

# Using SharePoint

This is a companion document to *About Share-Point*. That document describes the features of a SharePoint website in as much detail as possible with an emphasis on the relationships between features. This document itemizes the details of how the site features are used—user procedures. Procedures are organized by who would normally use them in order from casual user to administrator.

Microsoft SharePoint Products & Technologies encompasses two products which are referred to with the following acronyms:

- Microsoft SharePoint Services (SPS)
- Microsoft SharePoint Portal Server (SPPS)

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## Common Site Operations

**Search:** Use to search the site.

**Menu bar:** Use to open the corresponding page.

**Quick Launch bar:** Use to access specially-flagged content and to perform actions on the current content.

**Open as Web Folder:** This view is initiated with the browser's menu File, Open by entering the site URL and selecting "Open as Web Folder". All files are displayed as if in Windows Explorer, lists and libraries appear as folders.

### Home actions

**Add Listing:** [tbd]

**Create Subarea:** [tbd]

**Upload Document:** [tbd]

**Change Settings:** [tbd]

**Manage Users:** [tbd]

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**Manage Content:** [tbd]

**Manage Portal Site:** [tbd]

**View Page:** [tbd]

### Directory and Lists actions

**Select a view:** Choose from all available views.

**Alert me:** Add an alert for the current item.

**Export to spreadsheet:** Copies current data to an Excel file.

**Modify settings and columns:** Provides access to design and configuration settings.

### Area actions

**Manage Portal Site:** Displays a tree view of all areas with a plus/minus icon to expand/collapse each node. Moving the mouse pointer over an area opens a drop-down action menu:

- **Delete:** Delete the area and all its child areas. Home cannot be deleted.
- **Create Subarea:** opens a “Create Area” page to create a child area for the selected area.
- **Filter:** Make the selected area the top of the tree. Action is replaced by “Reset” to show entire tree.
- **Manage Security:** Provides access to security properties.
- **Edit:** Opens the “Change Settings” page where the area properties can be changed.
- **Add to My Links:** Add a link to the selected area to your “My Site”.

**Change Settings:** Opens the “Change Settings” page for the current area where the properties can be changed.

**Create Subarea:** Opens the “Create Area” page to create a child area for the open area.

**Edit Page:** Displays the “Modify Shared Page” link in the upper right corner which can be used to change the page layout and content.

**Manage Users:** Only available in the Home area. Opens the “Manage Users” page.

**Manage Security:** Provides access to the access rights of site groups.

**Add to My Links:** Not available in the Home area. Add a link to the selected area to your “My Site”.

**Manage Content:** Opens the “Documents and Lists” page for the open area. On that page you can edit lists, libraries, and documents.

**Alert Me:** Add an alert for the current item.

**Add Listing:** Opens the “Create Listing” page for the current area. [?] [Visible when group is current?]

**Add Person:** Opens the “Create Listing” page for the current area. [?] Use to add a listing for a person to an area.

### Sites actions

**Edit Page:** [?]

**Customize List:** [?]

**Create Site:** Opens “New SharePoint Site” page...

**Add Link to Site:** Opens the “Add Link to Site” page.

**Manage Content:** Opens the “Directories and Lists” page with the list named “Sites”.

**Manage Sites:** Opens the “edit view” page to view and edit site properties and delete sites. The view is also used by the area owner to approve new sites.

### News actions

**Add News:** Opens “Add News” page which is similar to the “Add Listing” page (without the dates).

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## Guest, Reader, and Contributor

### Managing your user profile

Opening My Site for the first time creates a user profile. Use the action [Edit Profile](#) on the Quick Launch bar to open the “Edit User Profile” page.

### Using lists

**Find list:** On a SPS site select menu item [Documents and Lists](#) to open page of same name, click the desired library’s icon to open it. On a SPSS site on the Sites area page select action [Manage Content](#) to open the “Documents and Lists” page.

**View lists:** These appear on various Web Parts on various pages.

**Open a list:** Click the list name.

**Open a URL on a links list item:** [does the web page open in the same browser window or in a new one? can it be controlled?]

**Add a list item:** Use the [Add](#) control to open a data entry window.

### Share data lists with Access

The following table summarizes the ways to share data between an Access database and a SharePoint site.

<i>Action</i>		<i>SharePoint List</i>	<i>Access Table</i>
push	Export To Access, Create Linked Table To Access	in, source	destination
push	Export	destination	in, source
pull	Get External Data	source	in, destination

**Export a list from a SharePoint site to Access.** This creates a copy of the list as an Access table.

1. In Access open a database.
2. Use menu [File](#), [Get External Data](#), [Import](#) to open “Import” dialog box.
3. In Files of type drop-down list select “Windows SharePoint Services ()”. This opens the “Import from Windows SharePoint Services Wizard” dialog box.
4. Follow the steps to select one SharePoint site, one or more lists or list views, and whether to Retrieve IDs for Lookup Columns. At the end select [Finish].

**Link to a list on a SharePoint site in Access.** This creates a second pathway for accessing the same physical data; when you change the Access table data, the changes appear in the SharePoint site immediately.

1. In Access open a database.
2. Use menu [File](#), [Get External Data](#), [Link Tables](#) to open “Link” dialog box.
3. In Files of type drop-down list select “Windows SharePoint Services ()”. This opens the “Link to Windows SharePoint Services Wizard” dialog box.
4. Follow the steps to select one SharePoint site, one or more lists or list views, and whether to Retrieve IDs for Lookup Columns. At the end select [Finish].

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**Export an Access table to a SharePoint list.** This copies the data to a new SharePoint list.

1. In Access open a database. Select the desired table or query.
2. Use menu File, Export to open “Export Table ...” dialog box.
3. In Save as type drop-down list select “Windows SharePoint Services ()”. This opens the “Export to Windows SharePoint Services Wizard” dialog box.
4. Follow the steps to select one SharePoint site, enter list name and description, and whether to Open The List When Finished. At the end select [Finish].

You can send the list data to Access from the SharePoint site. When the list is open there appears an “Office Links” pane with choices: Export to Access, Create Linked Table in Access, and Report With Access.

### Share data lists with Excel

You can copy or link a block of cells in an Excel spreadsheet to a SharePoint list. When two lists are linked changes in one are automatically reflected in the other. Lists can be created in two ways.

#### **Create a list in Excel.**

1. In Excel open a spreadsheet. Select the desired block of cells, including column headings when possible.
2. Use menu Data, List, Create List to open “Create List” dialog box. Select if headings were selected, then [OK]. This sets a background color for the selected block of cells and opens a List toolbar.
3. Sort, filter, and summarize the selected block as desired.
4. Use menu Data, List, Publish List to open “Publish List to SharePoint Site” dialog box.
5. Enter the URL of the SharePoint site and the list name and description. Select whether list is to be linked or not. Select [Next] to open the second dialog box.
6. Verify data types in each column. When correct select [Finish].

#### **Link a SharePoint list to an Excel spreadsheet:**

1. On the SharePoint site, open the list.
2. Select action Export To Spreadsheet (on the Quick Launch Bar). Alternatively in the Office Links pane select Export and Link to Excel.
3. If you are prompted and Open is a choice, select it. The “Import Data” dialog box opens.
4. Choose destination as existing worksheet, new worksheet, or new workbook. Select [Properties] to open “External Data Range Properties” dialog box. Set properties. Select [OK]. Back in “Import Data” select [OK].

### Share contact lists with Outlook contacts

You can copy data from a SharePoint contacts list to Outlook and vice versa. You can link a site list to Outlook so that you can use it in Outlook, however you must edit it on the site. While you have the list open in Outlook it will be automatically refreshed every 20 minutes.

#### **Copy a contacts from a list to Outlook:**

1. On the SharePoint site, open the list.
2. Select the Import Contacts toolbar button.
3. Select an Outlook Profile if necessary.
4. In the “Select Users To Import” dialog box, select as many names as you want, then select [Add]. Select [OK].

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### Copy contacts from a list to Outlook:

1. On the SharePoint site, open the list.
2. Select [Link to Outlook](#). Reply [Yes] to confirmation prompt.
3. In Outlook under Other Contacts, select the Microsoft Windows SharePoint Services entry you want. When you pause on the name of a SharePoint contact, the ScreenTips will append “in SharePoint Folders” to the name.
4. In the SharePoint contact list, open the desired contact item.
5. Select action [Copy to Personal Contacts](#).

### Edit a linked contact:

1. In Outlook, open the contact.
2. Select the address. This opens the contact on the SharePoint site.
3. Make your changes and save them.

## Share events lists with Outlook calendars

You can copy data from a SharePoint events list to Outlook. You can link a site events list to Outlook so that you can use it in Outlook, however you must edit it on the site. While you have the list open in Outlook it will be automatically refreshed every 20 minutes.

### Link an events list to Outlook as a calendar:

4. On the SharePoint site, open the desired events list.
5. Select action [Link to Outlook](#). Reply “Yes” to confirmation prompt.

### Copy an event from a linked events list to your Outlook calendar:

1. In Outlook, open Calendar.
2. Under Other Calendars, select a (previously linked) Windows SharePoint Services calendar (events list).
3. In the Windows SharePoint Services calendar, open the desired calendar item.
4. Select the action [Copy](#) to personal calendar.

## Using libraries

**Find a library on a SPPS site:** Use the Document Library area on the Home page to open the library page. Alternatively on the Sites area page select action [Manage Content](#) to open the “Documents and Lists” page.

**Find a library on a team site:** On a SPS site select menu item [Documents and Lists](#) to open page of same name, click the desired library’s icon to open it.

**View libraries:** Same as for lists.

**Open a library:** Same as for lists.

**Add a document:** There are at least six ways of adding a document to a document library. These are detailed in *About SharePoint*.

## Using alerts

**Add an alert** with the corresponding action in the Quick Launch bar when the item is open.

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**Manage your alerts:** On the site open the “Site Settings” page. In the section Manage My Information select [My Alerts On This Site](#) to open the same-named page. Use the controls to add, delete, or edit individual alerts.

**View alert history:** Open your personal site. Select action [Manage Alerts](#). This opens a page on which all your alerts are listed.

### Customizing a team site page

With the page open select the Modify Shared Page link. Make the desired changes (see details under Web Designer). Save the changes with the action [View Page](#). Then use the browser Refresh tool.

### Creating a personal My Site

Select the [My Site](#) link in the upper right corner. The site has two views, private and public. The public view is opened first. Each view is created with default settings that are associated with the portal site. The degree to which you can customize the default My Site view is controlled by your rights (authorizations) and by the settings of the available Web Parts.

Select the [Modify My Page](#) link to access customization tools.

### Searching

You can search for people, documents, or other items on the portal site by typing words in the search box located under the navigation bar.

After you type words into the search box and click the search button with the green arrow, a “Search Results” page opens with list of search results. These search results can be organized into different views:

- **By Site:** Items are organized under headings by the site in which they appear, and are then sorted by relevance.
- **Simple List:** Items are not organized into groups, and are sorted by relevance.
- **By Author:** Items are organized in groups under headings by author with the most relevant author groups first, and then sorted by relevance.
- **By Date:** Items are organized under headings by the date on which they were last modified, and then sorted by relevance.
- **By Area:** Items are organized under area headings, and then sorted by relevance.

You can collapse groups of items so that only the headings of the groups appear.

From the search results page, you can add a specific search to the My Links section of your personalized My Site. You can also ask to be alerted when changes occur to the results for a specific search.

For more control over search results, you can switch to advanced search from the search results page or by clicking the magnifying glass icon next to the search box on any page. You can use advanced search to search by properties of items, sort results by factors other than relevance, and set other advanced search options.

### Content Manager

#### Approving content

Individual lists may require approval before its list items become visible and accessible to site users: When a list is flagged for content approval, each list item must be approved by a list manager or administrator. New items have an approval status: pending, rejected, approved. When content approval is in effect for a list, its “Select A View” area has two more options: [Approve/Reject Items](#), [My Submissions](#). The first causes the list items to be sorted by approval status. The second causes only list items submitted by the current user to be displayed; this lets users check on the status of their list items.

#### Managing lists

These directions apply to all list types: document library, links list, discussion board, etc.

The “Create Page” page is used to create lists of all kinds. For SPS sites this page is opened with the [Create](#) menu bar item on the desired page. For SPPS sites this page is opened in two steps: (1) on the desired area page select action [Manage Content](#) to open the “Documents and Lists” page, then (2) select [Create].

**Add a list:** Open the “Create Page” page. Click the icon of the desired list type. If you clicked a List list type, the “New List” page opens. Enter the properties, then select [Create]. The new list appears in its own page. Now you can change columns and/or properties, create views, and enter data,

**Change an existing list:** On the site open the desired list. Select action [Modify settings and columns](#) in the Quick Launch bar. This opens the “Customize ...” page. Change settings, columns, and/or views as desired.

**Save the list as a template:** This can be initiated by an action in the General Settings section of the “Customize ...” page. You are prompted for a filename, template title, and template description. Content may be included.

**Copy/move list between two sites:** This is done in two steps: (1) export the list data from one site, and then (2) import the data into a list on the other site, which will then automatically add a List View Web Part of the new list data to the other Site Web Part Gallery.

#### Managing libraries

See discussion for Managing lists.

**Add a library:** Open the “Create Page” page. Click the icon of the desired library type which opens the “New <type> Library” page. Enter the library properties.

**Change library columns:** On the library view page select action [Modify Settings And Columns](#) in the Quick Launch bar. This opens the “Customize ...” page. Proceed as you would to modify a list: Change settings, columns, and/or views as desired.

**Establish taxonomy with columns and lookup tables:** One column can be created for each taxon. The column can be defined as a lookup type with a reference to a list used as a lookup table. When a

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taxonomy has two levels, use two columns and two lookup tables. The lookup table for the second-level needs a filtered view so that the value of the first level can restrict values for the second level.

Managing libraries in SPPS is different than in SPS. SPPS libraries are managed with the SharePoint Portal Server Central Administration. On the “SPPSCA for server\_name” page, in the Component Configuration section, select Configure document libraries (Web Storage System-based) to open the “List and Manage Document Libraries” page.

Note that SPPS 2003 libraries may have to be backward-compatible to SPPS 2001.

**Add a library to a SPPS site:** On the “List and Manage Document Libraries” page select Create document library to open the same-named page. Enter the Name and Description section properties. In the Associated Portal Site select the portal site to be associated with the library. In the Document Library Contact section and in Document Versions section enter the desired properties. Select [OK].

By default, users can get to the document library from the Document Library area on the home page of the portal site. If an area named Document Library already exists, the area for the document library you create uses the document library friendly name.

### Managing discussions

Periodically review discussion boards for what is being said and asked for.

### Managing web discussions

Web discussions can be viewed by a URL or all at once (per server). Then can be deleted by URL or server.

They are accessed: On the “Site Administration” page, under Management and Statistics, select Manage Web Discussions.

### Emulating areas in SPS

The following approach is a reasonable facsimile to dynamically populate data view content:

- Add topic(s) as properties (columns) in lists and libraries.
- Add one data source per list/library to the Data Source Catalog (DSC), unfiltered.
- On a “Topic” page use one Data View Web Part per topic value: set its source to the list/library in the DSC with a filter for the topic value.
- Format the list item Title as “Insert As Hyperlink To Display Form”. This opens the display form (page) when the title is clicked.

### Managing areas

View the entire portal site map from the Portal Site Content section of the “Site Settings” page. You can add, edit, move, or delete areas in a hierarchy and edit each area’s properties.

**Add groups** in the Portal Listings section on the Documents and Lists page accessed by the Manage Content action on the area page. Use action Add Group in the view Grouping and Ordering.

Go to an area page on the portal.

In the Actions list, click Manage Content.



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On the Documents and Lists page, in the Portal Listings section, click Portal Listings.

In the Views list, click Grouping and Ordering.

In the Actions list, click [Add Group](#).

In the Title box, type a title for the group.

Click OK.

**Order groups** in the Portal Listings section on the Documents and Lists page accessed by the Manage Content action on the area page. Use action [Manage Groups](#) in the view Grouping and Ordering.

In the Actions list, click Manage Content.

In the Portal Listings section, click Portal Listings.

In the Views list, click Grouping and Ordering.

In the Actions list, click [Manage Groups](#).

Under Position from Top, choose the order of the groups by selecting a number for each group.

Click Return to Grouping and ordering page.

**Add portal listing:** Use the [Add Listing](#) action in the Quick Launch bar on the Home page to open the “Add Listing” page. Enter the properties including the area. If you choose to “Add a listing by entering text” the “Rich Text Editor” window opens in which you type the desired text. When done select [Save].

Alternatively, open the desired area for the portal listing. Use the action [Manage Content](#) in the Quick Launch bar to open the “Documents and Lists” page for the open area. The “Portal Listings” list is included. Select the list to open it. Then use the [Add](#) action to open the “Add Listing” page. Continue as above.

**Add portal listing for person:** Use the [Add Person](#) action in the Quick Launch bar on the Home page to open the corresponding page. Enter the properties. Select [OK].

**Edit listing properties:** On the page that displays the listing, select action [Manage Content](#) to open the “Documents and Lists” page. In the “Portal Listings” section select [Portal Listings](#). Move the mouse pointer over the name of the desired listing to open a drop-down action menu. Select [Edit](#). Change the desired properties and save them.

**Add list or library to area page:** On the desired area page select action [Edit Page](#). Then select [Manage Shared Page](#). Select [Add Web Parts](#) to open task pane. Select Web Part, drag it to page. Close the task pane. Select action [View Page](#) to check the results.

### Managing news items

**Add a news listing:** Open a News page. Select the action [Add News](#) to open the “Add News” page. Enter the news listing properties, select a group in which the listing should appear, select one or more areas in which the listing should appear, enter desired audience (optional). Select [OK].

**Edit a news listing:** Open a News page with the desired news listing. Select the action [Edit News Listing](#) to open the “Edit News” page. Change the desired properties. Select [OK].

### Using audiences to target content

There is only one built-in audience: “All portal users”.

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**Add an audience:** Open the “Site Settings” page with the menu bar. In the section “User Profile, Audiences and Personal Sites” select the link Manage Audience. This opens the “Managing Audiences” site page. Select action Create Audience. Enter properties. Select [OK]. Then add audience rules on the “View Audience Properties” page.

**Target an item to an audience:** Use Site Settings to access the Portal Site Map page. Show all items (which are listings). Select an item to target. Open the item’s drop-down action menu, select Edit. On the Display tab in the Audience section, click the audience you want from the available audiences list, and then select [Add]. Select [OK].

**Move a targeted listing to the default (home?) portal site page:** Use Site Settings to access the Portal Site Map page. Show all items. Select an item to target. Drag the icon of the targeted listing to the Home area. [what happens? does the listing remain on the site map page and does a “copy” appear on the Home area page?]

[ CONFIRM: After you have dragged the listing, the page will refresh. Dragging an item to a new area moves the listing. To add a link to the listing in the new location without removing the listing from its old location, click the new area and then click Add Listing.]

**Target a Web Part to an audience:** On the page where you want to target the Web Part, select action Edit Page. Click Modify Shared Page at the top of the page, point to Modify Shared Web Parts, and then click the Web Part you want to target. In the pane for the Web Part, click Advanced to expand the advanced options. In the Target Audiences section, click Select. On the Select Audiences page, select an audience and click [OK].

**Display targeted listings on the Links For You Web Part on My Site:** Use Site Settings to access the Portal Site Content section. Select “Manage targeted links on My Site”. Select action Add Listing. Enter title and description. In the Content section, select Existing listing and type its address. Assign to optional group, enter URL of optional picture, and select audience. Select [Add], then [OK].

**Display a person on the Links For You Web Part on My Site:** Use Site Settings to access the Portal Site Content section. Select “Manage targeted links on My Site”. Select action Add Person. Enter name and description, assign to optional group, and select audience. Select [Add], then [OK].

**Move a targeted listing to the News For You Web Part on My Site:** Use Site Settings to access the Portal Site Map page. Select “Manage portal site structure”. Show all items. Select a targeted listing. Drag the icon of the targeted listing to the News area.

**Specify audience compilation schedule:** On the “Manage Audiences” page, click Specify compilation schedule. Select a schedule and enable it. Select [OK].

**Manually start an audience compilation:** On the “Manage Audiences” page, click Start compilation.

**Review audience compilation history:** Review the information on the “Manage Audiences” page.

**View audience membership:** On the “View Audiences” page, select the desired audience, then select

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### Monitor use of site

**View site usage data:** On the “Site Administration” page in the “Management and Statistics” section select [View Site Usage Data](#) to open the “Site Usage Report” page. This page displays activity statistics for five categories of suite usage (“reports”) for two reporting time intervals (by day or month).

**View site collection usage data:** On the top-level site’s “Site Administration” page in the “Site Collection Administration” section select [View Site Collection Usage Summary](#) to open the same-named page. This page displays six activity statistics grouped by storage, users, and activity.

**View site collection storage space allocation:** On the top-level site’s “Site Administration” page in the “Site Collection Administration” section select [View Storage Space Allocation](#) to open the same-named page. This page displays by list and library the disk space used, the count of items, and the date it was last modified. You can discover large and outdated content here.

### Managing search keywords

**Manage keywords:** Open the “Site Settings” page. In the “Search Settings and Indexed Content” section, select Manage keywords. Several views are available.

## Web Site Designer

### Decisions that affect personal sites

There are Web part properties that control how an individual user can customize and personalize their personal site. The site designer must decide what users will be allowed and not allowed to do in order to enforce the site goals.

### Creating a top-level SPS site

A top-level site can be created in two ways: (1) with Self-Service Site creation or (2) as a server administrator.

**Self-Service Site Creation:** Find the URL for the site creation page (from an announcement on the root site’s home page or the site administrator. Open that page, “New SharePoint Site”. Enter the properties and select [Create]. This will create the site and open the Templates Selection page.

**As server administrator:** Open the SPS Central Administration page, usually “http://<servername>:<port>/default.aspx” (servername is the computer’s first IP address). If you do not know the port number, find it in the properties of the SPS Central Administration site in IIS Manager on the server computer. In the Virtual Server Configuration section select Create A Top-Level Web Site, which opens the “Create Top-level Web Site” page. Enter the properties and select [Create].

### Creating a team site

**With the browser:** Open the parent site. Select [Create](#) on the menu bar to open the “Create” page. In the Web Pages section select Sites and Workspaces to open the “New SharePoint Site” page. Enter the properties and select [Create]. This will create the site and open the Templates Selection page.

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**With FrontPage:** Use menu File, New to open New task pane, select any link under New Web Site. In the “Web Site Templates” dialog box enter the URL location of the new site, indicate if it should be added to the current site, indicate if encryption is necessary, and select the tab and then the template. Select [OK].

**Import package:** In FrontPage open the destination site. If necessary, create a new empty site with the Empty Web Site template. Use menu Tool, Packages, Import to open the “File Open” dialog box. Select the package file and select [OK]. Next the “Import Web Package” dialog box opens. Verify and/or correct the destination URL, select the items you want to import, and select [Import]. Eventually a confirmation dialog box opens, select [OK].

### Using a site template

A site template is used to create a team site. An existing site template is selected from a list.

**Change a site template:** Use FrontPage.

**Create a new site template:** [tbd]

### Using FrontPage themes

FrontPage can apply themes to one or more pages or to an entire site. By doing so the entire page/site is automatically and uniformly formatted. A consistent look gives a website a professional, organized appearance. A perhaps overly simplistic description of a theme is a coordinated collection of HTML styles.

**Apply a FrontPage theme:** In FrontPage open the website. Use menu Format, Theme to open the Theme task pane. To affect a single page, open it in design view of select it in the folder list; to affect several pages, select them in the folder list. Best to check at least one file in design view. Select a theme then right-click the thumbnail preview to open a context menu. Select Apply to Selected Page(s) or Apply As Default Theme.

**Remove a FrontPage theme:** In FrontPage open the website. Use menu Format, Theme to open the Theme task pane. Select the pages. Select the No Theme option at the top of the task pane.

**Create a FrontPage theme:** In FrontPage use menu Format, Theme to open the Theme task pane. Select Create new theme... link at bottom of task pane to open the “Customize Theme” dialog box. Set the desired properties for each HTML element. Select [Save].

**Customize a FrontPage theme:** In FrontPage use menu Format, Theme to open the Theme task pane. Select an existing theme, right-click its thumbnail preview to open a context menu. Select Customize to open the “Customize Theme” dialog box. Set the desired properties for each HTML element. Select [Save] or [Save As] depending if you want to overlay the existing theme or make a copy of it.

**Apply a theme with the browser:** On the site open the “Site Settings” page. In the Customization section select Apply theme to site to open the “Apply Theme to Web Site” page. Select a theme and select [Apply].

### Use other FrontPage features to modify a site

- Navigation features: Navigation View, Link Bar Based on Navigation Structure, page Banner.

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- Link Bar with Custom Links features: Link Bar With Custom Links, Custom Link Bar.
- Dynamic web templates.
- CSS.
- Interactive Buttons.
- Scripted Behavior.

### Creating a basic web page

Open the parent site. Select Create on the menu bar to open the “Create” page. In the Web Pages section select Basic Web Page to open the “Basic Web Page” page. Enter the properties: name and document library name. Select [Create]. In the “Rich Text Editor” window, enter the HTML code for the page. You could also paste code written in a different editor. When done select [Save].

### Creating a Web Part page

Open the parent site. Select Create on the menu bar to open the “Create” page. In the Web Pages section select Web Part Page to open the “New Basic Page” page. Enter the properties: name, location, and layout template. Select [Create].

### Designing a Web Part page

Once a Web Part page has been created with a layout template, you can change it. Web Parts may be moved or added to pages and (re)configured.

You can edit a Web Part page on the site with a browser. You can also use FrontPage. Each has its advantages and limitations.

- With the browser you can only add Web Parts to Web Part zones.
- With FrontPage you can add Web Parts without using Web Part zones.

Pages that can be edited with a browser are indicated with a Modify Shared Page or Modify My Page link. The link opens a drop-down menu with actions:

- **Add Web Parts:** displays a task pane with actions to browse a gallery or select a Web Part from a list. Once you select a Web Part you can either (1) drag it from the list and drop it on a Web Part Zone or (2) select a zone and select [Add].
- **Design This Page:** opens the page in design view. You can rearrange the existing Web Parts by drag-and-drop.
- **Modify My/Shared Web Parts:** displays a sub-menu with one choice for every Web Part on the page. Choosing a Web Part opens a task pane where the part can be reconfigured.
- **Shared View:** displays the page as configured for the site as a whole.
- **Personal View:** displays the page with your personal settings.
- **Reset Page Content:** available only in personal view, it resets all personal settings to the shared view.

### Configuring a Web Part

In design view each Web Part has a drop-down arrow near the right edge of its title bar. Clicking this arrow displays four choices [how? as drop-down menu? task pane?]

- **Minimize:** shrinks the Web Part so that only its title bar shows; the action then changes to Restore which expands the Web Part to its original size.

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- **Close:** Removes the Web Part from the page while leaving it in its gallery.
- **Modify My/Shared Web Part:** opens a task pane that provides access to view, toolbar, appearance, layout, and advanced settings.
- **Help:** displays help about the Web Part.

### Creating a Portal Server site

The first SPPS site is created towards the end of the installation of Portal Server with the Setup Wizard.

**Add a Portal Server site:** On the SharePoint Portal Server Central Administration for <server\_name> page, in the Portal Site and Virtual Server Configuration section, select [Create a portal site](#) to open the “Create Portal Site for server\_name” page. In the Portal Creation Options section, select [Create a portal](#). In the other sections enter properties (site name, URL of virtual server and of site, owner account name and email address. Select [OK]. On the confirmation prompt select [OK]. Once the “Operation Successful” page appears, you can further configure the site.

### Site Administrator

To administer a SPPS site use the Site Settings link in the upper right corner of any area page. Tools are available on the “Site Settings” page and on the “Site Administration” page.

### Managing user profiles

Open the “Site Settings” page. Under the section “User Profile, Audiences and Personal Sites” select the link “Manage Profile database”. This opens the “Manage Profile Database” page. Actions include: [Add user profile](#), [View user profiles](#). The [View](#) action opens the “View User Profiles” page which lists all profiles. From that page you can use buttons to add and delete profiles. You can also open the “Edit User Profile” by holding the mouse pointer over a user account name [?], and from there change the properties.

You can automatically create user profiles by importing them from the current domain Active Directory, the entire domain forest, or a custom source. Information imported from Active Directory can overlay some properties; these are indicated on the “Edit User Profile” page with a linked disk icon.

### Managing security

**Add cross-site group:** On the “Site Administration” page in the “Users And Permissions” section select [Manage Cross-Site Groups](#) to open the “My Cross-Site Groups” page. This page lists all the cross-site groups of which you are the owner or a member. If desired, use the toolbar button to see all cross-site groups. Select [New Cross-Site Group] to open the same-named page. Enter the properties. Select [Create].

**Edit membership and/or properties of a cross-site group:** Open the “My Cross-Site Groups” page as described above. This page lists all the cross-site groups of which you are the owner or a member. If desired, use the toolbar button to see all cross-site groups. Select [New Cross-Site Group] to open the same-named page. Drill-down to a single group by clicking its name; this opens the “Cross-Site Group Members” page. Use toolbar buttons to add members, delete members, and edit the group properties.

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### Move a site

Moving could mean to a different server. It could also mean changing its URL.