click to edit)	Type	Required														
Title	Single line of text	✓														
name	Single line of text															
Created By	Person or Group															
Modified By	Person or Group															

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20. Those items under General Settings are explained here:

General Settings

Title, description and navigation

Versioning settings

Advanced settings

Validation settings

Column default value settings

Manage item scheduling

Rating settings

Audience targeting settings

Metadata navigation settings

Per-location view settings

Form settings

Title, description and navigation – this is used to change the display name and can be used to add a description as well as decide if a link appears on the quick launch bar.

Versioning settings - this is used to turn off and on content approval, set versions of items as well as set if one has to check out items before editing.

Advanced settings – this section has several miscellaneous settings that can be utilized which include those for content types, item level permissions, e-mail notifications, attachments, folders, searching and datasheets.

Rating settings – used to enabled/disable the five star rating system available.

Audience targeting settings – allows for the ability for content to be targeted to a said user base.

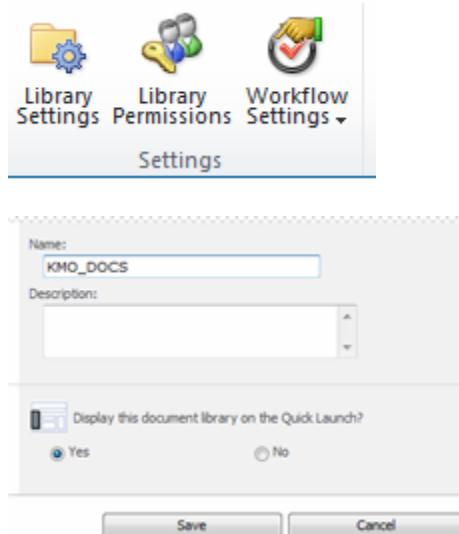
Metadata navigation settings – allows for keywords from a list to be used in the navigation tree view.

Per-location view settings – allows for the setting of which Views can be displayed for a folder or content type.

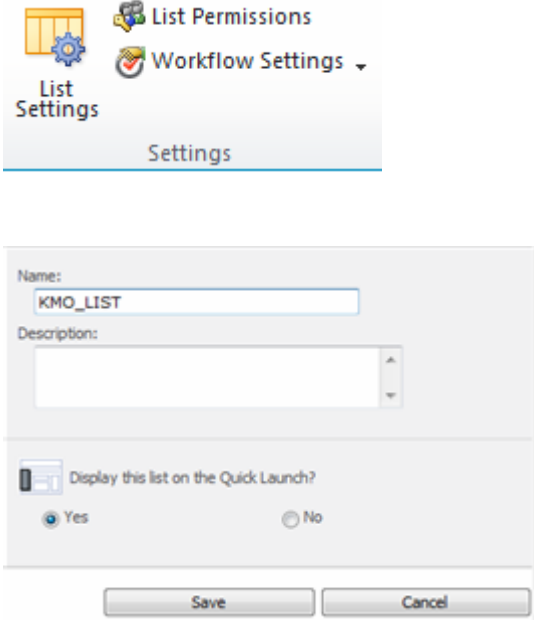
Form settings – used for InfoPath if utilized on the list or document library.

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21. The title, description and navigation is an important and useful item and deserves a description. In this example, we will assume that the previously created KMO_DOCS library needs changed so from Library Tools -> Library -> under Settings select Library Settings. Click under General Settings the Title, description and navigation link. In the Name field – place the cursor in that field and make the desired changes, then if desired add a description text and select whether to add the link to the quick launch or not then select Save.



The screenshot shows a 'Settings' dialog box with three tabs: 'Library Settings', 'Library Permissions', and 'Workflow Settings'. The 'Library Settings' tab is active. Below the tabs, there are three sections: 'Name' with a text field containing 'KMO_DOCS', 'Descriptions' with an empty text area, and a checkbox labeled 'Display this document library on the Quick Launch?' which is checked. At the bottom, there are 'Save' and 'Cancel' buttons.

<p>22. For a list item the same process would be followed thus in this example, we will assume that the previously created KMO_LIST needs changed so from List Tools -> List -> under Settings select List Settings. Click under General Settings the Title, description and navigation link. In the Name field – place the cursor in that field and make the desired changes, then if desired add a description text and select whether to add the link to the quick launch or not then select Save.</p>	
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Note: A list or library has two names, the name in the URL and the display name. When either item is initially created the name entered is what will be used as the URL name. In this case the document library is for examples sake KMO_DOCS – so the URL would be: http://myservername/sites/KMO_DOCS/Forms/AllItems.aspx if the name of the document library was changed to KMO_DOCS2 – the display name would be KMO_DOCS2 but the URL would remain with the KMO_DOCS in the name.

- **Content Approval**

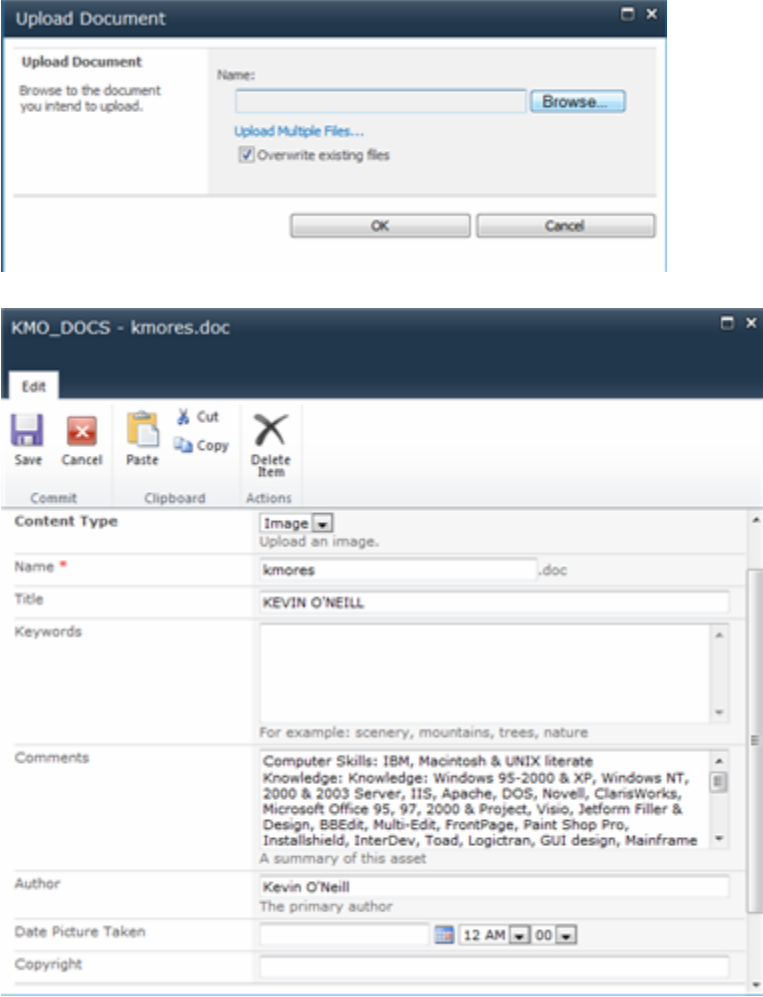
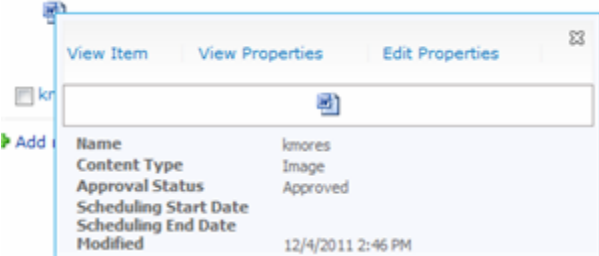
23. In this section the notion of content approval for a list or document is reviewed. In this case – the manual process for content approval is described. This can also be accomplished via a workflow. The first step is to turn content approval on in the desired list or document library. Thus, in this example, from the KMO_DOCS document library select from the Library tools -> Library tab under Settings the Library Settings selection then under General Settings select Versioning Settings and under Content

Require content approval for submitted items?

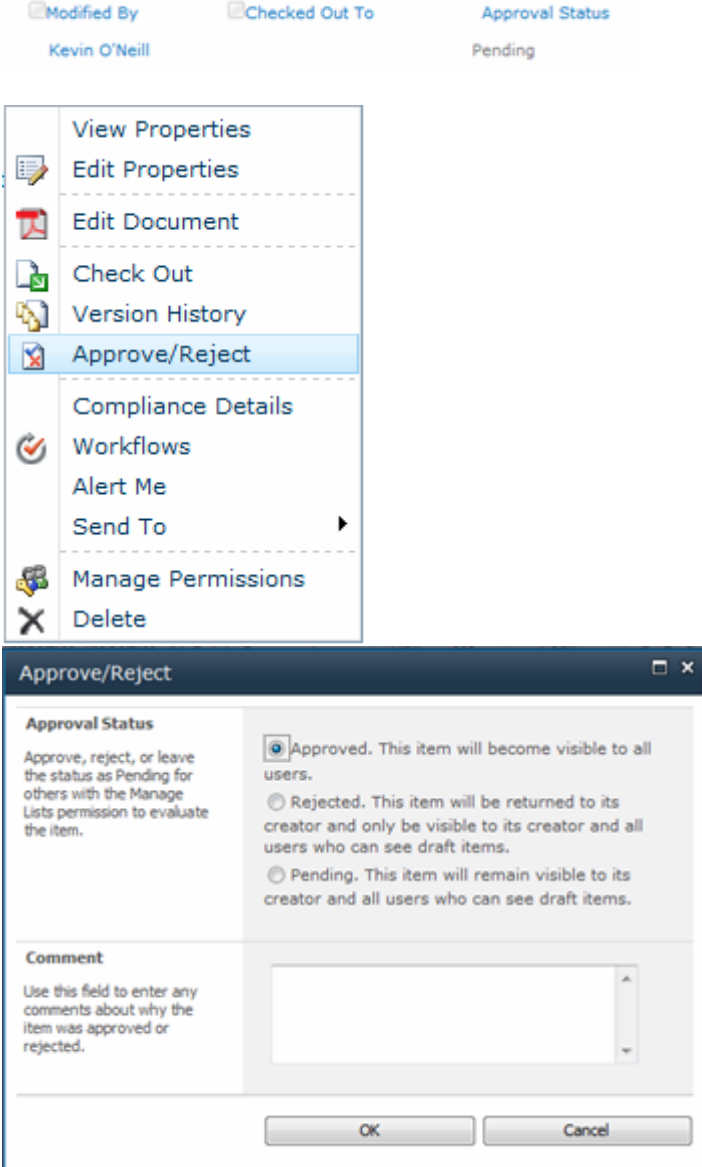
Yes

No

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<p>approval select Yes and click OK.</p>	
<p>24. In this case maneuver to the document library and click Add new item. Browse out to add the desired item select it and click OK. If prompted for Metadata enter it in and click Save.</p>	 <p>The image shows two screenshots. The top one is a 'Upload Document' dialog box with fields for 'Name', 'Browse...', 'Upload Multiple Files...', and a checked 'Overwrite existing files' checkbox. The bottom one is a metadata form for 'KMO_DOCS - kmores.doc'. The form includes fields for Name (kmores.doc), Title (KEVIN O'NEILL), Keywords, Comments (Computer Skills: IBM, Macintosh & UNIX literate; Knowledge: Knowledge: Windows 95-2000 & XP, Windows NT, 2000 & 2003 Server, IIS, Apache, DOS, Novell, ClarisWorks, Microsoft Office 95, 97, 2000 & Project, Visio, Jetform Filler & Design, BBEEdit, Multi-Edit, FrontPage, Paint Shop Pro, Installshield, InterDev, Toad, Logictan, GUI design, Mainframe; A summary of this asset), Author (Kevin O'Neill), Date Picture Taken (12 AM 00), and Copyright.</p>
<p>25. The document is displayed in the library – at this point hover over the document to see its properties. In this case since</p>	 <p>The image shows a document library view with a document titled 'kmores.doc'. A tooltip is displayed over the document, showing its properties: Name (kmores), Content Type (Image), Approval Status (Approved), Scheduling Start Date, Scheduling End Date, and Modified (12/4/2011 2:46 PM).</p>

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<p>the uploader has admin access – the Approval Status is Approved.</p>	
<p>26. If approval is required an individual with Approver rights would have to view the properties of the item and select to Approve/reject it. Additionally in the document library view the item would appear with an Approval Status of Pending. Once the approver hovers over the document and selects Approve/Reject then selects Approved and OK would the document be available for all users to see the document.</p>	 <p>The screenshot shows a document library interface. At the top, there are three columns: 'Modified By' (Kevin O'Neill), 'Checked Out To', and 'Approval Status' (Pending). A context menu is open over a document, listing options: View Properties, Edit Properties, Edit Document, Check Out, Version History, Approve/Reject (highlighted), Compliance Details, Workflows, Alert Me, Send To, Manage Permissions, and Delete. Below the menu is a dialog box titled 'Approve/Reject'. It has an 'Approval Status' section with three radio buttons: 'Approved' (selected), 'Rejected', and 'Pending'. Each option has a description of its effect. There is a 'Comment' section with a text area and 'OK' and 'Cancel' buttons at the bottom.</p>

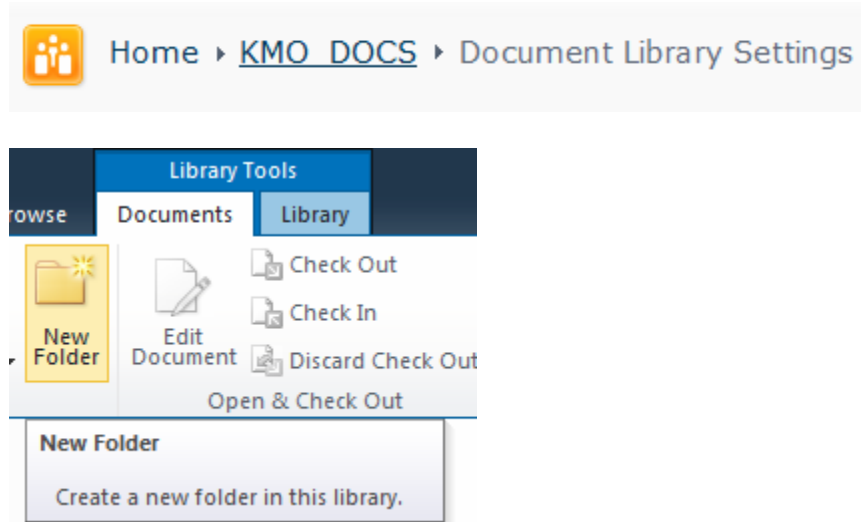
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NOTE: With content approval turned on – only two groups of users can see the document. The person who created or uploaded it and any user whom has Approver rights (by default includes those in the site owners group and those with designer rights)

<ul style="list-style-type: none">• Folders and Make “New Folder” <p>27. In this section the notion of lists and libraries being divided into folders similar to that of windows explorer is reviewed. Thus, in this example, from the KMO_DOCS document library select from the Library tools -> Library tab under Settings the Library Settings selection then under General Settings select Advanced settings and under Folders select Yes and click OK.</p>	
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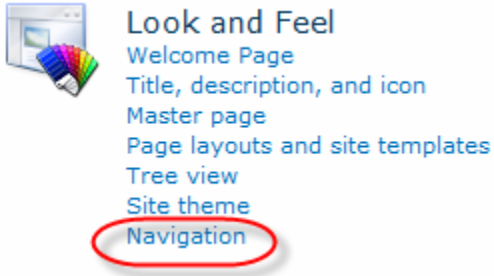
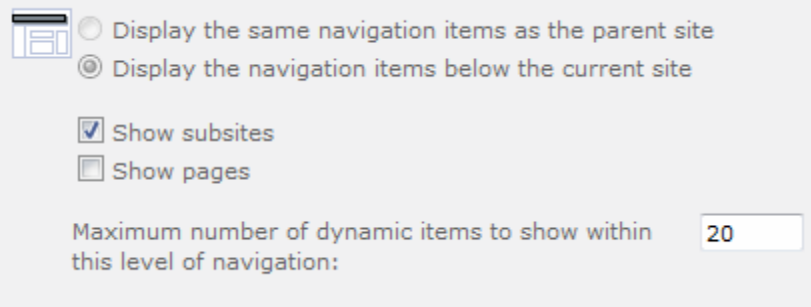
28. From the breadcrumb – select the document library in this case it's KMO_DOCS then from the Library Tools tab -> Documents -> the New Folder option should now be available if it wasn't previously.



NOTE: This option can be utilized with Calendars, Discussions, Surveys or Wikis.

Navigation Items

Navigation is of vital importance to the sites that one creates in SharePoint – in SharePoint 2010 several customization items are available. The navigation available is different depending if the site is created via a published or non-published site template.

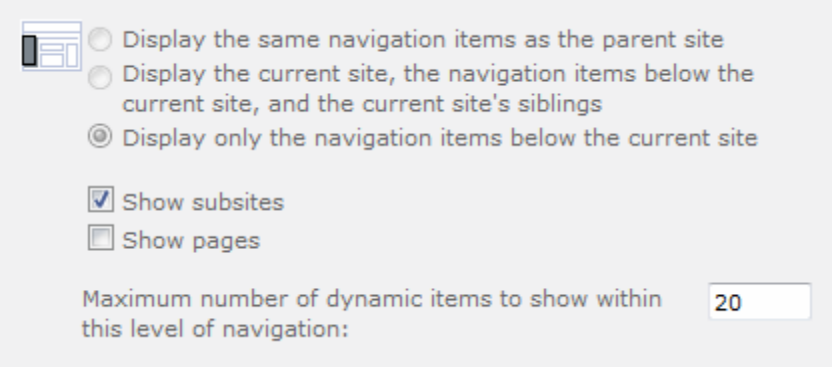
<p>1. If the site was created as a published site, to add a new tab or link go to Site Actions -> Site Settings -> under Look and Feel click Navigation.</p>	 <p>Look and Feel Welcome Page Title, description, and icon Master page Page layouts and site templates Tree view <u>Site theme</u> <u>Navigation</u></p>
<p>2. Global navigation if where a user sets how the top level navigation should appear. The global navigation bar appears on every page of the site across the top. Thus, in this case the 'Display the same navigation items as the parent site' displays the navigation items the same as the root site. Thus, this indicates the</p>	 <p><input type="radio"/> Display the same navigation items as the parent site <input checked="" type="radio"/> Display the navigation items below the current site</p> <p><input checked="" type="checkbox"/> Show subsites <input type="checkbox"/> Show pages</p> <p>Maximum number of dynamic items to show within this level of navigation: <input type="text" value="20"/></p>

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default setting for sites that are not top-level sites.

This indicates that the site should use (inherit) the global navigation items that the parent site uses. The 'Display the navigation items below the current site' displays the navigation items that appear from the site one is on downward. Thus, it indicates that the site's global navigation items should be populated by items below the site. The 'Show subsites' and 'Show pages' are the checkbox options so one has the option of turning them both on and off. The maximum number of

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<p>dynamic items to show within this level of navigation is essentially how many items will be displayed in the navigation.</p>	
<p>3. Current Navigation is the navigation that is essentially on the current site one has accessed. Thus as with global navigation the 'Display the same navigation items as the parent site' displays the navigation items the same as the root site.</p> <p>It specifies that the current navigation does not inherit parent site navigation by default.</p> <p>For a given site, selecting this option usually</p>	 <p>The screenshot shows a configuration panel for navigation. It features three radio button options: 'Display the same navigation items as the parent site', 'Display the current site, the navigation items below the current site, and the current site's siblings', and 'Display only the navigation items below the current site'. The third option is selected. Below these are two checked checkboxes: 'Show subsites' and 'Show pages'. At the bottom, there is a label 'Maximum number of dynamic items to show within this level of navigation:' followed by a text input field containing the number '20'.</p>

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causes the data source to start with the current site's immediate parent site, or one level up in the site hierarchy.

The 'Display the current site, the navigation items below the current site, and the current site's siblings' displays those items by indicating that the data source starts with the current site's immediate parent site, or exactly one level up in the site hierarchy. It includes the current site and the site's siblings, but trims out children of the sibling nodes.

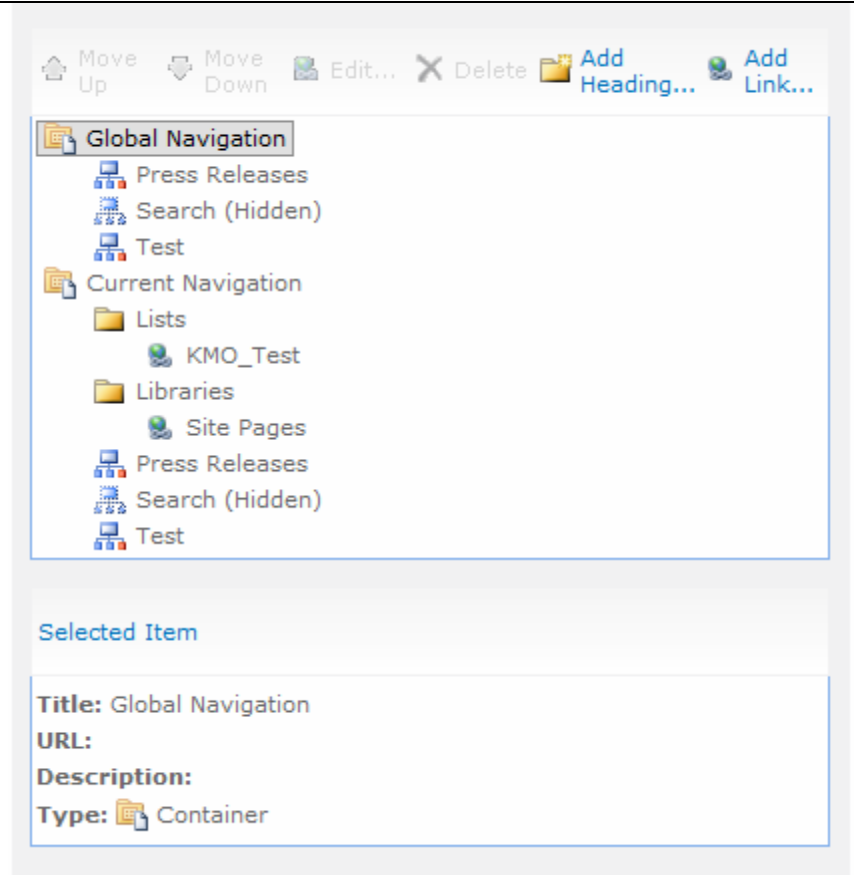
The 'Display the navigation items below the current

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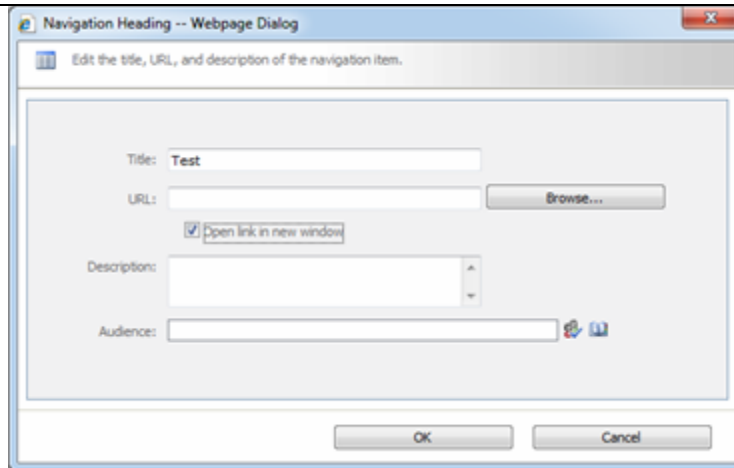
<p>site' displays the navigation items that appear from the site one is on downward. The 'Show subsites' and 'Show pages' are the checkbox options so one has the option of turning them both on and off. The maximum number of dynamic items to show within this level of navigation is essentially how many items will be displayed in the navigation.</p>	
<p>4. Sorting - has several options.</p>	<p><input type="radio"/> Sort automatically <input checked="" type="radio"/> Sort manually <input type="checkbox"/> Sort pages automatically</p>

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5. Navigation Editing and Sorting – in this area one can configure how they want their navigation to display.

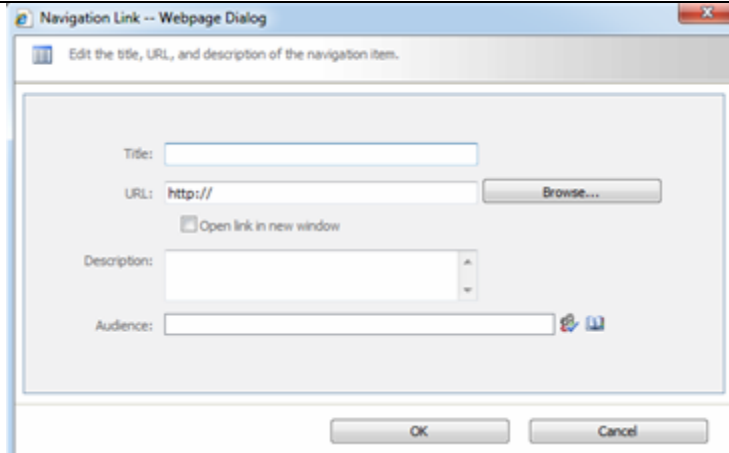


6. Clicking Add Heading allows one to enter in a desired information piece, URL, description and audience to target the heading to.



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7. Clicking Add Link allows one to enter in a desired information piece, URL, description and audience to target the link to. Typically Links appear under desired headings.



Navigation Link -- Webpage Dialog

Edit the title, URL, and description of the navigation item.

Title:

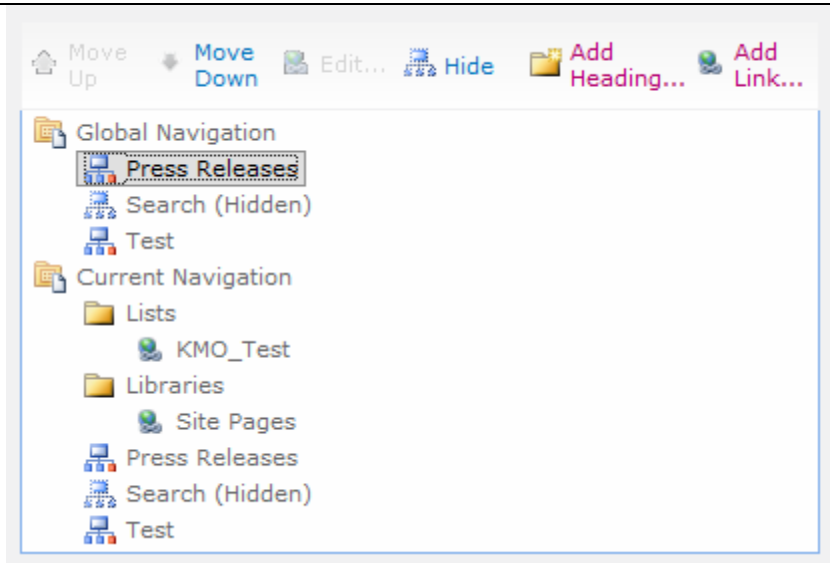
URL:

Open link in new window

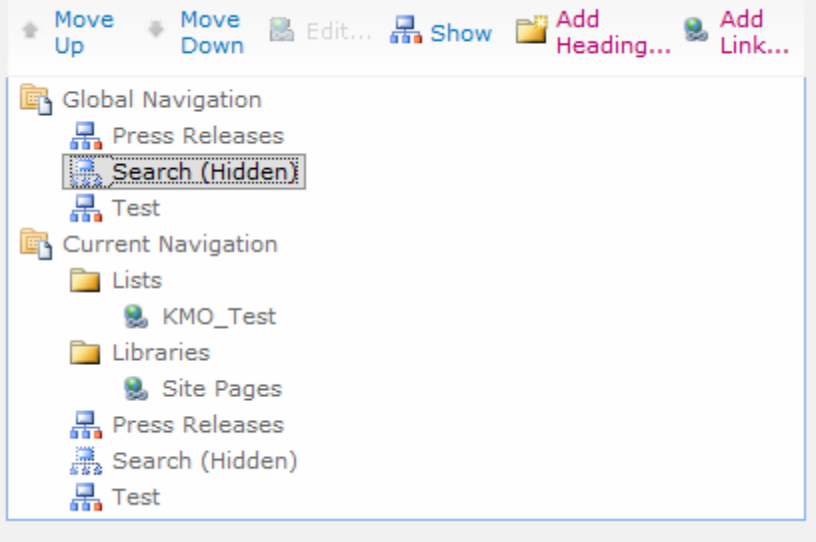
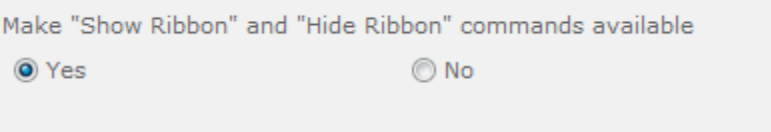
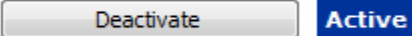
Description:

Audience:

8. Selecting an item allows one to select Move Down so the item appears down in the navigation – or clicking Hide – hides that information heading/link.

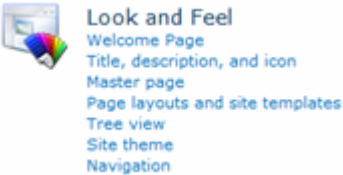
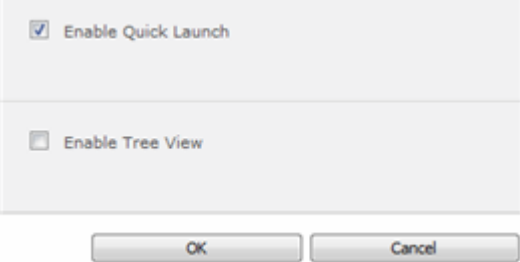



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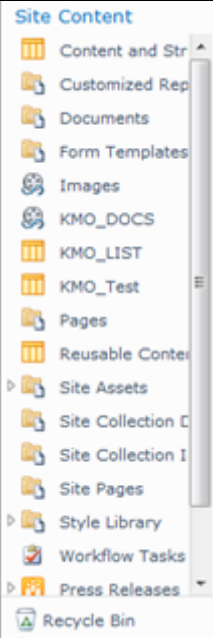
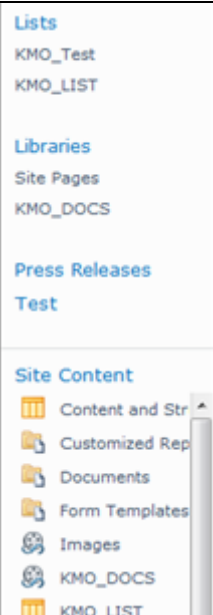
<p>9. To unhide an item that was previously hidden select it and choose Show. Additionally the item can be moved by selecting the Move Up or Move Down actions.</p>	 <p>The screenshot shows the SharePoint ribbon navigation pane. At the top, there are buttons for 'Move Up', 'Move Down', 'Edit...', 'Show', 'Add Heading...', and 'Add Link...'. Below these, the navigation structure is displayed: 'Global Navigation' (containing 'Press Releases', 'Search (Hidden)', and 'Test'), 'Current Navigation' (containing 'Lists', 'KMO_Test', 'Libraries', and 'Site Pages'), and another set of 'Press Releases', 'Search (Hidden)', and 'Test' items. The 'Search (Hidden)' item under 'Global Navigation' is highlighted with a dashed border.</p>
<p>10. Show and Hide Ribbon – this essentially turns off and on the feature set of the ribbon.</p>	 <p>The screenshot shows a dialog box with the text 'Make "Show Ribbon" and "Hide Ribbon" commands available'. There are two radio buttons: 'Yes' (which is selected) and 'No'.</p>
<p>11. Note the Show and Hide Ribbon only works when the publishing feature is activated – this can be verified by going to Site Actions -> Site Settings -> under Site Actions -> Manage Site Features -> SharePoint Server Publishing is Active.</p>	 <p>The screenshot shows two buttons: a grey 'Deactivate' button and a blue 'Active' button.</p>

Navigation Panel Views (Tree View)

On the default left hand navigation – there are three views – quick launch, tree view and both quick launch and tree view.

<p>1. To set the desired panel view from Site Actions -> Site Settings under Look and Feel click Tree view</p>	 <p>The screenshot shows a 'Look and Feel' settings menu with a colorful icon. The menu items are: Welcome Page, Title, description, and icon, Master page, Page layouts and site templates, Tree view, Site theme, and Navigation. 'Tree view' is highlighted.</p>
<p>2. To display items that make up the navigation of the site – on the left hand side click Enable Quick Launch and click OK</p>	 <p>The screenshot shows two checkboxes: 'Enable Quick Launch' (checked) and 'Enable Tree View' (unchecked). There are 'OK' and 'Cancel' buttons at the bottom.</p>
<p>3. Going back to one's home page with the Quick Launch enabled – the links will appear as such – in this case my lists, libraries and pages are displayed.</p>	 <p>The screenshot shows a navigation panel with the following sections: Lists (with a link to KMO_Test), Libraries (with a link to KMO_LIST), Site Pages (with a link to KMO_DOCS), Press Releases, and Test.</p>

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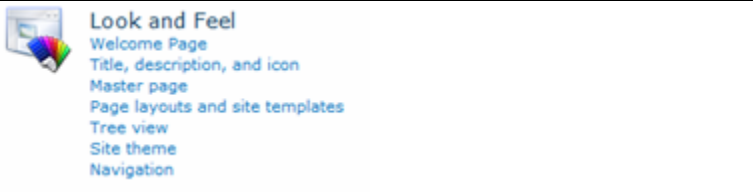
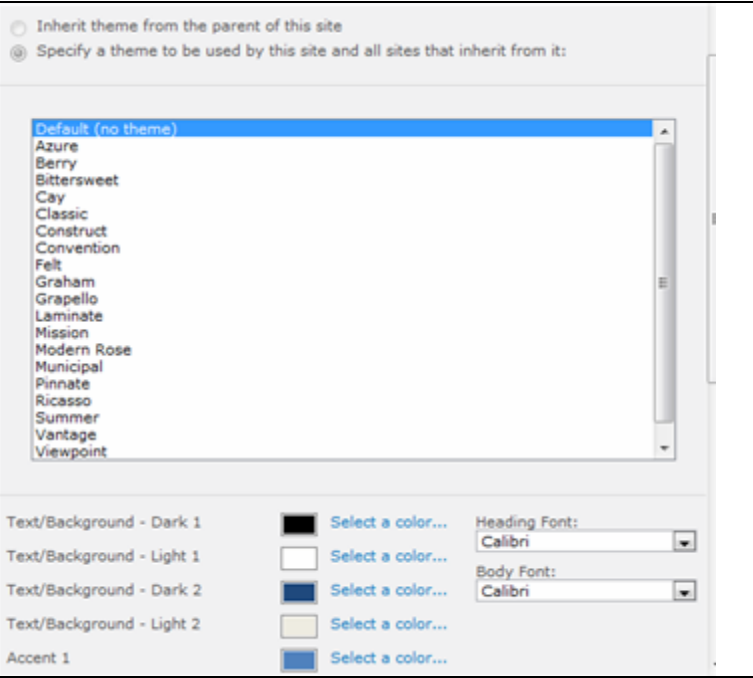
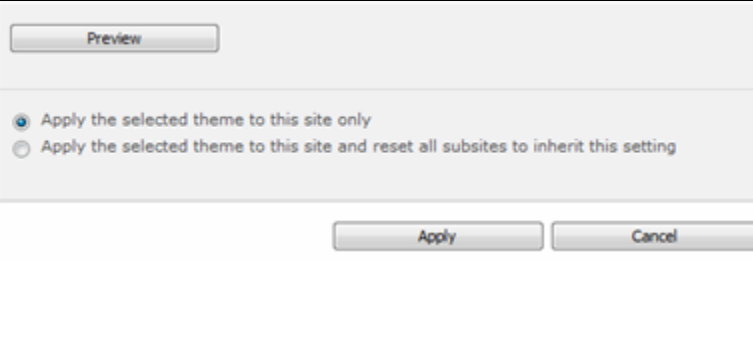
<p>4. With just the Enable Tree View selected under Site Actions -> Site Settings – the left navigation is depicted as such:</p>	 <p>The screenshot shows a vertical navigation pane titled "Site Content". It contains a list of items with icons: Content and Str, Customized Rep, Documents, Form Templates, Images, KMO_DOCS, KMO_LIST, KMO_Test, Pages, Reusable Conte, Site Assets, Site Collection D, Site Collection I, Site Pages, Style Library, Workflow Tasks, Press Releases, and Recycle Bin. A scroll bar is visible on the right side of the list.</p>
<p>5. With both Enable Quick Launch and Enable Tree View selected under Site Actions -> Site Settings more content is displayed.</p>	 <p>The screenshot shows a dialog box with two checked options: "Enable Quick Launch" and "Enable Tree View". At the bottom of the dialog are "OK" and "Cancel" buttons.</p>
<p>6. The left navigation is depicted as such:</p>	 <p>The screenshot shows a vertical navigation pane with several sections: "Lists" (containing KMO_Test and KMO_LIST), "Libraries" (containing Site Pages and KMO_DOCS), "Press Releases", and "Test". Below these sections is another "Site Content" section, which is partially visible and contains the same list of items as in the first screenshot.</p>

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Site Theme

One can control the fonts, colors and theme that are displayed across a site and subsite.

To set the desired theme, follow the steps below:

<p>1. From Site Actions -> Site Settings under Look and Feel click Site Theme.</p>	 <p>Look and Feel Welcome Page Title, description, and icon Master page Page layouts and site templates Tree view Site theme Navigation</p>
<p>2. Select 'Inherit theme from the parent of this site' – if the theme used on the top level site should also be used for the current site. Otherwise select 'Specify a theme to be used by this site and all sites that inherit from it' if the theme and attributes selected will be used by the current site and all site underneath it – in the tree. Select the desired color and font.</p>	 <p><input type="radio"/> Inherit theme from the parent of this site <input checked="" type="radio"/> Specify a theme to be used by this site and all sites that inherit from it:</p> <p>Default (no theme) Azure Berry Bittersweet Cay Classic Construct Convention Felt Graham Grapello Laminate Mission Modern Rose Municipal Pinnate Ricasso Summer Vantage Viewpoint</p> <p>Text/Background - Dark 1 <input type="color"/> Select a color... Heading Font: Calibri Text/Background - Light 1 <input type="color"/> Select a color... Body Font: Calibri Text/Background - Dark 2 <input type="color"/> Select a color... Text/Background - Light 2 <input type="color"/> Select a color... Accent 1 <input type="color"/> Select a color...</p>
<p>3. Select the preview button to see the site as it will look given the current attributes selected. After previewing the page – click either 'Apply the selected theme to this site only' or 'Apply the selected</p>	 <p>Preview</p> <p><input checked="" type="radio"/> Apply the selected theme to this site only <input type="radio"/> Apply the selected theme to this site and reset all subsites to inherit this setting</p> <p>Apply Cancel</p>

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theme to this site and reset all subsites to inherit this setting' and click Apply. To cancel the full operation click the Cancel button.

SharePoint Views

Views are a useful way to organize and group information that is needed to be viewed in a certain customized way. Views have several features which should be described:

Columns – the basic building block of a view – columns represent the data stored or the data calculated to be displayed.

Sort – is the make-up of how the data should be displayed. Typically two columns can be used – and usually users want data sorted by data or by an alphabetic nature.

Filter – is used usually as a way for a user to filter down the exact data they want displayed – examples include current date or the current user of the site thus typing in [Today] or [Me] as the column values respectively would display such data.

Inline Editing – When checked allows a user to select an edit button to edit that row –of data – however this option is only available if the view is set to a default view.

Tabular View – This allows for the checkboxes in each row to be shown or hidden

Group By – Allows for the columns to be grouped so one can expand or collapse them as needed.

Totals – Columns that are numeric in nature can be totaled.

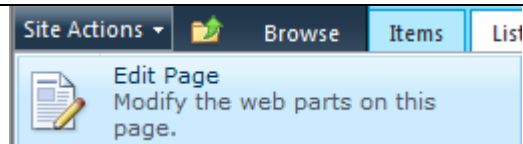
Style – Views can be changed by applying in-line styles to them.

Folders: Folders or Flat – List with folders can be shown with folders or flattened to show all of the data inside the folders.

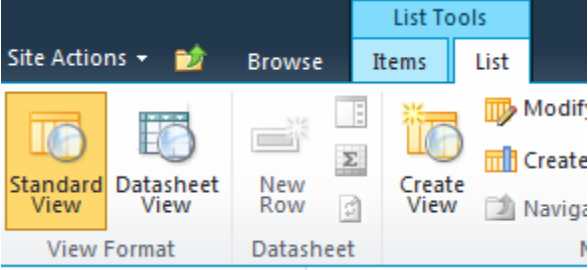
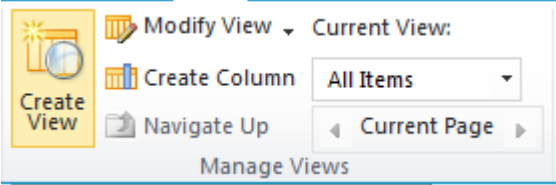
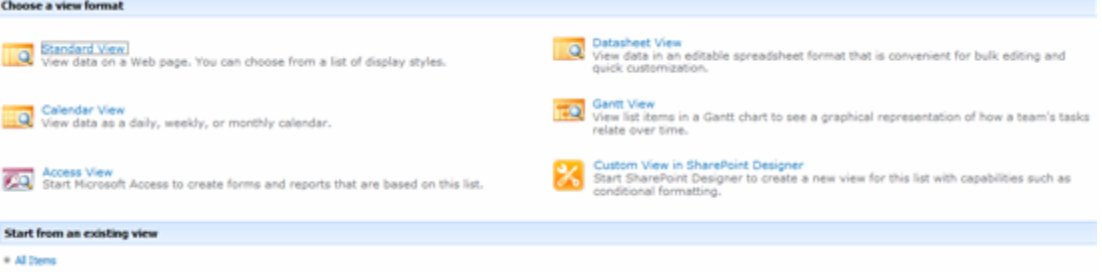
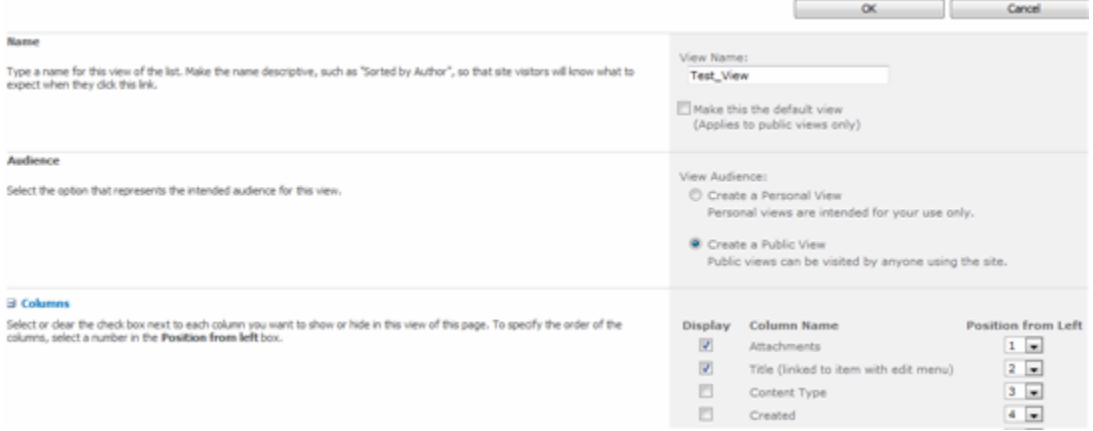
Item Limit – A limit can be placed on how many items are displayed in a views result return set.

Mobile – a view can be turned off or on for mobile viewing.

1. Maneuver to the pages content where a view of data is desired – usually



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<p>this is a list or a document repository. Select Site Actions -> Edit Page.</p>	
<p>2. Select in the List Tools tab the List option.</p>	
<p>3. In the Manage Views selection select Create View</p>	
<p>4. Choose a view format.</p>	
<p>5. In this example – the Standard View was selected. Where it says View Name: - the view needs to be</p>	

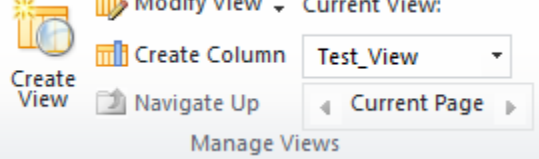
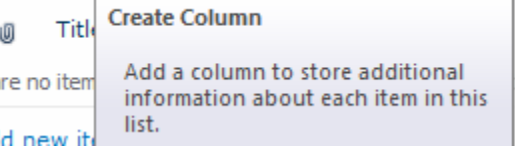
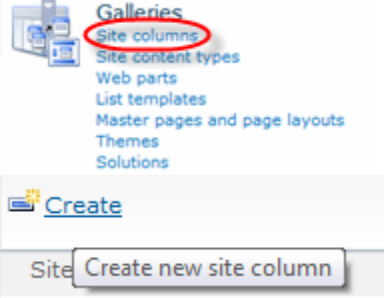
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named in
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be
displayed
need to
be
checked
as well
as the
order
that the
columns
should
appear in
the view
need
selected.

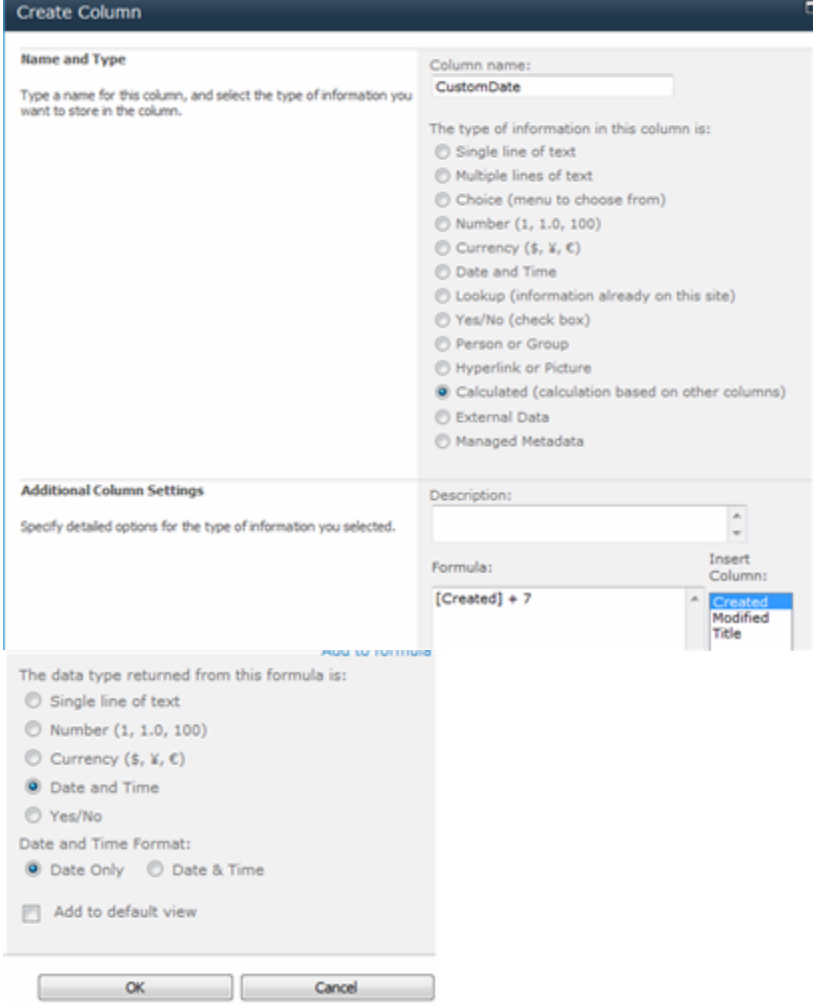
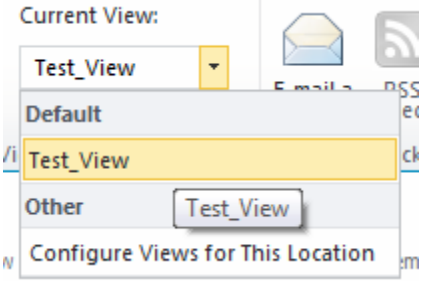
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<p>6. In the Sort field select from the drop down menu the desired field that the view should use to sort on.</p>	<p>Sort Select up to two columns to determine the order in which the items in the view are displayed. Learn about sorting items.</p> <p>First sort by the column: <input type="text" value="ID"/> <ul style="list-style-type: none"> <input checked="" type="radio"/> Show items in ascending order (A, B, C, or 1, 2, 3) <input type="radio"/> Show items in descending order (C, B, A, or 3, 2, 1) </p> <p>Then sort by the column: <input type="text" value="None"/> <ul style="list-style-type: none"> <input checked="" type="radio"/> Show items in ascending order (A, B, C, or 1, 2, 3) <input type="radio"/> Show items in descending order (C, B, A, or 3, 2, 1) <input type="checkbox"/> Sort only by specified criteria (folders may not appear before items) </p>
<p>7. Scroll down and expand the Item Limit selection and set the Number of items to display: to the desired amount – in this case I set it to 10 from the default of 30.</p>	<p>Item Limit Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the list in batches of the specified size. Learn about managing large lists.</p> <p>Number of items to display: <input type="text" value="10"/> <ul style="list-style-type: none"> <input checked="" type="radio"/> Display items in batches of the specified size. <input type="radio"/> Limit the total number of items returned to the specified amount. </p>
<p>8. Expand the Folders selection and select Show all items without folders. This allows for the documents from all folders to be shown.</p>	<p>Folders Specify whether to navigate through folders to view items, or to view all items at once.</p> <p>Folders or Flat: <input type="radio"/> Show items inside folders <input checked="" type="radio"/> Show all items without folders </p>
<p>9. Click OK once all desired items are selected.</p>	

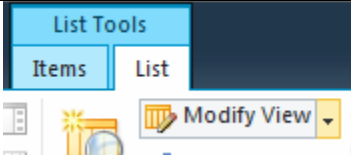
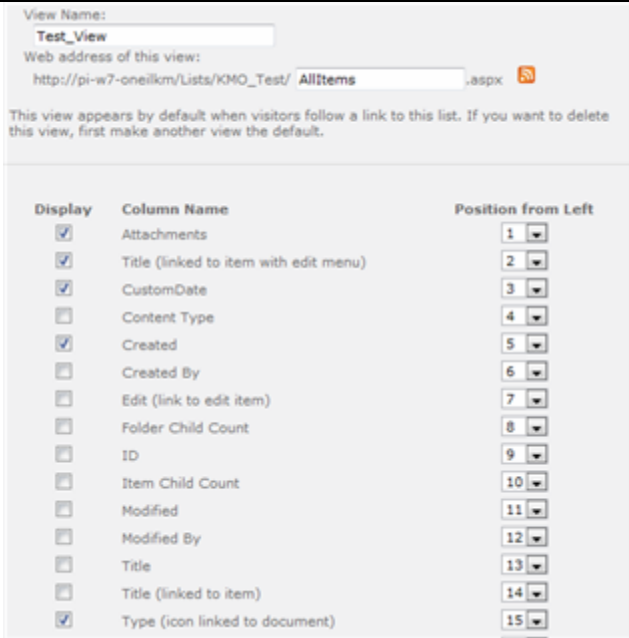
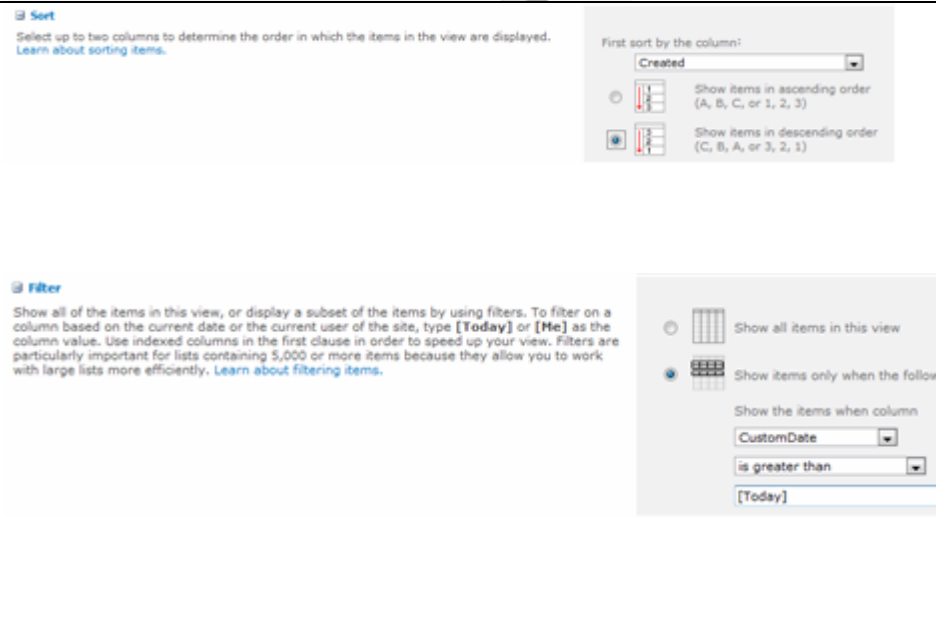
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<ul style="list-style-type: none"> • Custom Column View 	<p>This view example shows how to add a column using a built-in variable. In this case, the view displays the item based on its age.</p>
<p>1. In the Manage Views toolbox under Current View: select the view previously created.</p>	
<p>2. Select Create Column. Note: Unless one is at the root of the full site (example http://yourwebserver.domain.com) then this column will be ad-hoc meaning it will only be available at the actual site it was created in. If a column is to be used site-wide a user should go to the root of the full site and select Site Actions - > Site Settings then under Galleries select Site</p>	 <p>For a column to be used across the entire site and subsites:</p> 

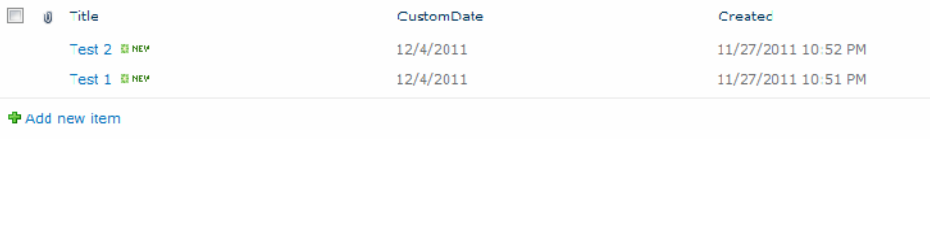
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<p>columns then Create</p>	
<p>3. In the Column name: enter in CustomDate and select under 'The type of information in this column is:' the Calculated (calculation based on other columns) In the Formula field enter in [Created] + 7</p> <p>Under 'The data type returned from this formula is:' select Date and Time</p> <p>Uncheck 'Add to default view' then select OK</p>	
<p>4. Verify under the Current View that the desired view is selected. In this case here – I have selected the Test_View.</p>	

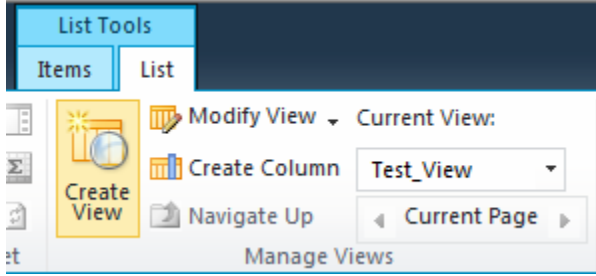
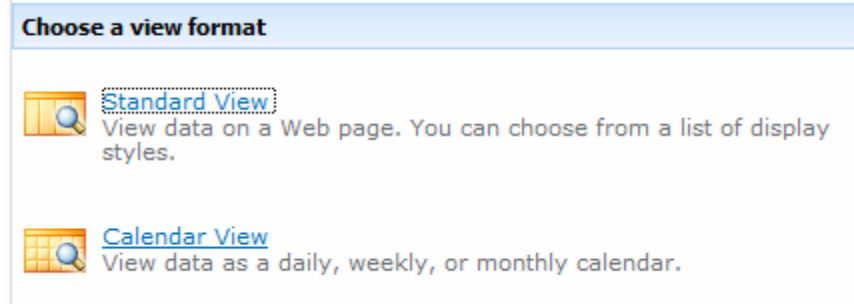
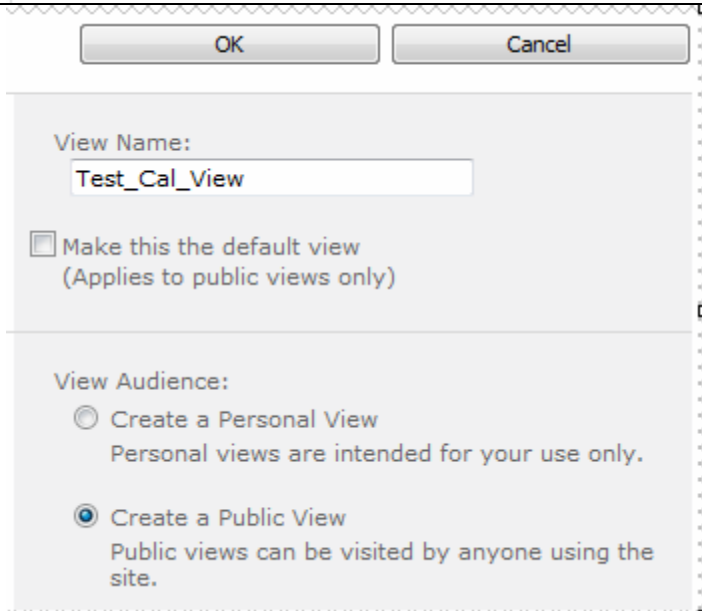
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<p>5. In the List Tools tab select List</p>																																																	
<p>6. Select Modify View -> Modify View</p>																																																	
<p>7. Check the custom column previously created in this case it's called CustomDate. Also check the columns Created and Type.</p>	 <table border="1"> <thead> <tr> <th>Display</th> <th>Column Name</th> <th>Position from Left</th> </tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/></td><td>Attachments</td><td>1</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Title (linked to item with edit menu)</td><td>2</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>CustomDate</td><td>3</td></tr> <tr><td><input type="checkbox"/></td><td>Content Type</td><td>4</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Created</td><td>5</td></tr> <tr><td><input type="checkbox"/></td><td>Created By</td><td>6</td></tr> <tr><td><input type="checkbox"/></td><td>Edit (link to edit item)</td><td>7</td></tr> <tr><td><input type="checkbox"/></td><td>Folder Child Count</td><td>8</td></tr> <tr><td><input type="checkbox"/></td><td>ID</td><td>9</td></tr> <tr><td><input type="checkbox"/></td><td>Item Child Count</td><td>10</td></tr> <tr><td><input type="checkbox"/></td><td>Modified</td><td>11</td></tr> <tr><td><input type="checkbox"/></td><td>Modified By</td><td>12</td></tr> <tr><td><input type="checkbox"/></td><td>Title</td><td>13</td></tr> <tr><td><input type="checkbox"/></td><td>Title (linked to item)</td><td>14</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Type (icon linked to document)</td><td>15</td></tr> </tbody> </table>	Display	Column Name	Position from Left	<input checked="" type="checkbox"/>	Attachments	1	<input checked="" type="checkbox"/>	Title (linked to item with edit menu)	2	<input checked="" type="checkbox"/>	CustomDate	3	<input type="checkbox"/>	Content Type	4	<input checked="" type="checkbox"/>	Created	5	<input type="checkbox"/>	Created By	6	<input type="checkbox"/>	Edit (link to edit item)	7	<input type="checkbox"/>	Folder Child Count	8	<input type="checkbox"/>	ID	9	<input type="checkbox"/>	Item Child Count	10	<input type="checkbox"/>	Modified	11	<input type="checkbox"/>	Modified By	12	<input type="checkbox"/>	Title	13	<input type="checkbox"/>	Title (linked to item)	14	<input checked="" type="checkbox"/>	Type (icon linked to document)	15
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<input checked="" type="checkbox"/>	Type (icon linked to document)	15																																															
<p>8. In the Sort option select the Created field and the descending order option.</p> <p>In the Filter section select the CustomDate field and select 'is greater than' and enter [Today]</p>	 <p>Sort Select up to two columns to determine the order in which the items in the view are displayed. Learn about sorting items.</p> <p>First sort by the column: Created</p> <p> <input type="radio"/> Show items in ascending order (A, B, C, or 1, 2, 3) <input checked="" type="radio"/> Show items in descending order (C, B, A, or 3, 2, 1) </p> <p>Filter Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. Learn about filtering items.</p> <p> <input type="radio"/> Show all items in this view <input checked="" type="radio"/> Show items only when the following conditions are met: </p> <p>Show the items when column CustomDate is greater than [Today]</p>																																																

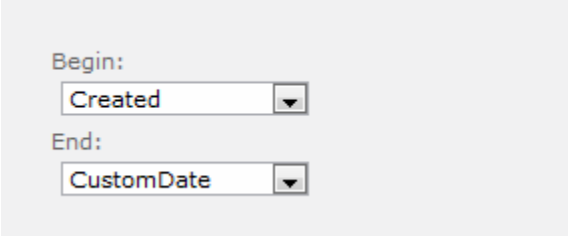
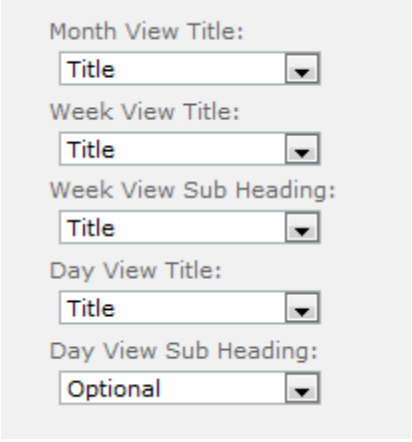
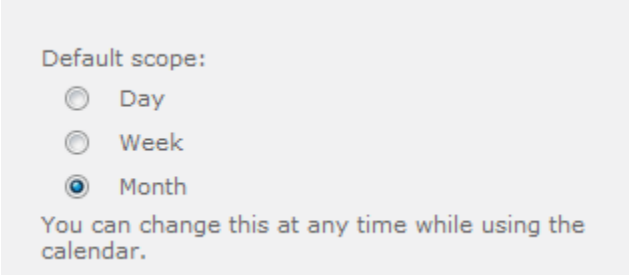
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Click OK so the view is saved.										
9. The active view will then be shown and in this example it is the Custom Column View.	 <table border="1"><thead><tr><th>Title</th><th>CustomDate</th><th>Createc</th></tr></thead><tbody><tr><td>Test 2 NEW</td><td>12/4/2011</td><td>11/27/2011 10:52 PM</td></tr><tr><td>Test 1 NEW</td><td>12/4/2011</td><td>11/27/2011 10:51 PM</td></tr></tbody></table> <p>+ Add new item</p>	Title	CustomDate	Createc	Test 2 NEW	12/4/2011	11/27/2011 10:52 PM	Test 1 NEW	12/4/2011	11/27/2011 10:51 PM
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Test 2 NEW	12/4/2011	11/27/2011 10:52 PM								
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

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<ul style="list-style-type: none"> • Calendar View 	<p>This view example shows how to add a calendar view so that items of value can be placed into a useful calendar.</p>
<p>1. Once on the page where a calendar view is desired select from the List Tools tab - > List -> Create View.</p>	
<p>2. Under Choose a view format select Calendar View.</p>	
<p>3. Under the View name: - enter in a name in this case its Test_Cal_View and select under View Audience, the desired audience.</p>	

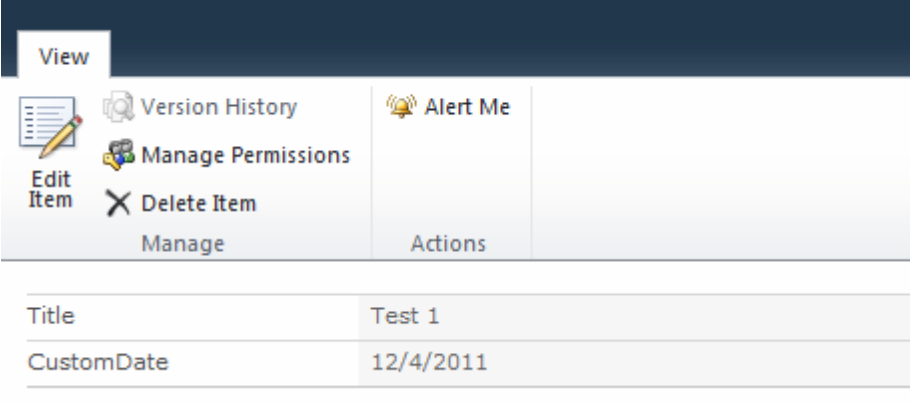
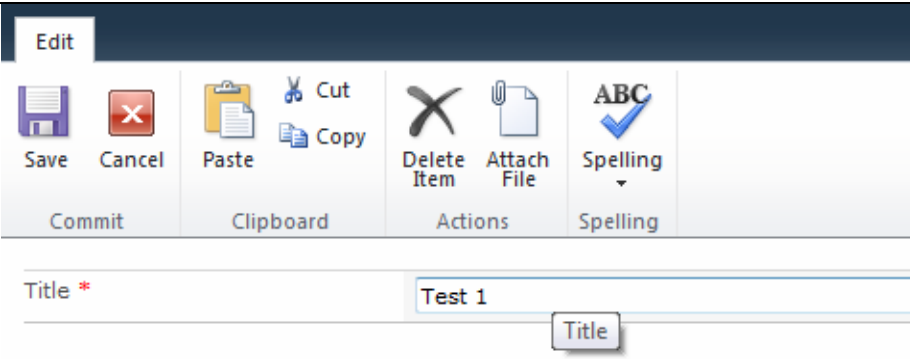
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<p>4. Under Time Interval select the desired Begin and End item columns to be utilized in this case here I've used Created and CustomDate from the previous view example.</p>	
<p>5. Under Calendar Columns select the columns that will be displayed in the view. In this case I've made it easy and selected the display field to be the title. NOTE: the title field is required.</p>	
<p>6. Select the default scope.</p>	

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<p>7. Select the desired Filter</p>	<p><input checked="" type="radio"/>  Show all items in this view</p> <p><input type="radio"/>  Show items only when the following is true:</p> <p>Show the items when column</p> <p>None <input type="text"/></p> <p>is equal to <input type="text"/></p> <p><input type="text"/></p> <p><input type="radio"/> And <input checked="" type="radio"/> Or</p> <p>When column</p> <p>None <input type="text"/></p> <p>is equal to <input type="text"/></p> <p><input type="text"/></p>																																								
<p>8. Select the desired Mobile options and how many items to display in this view – the default is 3.</p>	<p><input checked="" type="checkbox"/> Enable this view for mobile access (Applies to public views only)</p> <p><input type="checkbox"/> Make this view the default view for mobile access (Applies to public views only)</p> <p>Number of items to display in list view web part for this view:</p> <p><input type="text" value="3"/></p>																																								
<p>9. Click OK when done and the view is saved</p>																																									
<p>10. The view is then displayed in a calendar format.</p>	<p>December, 2011</p> <table border="1"><thead><tr><th>Sunday</th><th>Monday</th><th>Tuesday</th><th>Wednesday</th><th>Thursday</th></tr></thead><tbody><tr><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td></tr><tr><td colspan="5">Test 1</td></tr><tr><td colspan="5">Test 2</td></tr><tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr><tr><td colspan="2">Test 1</td><td colspan="3"></td></tr><tr><td colspan="2">Test 2</td><td colspan="3"></td></tr><tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td></tr></tbody></table>	Sunday	Monday	Tuesday	Wednesday	Thursday	27	28	29	30	1	Test 1					Test 2					4	5	6	7	8	Test 1					Test 2					11	12	13	14	15
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<p>11. Selecting an item shows the data and if so desired the item can be edited by clicking Edit Item.</p>	
<p>12. The edit can be made and then the Save button selected.</p>	

SharePoint Permissions

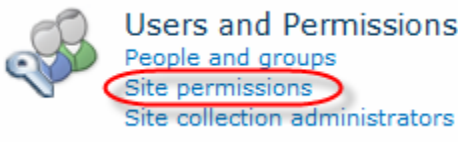
Permissions in SharePoint are a broad topic – the following will be described with the Site Owner mind frame.

Essentially, the easiest way to handle permissions is by groups. Most firms utilize Active Directory which ties into SharePoint and then administrators add the users to the desired groups that are created. By default a top level site has three groups:

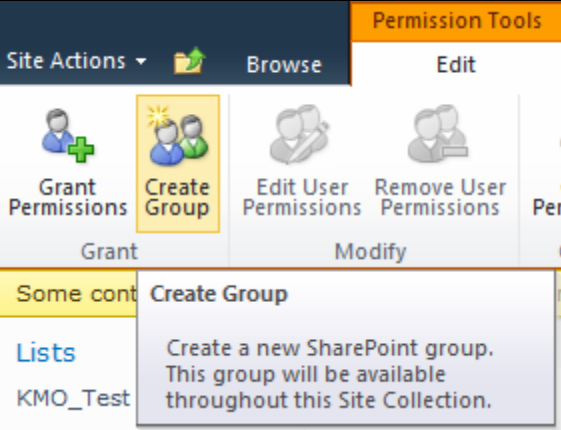
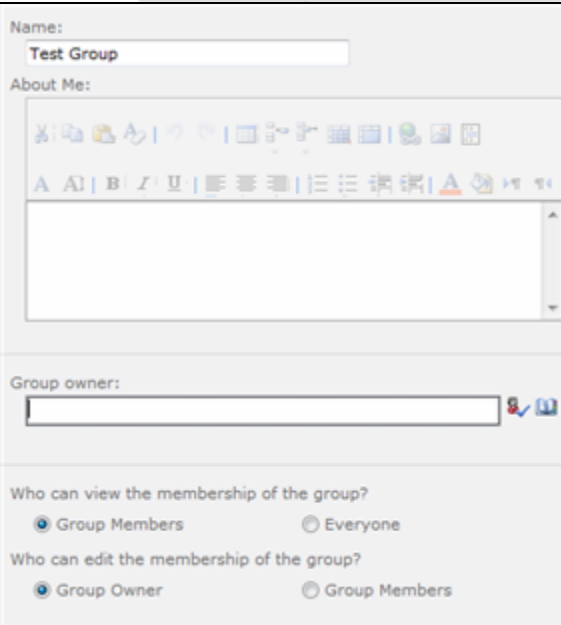
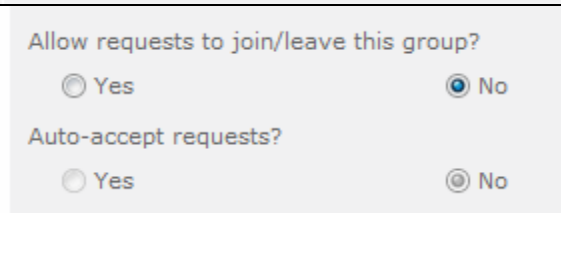
Owners -> whom will have full control of the site

Members -> whom can contribute content to lists and libraries

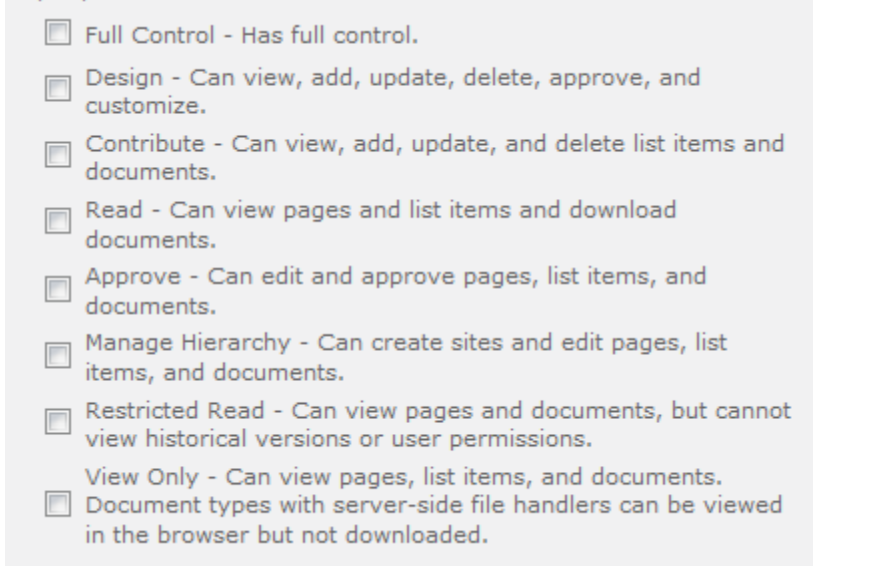
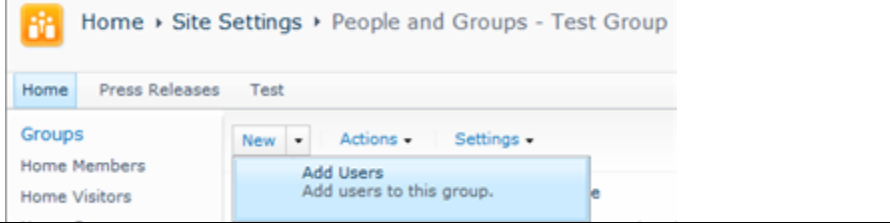
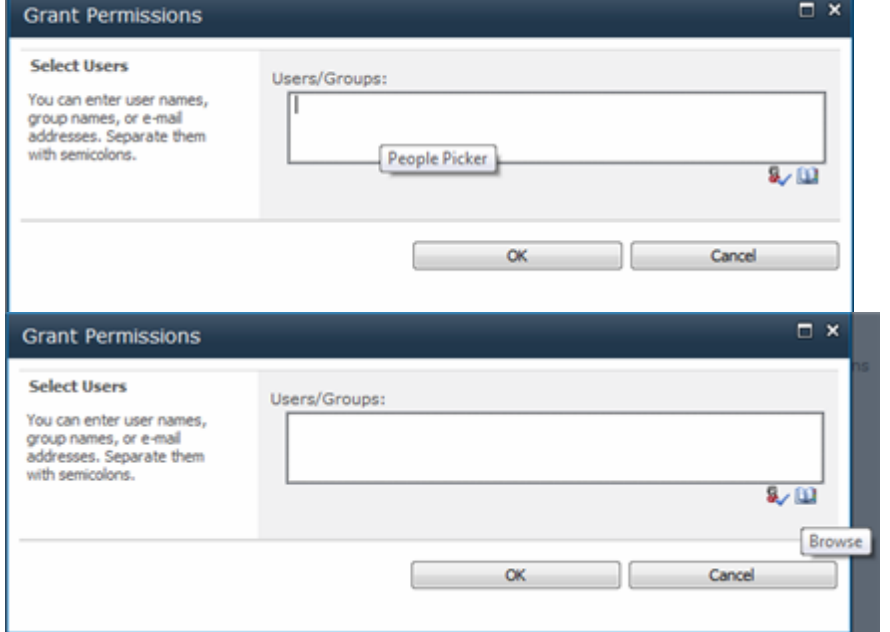
Visitors -> whom have read only access to the site

<ul style="list-style-type: none">• Create a group	The steps below go over how to create a custom group which then can be populated with users.
1. Maneuver to the site where the group should be created and where you currently are likely an administrator/site owner.	
2. Select Site Actions -> Site Settings and under Users and Permissions select the Site permissions link	 <p>Users and Permissions People and groups Site permissions Site collection administrators</p>

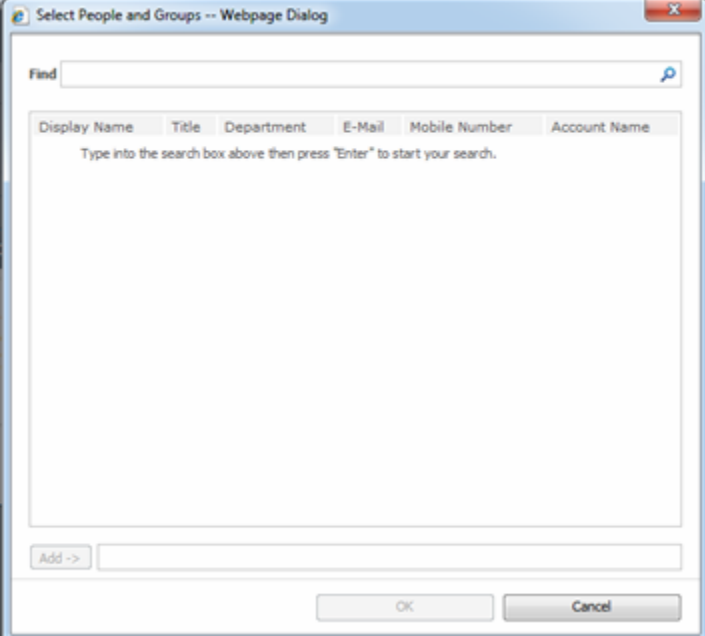
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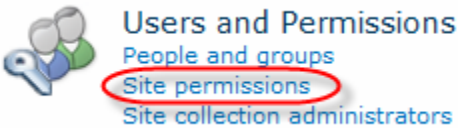
<p>3. On the ribbon menu select Create Group</p>	 <p>The screenshot shows the SharePoint ribbon with the 'Permission Tools' group selected. The 'Create Group' button is highlighted in yellow. A tooltip is visible over the 'Create Group' button, stating: 'Create a new SharePoint group. This group will be available throughout this Site Collection.'</p>
<p>4. Name the group, enter in a group owner (example domain\user), select who can view the membership of the group and who can edit the membership of the group.</p>	 <p>The screenshot shows the 'Create Group' dialog box. The 'Name' field contains 'Test Group'. The 'About Me' field is empty. The 'Group owner' field is empty. The 'Who can view the membership of the group?' section has 'Group Members' selected. The 'Who can edit the membership of the group?' section has 'Group Owner' selected.</p>
<p>5. Select if users are allowed to join/leave the group and if auto-accept requests are allowed</p>	 <p>The screenshot shows the 'Allow requests to join/leave this group?' section with 'No' selected. The 'Auto-accept requests?' section has 'No' selected.</p>

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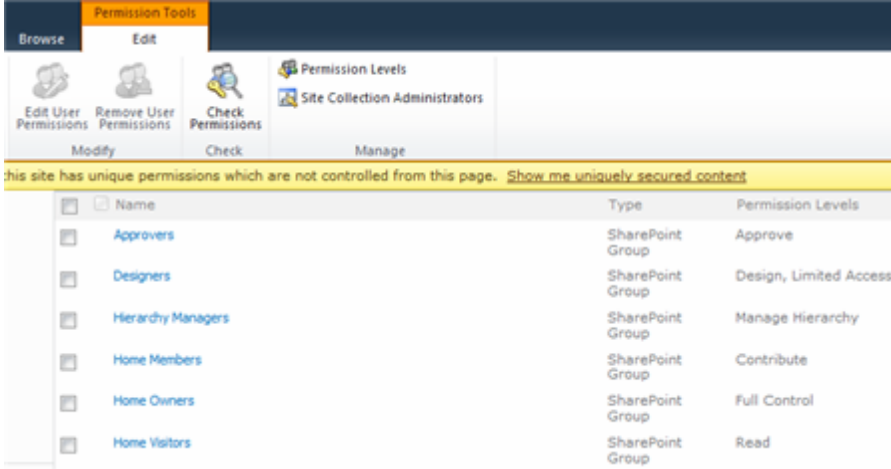
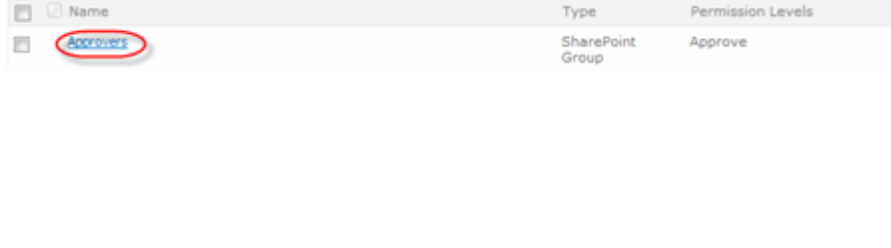
<p>6. Choose the permission level of the group and click Create</p>	 <p>A list of permission levels with checkboxes:</p> <ul style="list-style-type: none"><input type="checkbox"/> Full Control - Has full control.<input type="checkbox"/> Design - Can view, add, update, delete, approve, and customize.<input type="checkbox"/> Contribute - Can view, add, update, and delete list items and documents.<input type="checkbox"/> Read - Can view pages and list items and download documents.<input type="checkbox"/> Approve - Can edit and approve pages, list items, and documents.<input type="checkbox"/> Manage Hierarchy - Can create sites and edit pages, list items, and documents.<input type="checkbox"/> Restricted Read - Can view pages and documents, but cannot view historical versions or user permissions.<input type="checkbox"/> View Only - Can view pages, list items, and documents. <p>Document types with server-side file handlers can be viewed in the browser but not downloaded.</p>
<p>7. The group is created and now additional users can be added by selecting New -> Add Users</p>	 <p>A screenshot of a web interface showing a 'New' dropdown menu with 'Add Users' selected. The breadcrumb path is 'Home > Site Settings > People and Groups - Test Group'. Other options in the menu include 'Add users to this group.' and 'e'.</p>
<p>8. In the Select Users click the People Picker and either enter in the users by name and click the check mark or click the browse book and select the desired users and click OK.</p>	 <p>Two screenshots of the 'Grant Permissions' dialog box. The top screenshot shows the 'People Picker' button highlighted in the 'Users/Groups' field. The bottom screenshot shows the 'Browse' button highlighted in the same field.</p>

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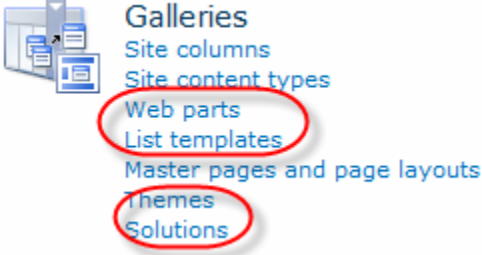
<p>9. If the browse book was selected the screen will look as such and entering in a users name after the Find option and clicking the magnifying glass will find the user – then clicking Add – will add the user into the middle pane. Repeat the process for each user whom should be added to the group – when done click OK.</p>	
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<ul style="list-style-type: none">• View permissions of a group	<p>The steps below go over how to view permissions of a group.</p>
<p>1. Sometimes viewing the permissions of a group is needed so it is known what users have access. Thus, maneuver to the site where the permissions should be viewed and where you currently are</p>	

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<p>likely an administrator/site owner. Then from Site Actions -> Site Settings under Users and Permissions click Site permissions</p>																						
<p>2. The groups for that site are shown.</p>	 <p>The screenshot shows the 'Permission Tools' interface in SharePoint. It includes buttons for 'Edit User Permissions', 'Remove User Permissions', 'Check Permissions', 'Permission Levels', and 'Site Collection Administrators'. Below these is a table of site groups:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Permission Levels</th> </tr> </thead> <tbody> <tr> <td>Approvers</td> <td>SharePoint Group</td> <td>Approve</td> </tr> <tr> <td>Designers</td> <td>SharePoint Group</td> <td>Design, Limited Access</td> </tr> <tr> <td>Hierarchy Managers</td> <td>SharePoint Group</td> <td>Manage Hierarchy</td> </tr> <tr> <td>Home Members</td> <td>SharePoint Group</td> <td>Contribute</td> </tr> <tr> <td>Home Owners</td> <td>SharePoint Group</td> <td>Full Control</td> </tr> <tr> <td>Home Visitors</td> <td>SharePoint Group</td> <td>Read</td> </tr> </tbody> </table>	Name	Type	Permission Levels	Approvers	SharePoint Group	Approve	Designers	SharePoint Group	Design, Limited Access	Hierarchy Managers	SharePoint Group	Manage Hierarchy	Home Members	SharePoint Group	Contribute	Home Owners	SharePoint Group	Full Control	Home Visitors	SharePoint Group	Read
Name	Type	Permission Levels																				
Approvers	SharePoint Group	Approve																				
Designers	SharePoint Group	Design, Limited Access																				
Hierarchy Managers	SharePoint Group	Manage Hierarchy																				
Home Members	SharePoint Group	Contribute																				
Home Owners	SharePoint Group	Full Control																				
Home Visitors	SharePoint Group	Read																				
<p>3. In this case – the Approvers link was clicked and the users whom are members of that group are displayed.</p>	 <p>This is a close-up of the 'Approvers' group link from the previous screenshot. The link is circled in red, and the table below it shows:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Permission Levels</th> </tr> </thead> <tbody> <tr> <td>Approvers</td> <td>SharePoint Group</td> <td>Approve</td> </tr> </tbody> </table>	Name	Type	Permission Levels	Approvers	SharePoint Group	Approve															
Name	Type	Permission Levels																				
Approvers	SharePoint Group	Approve																				

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<ul style="list-style-type: none">• Site Action areas	<p>A site owner typically will be working in four areas: Site Actions -> Site Settings Site Actions -> Edit Page Site Actions -> New Page, New Document Library, New Site and More Options While in a list or library (Settings -> List or Library Settings)</p>
<p>1. Under Site Actions -> Site Settings a Site Owner likely will see the following options:</p>	
<p>2. If a user is a subsite owner and doesn't have rights to the top level site then while going to Site Actions -> Site Settings they will not have access to the following:</p>	 <p>Galleries Site columns Site content types Web parts List templates Master pages and page layouts Themes Solutions</p>

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3. A Site Collection administrator will have many more options to choose from.



Users and Permissions
People and groups
Site permissions
Site collection administrators



Galleries
Site columns
Site content types
Web parts
List templates
Master pages and page layouts
Themes
Solutions



Site Administration
Regional settings
Site libraries and lists
User alerts
RSS
Search and offline availability
Sites and workspaces
Workflows
Workflow settings
Site output cache
Term store management
Content and structure
Searchable columns
Content and structure logs



Look and Feel
Welcome Page
Title, description, and icon
Master page
Page layouts and site templates
Tree view
Site theme
Navigation



Site Actions
Manage site features
Reset to site definition
Delete this site
Site Web Analytics reports
Site Collection Web Analytics reports



Site Collection Administration
Search settings
Search scopes
Search keywords
FAST Search keywords
FAST Search site promotion and demotion
FAST Search user context
Recycle bin
Site collection features
Site hierarchy
Site collection navigation
Site collection audit settings
Portal site connection
Site collection policies
Site collection cache profiles
Site collection object cache

- **Item Level Permissions**

4. It is possible to set permissions at the item level of announcements, calendars, custom lists, discussion boards, links and surveys and tasks. To set such permissions one would access the list or library settings menu and select the List or Library Settings then Advanced Settings. In the Item-level Permissions one would then check the desired setting. Click OK when done.

Read access: Specify which items users are allowed to read

- Read all items
- Read items that were created by the user

Create and Edit access: Specify which items users are allowed to create and edit

- Create and edit all items
- Create items and edit items that were created by the user
- None

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- **Search Visibility**

5. It is possible to set if items when searched for show up in results. To set this access the list or library settings menu and select the List or Library Settings then Advanced Settings. In the Search one would then check the desired setting. Click OK when done.

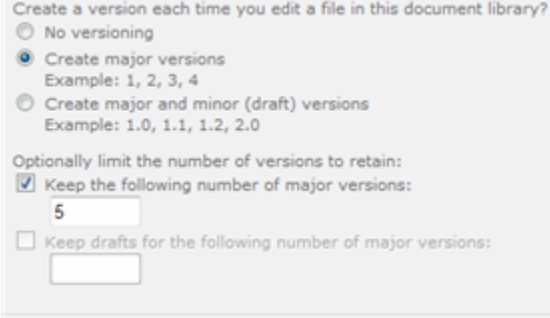
Allow items from this list to appear in search results?

Yes

No

List and Library Versioning

Versioning is mainly used so one can revert back to a previous version of an item/document and view a previous version.

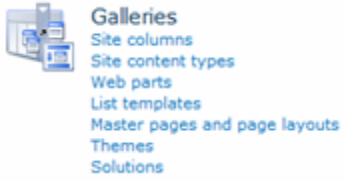
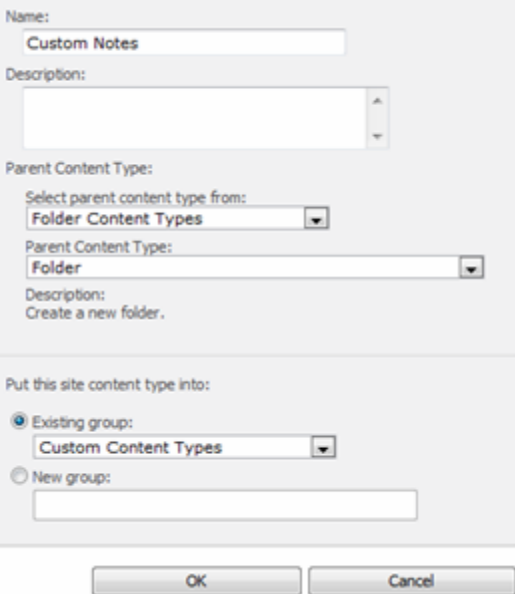
<p>1. The first item one needs to do in regards to versioning is to enable it. Typically it is also a good idea to enter in the number of major versions that get kept. In this example here Create major versions of each document has been selected and 5 major versions will be kept with the notion that after five versions get uploaded the oldest version will be deleted (and not kept) once a sixth version is uploaded.</p>	 <p>Create a version each time you edit a file in this document library?</p> <p><input type="radio"/> No versioning</p> <p><input checked="" type="radio"/> Create major versions Example: 1, 2, 3, 4</p> <p><input type="radio"/> Create major and minor (draft) versions Example: 1.0, 1.1, 1.2, 2.0</p> <p>Optionally limit the number of versions to retain:</p> <p><input checked="" type="checkbox"/> Keep the following number of major versions: <input type="text" value="5"/></p> <p><input type="checkbox"/> Keep drafts for the following number of major versions: <input type="text"/></p>
<p>2. Additionally, it should be noted that minor versions for draft purposes can be kept by selecting that version and thus</p>	

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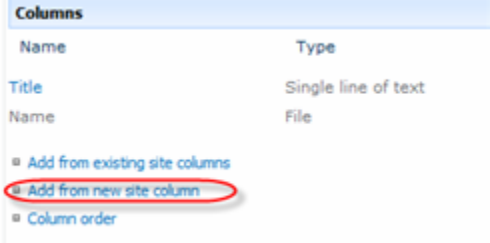
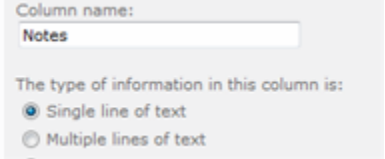

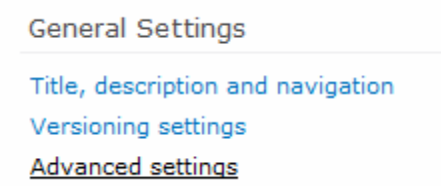
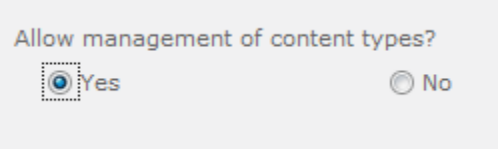
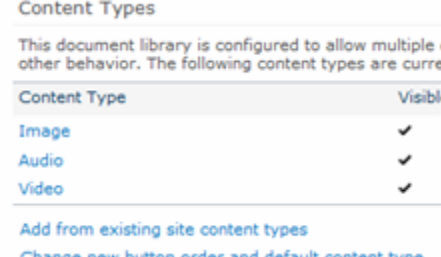
<p>if this is selected then versions ending in .0 are major versions and versions ending with non-zero extensions are minor versions.</p>	
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Content Types

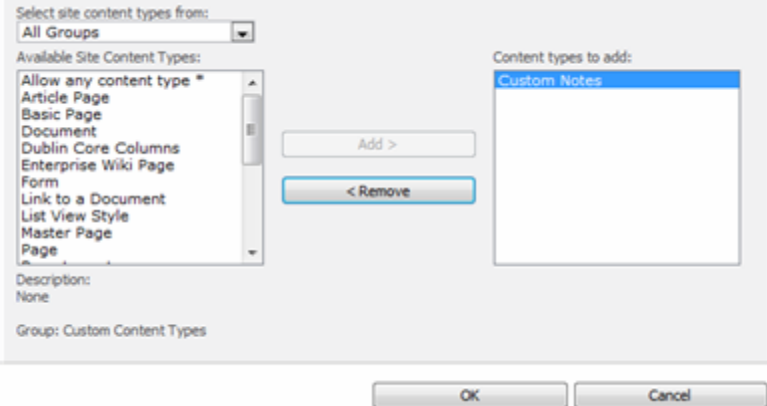
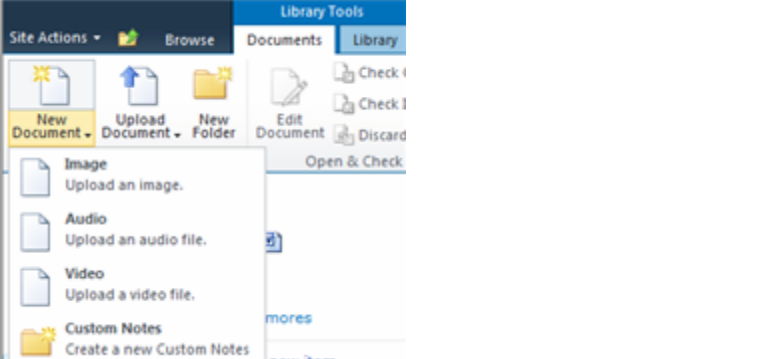
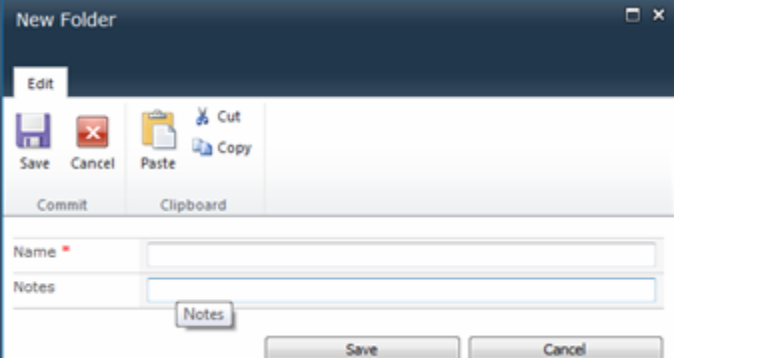
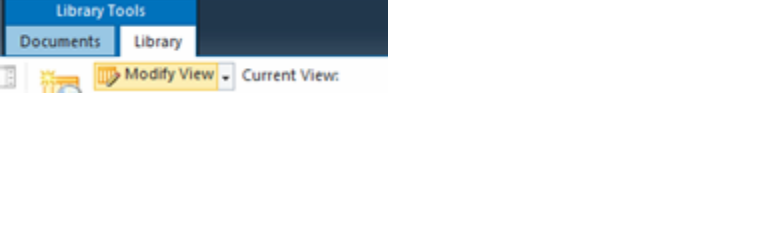
A content type essentially defines the attributes of a list item, a document, or a folder. SharePoint 2010 has several built in content types and site columns that may meet your needs. The below steps show how to best use content types – note there are essentially two kinds of content types – Site content types which are available to the root site and all its parents (subsites) and List content types which are essentially Site content types that are added to a list and then customized just for that lists purpose.

<p>1. To create a custom Site content type – from Site Actions -> Site Settings – under Galleries select Site content type</p>	 <p>The screenshot shows the 'Galleries' section in SharePoint Site Settings. The 'Site content types' link is highlighted in blue. Other links include Site columns, Web parts, List templates, Master pages and page layouts, Themes, and Solutions.</p>
<p>2. Click Create and enter in the desired data – in this example I will create a custom content type to be used with Folders so that a notes field is added. In this case I have named the item Custom Notes and selected Folder Content Types as the Parent Content Type and Folder as the second Parent Content Type. The item will be placed into an existing group called Custom</p>	 <p>The screenshot shows the 'Create Site Content Type' dialog box. The 'Name' field contains 'Custom Notes'. The 'Description' field is empty. Under 'Parent Content Type', 'Select parent content type from:' is set to 'Folder Content Types' and 'Parent Content Type:' is set to 'Folder'. The description for the parent is 'Create a new folder.'. Under 'Put this site content type into:', the 'Existing group:' radio button is selected, and the dropdown is set to 'Custom Content Types'. There are 'OK' and 'Cancel' buttons at the bottom.</p>


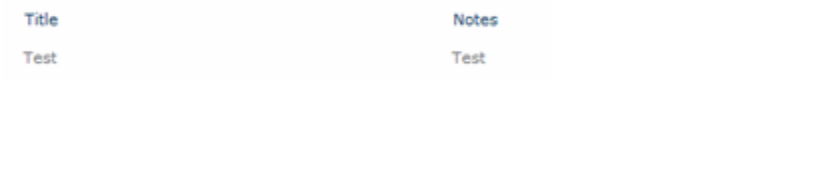
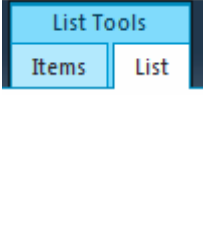
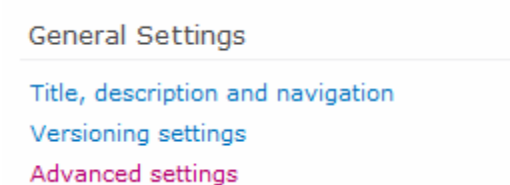
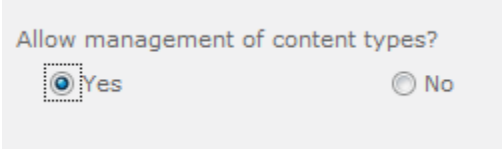
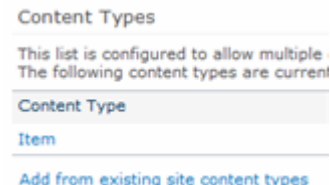
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<p>Content Types. When done with selections click OK.</p>									
<p>3. On the page that displays under the Columns section click Add from the new site column.</p>	 <p>The screenshot shows a 'Columns' configuration interface with a table of columns and a list of actions. The 'Add from new site column' option is highlighted with a red circle.</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>Title</td> <td>Single line of text</td> </tr> <tr> <td>Name</td> <td>File</td> </tr> </tbody> </table> <ul style="list-style-type: none"> ▣ Add from existing site columns ▣ Add from new site column ▣ Column order 	Name	Type	Title	Single line of text	Name	File		
Name	Type								
Title	Single line of text								
Name	File								
<p>4. In the new Site Column screen that appears create a Column called Notes which is a Single line of text and click OK.</p>	 <p>The screenshot shows a 'Column name' configuration screen. The column name is 'Notes' and 'Single line of text' is selected.</p> <p>Column name: <input type="text" value="Notes"/></p> <p>The type of information in this column is:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Single line of text <input type="radio"/> Multiple lines of text 								
<p>5. Now maneuver to the Document Library where the content type will be utilized. From the Library Tools tab select Library -> then Library settings.</p>	 <p>The screenshot shows the 'Library Tools' tab with 'Documents' and 'Library' buttons. The 'Library' button is selected.</p>								
<p>6. Under General Settings select Advanced Settings.</p>	 <p>The screenshot shows the 'General Settings' page with links for 'Title, description and navigation', 'Versioning settings', and 'Advanced settings'. The 'Advanced settings' link is selected.</p>								
<p>7. Under Content Types select Yes to Allow management of content types and then click OK.</p>	 <p>The screenshot shows a dialog box asking 'Allow management of content types?'. The 'Yes' option is selected.</p> <p>Allow management of content types?</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Yes <input type="radio"/> No 								
<p>8. Under Content Types select Add from existing site content types.</p>	 <p>The screenshot shows the 'Content Types' configuration page. The 'Add from existing site content types' option is selected.</p> <p>Content Types</p> <p>This document library is configured to allow multiple other behavior. The following content types are currently available:</p> <table border="1"> <thead> <tr> <th>Content Type</th> <th>Visible</th> </tr> </thead> <tbody> <tr> <td>Image</td> <td>✓</td> </tr> <tr> <td>Audio</td> <td>✓</td> </tr> <tr> <td>Video</td> <td>✓</td> </tr> </tbody> </table> <p>Add from existing site content types</p> <p>Change new button order and default content type</p>	Content Type	Visible	Image	✓	Audio	✓	Video	✓
Content Type	Visible								
Image	✓								
Audio	✓								
Video	✓								

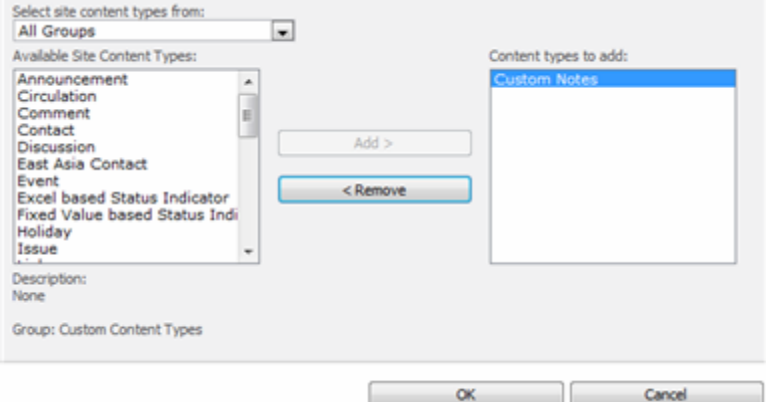
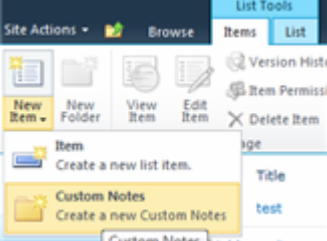
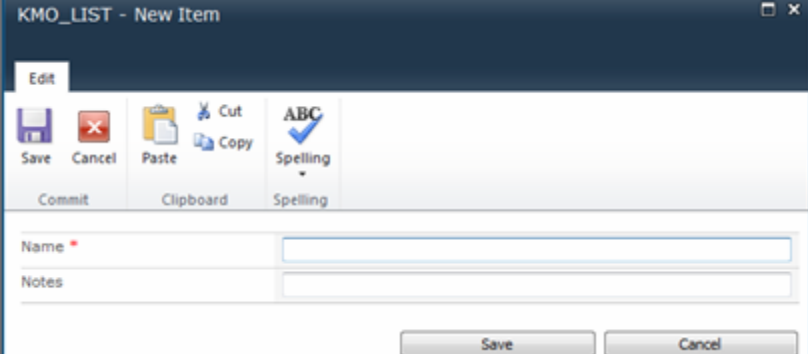
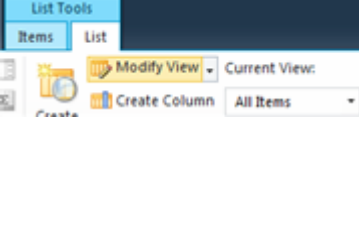

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<p>9. Select the custom Content Types from the list and click Add – then select OK.</p>	
<p>10. Maneuver to the document library and from Library Tools -> Document – under New Document will now be the Custom Notes Field. Thus select this option.</p>	
<p>11. A New Folder screen appears and now a Notes field is present which can be used to store the custom information for this folder. Enter in the desired information and then click Save.</p>	
<p>12. So that the notes field displays in the default view of the document library select from Library Tools -> Library then select the Modify View selection</p>	

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<p>13. Select under Columns the Notes field and select where it should appear in the view – then click OK.</p>	
<p>14. The folder is now displayed with the entered Title and Notes (in this example it is Test)</p>	
<p>15. To add the same Custom Content Type to a list – maneuver to that list and select from the List Tools tab – List - > List Settings</p>	
<p>16. Under General Settings select Advanced Settings</p>	
<p>17. Under Content Types select Yes to Allow management of content types and then click OK.</p>	
<p>18. Under Content Types select Add from existing site content types</p>	

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<p>19. Select the custom Content Types from the list and click Add – then select OK.</p>	
<p>20. From List Tools -> Items select New Item and select the Custom Notes</p>	
<p>21. A New Item screen appears and now a Notes field is present which can be used to store the custom information for this list item. Enter in the desired information and then click Save.</p>	
<p>22. So that the notes field displays in the default view of the list select from List Tools -> List then select the Modify View selection</p>	
<p>23. Select under Columns the Notes field and select where it should appear in the view – then click OK.</p>	

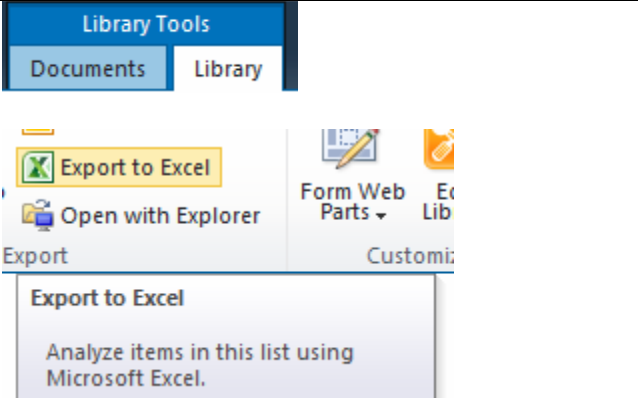
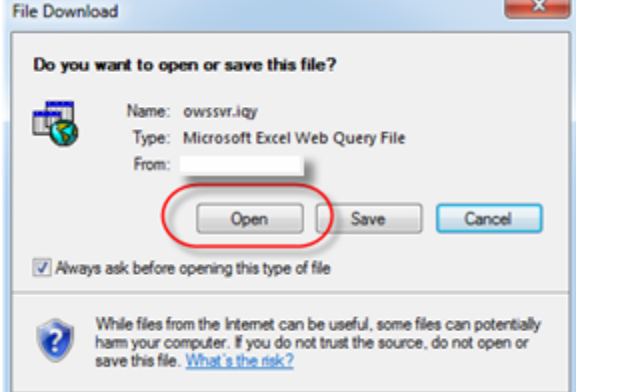
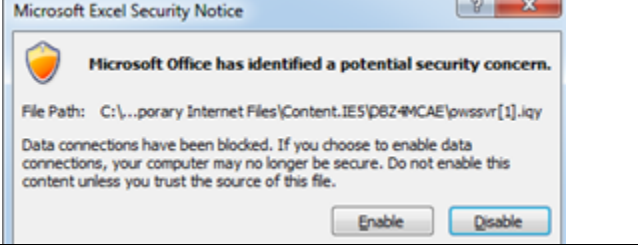
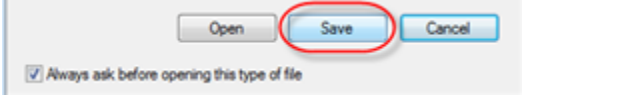
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24. The list item is now displayed with the entered Title and Notes (in this example it is Test)	<table border="1"><thead><tr><th data-bbox="617 336 698 357">Title</th><th data-bbox="1312 336 1354 357">Notes</th></tr></thead><tbody><tr><td data-bbox="662 370 695 391">test</td><td data-bbox="1312 370 1354 391"></td></tr><tr><td data-bbox="662 400 695 421">Test</td><td data-bbox="1312 400 1354 421">Test</td></tr></tbody></table>	Title	Notes	test		Test	Test
Title	Notes						
test							
Test	Test						
Therefore, this same process can be utilized to create a variety of custom information items.							




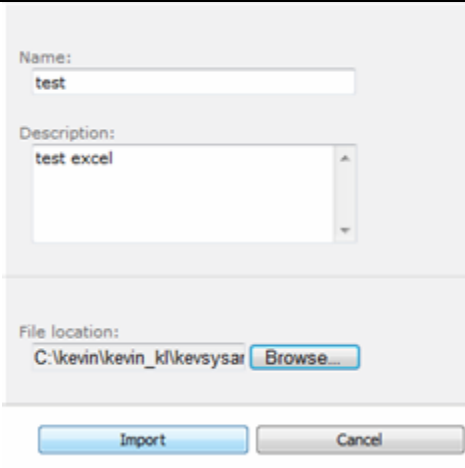
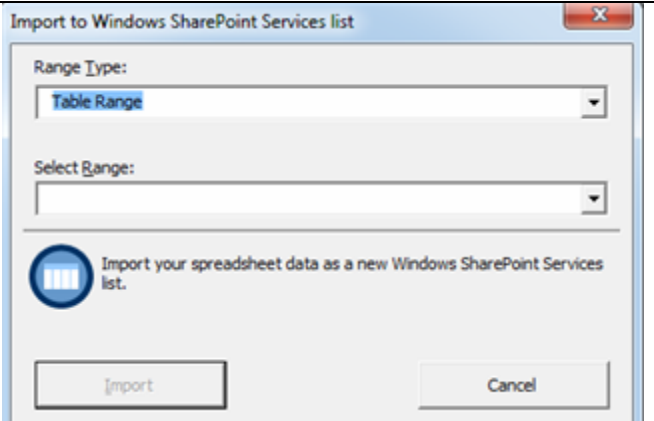
Exporting and Importing using Excel

In SharePoint 2010 – users now have the ability to better export and import using tools such as Excel.

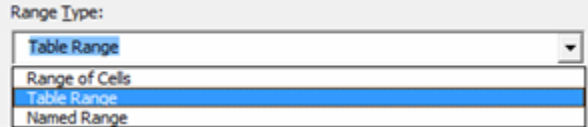

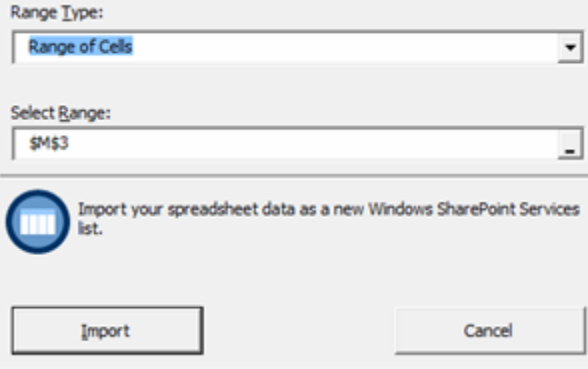
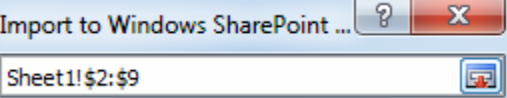
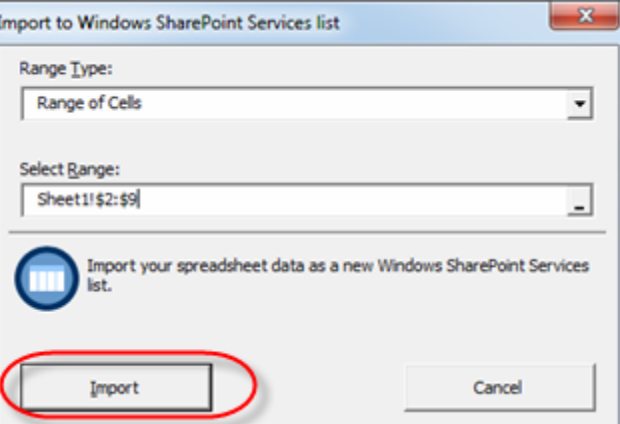
To utilize this functionality, follow the steps below.

<p>1. From a document library select the Library Tools tab – select Library then select Export to Excel.</p>	 <p>The screenshot shows the 'Library Tools' ribbon with the 'Library' tab selected. The 'Export to Excel' button is highlighted with a yellow box. Below the ribbon, the 'Export to Excel' button is shown in a larger view, with the text 'Analyze items in this list using Microsoft Excel.'</p>
<p>2. Click the Open button when prompted</p>	 <p>The screenshot shows a 'File Download' dialog box. The file name is 'owssvr.iqy' and the type is 'Microsoft Excel Web Query File'. The 'Open' button is circled in red. Below the dialog box, there is a security warning: 'While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?'</p>
<p>3. Click Enable if prompted</p>	 <p>The screenshot shows a 'Microsoft Excel Security Notice' dialog box. The text reads: 'Microsoft Office has identified a potential security concern. Data connections have been blocked. If you choose to enable data connections, your computer may no longer be secure. Do not enable this content unless you trust the source of this file.' The 'Enable' button is highlighted with a blue box.</p>
<p>4. The data set will open in excel</p>	
<p>5. Optionally – one could instead of Open select Save and save it to their desktop</p>	 <p>The screenshot shows the 'File Download' dialog box again, but this time the 'Save' button is circled in red. The 'Always ask before opening this type of file' checkbox is checked.</p>

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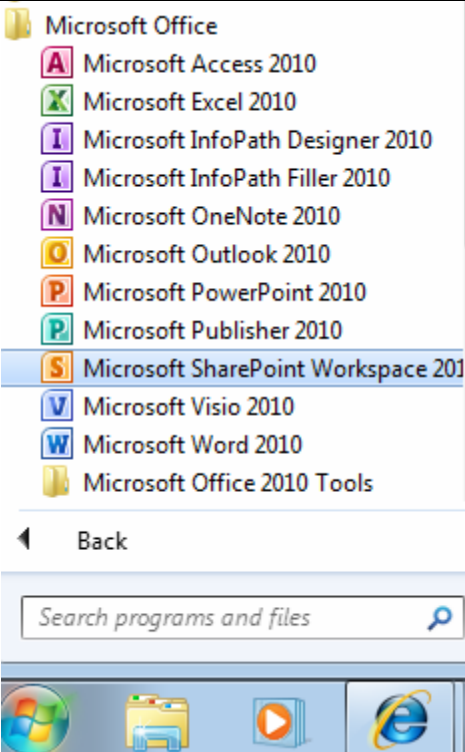
<p>6. Then open the data file which will connect with SharePoint and open the item</p>	 <p>Type: Microsoft Excel Web Query File Size: 998 bytes Date modified: 1/3/2012 2:44 PM</p>
<p>7. If one has Excel installed on the computer – then importing from Excel into SharePoint is an option to do so from Site Actions -> More Options -> select Import Spreadsheet</p>	 <p>Page Site All Categories > Blank & Custom Collaboration Content Import Spreadsheet</p>
<p>8. On the right hand side select Create:</p>	 <p>Import Spreadsheet Type: List Categories: Blank & Custom Create a list which duplicates the columns and data of an existing spreadsheet. Importing a spreadsheet requires Microsoft Excel or another compatible program. Create</p>
<p>9. Name the item, enter in a description then browse out to where the Excel file is located and click Import</p>	 <p>Name: test Description: test excel File location: C:\kevin\kevin_kl\kevsyasat Browse... Import Cancel</p>
<p>10. The Excel document will then open up and display the Import to Windows SharePoint Services list menu:</p>	 <p>Import to Windows SharePoint Services list Range Type: Table Range Select Range: Import your spreadsheet data as a new Windows SharePoint Services list. Import Cancel</p>

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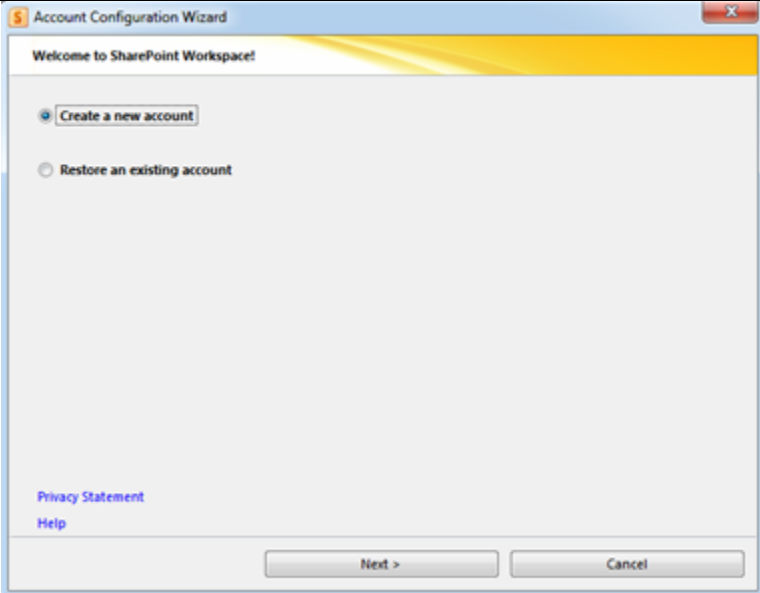
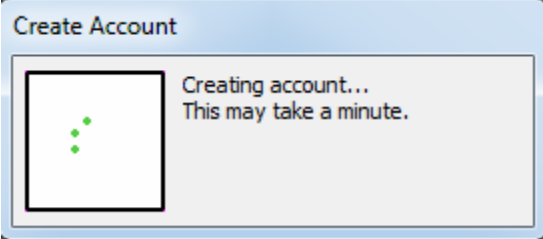
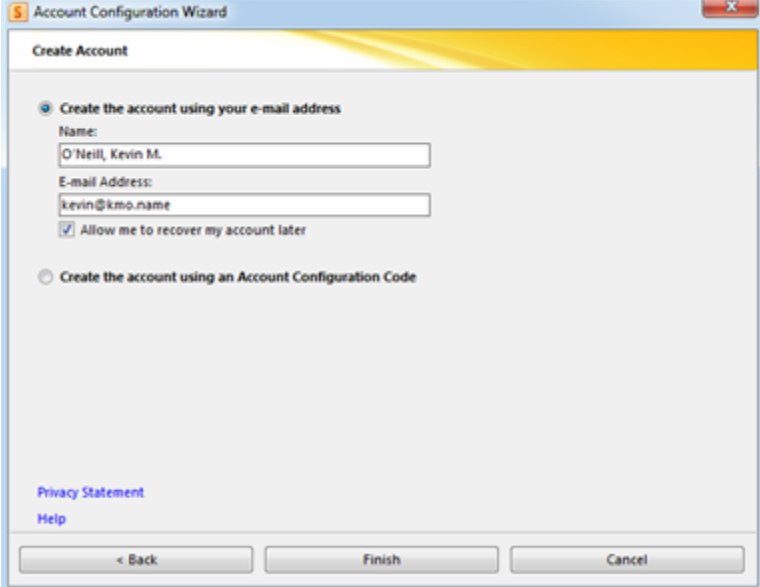
<p>11. In the Range Type one has three options Range of Cells, Table Range or Named Range to choose from:</p>	
<p>12. In this example, I have chosen Range of Cells and then selected the option under Select Range which brings up a selector so one can select the Range of Cells to Import. When done one clicks the  button then selects Import:</p>	  
<p>13. The data will appear in the SharePoint list</p>	

SharePoint Workspace

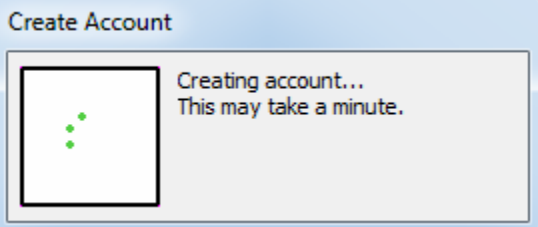
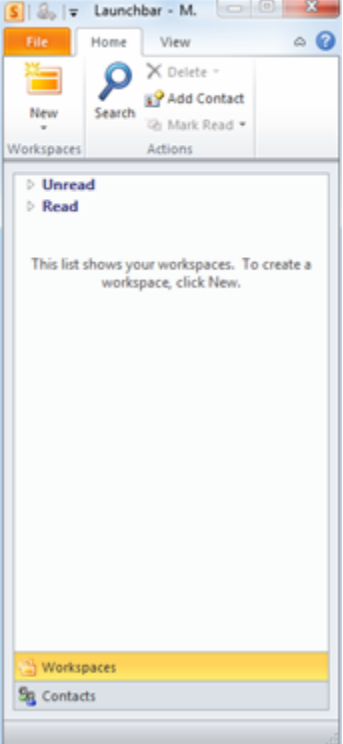
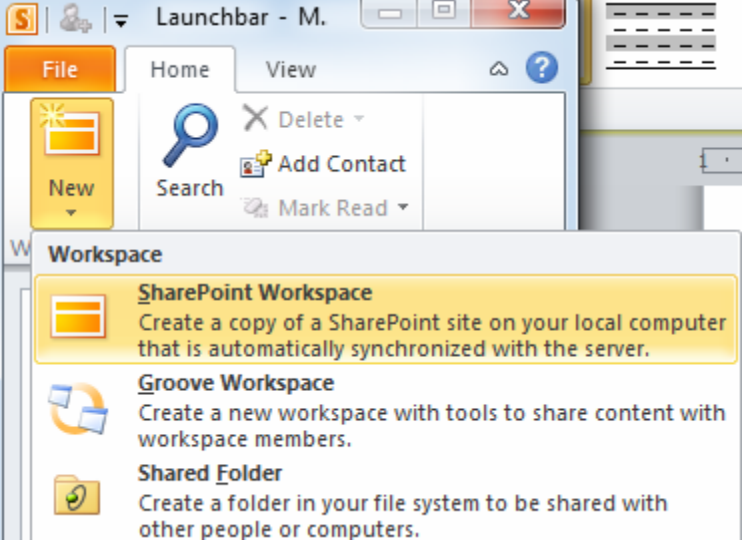
The SharePoint Workspace is essentially a way for a user to organize and work on their files on a local basis and thus if desired synchronize files with a SharePoint environment. The SharePoint Workspace is available out of the box if a user is running the Office 2010 Professional edition.

<p>1. To access the workspace for the first time from Start -> Microsoft Office -> select Microsoft SharePoint Workspace 2010.</p>	 <p>The screenshot shows the Windows Start menu for Microsoft Office 2010. The applications listed are: Microsoft Access 2010, Microsoft Excel 2010, Microsoft InfoPath Designer 2010, Microsoft InfoPath Filler 2010, Microsoft OneNote 2010, Microsoft Outlook 2010, Microsoft PowerPoint 2010, Microsoft Publisher 2010, Microsoft SharePoint Workspace 2010 (highlighted), Microsoft Visio 2010, Microsoft Word 2010, and Microsoft Office 2010 Tools. Below the list is a 'Back' button and a search box labeled 'Search programs and files'. The taskbar at the bottom shows the Start button, a folder icon, a play button icon, and the Internet Explorer icon.</p>
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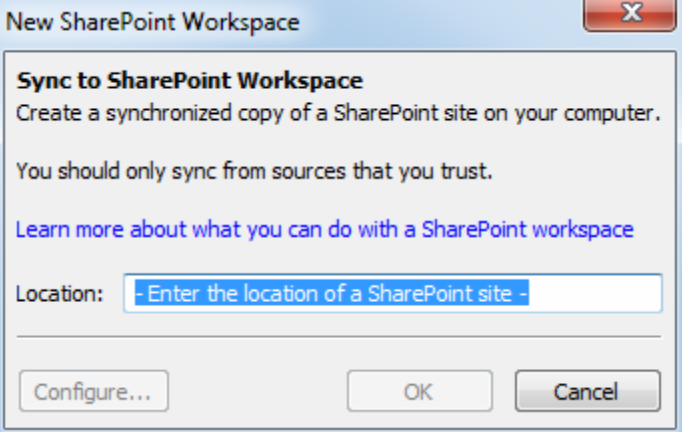
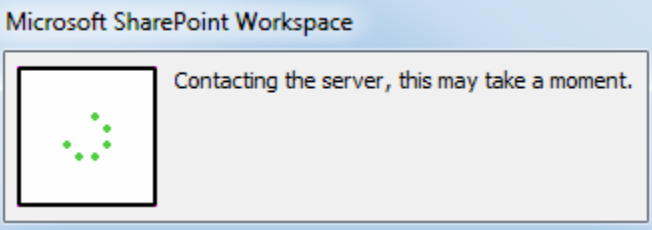
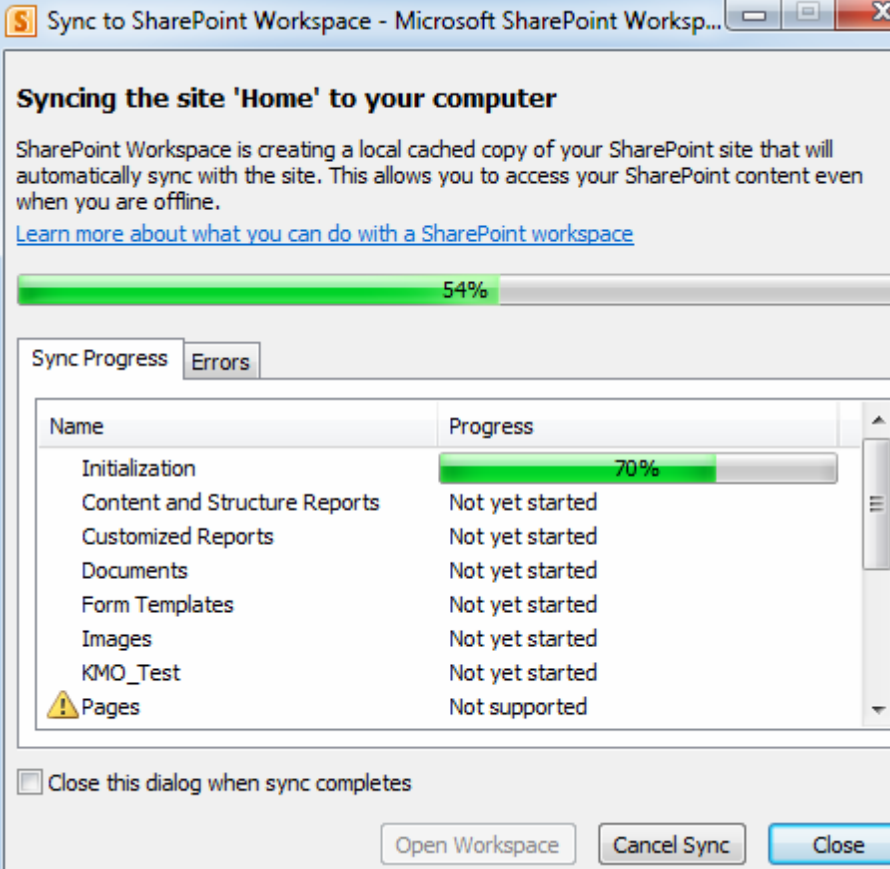
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<p>2. Select from the menu Create a new account and click Next</p>	
<p>3. The account is created</p>	
<p>4. At the Create Account screen select Create the account using your e-mail address and then enter in the Name: and E-mail Address: fields as desired and check Allow me to recover my account later and then select Finish.</p>	

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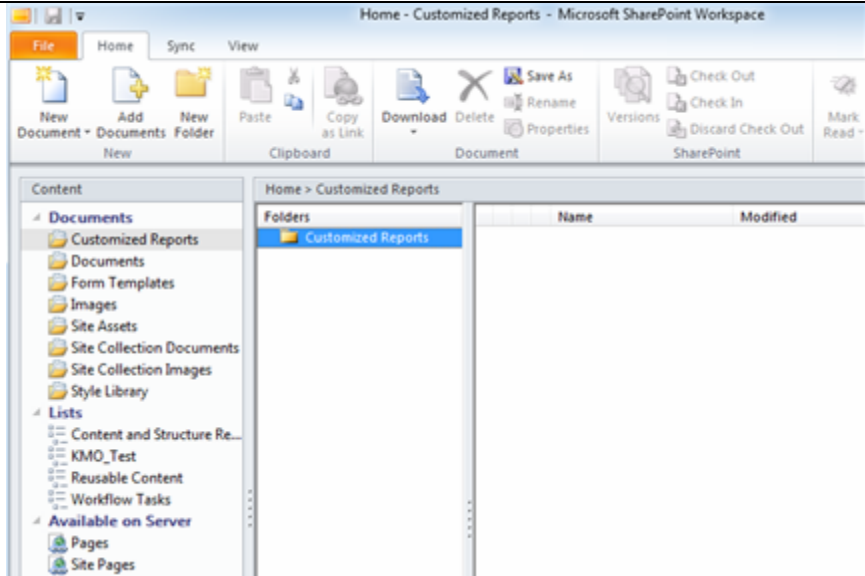
<p>5. The Create Account screen is shown.</p>	
<p>6. The Launchbar is displayed.</p>	
<p>7. Select from the File menu -> SharePoint Workspace</p>	

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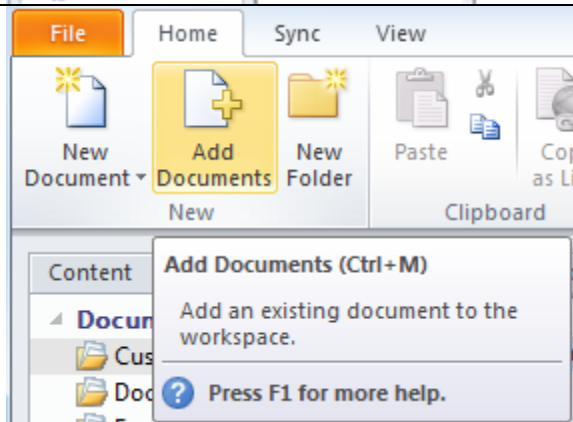
<p>8. Enter in the URL of the desired SharePoint environment site(example http://myfirmintranet.myfirm.com/dept/myteam)</p>																			
<p>9. Click Configure</p>																			
<p>10. Click OK so that the desired site is synced to the workspace.</p>	 <table border="1" data-bbox="605 1410 1417 1751"><thead><tr><th>Name</th><th>Progress</th></tr></thead><tbody><tr><td>Initialization</td><td>70%</td></tr><tr><td>Content and Structure Reports</td><td>Not yet started</td></tr><tr><td>Customized Reports</td><td>Not yet started</td></tr><tr><td>Documents</td><td>Not yet started</td></tr><tr><td>Form Templates</td><td>Not yet started</td></tr><tr><td>Images</td><td>Not yet started</td></tr><tr><td>KMO_Test</td><td>Not yet started</td></tr><tr><td>Pages</td><td>Not supported</td></tr></tbody></table>	Name	Progress	Initialization	70%	Content and Structure Reports	Not yet started	Customized Reports	Not yet started	Documents	Not yet started	Form Templates	Not yet started	Images	Not yet started	KMO_Test	Not yet started	Pages	Not supported
Name	Progress																		
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Images	Not yet started																		
KMO_Test	Not yet started																		
Pages	Not supported																		

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11. Select the directory where the file(s) should be synced into.

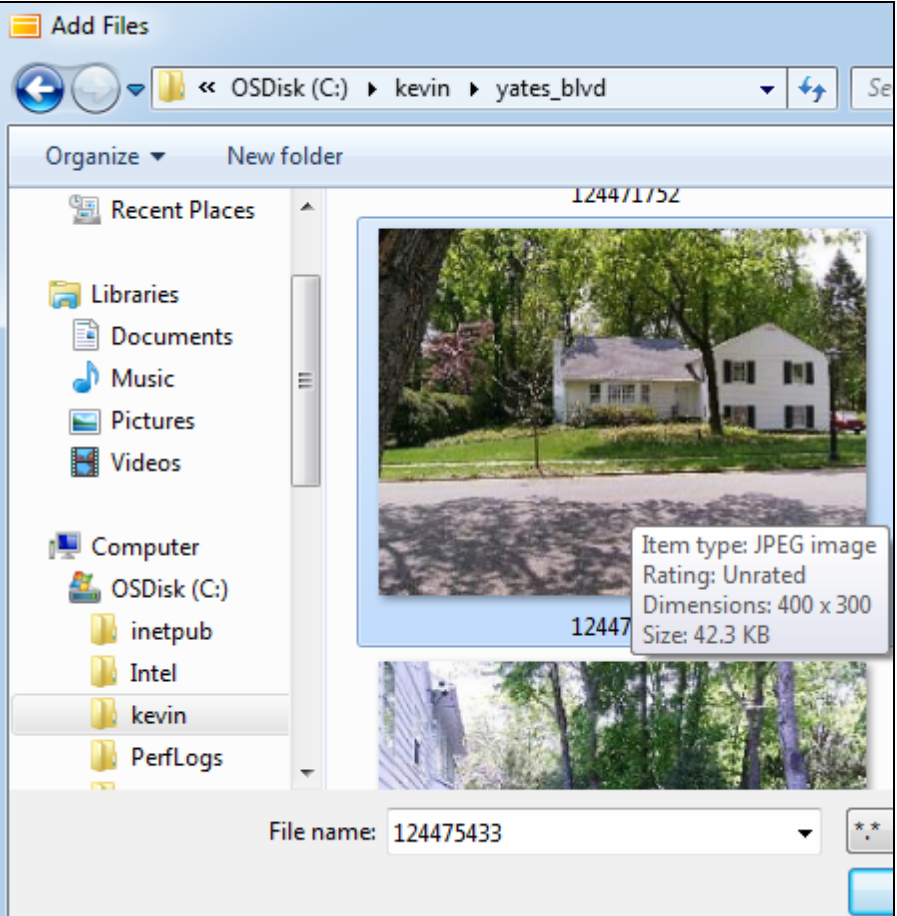


12. Select File->Add Documents

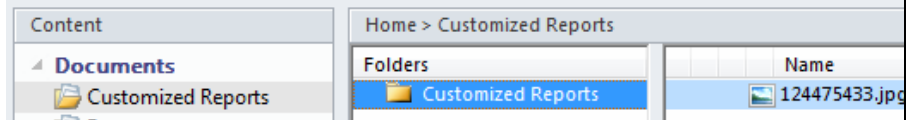


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13. Browse to the directory of the file that should be synced into the workspace from the SharePoint server and click OK.



14. The file displays in the workspace in the directory chosen.



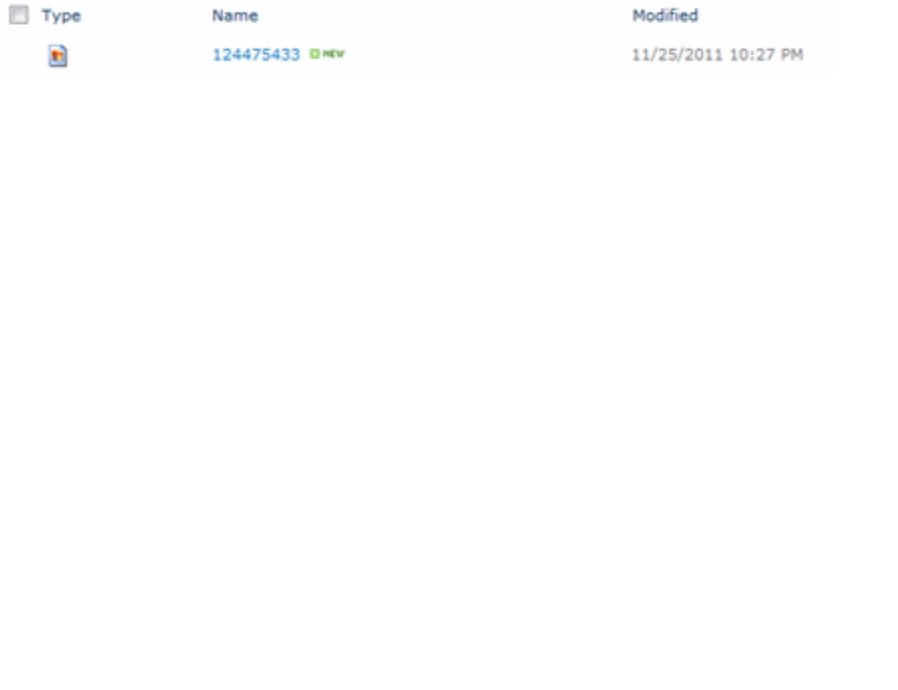
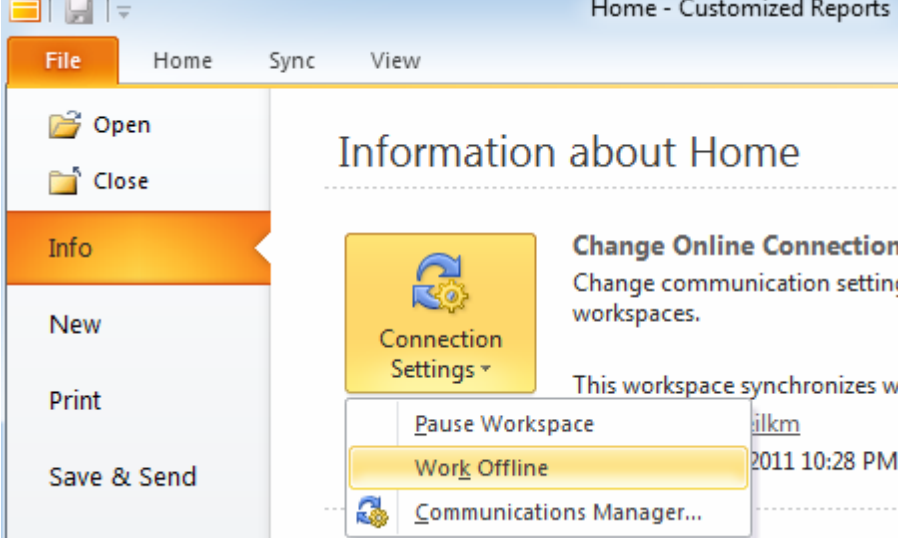
15. Select File -> Sync -> Sync Workspace.



NOTE: Lower right hand side of workspace tells one the status:

Last synchronized 11/25/2011 10:28:22 PM

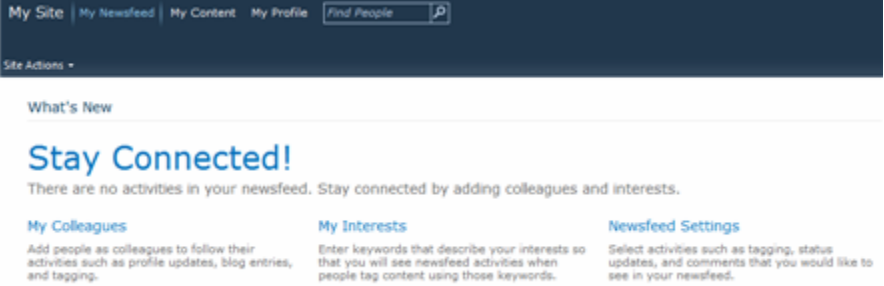
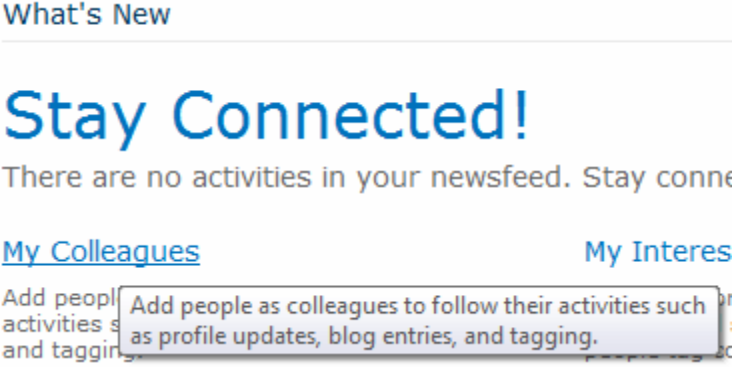
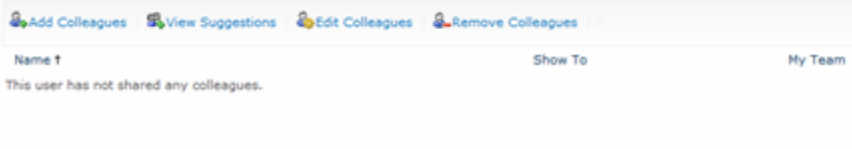
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<p>16. In this case, it is a good idea to go to the SharePoint site – Access Site Actions -> View All Site Content and in this case I selected Customized Report since that is where I uploaded the item to in my workspace. Note it was uploaded to the SharePoint environment.</p>	 <table border="1"> <thead> <tr> <th>Type</th> <th>Name</th> <th>Modified</th> </tr> </thead> <tbody> <tr> <td></td> <td>124475433 </td> <td>11/25/2011 10:27 PM</td> </tr> </tbody> </table>	Type	Name	Modified		124475433	11/25/2011 10:27 PM
Type	Name	Modified					
	124475433	11/25/2011 10:27 PM					
<p>17. Once a file is synced into a workspace – if one wants to work on the file while off the network (example at home) then they can select File -> Info select Connection Settings and click Work Offline.</p>	 <p>Home - Customized Reports</p> <p>File Home Sync View</p> <p>Open Close</p> <p>Info</p> <p>New Print Save & Send</p> <p>Information about Home</p> <p>Change Online Connection Change communication settings workspaces.</p> <p>This workspace synchronizes w</p> <p>Pause Workspace Work Offline Communications Manager...</p> <p>ilk 2011 10:28 PM</p>						

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SharePoint mySites

In SharePoint 2010 the notion of mySites allows for a more social experience to users of SharePoint. Users can now update their status, connect with other individuals as well as share content freely amongst other items.

<p>1. If mySites are turned on then from Site Actions -> the following option will be available typically under your login name.</p>	
<p>2. The default page of a My Site will appear as such.</p>	
<p>3. Clicking My Colleagues brings one to a page where they can add and edit those individuals whom they want to follow the activities of.</p>	
<p>4. At the following screen click Add Colleagues</p>	

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5. In the Colleagues section – enter in the individual's names whom you wish to follow or click the browse book and find the individuals – click Add then click OK. If the users are members of your team click the proper selection under this option. Additionally in the Add to Group add the users to a desired group or create a new group. Finally, in the Show to - select whom should see the colleagues in your profile. Select OK when done.

Add Colleagues

Colleagues
Identify the people you know or work with as colleagues.

Add to Group
Adding a colleague to your team helps you control the privacy of your profile. You can configure your profile so that it is visible only to your team. Adding a colleague to a group helps you organize your list of colleagues.

Add to My Team:
 Yes
 No

Add to a Group:
 Existing group:
General
 New group:

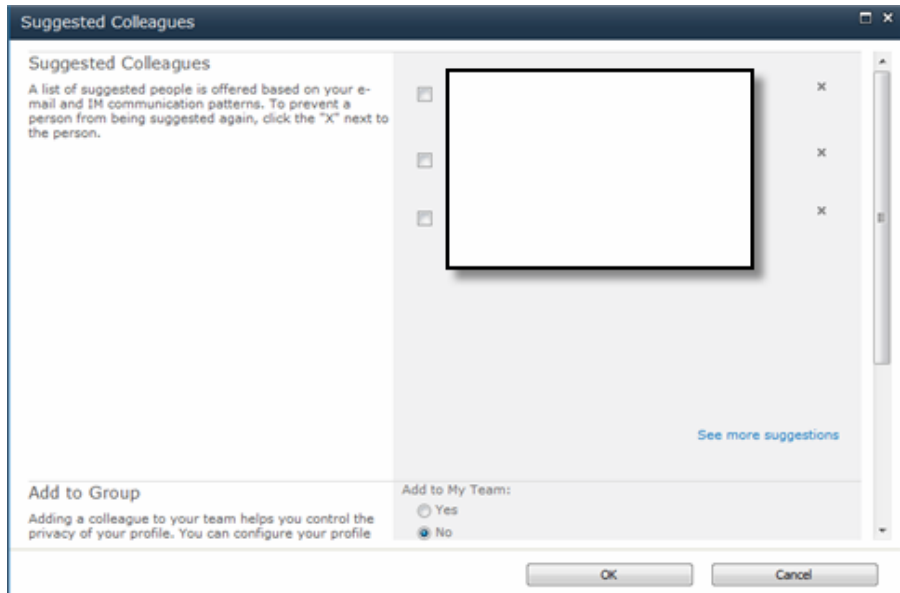
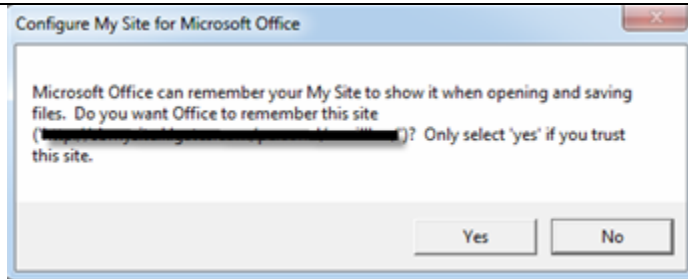
Show to
Choose who can view these colleagues. The privacy setting you select here affects who can see these colleagues when they visit your profile.

Show these colleagues to:
Everyone

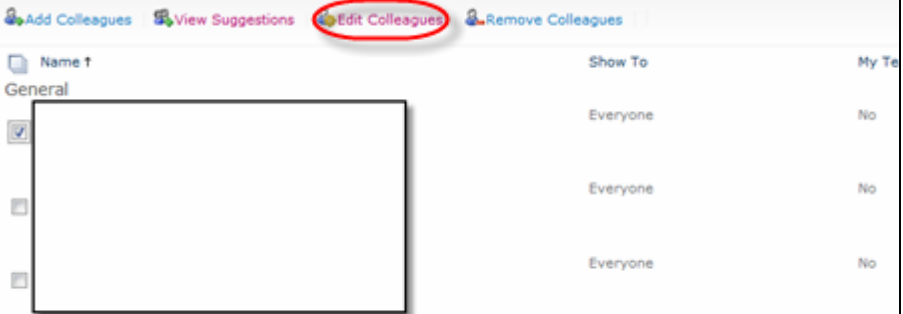
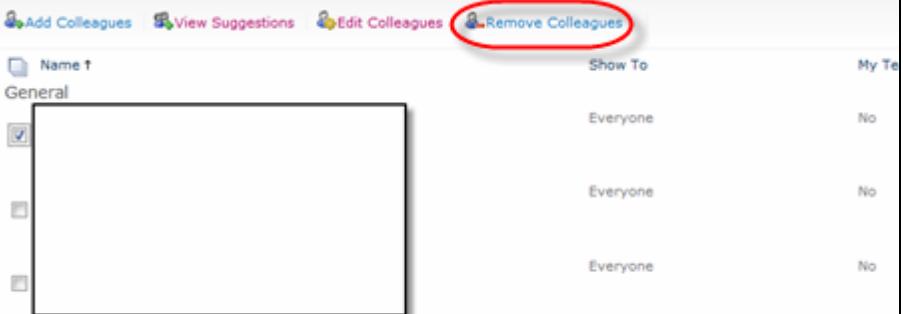
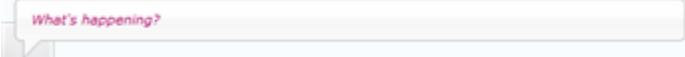
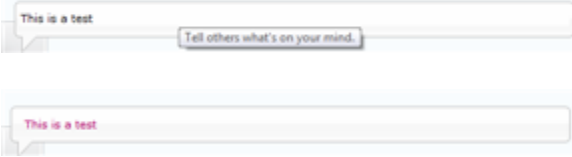
OK Cancel

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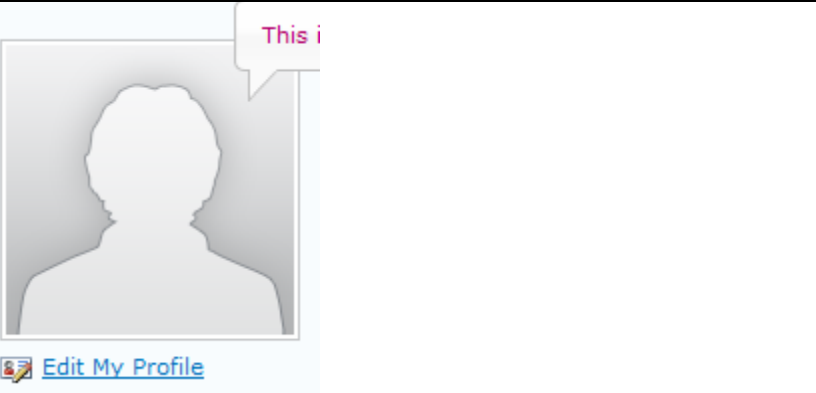
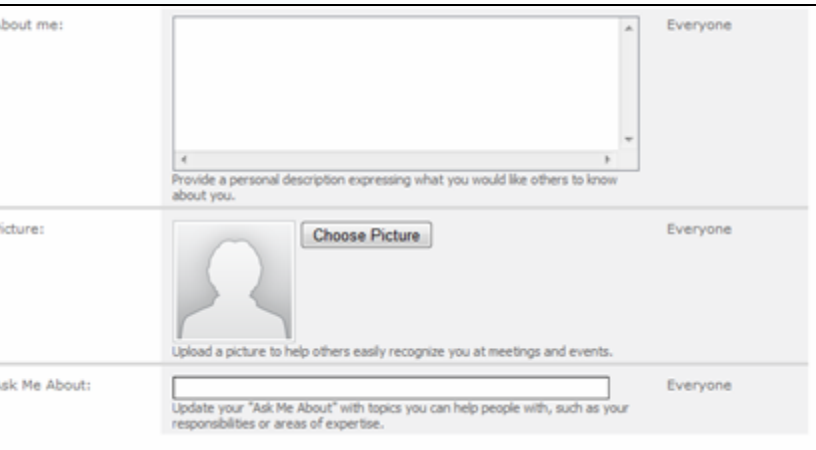
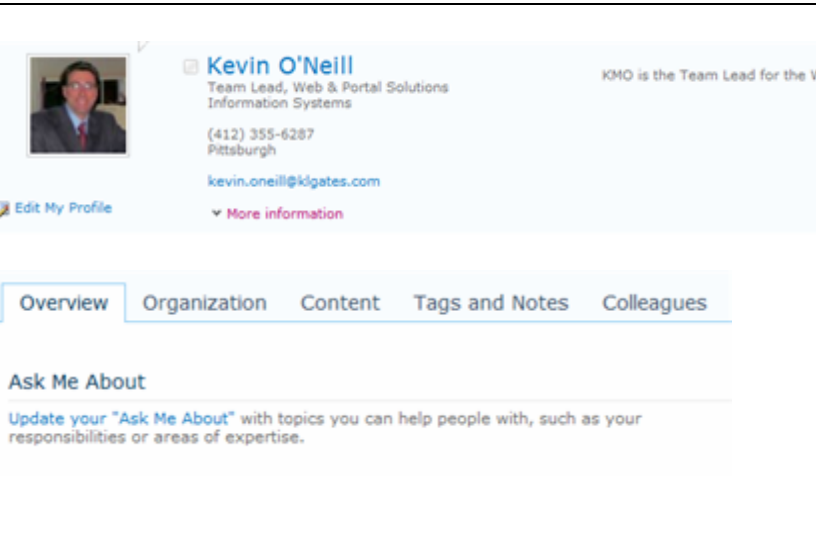

6. Click View Suggestions and if prompted to Configure My Site for Microsoft Office – click Yes. Then the display shows those people whom you most likely have connected with via e-mail and instant messenger. Check those users whom you wish to connect with. If the users are members of your team click the proper selection under this option. Additionally in the Add to Group add the users to a desired group or create a new group. Finally, in the Show to - select whom should see the colleagues in your profile. Select OK when done.



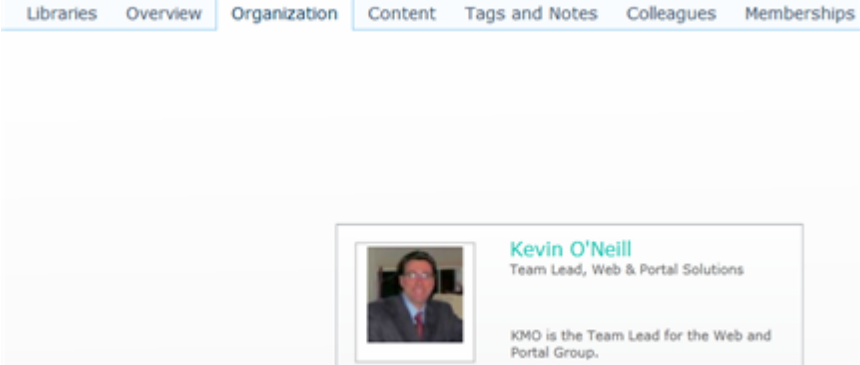
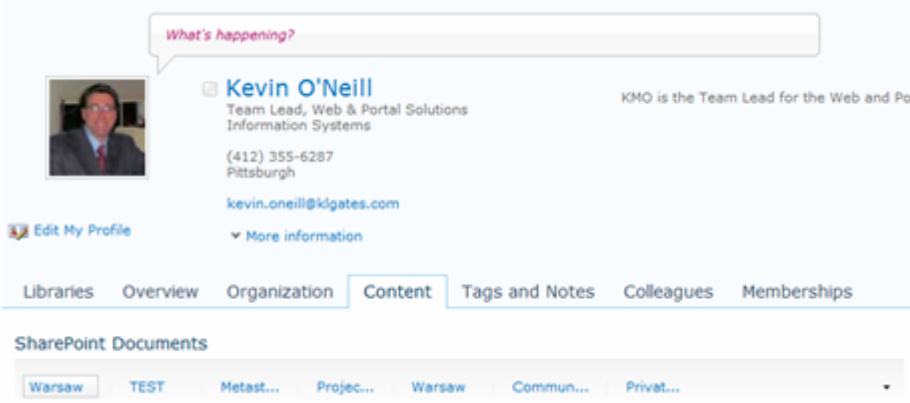
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<p>7. Edit Colleagues – on the Colleagues tab first check those individuals whom you want to edit – then click the Edit Colleagues link. Edit the information that displays as desired then click Save and Close.</p>	
<p>8. Remove Colleagues - on the Colleagues tab first check those individuals whom you want to remove – then click the Remove Colleagues link.</p>	
<p>9. Another piece of functionality of value on the My Colleagues is the What's Happening balloon.</p>	
<p>10. Click into the balloon and then enter in your text – in this case “This is a test” was entered. When done hit the</p>	

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<p>enter key.</p>	
<p>11. Click the Edit My Profile link to update your profile.</p>	 <p>This i</p> <p>Edit My Profile</p>
<p>12. Enter in the desired information into the profile – a sampling of fields is shown here - click Save and Close.</p>	 <p>About me: <input type="text"/> Everyone</p> <p>Provide a personal description expressing what you would like others to know about you.</p> <p>Picture: <input type="button" value="Choose Picture"/> Everyone</p> <p>Upload a picture to help others easily recognize you at meetings and events.</p> <p>Ask Me About: <input type="text"/> Everyone</p> <p>Update your "Ask Me About" with topics you can help people with, such as your responsibilities or areas of expertise.</p>
<p>13. Once completed click the Overview tab to view some of the information entered into the profile. Click the More information link to see the hidden information</p>	 <p> Kevin O'Neill KMO is the Team Lead for the Web and P</p> <p>Team Lead, Web & Portal Solutions Information Systems</p> <p>(412) 355-6287 Pittsburgh</p> <p>kevin.oneill@kgates.com</p> <p>Edit My Profile More information</p> <p>Overview Organization Content Tags and Notes Colleagues</p> <p>Ask Me About</p> <p>Update your "Ask Me About" with topics you can help people with, such as your responsibilities or areas of expertise.</p>

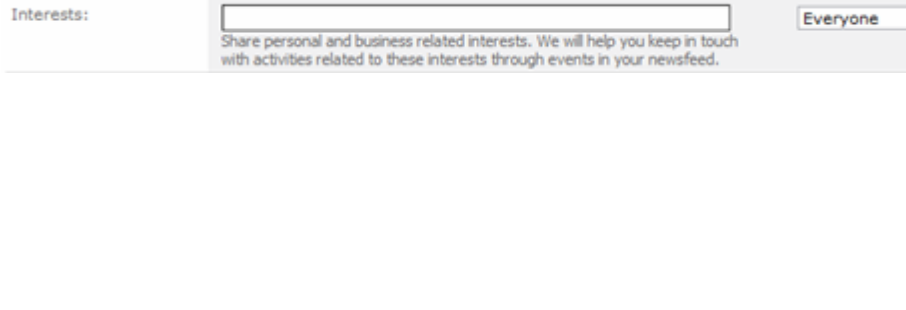
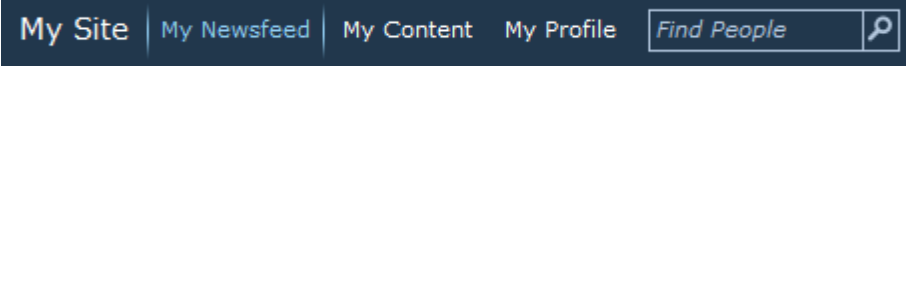
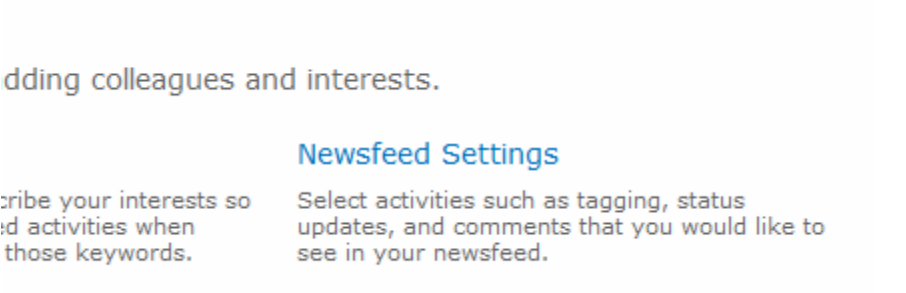
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<p>14. Moving left to right across the Organization tab – when selected this displays a Silverlight Control of the relationships to you in the organization. It is based upon whom you select to be on your team as well as how the information is fed into the mySites by the farm administrator(s)</p>	
<p>15. Clicking the Content tab shows ones SharePoint documents they have uploaded or sites they are associated with.</p>	

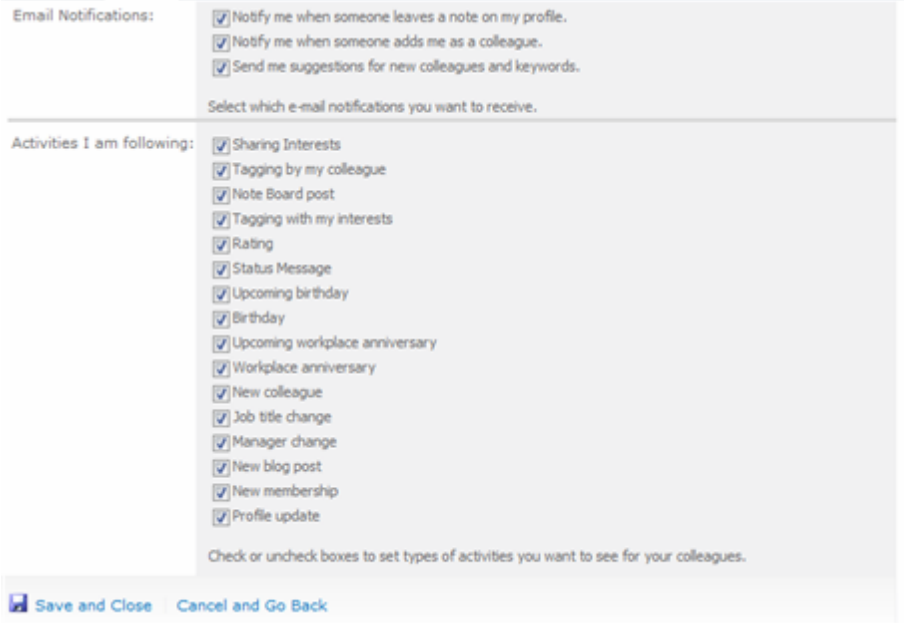
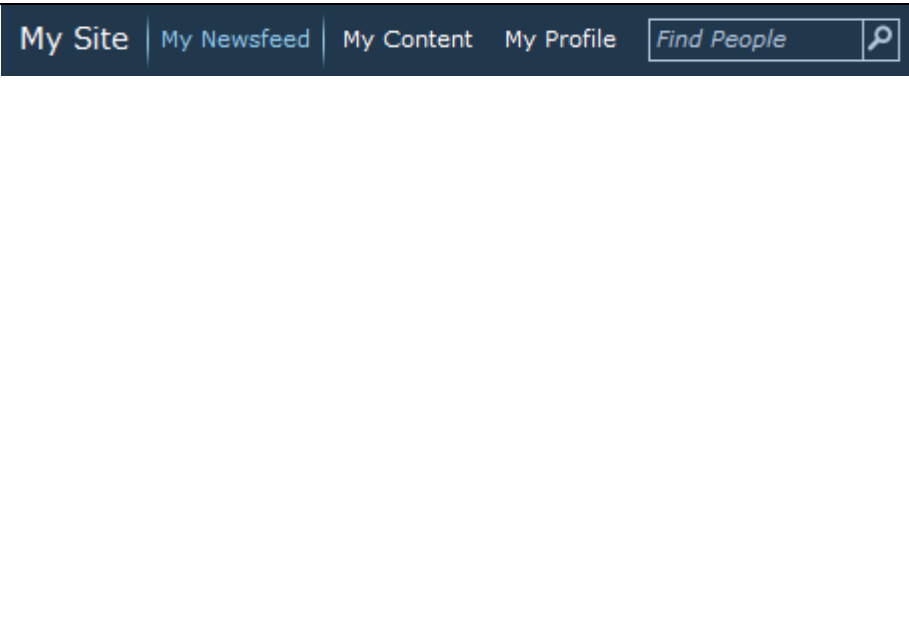

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<p>16. Clicking Tags and Notes shows one the items they have previously tagged within SharePoint itself. The tags are essentially shown in a tag cloud which a user can then click those words of interest and see the items that were tagged with those said keywords.</p>	
<p>17. Clicking the Memberships tab shows one the sites they are members of.</p>	
<p>18. Clicking on the My Site link on the top navigation brings one back to the default My Site page.</p>	
<p>19. Clicking My Interests brings one to a section of their profile where they can enter in their</p>	

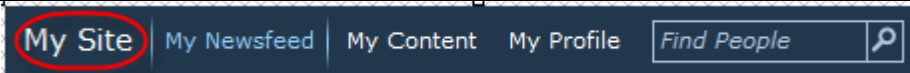
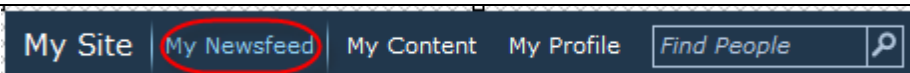
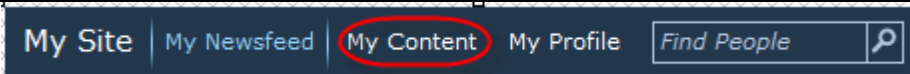
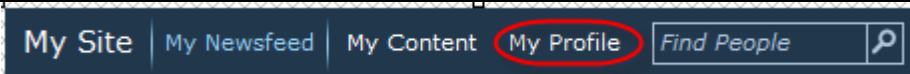

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<p>interests</p> <p>20. At this screen one simply enters in their interests. When done making edits one should select Save and Close.</p>	
<p>21. Clicking on the My Site link on the top navigation brings one back to the default My Site page.</p>	
<p>22. The last section on this page to select is the Newsfeed Settings</p>	

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<p>23. On this screen of one's profile – a user selects how e-mail notifications should be sent and selects the activities they wish to follow by checking and unchecking the selections. When done making edits one should select Save and Close.</p>	 <p>Email Notifications:</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Notify me when someone leaves a note on my profile.<input checked="" type="checkbox"/> Notify me when someone adds me as a colleague.<input checked="" type="checkbox"/> Send me suggestions for new colleagues and keywords. <p>Select which e-mail notifications you want to receive.</p> <p>Activities I am following:</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Sharing Interests<input checked="" type="checkbox"/> Tagging by my colleague<input checked="" type="checkbox"/> Note Board post<input checked="" type="checkbox"/> Tagging with my interests<input checked="" type="checkbox"/> Rating<input checked="" type="checkbox"/> Status Message<input checked="" type="checkbox"/> Upcoming birthday<input checked="" type="checkbox"/> Birthday<input checked="" type="checkbox"/> Upcoming workplace anniversary<input checked="" type="checkbox"/> Workplace anniversary<input checked="" type="checkbox"/> New colleague<input checked="" type="checkbox"/> Job title change<input checked="" type="checkbox"/> Manager change<input checked="" type="checkbox"/> New blog post<input checked="" type="checkbox"/> New membership<input checked="" type="checkbox"/> Profile update <p>Check or uncheck boxes to set types of activities you want to see for your colleagues.</p> <p>Save and Close Cancel and Go Back</p>
<p>24. On the main navigation it should be noted that the Find People search can prove very useful in finding individuals. Simply by typing in the desired term and clicking the magnifying glass result sets are returned.</p>	 <p>My Site My Newsfeed My Content My Profile <input type="text" value="Find People"/> </p>

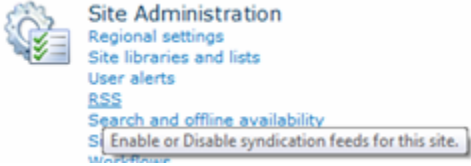
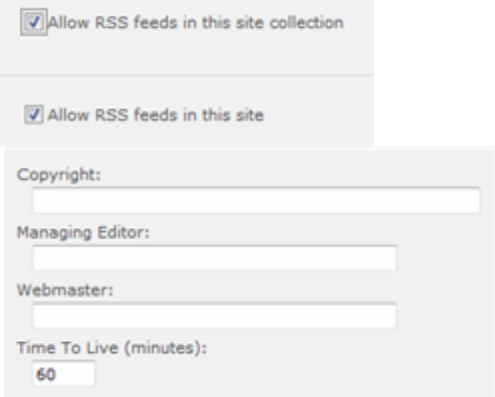
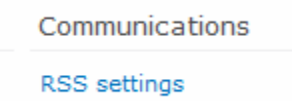
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25. On this same navigation bar a user can navigate to their My Site by clicking that link.	 <p>A dark blue navigation bar with white text. From left to right: 'My Site' (circled in red), 'My Newsfeed', 'My Content', 'My Profile', and a search box containing 'Find People' with a magnifying glass icon.</p>
26. Additionally, a user can access their my Newsfeed by clicking that link	 <p>A dark blue navigation bar with white text. From left to right: 'My Site', 'My Newsfeed' (circled in red), 'My Content', 'My Profile', and a search box containing 'Find People' with a magnifying glass icon.</p>
27. A user can access their My Content by clicking that link	 <p>A dark blue navigation bar with white text. From left to right: 'My Site', 'My Newsfeed', 'My Content' (circled in red), 'My Profile', and a search box containing 'Find People' with a magnifying glass icon.</p>
28. Finally, a user can access their My Profile by selecting that link	 <p>A dark blue navigation bar with white text. From left to right: 'My Site', 'My Newsfeed', 'My Content', 'My Profile' (circled in red), and a search box containing 'Find People' with a magnifying glass icon.</p>
29. The first time one accesses their My profile the profile based on one's information may take a minute or two to process.	 <p>A light blue rectangular box with a small green dot and the text 'Processing...'. Below it, in smaller text: 'Please wait while your personal site is setup for the first time and the default document libraries and lists are created. This may take several seconds.'</p>

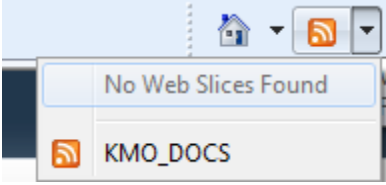
Real Simple Syndication (RSS)

RSS is available in SharePoint 2010 to create RSS feeds for a list and library. This allows one to not only view – but have a mechanism available to distribute news items of value to a targeted audience. One item to note is that the RSS Viewer web part cannot be used to read SharePoint RSS feeds.

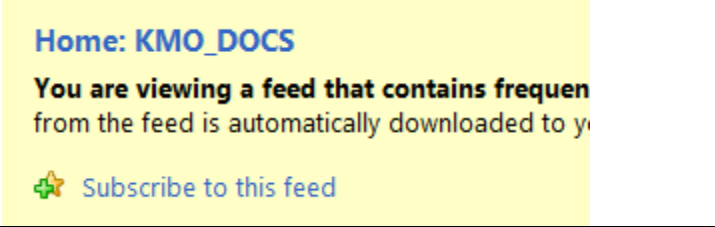
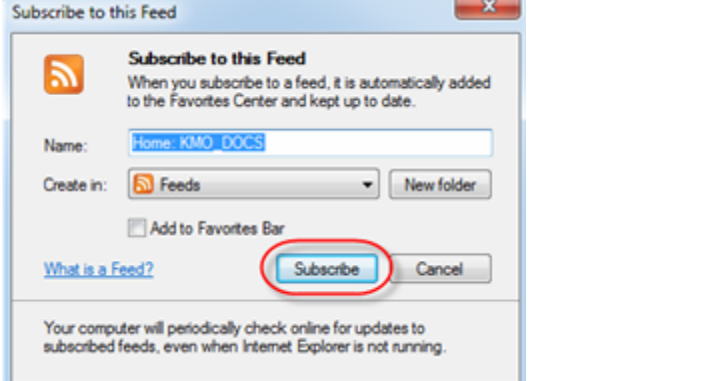
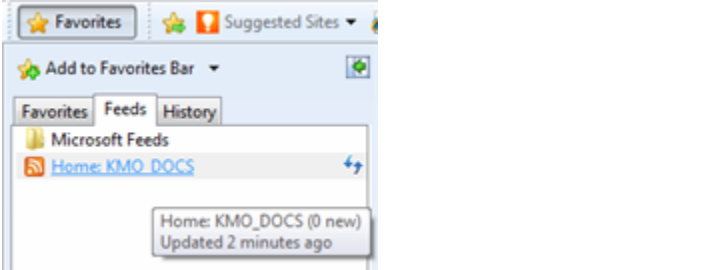
In order to set-up RSS follow these steps:

<p>1. From the top level site select Site Actions -> Site Settings -> then select RSS from the Site Administration group</p>	 <p>Site Administration Regional settings Site libraries and lists User alerts RSS Search and offline availability S [Enable or Disable syndication feeds for this site.]</p>
<p>2. Select and enter in the desired options then click OK. Note that the Copyright, Managing Editor and Webmaster fields may or may not appear in all RSS viewers. Also the Time to Live is the number of minutes that users should be waiting for updates to the RSS feed.</p>	 <p><input checked="" type="checkbox"/> Allow RSS feeds in this site collection</p> <p><input checked="" type="checkbox"/> Allow RSS feeds in this site</p> <p>Copyright: <input type="text"/></p> <p>Managing Editor: <input type="text"/></p> <p>Webmaster: <input type="text"/></p> <p>Time To Live (minutes): <input type="text" value="60"/></p>
<p>3. RSS can also be enabled at the list and library level as well – thus access the desired list or library and select list or library settings.</p>	
<p>4. For a list – from the List Tools tab select List -> list Settings then under Communications -> RSS settings.</p>	 <p>Communications <hr/> RSS settings</p>
<p>5. For a library – from the Library Tools tab select Library then Library Settings then under Communications</p>	

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-> RSS settings													
6. In both cases under the List RSS check Yes to Allow RSS for this list.	<p>Allow RSS for this list?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>												
7. Under RSS Channel Information enter in the Title and Description of the feed as well as an Image URL if desired.	<p>Truncate multi-line text fields to 256 characters?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Title:</p> <p>Home: KMO_DOCS</p> <p>Description:</p> <p>RSS feed for the KMO_DOCS list.</p> <p>Image URL:</p> <p>/_layouts/images/siteIcon.png</p> <p>(Click here to test)</p>												
8. Select under Document Options – how attachments should be displayed.	<p>Include file enclosures for items in the feed?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Link RSS items directly to their files?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>												
9. Under Columns – select the desired columns to appear in the feed.	<p><input type="checkbox"/> Select all</p> <table border="1"> <thead> <tr> <th>Include</th> <th>Column Name</th> <th>Display Order</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Author</td> <td>1</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Date Picture Taken</td> <td>2</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Comments</td> <td>3</td> </tr> </tbody> </table>	Include	Column Name	Display Order	<input checked="" type="checkbox"/>	Author	1	<input checked="" type="checkbox"/>	Date Picture Taken	2	<input checked="" type="checkbox"/>	Comments	3
Include	Column Name	Display Order											
<input checked="" type="checkbox"/>	Author	1											
<input checked="" type="checkbox"/>	Date Picture Taken	2											
<input checked="" type="checkbox"/>	Comments	3											
10. Under item limit enter in the Maximum number of items to include and for how many days back should be included.	<p>Maximum items to include:</p> <p>25</p> <p>Maximum days to include:</p> <p>7</p>												
11. Click OK when done.													
12. Feeds can be read by any reader – in this case the out of the box RSS reader with Internet Explorer is used so thus while on this page if the RSS item is selected then the feed itself – is													

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<p>engaged.</p>	
<p>13. Once selected then the feed can be subscribed to by clicking the 'Subscribe to this feed' link.</p>	 <p>The screenshot shows a yellow banner with the text "Home: KMO_DOCS" in blue. Below it, a message states: "You are viewing a feed that contains frequent updates. An update from the feed is automatically downloaded to your computer." At the bottom of the banner is a green plus icon followed by the text "Subscribe to this feed".</p>
<p>14. When prompted select the Subscribe button.</p>	 <p>The screenshot shows a dialog box titled "Subscribe to this Feed". It contains an RSS icon and the text: "Subscribe to this Feed. When you subscribe to a feed, it is automatically added to the Favorites Center and kept up to date." There is a text field for "Name:" containing "Home: KMO_DOCS". Below it is a "Create in:" dropdown menu set to "Feeds" with a "New folder" button. There is an unchecked checkbox for "Add to Favorites Bar". At the bottom, there is a "What is a Feed?" link and two buttons: "Subscribe" (which is circled in red) and "Cancel".</p>
<p>15. In Internet Explorer 8 by clicking favorites the RSS feed just subscribed to is shown and can be accessed as desired.</p>	 <p>The screenshot shows the Internet Explorer Favorites bar. It has tabs for "Favorites", "Feeds", and "History". Under the "Feeds" tab, there is a "Microsoft Feeds" folder containing the "Home: KMO_DOCS" feed. A tooltip is visible over the feed, showing "Home: KMO_DOCS (0 new) Updated 2 minutes ago".</p>

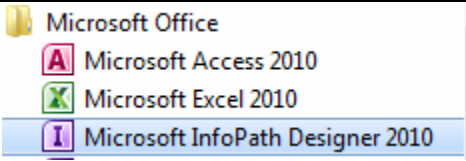
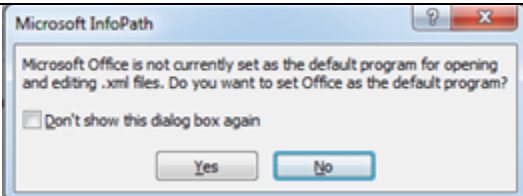
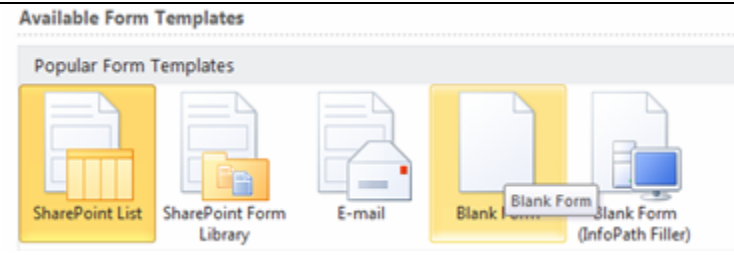
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InfoPath

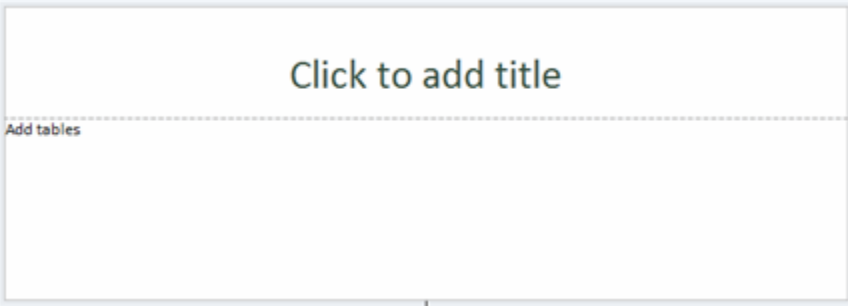
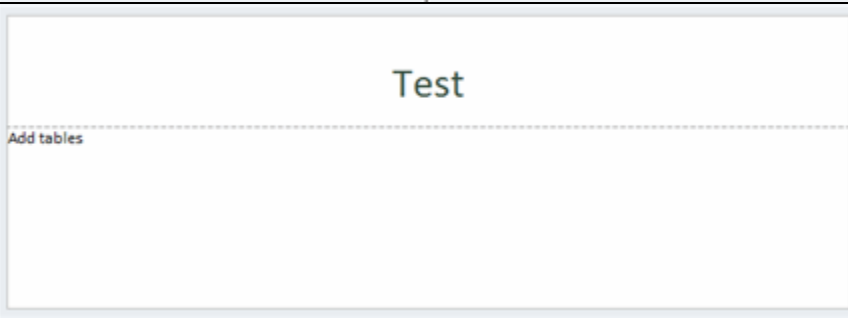
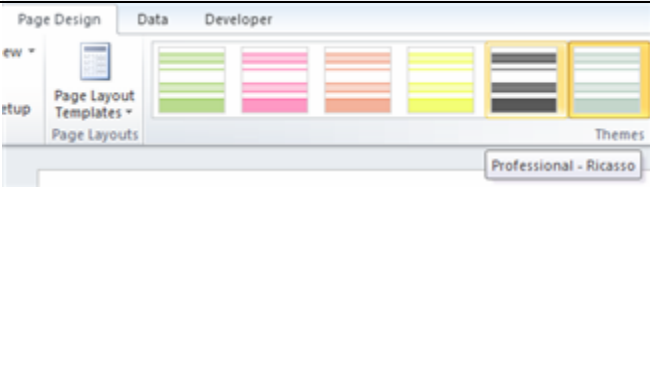
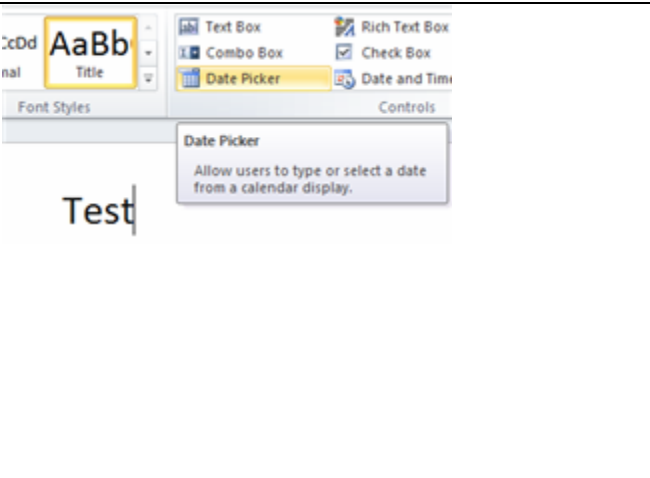
InfoPath

InfoPath is a toolset designed for power users to create forms that users can then fill in. The InfoPath designer tool is available with the Microsoft Professional Office 2010 edition. Also it should be noted when designing forms – so that a client piece of InfoPath (named the Microsoft InfoPath Filler 2010) does not have to be installed on every computer that is to use the form that is created – a web-site version of the form should be created for better architecture and flexibility.

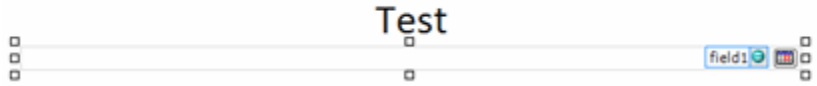
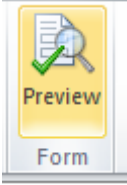
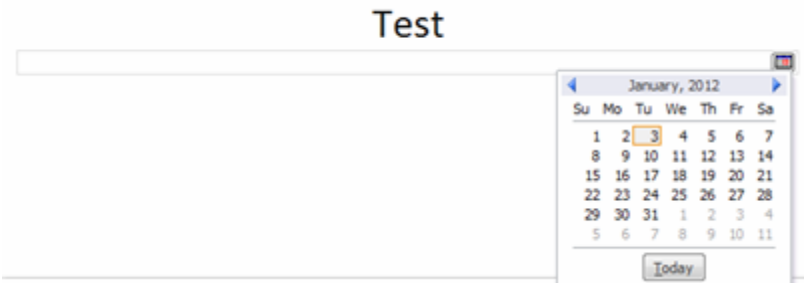
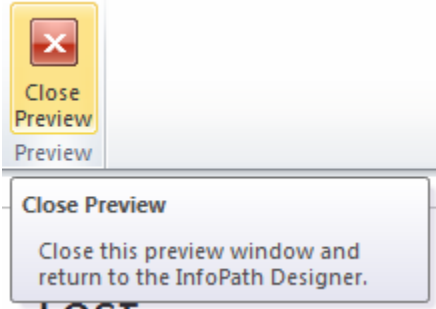
The steps below cover creating a simple InfoPath Form

<p>1. Access the InfoPath Designer 2010 – found from Start -> Microsoft Office -> Microsoft InfoPath Designer 2010</p>	
<p>2. Select No if prompted unless you wish .xml files to open in InfoPath</p>	
<p>3. Under Popular Form Templates double click Blank Forms</p>	

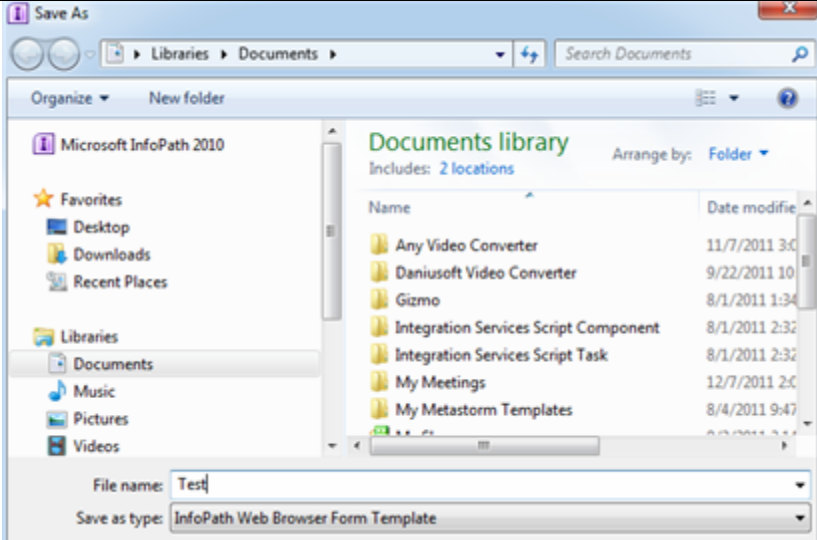

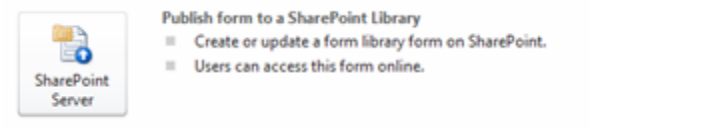
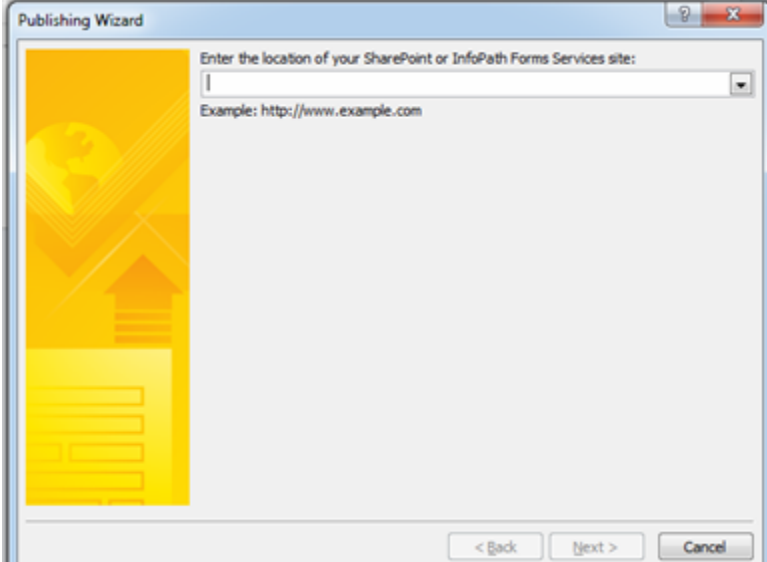
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<p>4. The screens middle section will appear as such:</p>	
<p>5. Click to add title and type in "Test"</p>	
<p>6. On the Page Design tab click a selection – in this case Professional – Ricasso was selected.</p>	
<p>7. Select the Home tab – then place the cursor on the title line (where it says Test) – hit enter once then from the toolbox select the Date Picker</p>	

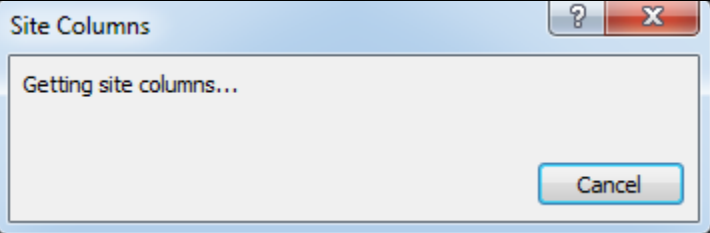
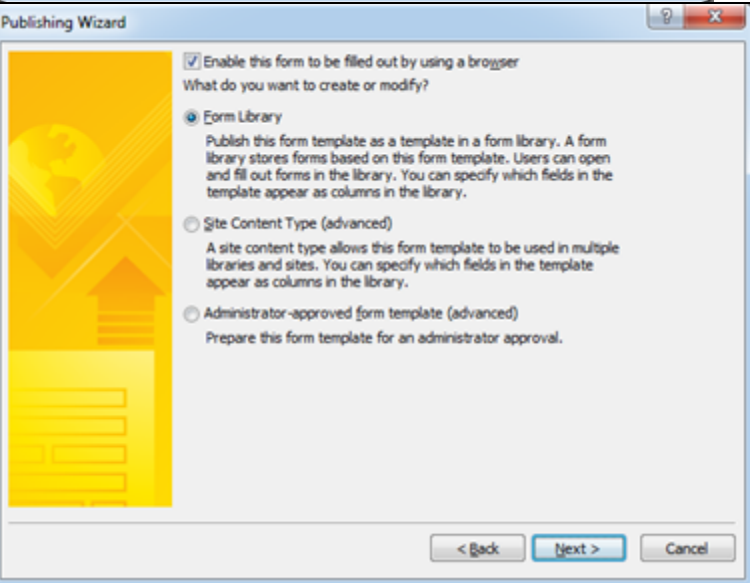
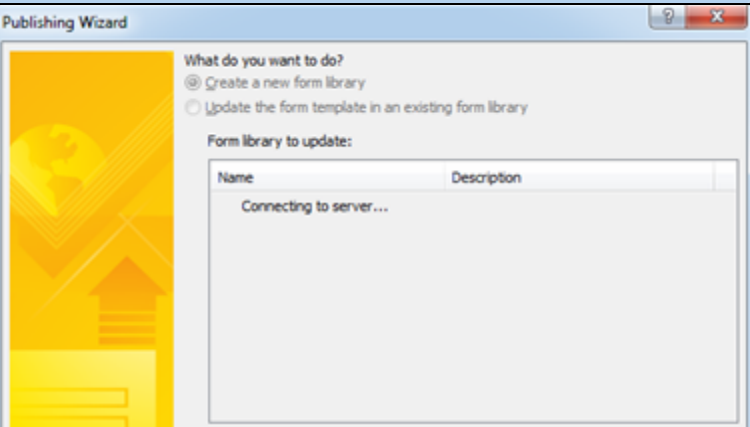
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<p>8. The date picker is added to the form</p>	 <p>The screenshot shows a form titled "Test" with a date picker control. The date picker is currently set to "field1" and has a small calendar icon next to it.</p>
<p>9. In the Ribbon select the Preview button which is likely on the far right – under the Form group</p>	 <p>The screenshot shows a ribbon button labeled "Preview" with a magnifying glass icon and a green checkmark. Below the button is the text "Form".</p>
<p>10. The form is shown and the control that was added can be selected</p>	 <p>The screenshot shows the form titled "Test" with the date picker control selected. The date picker is open, showing a calendar for January 2012. The date "3" is selected. The calendar has a "Today" button at the bottom.</p>
<p>11. On the ribbon select the Close Preview button – under the Preview section</p>	 <p>The screenshot shows a ribbon button labeled "Close Preview" with a red 'X' icon. Below the button is the text "Preview". A tooltip is visible over the button, containing the text "Close Preview" and "Close this preview window and return to the InfoPath Designer."</p>

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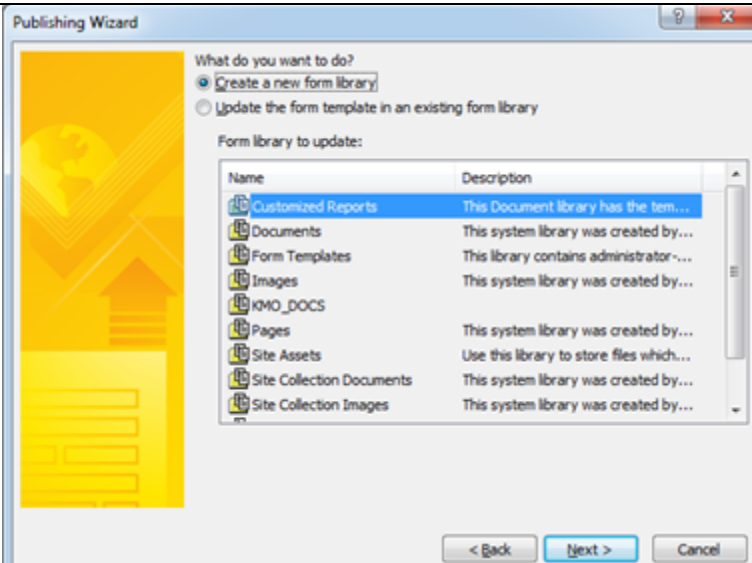
<p>12. At this point – select File -> Save As and save and name the form into a directory of your choice</p>	
<p>13. To publish the form to SharePoint – from the File tab – select Publish</p>	
<p>14. Select SharePoint Server</p>	
<p>15. Enter in the name of the SharePoint site and click Next</p>	

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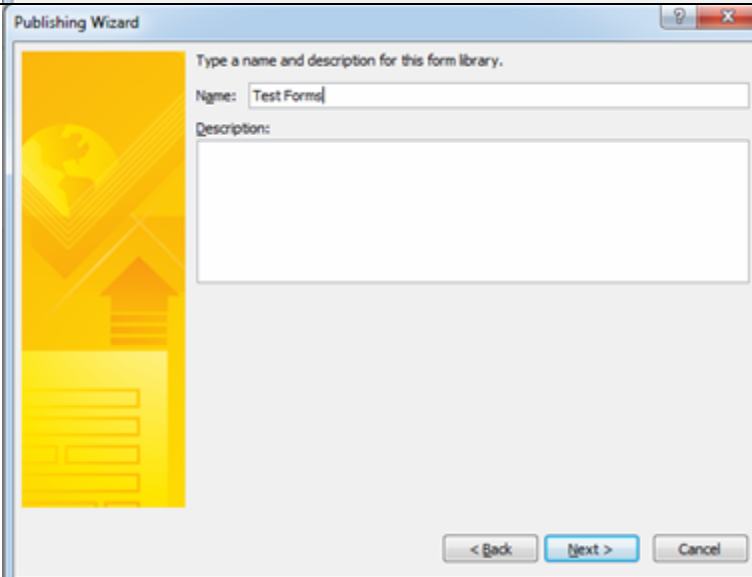
<p>16. A wizard will then run</p>	 <p>The screenshot shows a dialog box titled "Site Columns" with a question mark icon and a close button (X) in the top right corner. The main area contains the text "Getting site columns..." and a "Cancel" button at the bottom right.</p>
<p>17. When prompted check "Enable this form to be filled out by using a browser" and select Form Library then select Next</p>	 <p>The screenshot shows the "Publishing Wizard" dialog box. It has a question mark icon and a close button (X) in the top right corner. The main area contains a checked checkbox "Enable this form to be filled out by using a browser" and the question "What do you want to create or modify?". Below this are three radio button options: "Form Library" (selected), "Site Content Type (advanced)", and "Administrator-approved form template (advanced)". The "Form Library" option has a description: "Publish this form template as a template in a form library. A form library stores forms based on this form template. Users can open and fill out forms in the library. You can specify which fields in the template appear as columns in the library." At the bottom are buttons for "< Back", "Next >", and "Cancel".</p>
<p>18. The server will be contacted</p>	 <p>The screenshot shows the "Publishing Wizard" dialog box. It has a question mark icon and a close button (X) in the top right corner. The main area contains the question "What do you want to do?" and two radio button options: "Create a new form library" (selected) and "Update the form template in an existing form library". Below this is a section titled "Form library to update:" with a table. The table has two columns: "Name" and "Description". The first row contains the text "Connecting to server...".</p>

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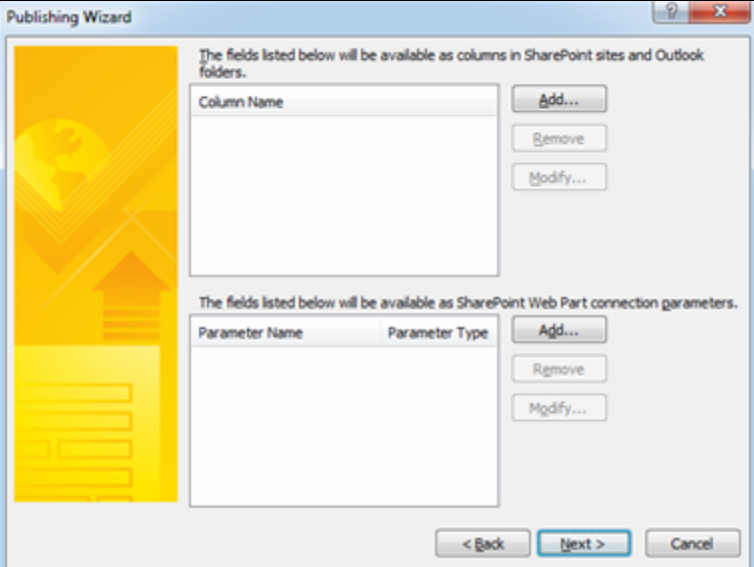
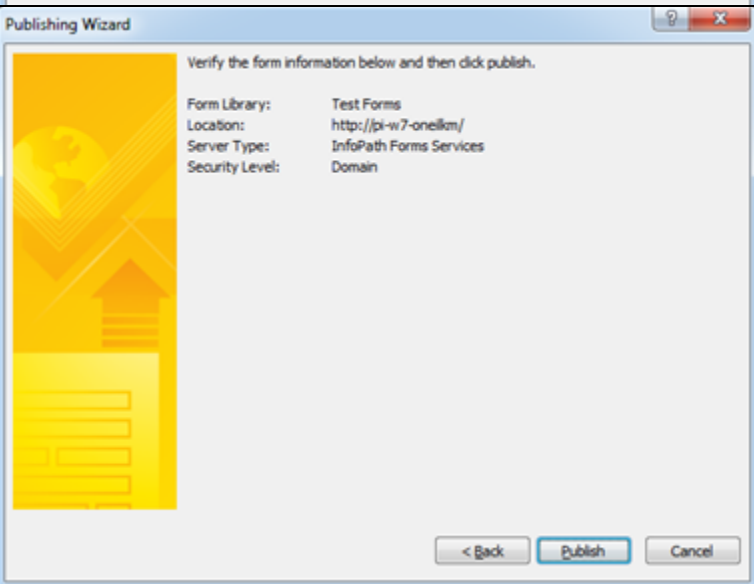
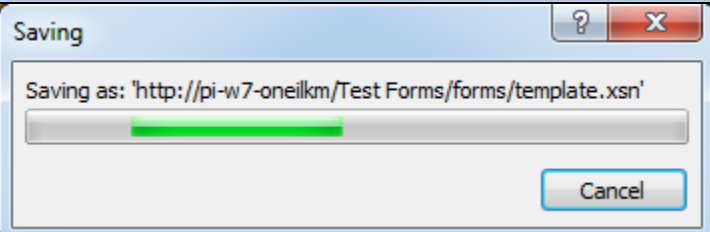
19. In this example “Create a new form library” will be selected – then Next:



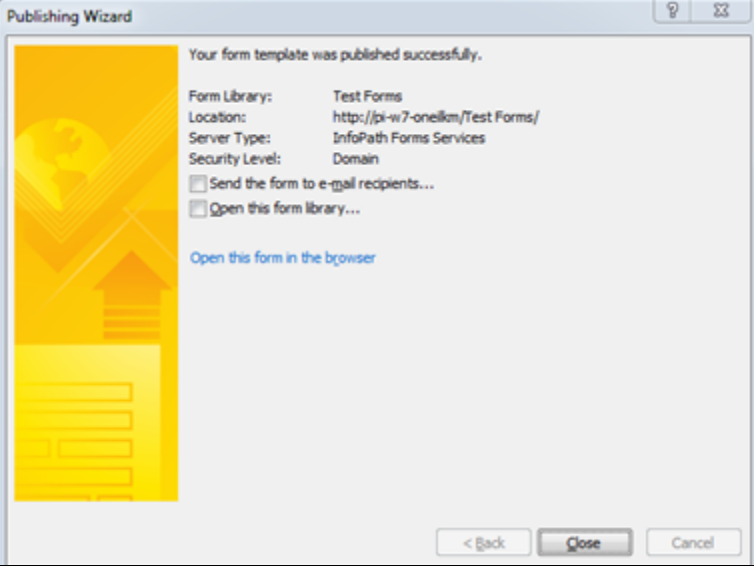
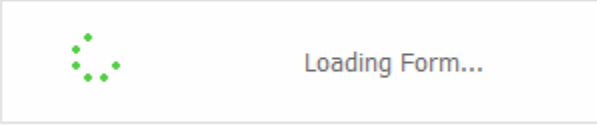
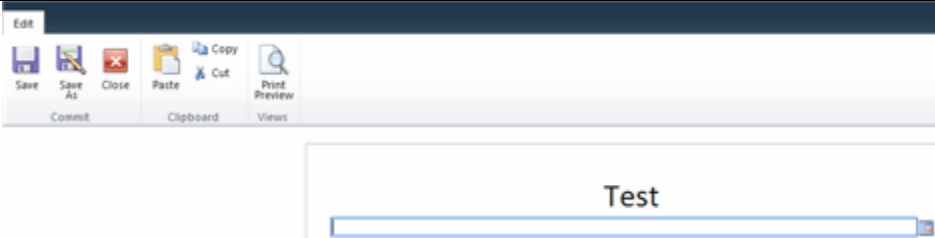
20. A name “Test Forms” was entered and Next selected:



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<p>21. Select Next as in this example we will not be adding columns or parameters to SharePoint sites and Outlook folders:</p>	 <p>The Publishing Wizard dialog box is shown. It has a title bar with a question mark and a close button. The main area is divided into two sections. The top section is titled 'The fields listed below will be available as columns in SharePoint sites and Outlook folders.' It contains a list box for 'Column Name' which is currently empty. To the right of the list box are three buttons: 'Add...', 'Remove', and 'Modify...'. The bottom section is titled 'The fields listed below will be available as SharePoint Web Part connection parameters.' It contains a list box with two columns: 'Parameter Name' and 'Parameter Type', which is also empty. To the right of this list box are three buttons: 'Add...', 'Remove', and 'Modify...'. At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted in blue.</p>
<p>22. Verify information – then select Publish:</p>	 <p>The Publishing Wizard dialog box is shown in the 'Verify' step. The title bar has a question mark and a close button. The main area contains the text 'Verify the form information below and then click publish.' Below this text are four lines of information: 'Form Library: Test Forms', 'Location: http://pi-w7-oneilm/', 'Server Type: InfoPath Forms Services', and 'Security Level: Domain'. At the bottom of the dialog are three buttons: '< Back', 'Publish', and 'Cancel'. The 'Publish' button is highlighted in blue.</p>
<p>23. The wizard will run through and create connections as needed</p>	 <p>The Saving dialog box is shown. The title bar has a question mark and a close button. The main area contains the text 'Saving as: 'http://pi-w7-oneilm/Test Forms/forms/template.xsn'' above a progress bar that is partially filled with green. At the bottom right of the dialog is a 'Cancel' button.</p>

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<p>24. When completed make the desired selection and click Close when desired:</p>	 <p>The Publishing Wizard dialog box displays the following information:</p> <ul style="list-style-type: none">Your form template was published successfully.Form Library: Test FormsLocation: http://pi-w7-oneilm/Test Forms/Server Type: InfoPath Forms ServicesSecurity Level: Domain<input type="checkbox"/> Send the form to e-mail recipients...<input type="checkbox"/> Open this form library...Open this form in the browser <p>Buttons: < Back, Close, Cancel</p>
<p>25. In this example – “Open this form in the browser” was selected</p>	 <p>A dialog box with a green circular loading icon and the text "Loading Form..."</p>
<p>26. The form was then displayed for entering in data:</p>	 <p>A window titled "Test" with a menu bar (Edit) and a toolbar containing icons for Save, Save As, Close, Paste, Copy, Cut, and Print Review. Below the toolbar is a large text input field.</p>