



Participant's Guide

SharePoint Content Manager Training





2006 Fremont Investment & Loan

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Printed in the United States of America

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Using this Guide

This Participant's Guide for SharePoint Content Manager Training provides you with information about the role of Content Manager. Activities, review questions, job aids, and glossary definitions are included.

Small icons accompany the different sections to help you easily identify each section.

Icon Key			
	Objectives		Q & A, reviews
	Computer activities		Glossary

Course Goals

The goal of this course is to provide you with the knowledge and skills necessary to begin working as a Content Manager for your selected business unit. Through lecture, demonstration, and practice, you will learn the role of the Content Manager.

Upon completion of this course, you will be able to:

- Configure and support portal Areas and Web Parts
- Publish Office 2003 documents to FILConnect
- Configure Libraries for version control and approval processing
- Create and manage lists, including: contacts, tasks, and discussions
- Change document status
- Support contributors in the publishing process
- Perform the role of a Content Manager according to Fremont standards and best practices

Course Outline

Lesson 1: Areas

-  About Areas
 -  Identifying Areas & Web Parts
 -  Creating a Portal
 -  Configuring a Portal Area
 -  Moving & Deleting a Portal Area

Lesson 2: Web Parts

-  Web Part Types
-  Adding a Web Part
-  Using the Content Editor Web Part
-  Modifying Web Parts
-  Closing/Deleting Web Parts

Lesson 3: Web Page Layout

-  Changing the Page Layout

Lesson 4: Portal Listings

-  What Are Portal Listings?
 -  Adding a Listing
 -  Editing a Listing
 -  Approving / Rejecting Listings

Lesson 5: Grouping and Ordering Content

- ✚ Organizing Content by Group
 - ✚ Adding a Listing Group
 - ✚ Renaming a Listing Group
 - ✚ Deleting a Listing Group

Lesson 6: Lists

- ✚ List Types
 - ✚ Creating a List
 - ✚ Modifying a List
 - ✚ Deleting a List

Lesson 7: Document Management

- ✚ About Document Management
 - ✚ Creating a Document Library
 - ✚ Modifying a Document Library
 - ✚ Creating a Document in a Document Library
 - ✚ Uploading Documents to a Document Library
- ✚ Managing Documents
 - ✚ Modifying Documents on FILConnect
 - ✚ Moving Documents to a New Library
 - ✚ Setting Alerts in FILConnect
 - ✚ Approving/Rejecting Content
 - ✚ Check-in/Check-out Documents
- ✚ Document Approval/Publication
 - ✚ Document Workflow

 Version History

-  View Document Versions
-  Restore Document Versions
-  Delete Document Versions

Lesson 8: Working with Images

-  Creating a Picture Library
-  Modifying a Picture Library
-  Uploading Images

Lesson 9: Views

-  Creating a View
-  Changing an Existing View
-  Deleting a View

Lesson 10: Sort and Customizing Item Order

-  Comparison of Sorting and Customer Ordering
-  Ways to Sort or Customize the Item Order
-  Sorting Items

Appendix A – Web Part Properties

Appendix B - Portal Governance

Appendix C - Glossary

Assessment

Participants will demonstrate their ability to meet the listed objectives through an online quiz and hands-on activities.

Lesson 1 – Areas

Lesson Objectives

After completing Lesson 1, you will be able to:



- Identify Areas, Zones, and Web Parts
- Create portal areas and sub-areas
- Configure areas and sub-areas

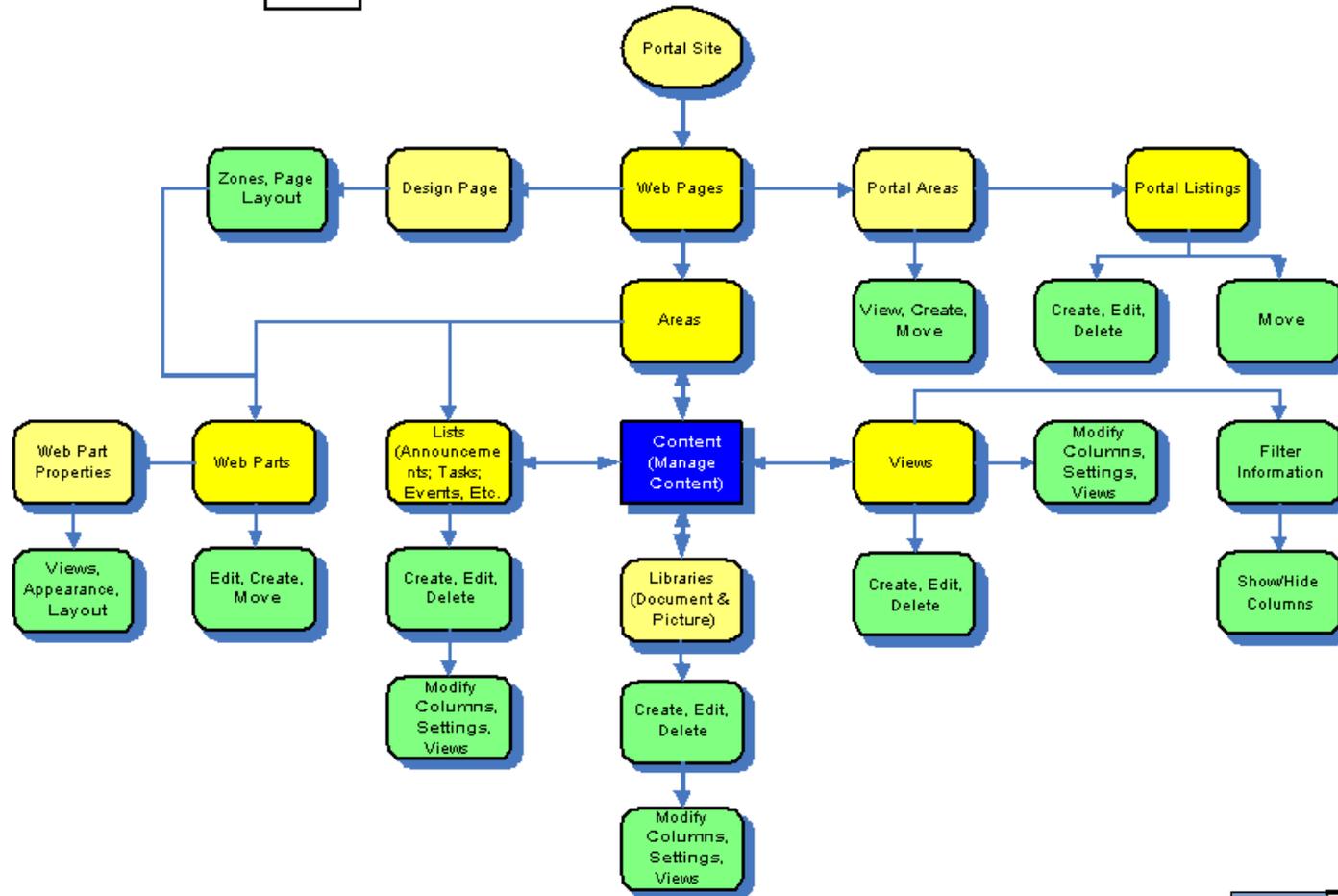
About areas

In FILConnect, areas provide a flexible way to both describe and find information on the portal site. Areas define the structure of the portal site as a hierarchy that can be used to intuitively organize and browse the content on the portal site.

Documents, lists, and other items on the portal site and in other Web sites or file shares can be associated with one or more areas by using listings. Users can find information by browsing or searching the relevant areas for those items.

Monday, May 09, 2005

Content Management



Creating a Portal Area

Exercise 1-1

In this exercise, you are adding two portal areas to your business unit Portal on FILConnect. It's within these areas that you'll be adding and configuring content throughout today's class.

Part I

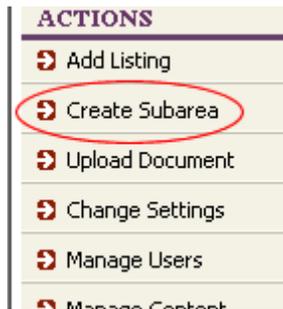
1. From the FILConnect Home page, under the *Actions* Quick Launch menu, click **Manage Portal Site**. The Portal Site Map opens.
2. On the Portal Site Map, click **Create Area**.
3. On the *Create Area* page, enter **Title**, **Description**, etc.
4. In the *Publishing Dates* section, you can specify start and end dates to display this area by doing the following:
 - To specify a start date, type the date you want this area to appear on the portal site in the Start date box. The default date is today's date.
 - To specify an end date, type the date you no longer want this area to appear on the portal site in the Expiration date box. You can leave this blank to display the area indefinitely.
5. Click **OK** when ready.
6. Repeat steps 2 through 5 to create a secondary portal area.

Creating a Sub-area

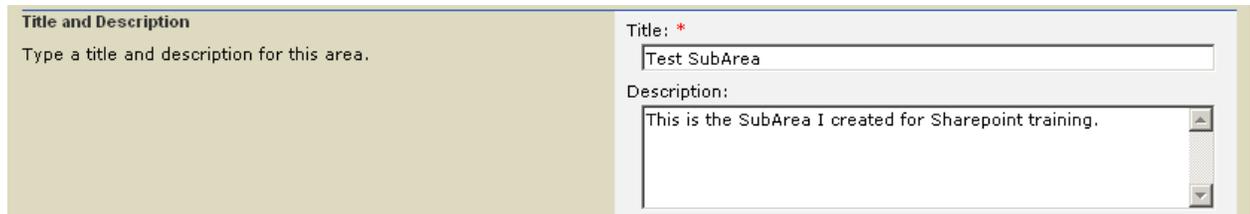
Exercise 1-2

In this exercise, you are adding sub-areas to the primary and secondary portal areas you just created for your business unit Portal on FILConnect.

1. On the primary portal page (area) you just created, under **Actions** menu, click **Create Subarea**.



2. On the **Create Area** screen, enter the following **Title** and **Description**:

A screenshot of a web form titled 'Title and Description'. The form has a light green header with the title and a subtitle 'Type a title and description for this area.' Below the header, there are two input fields. The first is labeled 'Title: *' and contains the text 'Test SubArea'. The second is labeled 'Description:' and contains the text 'This is the SubArea I created for Sharepoint training.' The description field has a vertical scrollbar on its right side.

3. In the **Publishing Dates** section, you can specify start and end dates to display this area by doing the following:
 - To specify a start date, type the date you want this area to appear on the portal site in the Start date box. The default date is today's date.
 - To specify an end date, type the date you no longer want this area to appear on the portal site in the Expiration date box. You can leave this blank to display the area indefinitely.

<p>Publishing Dates</p> <p>In the Start date box, type the date you want this area to appear on the portal site.</p> <p>In the Expiration date box, type the date you want this area to no longer appear on the portal site.</p> <p>Note: Once you approve an item, it appears in search results regardless of appearance and expiration date.</p>	<p>Start date:</p> <input type="text" value="5/11/2005"/> <p>Example: mm/dd/yyyy</p> <p>Expiration date:</p> <input type="text"/> <p>Example: mm/dd/yyyy</p>
--	--

4. Click the **OK** button when you're finished.
5. Repeat steps 1 through 4 to create a sub-area on the secondary portal page.

Configuring a Portal Area

Exercise 1-3

To configure the area after creating it, go to the Area and click **Change Settings**. Rename the Area “[your name] Sample Area.” Set the expiration date to one month from now.

1. To configure a portal area after creating it, go to the area and click **Change Settings**. The **Change Settings** page for the chosen area opens.



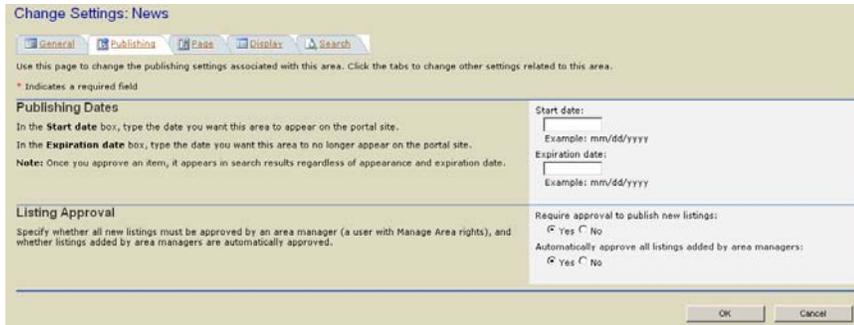
The General tab is selected by default.

1. In the Title and Description section, type a new title and description for the listing.
2. In the Address section, type a new Web address or path for the listing.

3. In the Location section, click Change location to display the listing in a different portal area or to select additional areas.
 1. On the Change Location page, select the area in which to display this listing.
 2. Click OK.

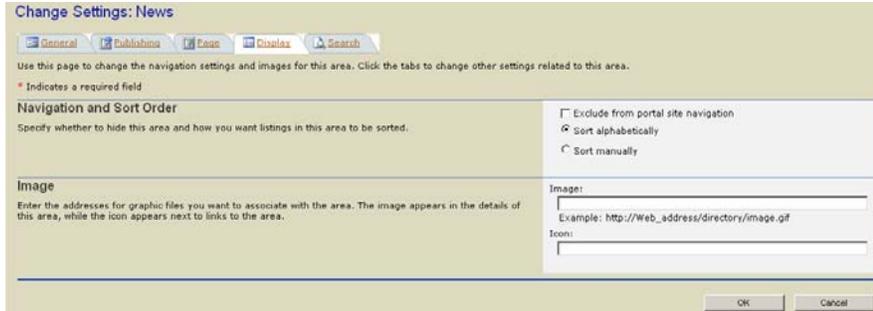
Note: You can see the current location of the listing under **Default location**.

2. Click the **Publishing** tab.



1. In the **Publishing Dates** section, you can specify start and end dates to display this listing:
 - To specify a start date for this listing, type the date you want this listing to appear in the portal site in the **Start date** box. The default date is today's date.
 - To specify an end date for this listing, type the date you no longer want this listing to appear in the portal site in the **Expiration date** box. You can leave this blank to display the listing indefinitely.
2. In the **Listing Approval** section, do one of the following:
 - Click **Yes** under **Require approval to publish new listings**. All new listings must be approved by the Content Manager.
 - Click **No** under **Automatically approve all listings added by area managers**. Listings added by area managers (a user with Manager Area rights) are not automatically approved.

3. Click the **Display** tab



1. The **Navigation and Sort Order** section allows you to specify how listings in this area are sorted.
2. The **Image** section, allows you to include a graphics file to display for this listing.

4. Click the **Search** tab.



1. In the **Search Results** section, accept the default setting to include this area in search results.
2. In the **Topic Assistance** section, click the **No** option to exclude this area when automatically categorizing content. This option has not been implemented.
3. Click **OK**.

Move and Delete a Portal Area

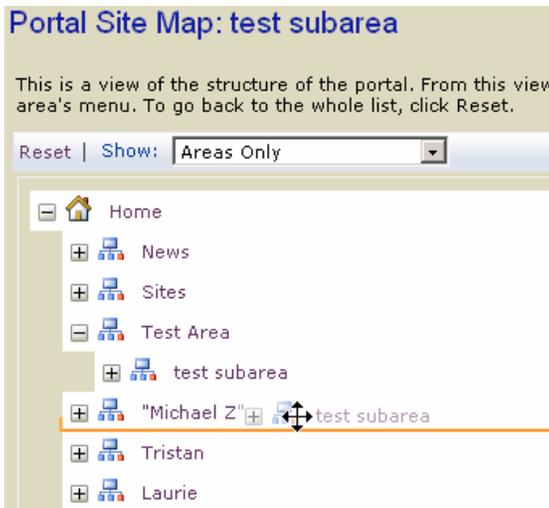
Exercise 1-4

Part I: - Move an area

1. In the **Actions** list, click **Manage Portal Site**.



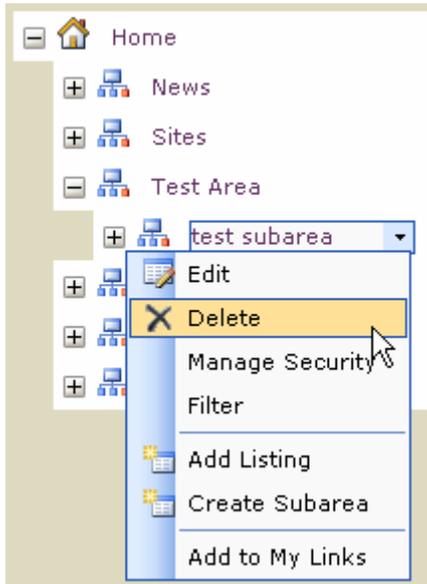
2. On the portal site map, click the icon next to the area, and drag it to the new location.



You can also move an area by editing the settings for the area.

Part II - Delete an area

1. On the *Portal Site Map* page, hover the cursor on the area you want to delete and click the arrow that appears.
2. On the pop-up menu, click **Delete**.



A confirmation dialog box appears asking you to confirm the deletion.

Note: Deleting this area also deletes its sub-areas and listings.



3. Click **OK**.
4. When the **Operation Successful** page appears, click **OK**.
5. To view your changes, click the **Return To Portal** link, located top right on the title bar of the page..





Q & A/Review

1. What are Areas and what do they provide us with?
2. How do you rename a portal area after you created it?
3. What are the differences between areas and Web parts?

Lesson 2 – Web Parts

Lesson Objectives

After completing Lesson 2, you will be able to:



- Add, Remove and Modify Web Parts
- Identify Web Part Types
- Understand Web Part pages and their properties

About Web Parts

A Web Part is a modular unit of information that has a single purpose and that forms the basic building block of a Web Part Page. Understanding how Web Parts work can help you share them in more creative and interesting ways.

Types of Web Parts

Web Parts can be classified as one of three types. The type of Web Part you are working with can be important because:

- ✚ You may have permission to modify only some types of Web Parts on certain Web Part Pages, but not on other Web Part Pages.
- ✚ You may be able to connect to certain types of Web Parts on a Web Part Page, but not to other types of Web Parts on the same Web Part Page.
- ✚ **Shared Web Part** A Web Part added to a Web Part Page in shared view. Shared Web Parts are available to all users of a Web Part Page with appropriate permissions.
- ✚ **Personalized Web Part** A shared Web Part with one or more property values modified by a user that has made changes to the Web Part in personal view. The changes made to the personalized Web Part are only available to the user who made those changes. Users who do modify a web part in personal view, continue to see the shared Web Part all users see.

 **Private Web Part** A Web Part added to a Web Part Page from a Web Part gallery or imported from a computer while creating or making changes to a Web Part Page in personal view. Private Web Parts are only available to the user who added or imported the Web Part. Other users can not see private Web Parts.

Adding Web Parts

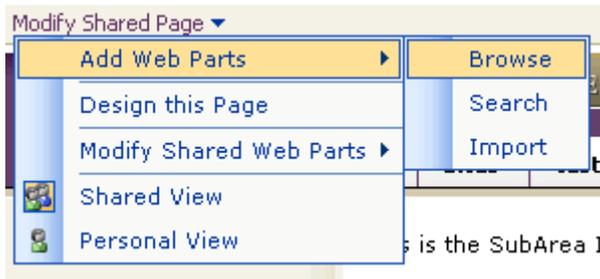
Exercise 2-1

Part I: Now that you have an area created, you need to add content. In this activity, you will add Web Parts to your area. The Web Parts are the containers in which the content resides.

1. Go to your sample area, and on the **Actions** menu, click **Edit Page**.



2. On the **Modify Shared Page** menu, point to **Add Web Parts** and then click **Browse**.



3. In the **Add Web Parts** panel, under the **Web Part list**, click and drag **Grouped Listings** to the middle left zone on the Web page.



4. In the **Add Web Parts** panel, click the **Close** button to return to the page view. The Web part you added is now displayed to all users.

Part II: In addition to the Web Part added above, add the following Web Parts to your area:

- Content Editor Web Part – Middle Left Zone
- Group Listing – Middle Left Zone
- Image Web Part – Middle Right Zone

Using the Content Editor

Exercise 2-2

Part I: Along with content provided through external files and links, you can create your own content quickly and easily. In this exercise, you will add a simple listing using the **Content Editor**.

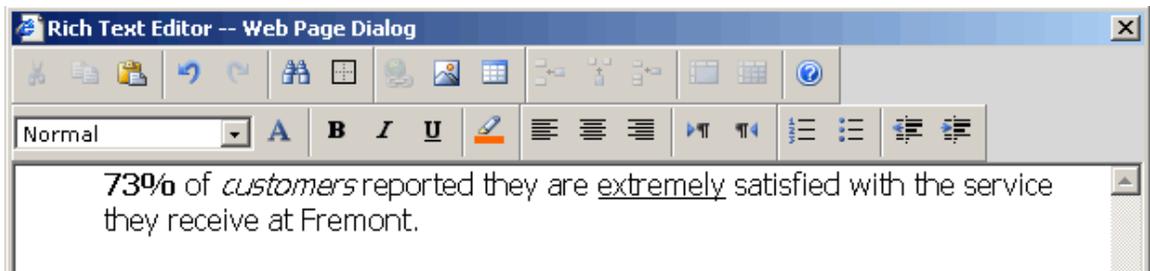
1. To begin using the content editor, go to the **Content Editor Web Part** and click **open the tool pane**.



2. In the **Content Editor Web Part** tool pane, click the **Rich Text Editor...** button.



3. Enter the following text and format as shown:



4. When you're finished, click the **Save** button.

Part II: Modify the text you just entered by adding another sentence.

Sample sentence:

We strive to continue meeting the extreme customer satisfaction goal by continuing to provide outstanding service.

5. When you're finished, close the **Content Editor Web Part** tool pane. Your text appears in the Web Part.

Modifying Web Parts

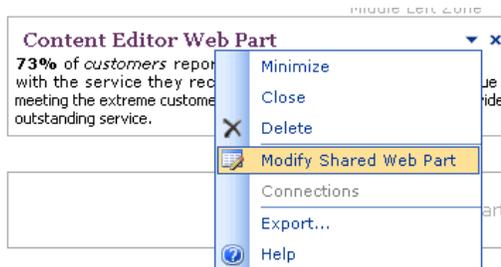
Exercise 2-3

Part I: Web Parts are created with default naming conventions and layout attributes that might not suit your needs. In this activity, you will modify a Web Part to make it more user-friendly.

1. On the Modify Shared Page menu, click **Design this Page**.



2. On the Content Editor Web Part menu, click **Modify Shared Web Part**.



3. In the Content Editor Web Part Tool Pane, expand the **Appearance** section, and rename the Web Part as shown:



4. When you're finished, click **OK**.

Part II:

Rename the Content Editor Web Part

5. In the Content Editor Web Part Tool Pane, expand the **Appearance** section, and rename the Web Part as "Latest Updates."
6. When you are finished, click **OK**.

Close Web Parts

Exercise 2-4

Closing Web parts

You can close a Web part from a page at any time. Closing a Web part from a page does not delete the Web part; it simply removes it from your view. The Web part is still available for use on the same Web page when selected from the Web part library.

1. Rest the pointer over the Latest Updates Web Part, and then click the down arrow to open the Web Part menu.



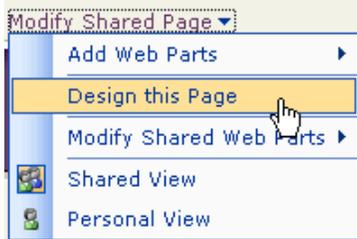
2. Click **Close**. The Web Part is removed from the page.

Delete Web Parts

Exercise 2-5

Deleting Web parts

1. In the upper left corner of the page, click **Modify Shared Page**, and then select **Design this Page**.



2. Hover over the Web part you want to delete, click the drop-down arrow, and then click **Delete**.



A confirmation dialog box appears asking you to confirm the deletion.

Note: Deleting this Web Part also deletes the content associated with the Web Part.

Review Questions



1. What are Web Parts.
2. Identify the Web parts on your portal page?
3. Can you add more than five Web parts to an area?
4. How do you close a Web part?
5. How do you delete a Web part?
6. What's the difference between closing and deleting a Web part?

Lesson 3 - Web Page Layout

Lesson Objectives

After completing Lesson 3, you will be able to:



- Understand Web Part Pages/Layout
- Modify the Layout of a Web Part Page

Web Part Pages

Web Part Pages provide crucial benefits to you as a knowledge worker because:

- ✚ They bring disparate but related information together on one page, so you can easily summarize and expose the details you need to make quick, effective decisions
- ✚ Information that was previously stored in incompatible applications, different data sources, and uncoordinated Web pages is now available through one convenient and integrated portal page, so you can save time and conveniently access this information
- ✚ They are Web pages that you can design right inside the browser, so you can see and deploy your design changes instantly
- ✚ They organize critical and useful information into a mini-application, to make it easy to satisfy your business and personal information needs
- ✚ Web Parts are designed to be reusable, shareable, and scalable, so it's easy to distribute critical content and tasks to a few or to many users
- ✚ You can better control and interact with the information you need each day to do your job, so you become more productive and efficient
- ✚ You can tailor content and data to fit your environment and style, so you can work the way that suits you best

- ✚ Web Pages are made up of one or more Web Parts that use a consistent user interface for the title bars, frames, menu commands, and properties, so that once you know how to use and modify one Web Part, you know how to use and modify all Web Parts

Web Page Layout

This section provides some guidelines on developing portal page layout. Visual and functional continuity are two essential components to an effective portal solution. The proper use of shapes, images, colors, and fonts can greatly increase the likelihood that the user will find appropriate information. A site that is dense with text links and documents is difficult to read. A balance must be struck with the visual relief of surrounding white space, bulleted lists, and font characteristics.

- ✚ Use space. Add space around important information.
- ✚ Keep it simple. It takes more time, but develop a page that presents a logical and simple page layout.
- ✚ The Grouped Listings web part is one of the most complex and flexible web parts that ships with SharePoint. Spend time learning its many uses.
- ✚ Contrast is important. Strike a balance between portal listings, images, and other content to invite the reader to continue scanning content.
- ✚ Use the top of the page wisely. The upper part of the web page is the most valuable real estate.
- ✚ Use even lists. Make sure the lists on your page are easy to scan

While in design mode, you can drag and drop Web parts into zones to rearrange how the web parts are displayed on the page.

Change the Page Layout

Exercise 3-1

Now that you have added content by adding Web Parts to an area, you can change the design to change the page layout.

1. In the upper right corner of the page, click **Modify Shared Page**, and then select the **Design this Page** option.



2. Drag Web Parts to arrange them as you want them to be displayed on the page.
3. Continue to move Web parts into different zones on the Web page to arrange them in the order you want.
4. When finished, click **View Page** in the **Actions** list to exit design mode and view the page.



5. Click the **Refresh** button on the IE toolbar to view changes.

Review Questions



1. How are Web pages created?
2. How do you change the Web page layout?
3. What mode should you be in to rearrange how the web parts are displayed on the page?

Lesson 4 – Portal Listings

Lesson Objectives

After completing Lesson 4, you will be able to:



- Add Portal Listings
- Edit Portal Listings
- Approve and Reject Portal Listings

Portal Listings

You can highlight information important to portal users by adding listings to the News area. A news listing can be either text-based content or a link to an existing news item, such as an article on a news service. To make managing news listings easier, you can specify start and end dates for content display and automatically mark expired news listings for archiving at the end of the publishing dates.

Adding Listings

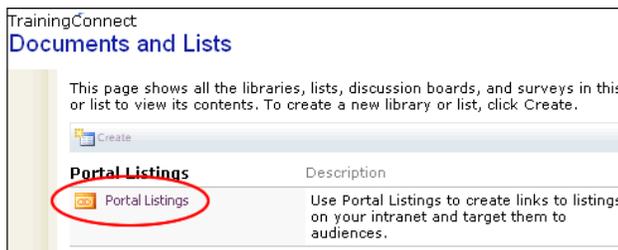
Exercise 4-1

Part I: By adding listings to your Web page, you can share information with all users who visit your area.

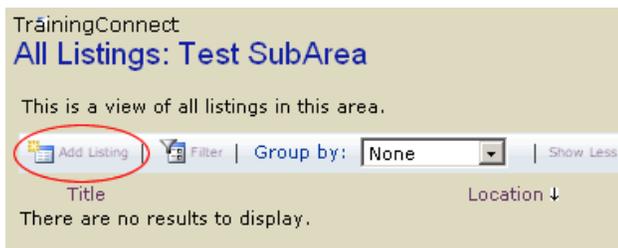
1. On the **Actions** menu, click **Manage Content**.



2. On the *Documents and Lists* page, click **Portal Listings**.



3. On the All Listings toolbar, click **Add Listing**.



4. On the *Add Listing* page, enter a title and description for your listing:

Title and Description
Type the title and description for this listing.

Title: *
Fremont General Report

Description:
This is a brief about Fremont's 2004 4th quarter.

- In the Content section, select Add a listing by entering text, and then click the **Open Text Editor** button.

Source for this listing

Existing listing
Address:
Example: http://Web_address/directory/ or \\server\directory

Add a listing by entering text
Edit listing text:

Open Text Editor

- Enter the following sentence in the Text Editor box.

Fremont General Corporation reported net income from continuing operations of \$90,595,000 for the fourth quarter of 2004.

- When you're finished, click the **OK** button.
- On the **Add Listing** page, click the **OK** button.
The new listing is placed into a pending status.
- Repeat **steps 1 through 8** by **adding 3 additional listings** of your choice.

Adding Listings – Internal Content

Exercise 4-2

You can quickly add new listings to a web page using shortcut commands. By adding listings to your Web page, you can share information with all users who visit your area.

1. Open a new Browser window, by clicking **File, New, Window**.
2. On the FILConnect home page, select the **Content Manager List** link under Important Links. The URL address for this link appears in the Address field.
3. Select the URL address and right-click the main mouse button.
4. Open the previous Browser window and select **Add Listing** from the **Actions** menu. The *Add Listing* page opens.
5. Enter the **Title and Description** for this listing in the corresponding fields.
6. In the Content section, place the cursor in the Existing listing Address field.
7. Right-click the main mouse button and select the Paste option from the pop-up menu. The URL address appears in the Existing listing Address field.
8. When you are finished, click the **OK** button.
9. Repeat steps 2 through 8 by adding 3 additional listings to existing content of your choice on FILConnect.

Adding Listings (External Sites)

Exercise 4-3

In this exercise, you are going to create multiple listings by linking to external Web sites, such as Google.

1. Open two Browser windows, by clicking **File, New, Window**.
2. In the *Address* field, enter an external Web site URL address.
3. Right-click the main mouse button in the *Address* field and select the **Copy** option from the pop-up menu.
4. Open the previous Browser window and select **Add Listing** from the **Actions** menu. The *Add Listing* page opens.
5. Enter the **Title** and **Description** for this listing in the corresponding fields.
6. In the **Content** section, place the cursor in the **Existing listing Address** field.
7. Right-click the main mouse button and select the **Paste** option from the pop-up menu. The URL address appears in the Existing listing Address field.
8. When you are finished, click the **OK** button.
9. Repeat steps 2 through 8 to add 3 additional listings to external sites of your choice.

Editing Listings

Exercise 4-4

Edit the listing content by changing Fremont General Corporation (FCG) to a boldface type and a larger font size.

1. On the **ACTIONS** menu, click **Manage Content**.



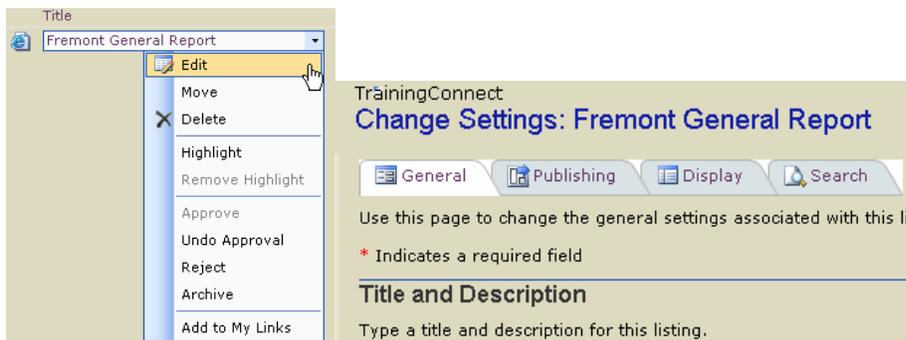
2. On the **Documents and Lists** page, click **Portal Listings**. On this listing page, all portal listings are displayed. From here, you can edit an existing listing.

Portal Listings	Description	Items	Last Modified
Portal Listings	Use Portal Listings to create links to listings on your intranet and target them to audiences.	0	No Date

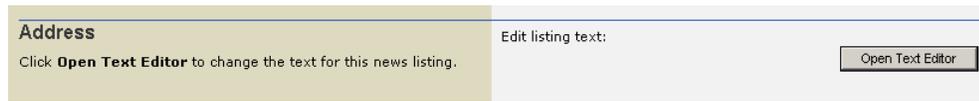
3. Hover over the **Fremont General Report** listing you added.



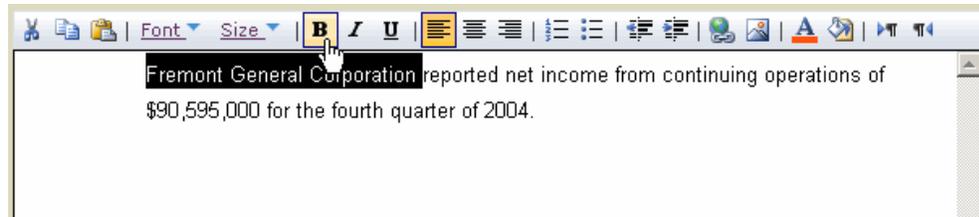
4. Select the **Edit** option from the drop-down menu that appears. The **Change Settings** page opens.



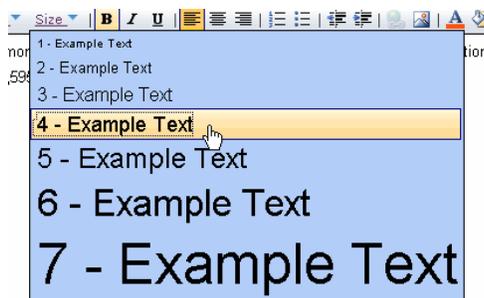
- Click the **Open Text Editor** button to edit the listing.



- Highlight Fremont General Corporation and click the **Bold** command button on the toolbar.



- Click the **Size** drop-down arrow and select the number 4 example to apply the new font size.



- When you are finished, click the **OK** button. Control returns to the **Change Settings** page.
- On the **Change Settings** page, click the **OK** button.

Approve or Reject Listings

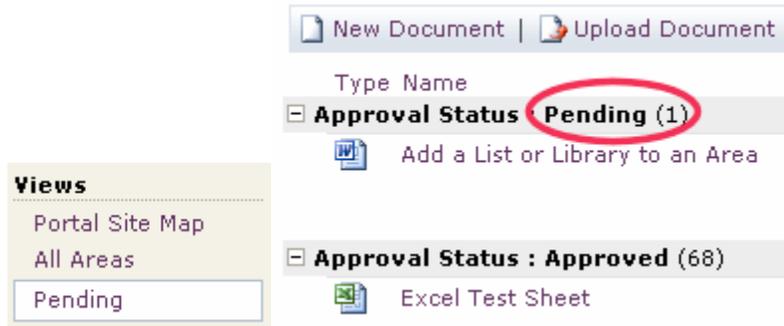
In order to view the pending listings, the listings need to be approved by the Content Manager. Once the Content Manager approves the listings they appear on the Web page they were created on.

Approving Listings

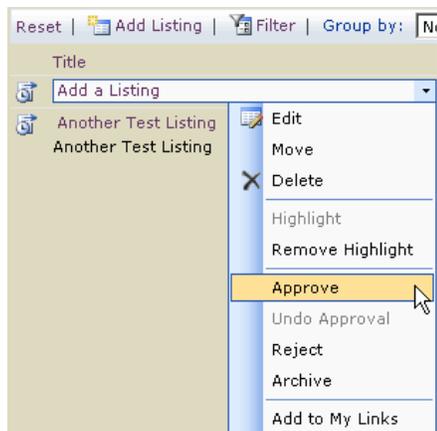
Exercise 4-5

Approving listings allows you to control the viewable content on FILConnect.

1. Click Manage Portal Site on the Actions menu.
2. Select **Pending** on the **Views** menu. A list of pending items appears.



3. Hover over the listing you want to approve and select the listing drop-down arrow to access the Edit menu.



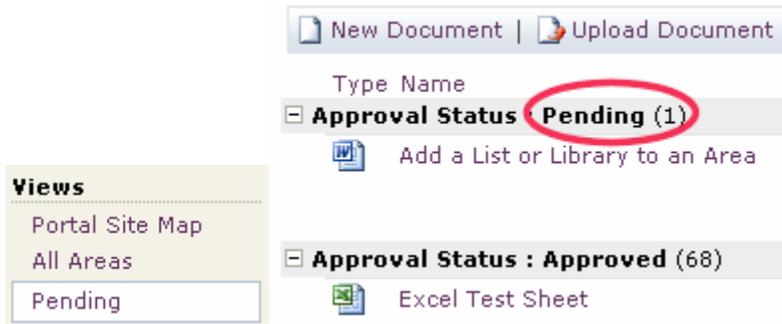
4. Select the **Approve** option from the pop-up menu. The new listing appears on your Web page.

Rejecting Listings

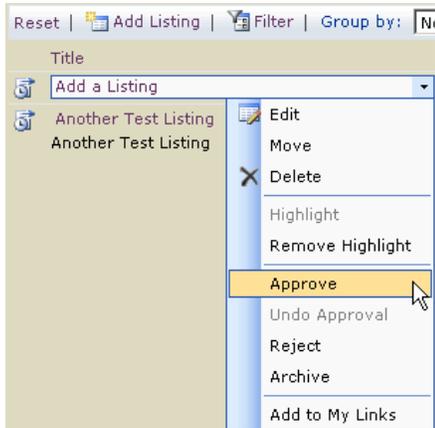
Exercise 4-6

Rejecting listings allows you to control when content is viewable (and if the content is appropriate for viewing) on FILConnect.

1. Click **Manage Portal Site** on the **Actions** menu.
2. Select **Pending** on the **Views** menu. A list of pending items appears.



3. Hover over the listing you want to approve and select the listing drop-down arrow to access the Edit menu.



4. Select the **Reject** option from the pop-up menu.
The listing is placed in the Reject status, and will not be viewable on your Web page.

Review Questions



1. How do you add a portal listing to content on another portal?
2. What about a portal listing to an external Web site?
3. Can you edit a portal listing? How?
4. Who is responsible for approving portal listings? How?

Lesson 5 – Grouping and Ordering Content

Lesson Objectives

After completing Lesson 5, you will be able to:



- Manage Groups and List Ordering
- Create Listing Groups
- Rename Listing Groups
- Delete Listing Groups

Grouping and Ordering Content in an Area

To further organize the content within an area or sub-area, you can assign content to different groups. Each group is displayed with a group heading and the content assigned to that group listed under it. There are default group headings called General, Highlights, and Experts that you can assign content to, but you can also create new groups that work best for your organization and content. For example, in the Topics area, under the sub-area Resources, you might create groups called Online Training, Classroom Training, and Books. You can specify the order in which groups appear on a page. You can also rename and delete groups.

Add a listing group

Exercise 5-1

Listing groups are used to organize multiple listings in an area. For example, the Residential portal created the Compliance, Operations, Product Information, and Broker Channel Management groups to organize their content under the Communities tab.

1. In the **Actions** list, click **Manage Content**.



2. On the *Documents and Lists* page, click **Portal Listings** under the **Portal Listings** section.



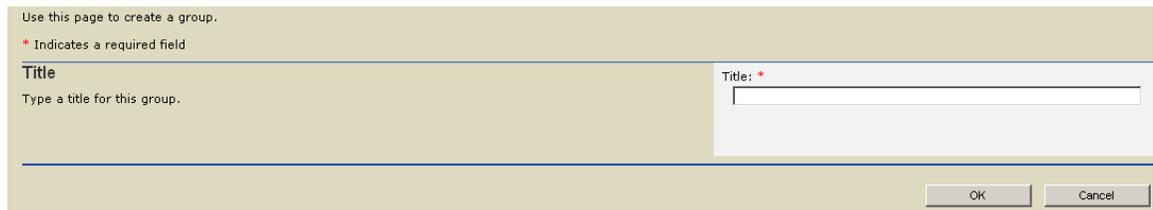
3. In the **Views** list, click **Grouping and Ordering**.



4. In the **Actions** list, click **Add Group**.



5. In the **Title** box, enter a title for the group.



Click **OK**. A new group is created based on the criteria you entered in the Title box.

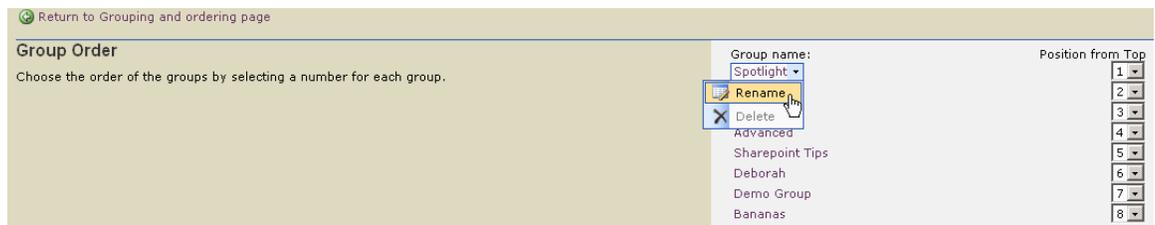
6. Repeat steps 4 through 6 to **create 5 additional groups** to further organize your content.

Rename a listing group

Exercise 5-2

You can rename a listing group if the name of a group used to organize listings is not suitable.

1. In the **Group name** list, point to the group you want to rename, click the arrow on the bar that appears, and then click **Rename** on the menu that appears.



2. Type a new title for the group.



3. Click **OK**. If you have existing listings tied to the previous group name, these listing are automatically updated with the new group name.
4. Click the **Return to Grouping and ordering page** link.

Delete a listing group

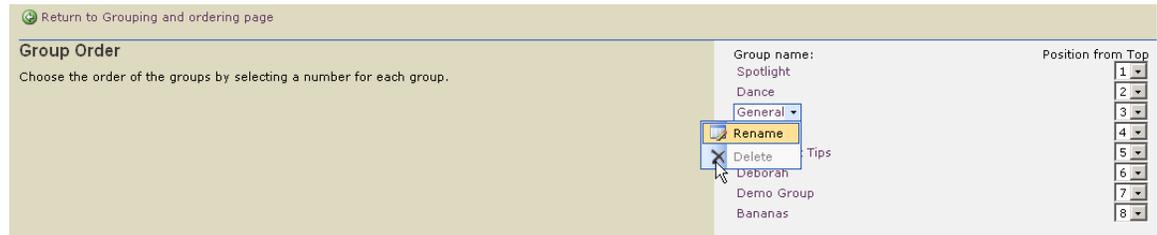
Exercise 5-3

You can delete a listing group if the group is no longer useful. When a listing group is deleted, any listings assigned to that group are automatically moved under the General group.

1. In the **Actions** list, click **Manage Groups**.



2. Rest the pointer on the group name that you want to delete. Select the **Delete** option from the edit menu.



3. A confirmation dialog box appears asking to confirm deletion of the group.
4. Click **OK**.



Although the General, Expert, and Highlight groups cannot be deleted, you can rename these groups.

Review Questions



1. How do you create a listing group?
2. What are some ways to group and order listings?
3. Explain how grouping and viewing facilitate navigation.

Lesson 6 –Lists

Lesson Objectives

After completing Lesson 6, you will be able to:



- Identify different List types
- Create a simple Contacts list
- Edit the Contacts list
- Delete a List

Lists

A list is a collection of information that you share with team members. For example, you can create a sign-up sheet for an event, or you can create a list of ideas.

Sites include a set of built-in lists. Except for the announcements list, these lists are empty when you create the site. You can immediately fill them with items pertinent to your team. The announcements list contains a sample announcement to help you get started with your site.

You can use the lists that come with your site as is, you can modify or delete lists that you don't use, and you can create your own lists. When you create your own lists, you can base them on the designs used for the built-in lists, or you can create custom lists from scratch.

Through FILConnect, you can create the following kinds of lists:

- Links
- Announcements
- Contacts
- Events
- Tasks
- Issues
- Custom Lists

Type of List	Description
Links	A list of hyperlinks to Web pages of interest to team members. By default, a view of the built-in links list appears on the home page.
Announcements	A place to post information for the team. By default, a view of the built-in announcements list appears on the home page.
Contacts	Information such as name, telephone number, e-mail address, and street address for people who work with your team. By default, a hyperlink to the built-in contacts list appears on the Quick Launch bar.
Events	A list of important dates. By default, a view of the built-in events list appears on the home page.
Tasks	A to-do list for team members. By default, a hyperlink to the built-in tasks list appears on the Quick Launch bar.
Issues	A list you can use to manage a set of issues or problems. You can assign, prioritize, and follow the progress of issues from start to finish.
Custom Lists	<p>A list with a minimum number of predefined columns. When you want to create a list that is unlike any of the built-in lists, create a custom list.</p> <p>If you want to start with a list of information in a spreadsheet, you can define a range of cells to use as a list in your site. Windows SharePoint Services imports the data from the spreadsheet and displays it the same way it displays the built-in lists: in columns that can be filtered and sorted, and accompanied by commands that enable team members to add, edit, and delete items.</p> <p>There is no link between the original spreadsheet and the list on the site. If you change the spreadsheet, the list on the site is not updated. Likewise, changes to the list on the Web site are not reflected in the original spreadsheet.</p>

You can easily determine the appropriate list to use for a given situation by recognizing the type of data you wish to display, and identifying which list makes the most sense.

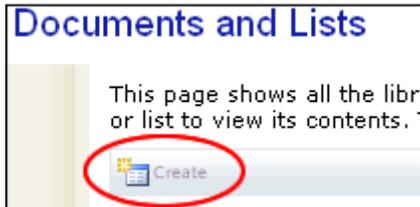
Each list appears on a page that includes commands for adding items, sorting and filtering items, switching to a different view of the list, and changing the design of the list. You can copy the list to a spreadsheet, and you can create an alert to be notified of changes to the list from this page. You can also attach a file to any one of the following types of lists: announcements, events, discussions, contacts, and custom lists.

Creating a List

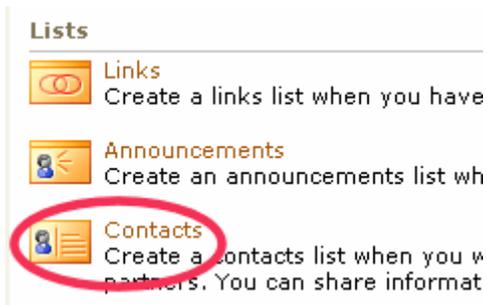
Exercise 6-1

Part I: A list is a collection of information you wish to display and share with all visitors to your site. In this activity, you'll add a department contact list to your site.

1. On the **Actions** menu, click **Manage Content**.
2. On the **Documents and Lists** toolbar, click **Create**.

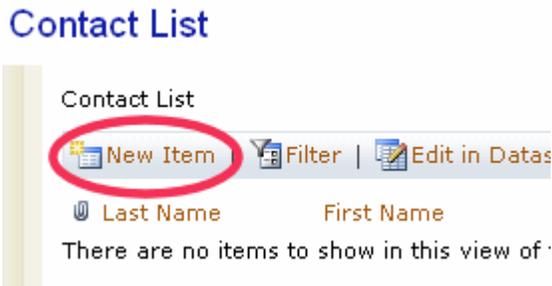


3. On the **Create Page** screen, locate the **Lists** section and click **Contacts**.



4. Name your list "Dept. Contacts" and enter a short description. When you're finished, click the **Create** button. The empty list is created and displayed.

5. Click the **New Item** button to add an entry to your list.



6. Enter the following contact information (Last Name, First Name, Full Name, E-mail Address) in the New Item Form.

7. On the toolbar, click **Save and Close**. Your list now contains its first item.
8. Return to your Web page.

Part II: You've created your list, but it doesn't show up on the site until you add the appropriate Web Part. Find the Web Part you just created and add it to your page.

Editing a List

Exercise 6-2

After a list has been created and the Web Part is added to an area, you can always add more information to the list, remove the list from the area, or delete it from the site entirely.

1. On the **Actions** menu, click **Manage Content**.



2. On the **Documents and Lists** page, select **Department Contacts** under the *Lists* section.
3. Click the **New Item** button on the toolbar. The *Contacts* form opens prompting you to enter the relevant information.
4. Enter the **Contact** information for the new Contact.

A screenshot of the 'New Item' form for a 'Contact List'. The toolbar at the top includes 'New Item', 'Filter', and 'Edit in Datasheet'. The form title is 'Contact List: New Item'. The form fields include: Last Name, First Name, Full Name, E-mail Address, Company, Job Title, Business Phone, Home Phone, Mobile Phone, Fax Number, Address, City, State, Postal Code, Country, Web Page (with a 'Type the Web address: (Click here to test)' prompt and 'http://' text), Type the description, and Notes.

5. When you are finished, click **Save and Close**.
6. Add 6 more Contacts. Your list now contains the new contacts you just entered.
7. Return to your Web page.

Deleting a List

Exercise 6-3

After a list has been created, you can remove the list from the area or delete it from the site entirely.

1. On the **Actions** menu, click **Manage Content**.



2. On the **Documents and Lists** page, select **Department Contacts** under the *Lists* section.
3. In the **Actions** list, click **Modify settings and columns**. The Customize page for the chosen list opens.



4. On the Customize page, select the **Delete this list** link under the General Settings section.

General Settings



General settings of this list include

Title:
Web Address:
Description:
On Quick Launch Bar:
Attachments enabled:
Content Approval Required:

- Change general settings
- Save list as template
- Delete this list
- Select portal area for this list

5. Click the **OK** button to delete the list.



Q & A Review



1. Name at least three list types and describe what they are.
2. How do you create a list?
3. How do you edit a list?
4. How do you delete a list?

Lesson 7 – Document Management, Document Libraries / Document

Lesson Objectives

After completing Lesson 7 you will be able to:

- Create / Modify a document and picture library
- Create and upload documents in FILConnect
- Create Alerts
- Approve documents for publication
- Check documents in and out
- Maintain document version control

About Libraries

Libraries allow you to share files with site users. The kind of library you use depends upon the kind of files that you are sharing. To share a collection of digital pictures or graphics, use a picture library. For most file types including documents and spreadsheets, use a document library.

A library displays a page that lists each file or folder and its properties, as well as a hyperlink to each file. The page includes commands for adding files and folders, sorting and filtering the list of files, switching to a different view of the library, and changing the design of the library. You can also create alerts so you are notified of any changes in the library or specific files within a library.

Create a Document Library

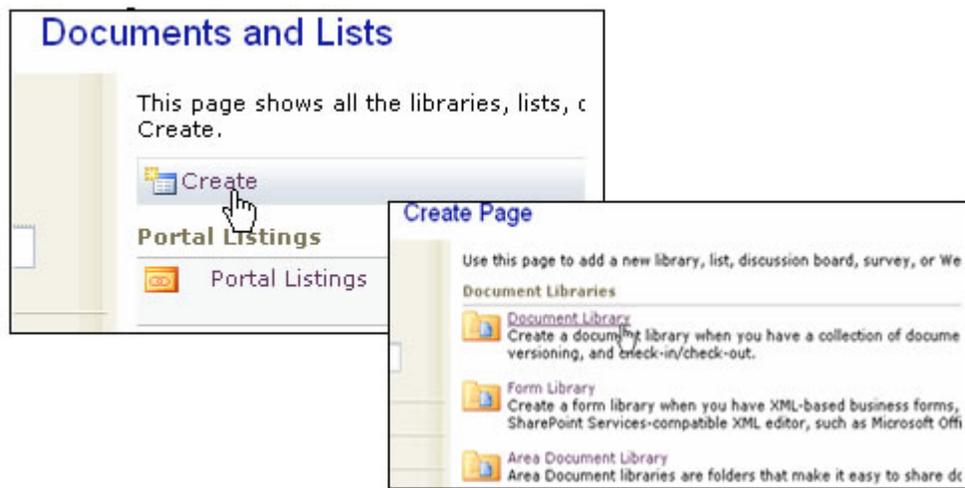
Exercise 7-1

Libraries allow you to share files with site users. The kind of library you use depends upon the kind of files that you are sharing. To share a collection of digital pictures or graphics, use a picture library. For most file types including documents and spreadsheets, use a document library.

1. In the **Actions** list, click **Manage Content**. The *Documents and Lists* page opens.



2. On the *Documents and Lists* page, click **Create**. The Create page opens.
3. On the Create page, click **Document Library** under the **Document Libraries** section. The New Document Library page opens.



Use this page to define the general settings of this document library. You can set the name, description, and whether a link to this document library appears on the Quick Launch bar.

4. Enter the **Name** and **Description** as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors identify this document library.

Name and Description
 Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this document library.

Name:

Description:

5. Select the **Yes** or **No** radio button under *Navigation* to specify whether a link to this document library appears in the Quick Launch bar.

Navigation
 Specify whether a link to this document library appears in the Quick Launch bar on the home page.

Yes
 No

6. Select the **Yes** or **No** radio button under *Document Versions* to specify whether a backup copy, or version, is created each time you edit a file in this document library.

Document Versions
 Specify whether a backup copy, or version, is created each time you edit a file in this document library. [More information on versions.](#)

Create a version each time you edit a file in this document library?
 Yes
 No

7. Click the **Document Template** drop-down arrow to specify the default document template used for all new files created in this document library. Microsoft Word is the default template that is used if you do not choose another template.

Document Template
 Select a document template to determine the default for all new files created in this document library.

Document template:

- Microsoft Office Word document
- None
- Microsoft Office Word document
- Microsoft Office FrontPage Web page
- Microsoft Office Excel spreadsheet
- Microsoft Office PowerPoint presentation
- Basic page
- Web Part Page

8. When you are finished, click the **Create** button.

Modify a Document Library

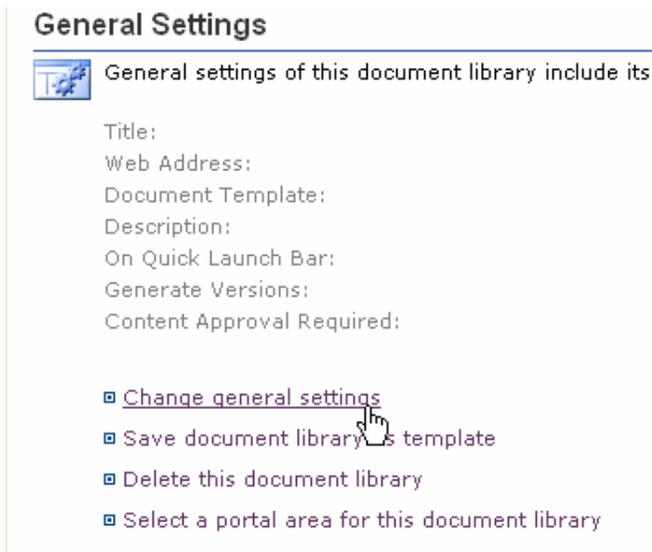
Exercise 7-2

Once a library is created, you can modify the setting associated with the library.

1. In the **Actions** list, click **Modify settings and columns**. The Customize page opens.



2. On the Customize page, select the **Change general settings** link under the General Settings section to modify the name, description, and to specify whether a backup copy, or version, is created each time you edit a file in this document library. Select the default document template used for all new files created in this document library.



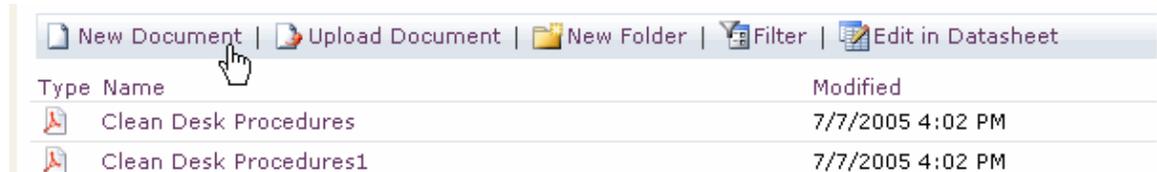
3. When you are finished, click the **OK** button.
4. Select the white tab for the area you created.

Create a Document in FILConnect

Exercise 7-3

Now that you have uploaded existing documents, you can create a new document within FILConnect.

1. On the Document Library toolbar, click **New Document**.



2. In the dialog box, click the **OK** button.



After you click the **OK** button, the chosen Microsoft application template opens allowing you to create and format a document as you normally would.

Note: Word 2003 has been set as the default template for creating new documents.

3. Type “sample text document” on the page and click the Save As button.

When you click the Save As button, you are prompted to save the file within FILConnect.

4. In the **Save As** dialog box, name the document “New Sample Document” and click the **Save** button.
5. In the **Web File Properties** dialog box, enter a owner name, description, and select a status for the document from the status drop-down box.
6. Click **OK** when finished.
The document is now saved to your library.

When you close the application window and refresh the library, you will see the document listed.

Uploading Documents

Exercise 7-4

Part I: Within document libraries, you have the option of creating new documents or uploading existing documents. In this activity, you will upload both single and multiple documents from a shared drive.

1. In the **Actions** list, click **Manage Content**.



2. On the *Documents and Lists* page, select a Document Library under the Document Library section. The chosen Library opens.



3. Within the Document Library, click the **Upload Document** button on the toolbar.



4. On the Upload Document page, click the Browse button to locate the document you want to add to the library.
5. In the **Choose File** dialog box, select the document [*note: your instructor will tell you where to find a document*], and then click the **Open** button.
6. Enter the owner name and a brief description of the document.
7. On the **Status** drop-down menu, select **Final**.
8. Uncheck the option to Add a listing for this document.

The screenshot shows the 'Upload Document' dialog box with the following fields and options:

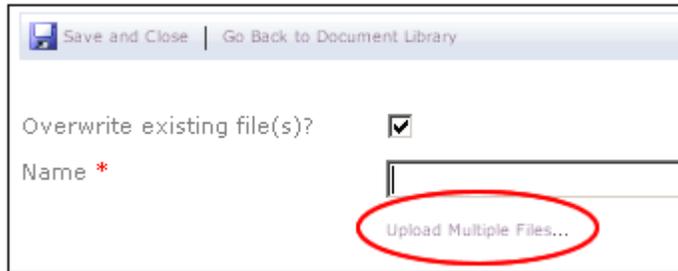
- Toolbar:** 'Save and Close' (circled in red) and 'Go Back to Document Library'.
- Overwrite existing file(s)?**
- Name ***
- Upload Multiple Files...** (link)
- Owner**
- Description**
- Status**
- Add a listing for this document** (indicated by a red arrow)

9. When you're finished, click **Save and Close** on the toolbar.

The document is added to the library, with the information you provided.

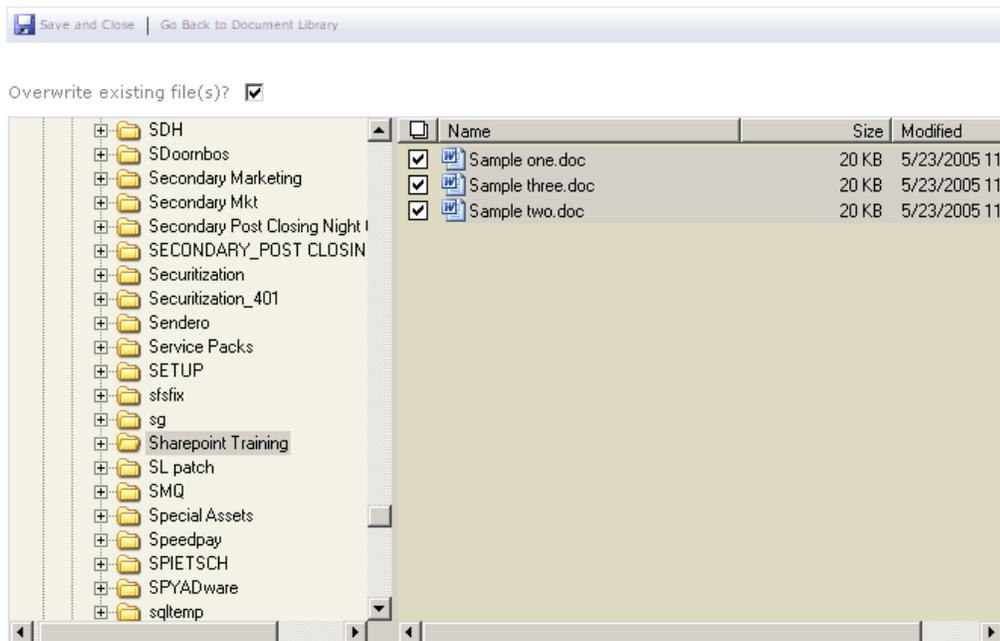
Part II: In addition to uploading single documents, you can add multiple documents using the *Upload Multiple Files* feature.

1. Within the Document Library, click **Upload Document** on the toolbar.
2. On the Upload Document page, click **Upload Multiple Files**.



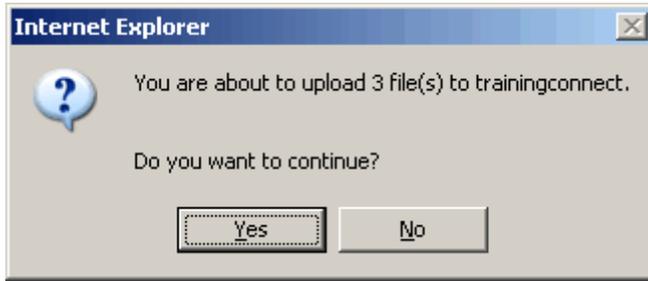
3. On your J: drive, select several files by clicking the checkbox next to each one you want to upload. Select more than 10, if available.

Example:



4. When you're finished, click the **Save and Close** button.

In the dialog box verifying your upload, click the **Yes** button.



The files are added to your library.

Document Approval / Publication

As a Content Manager, a large part of your duties will be performing document management functions. Users submit documents for publication, which you must approve.

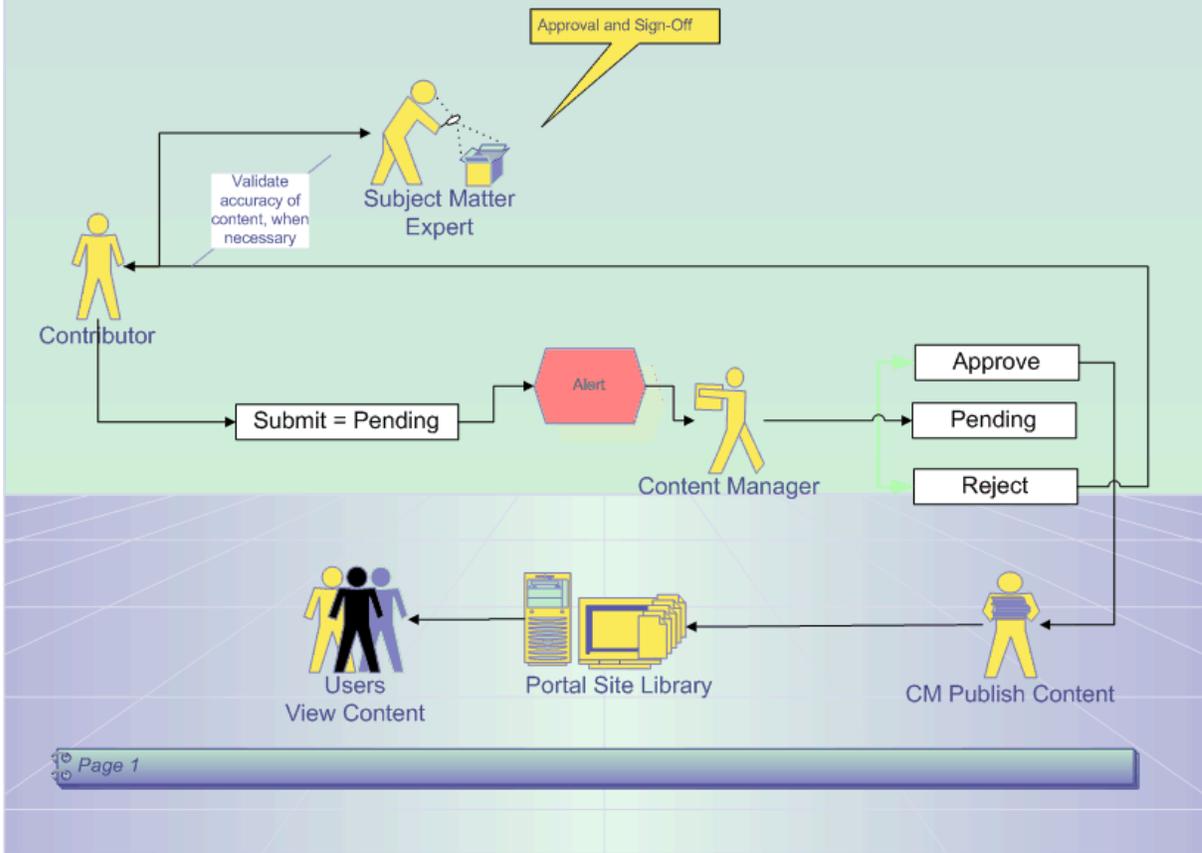
Documents become viewable to users after they have been uploaded and approved.

On the following page is a document workflow diagram depicting a simple document approval/publication process.

Document Work Flow
 Wednesday, May 4, 2005

1. Work flow begins with the **Contributor** who authors the document.
2. Upon completion, the **Contributor** submits the document for approval to their **Content Manager (CM)**.

NOTE: By default, all documents created by the **Contributor** are automatically assigned the **Pending** status.
3. The **CM** reviews the document for quality assurance and technical accuracy. The **CM** may forward the document to a third-party for the technical review who then returns the document with their comments to the **CM**.
4. The document is either:
 - a. **Pending** - CM has control over the document.
 - b. **Rejected** - Returned to the Contributor for changes.
 - c. **Approved** - Published on FILConnect for users to read.



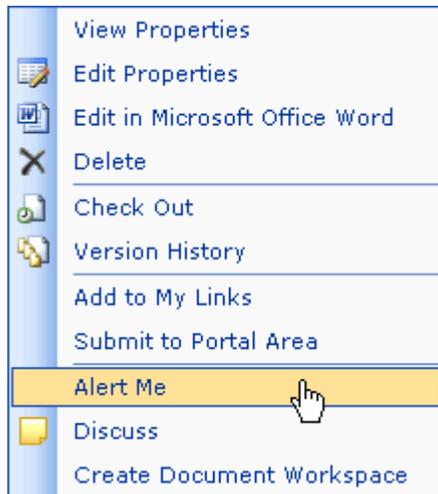
Alerts in FILConnect

Part of the Content Manager role is approving or rejecting documents submitted to the libraries you're managing. How do you know when a new document has been added to a library and is awaiting approval? You can check the library every day, looking for new documents, or you can set an alert to notify you whenever a new document is added.

Setting up a Document Alert

Exercise 7-5

1. On the **Actions** menu, click **Manage Content**. The *Documents and Lists* page opens. By default, the *All Documents* view is displayed.
2. Locate the library you added earlier, and **click the library link** under **Document Libraries**.
3. Hover over a document and select the **Edit** Menu.
4. Select the **Alert Me** link from the *Edit* menu.



5. The Add Area Alert page opens.

Deborah Holmes
Add Area Alert

Use this page to add the following alert: Area: News. By default, this alert will tell you when area listings, lists, and list items are discovered or changed.

* Indicates a required field

Title
 Type a title for this alert or use the one provided.

Title: *

Delivery Options
 Use these settings to specify how you want to receive alert results.
 You can make alert results appear in the My Alerts Summary to easily monitor new results. You can also receive alert results in e-mail.

My Alerts Summary
 E-mail address: **dholmes@fmtinv.com**
 Send alert results immediately
 Send an alert summary daily
 Send an alert summary weekly

Advanced options

OK Cancel

6. Accept the default Title or enter the Title you want.
7. Select the **My Alerts Summary** checkbox under *Delivery Options* to add this alert to your *Alerts Summary* page.
8. Select the **e-mail address:** checkbox and the **radio button** that determines how often you want to be alerted of a change to the chosen document.
9. Click OK when you are finished.

Approving / Rejecting Content

Exercise 7-6

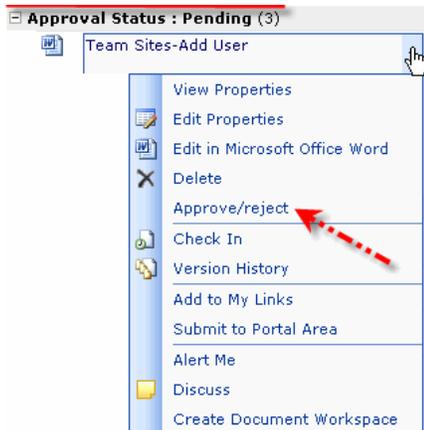
A Contributor has the ability to upload documents, but these documents are not available to the public until you approve them. The file sharing (check-in/check-out) features within FILConnect are not activated for these documents until the documents are approved. Part of the Content Manager role is to approve or reject documents submitted by contributors to the libraries you manage.

Approving and rejecting content allows you to control the publication of documents in FILConnect.

1. On the **Actions** menu, click **Manage Content**. The *Documents and Lists* page opens. By default, the *All Documents* view is displayed.
2. Locate the library you added earlier, and **click the library link** under **Document Libraries**.
3. Select the **Approve/reject Items** link under the **Select A View** menu.



4. Select the **Approve/reject** option from the filename **Edit** menu.



5. Select **Rejected** or **Approved** to change the Approval Status.

Use this page to approve or reject submissions. Note that rejecting an item does not delete it, and that users who know the exact URL of a rejected item can still view it. [More information on content approval.](#)

<p>Approval Status</p> <p>Approve, reject, or leave the status as Pending for others with the Manage Lists right to evaluate the item.</p>	<p><input type="radio"/> Approved. This item will become visible to all users.</p> <p><input type="radio"/> Rejected. This item will be returned to its creator and not appear in public views.</p> <p><input checked="" type="radio"/> Pending. This item will remain visible to its creator and all users with the Manage Lists right.</p>
<p>Comment</p> <p>Use this field to enter any comments about why the item was approved or rejected.</p>	<div style="border: 1px solid gray; height: 50px;"></div>

6. Enter the reason for the approval or rejection in the Comments text box.

Check In Comments X

Comments on version:

7. Click the **OK** button when you are finished. The Approval Status option you selected is applied to the document. The view of the *Document Library* page changes and displays the approval status (Pending, Approved, or Rejected) of all documents submitted to the document library.

Note: The **Approve/Reject** link only appears when the content approval option is selected (turned on) for the library.

Managing Documents

After a document has been submitted and approved, FIELConnect then works as a document management tool providing users with the ability to check documents in and out. While most readers will simply view a document, Contributors and Content Managers are given access rights that allow them to edit documents. To ensure there's only one version of a document being edited at a time, users must check out a document to work on it.

Document check out

When you check out a document, other users cannot edit the document or see your changes to the document. If you later decide to check in the document without saving your changes, you can use the Discard changes or undo check out option on the Check In page. You lose any changes made while you checked out the document, and the document reverts to the last checked-in version. No version history is kept for the unsaved changes.

Document check in

When you check in a document, other users who can access the document library can view and edit the document. The following options are available when checking in a document:

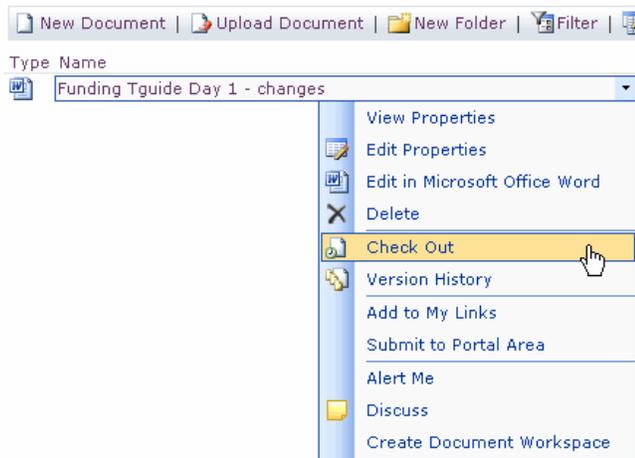
- Check in document
- Check in changes saved to this document, but keep the document checked out
- Discard changes and undo check out

Editing Documents on FILConnect (Checking Documents In and Out)

Exercise 7-7

Checking documents in and out allows you to control the editing of a document to ensure that there is only one version of a document edited at a time.

1. In the Document Library, locate the document you wish to check out and click it's edit menu button.
2. Click the **Check Out** option from the pop-up menu.

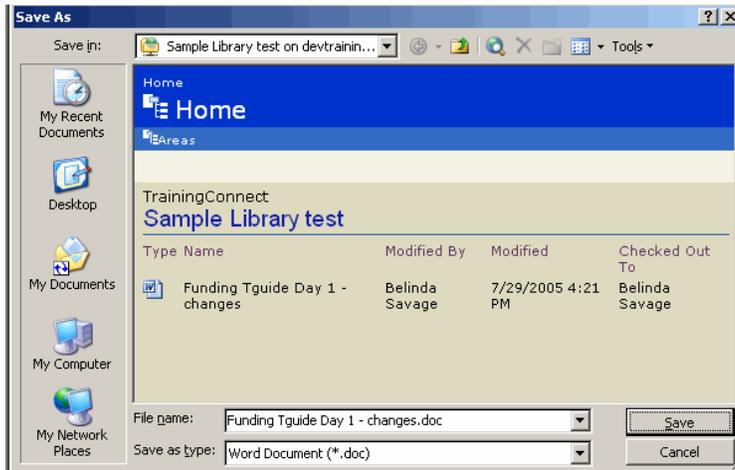


The document is now checked out to you, and anyone who tries to check out the document is informed that you are the current owner

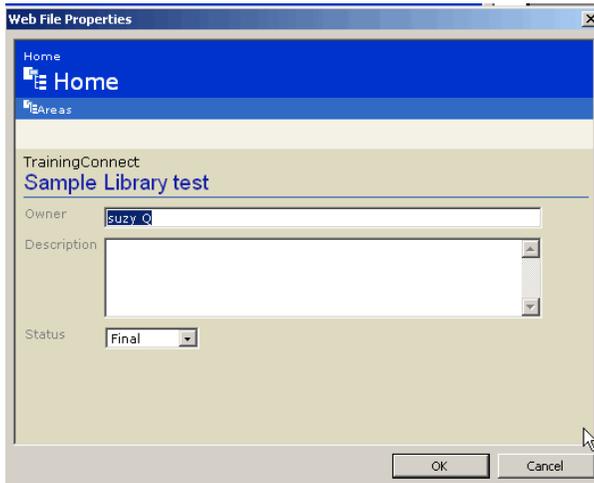
Type	Name	Modified	Modified By	Checked Out To
	Funding Tguide Day 1 - changes	7/29/2005 4:21 PM	Belinda Savage	Belinda Savage

3. Click the **Edit in MS xx** option to open the document in the original application.
4. Click **OK** when prompted to open the document for editing.
5. Make some changes to the document and then click the **Save As** button.

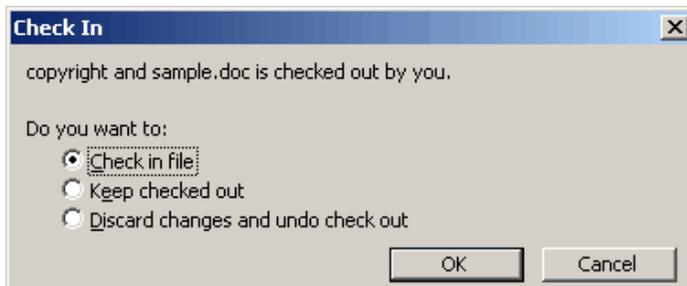
The **Save As** dialog box appears. You are prompted to save the file to FILConnect



6. Click the **Save** button.
7. In the **Web File Properties** dialog box, enter the document owner name and description.
8. Select a status from the Status drop-down list. Then click the **OK** button.



9. Close the document you updated. The Check In dialog box appears.



10. To check in the file, select the **Check in file** option, and click the **OK** button.
The Check In comments box appears.
11. Enter any comments you want for this version.
12. Click **OK**. The document closes and the application window remains available.
13. Click the applications close button (X) to return to the Document Library.

Moving Documents to a New Library

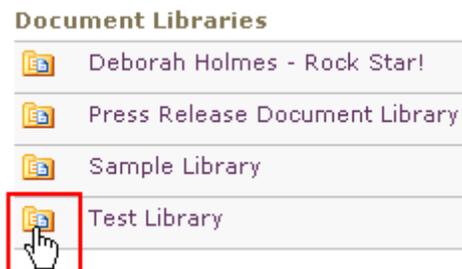
Exercise 7-8

Once documents are added to a document library, you have the option of moving them from one library to another library using Explorer View.

1. Click **Manage Content** on the **Actions** menu.



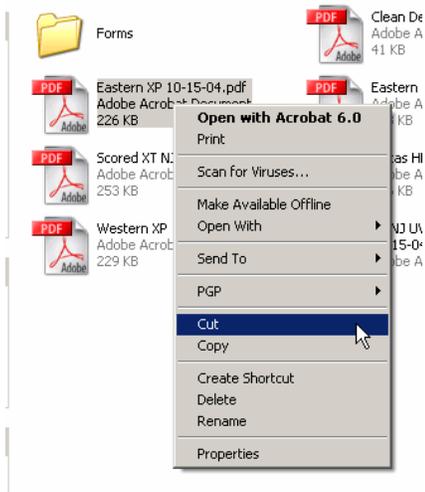
2. Select the **Document Library** link under the Document Libraries section to open the Document Library.



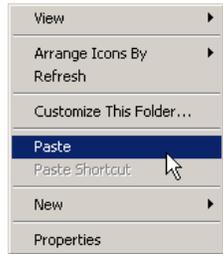
3. In the source Document Library, click **Explorer View** on the toolbar.



4. Highlight (select) the documents you want to move to the destination library, right-click the main mouse button and choose the **Cut** command.



5. Navigate to the *destination* Document Library you want to move the documents into.
6. In the *destination* Document Library, click **Explorer View** on the toolbar.



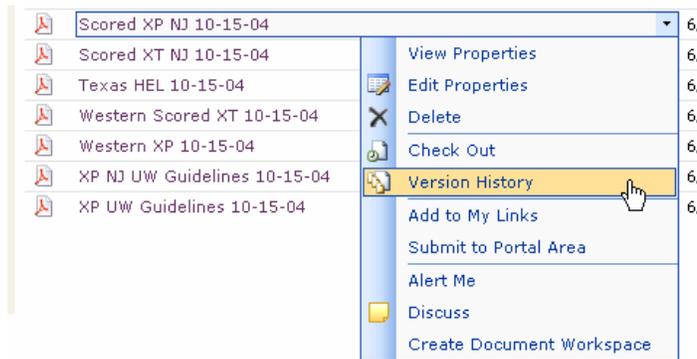
7. Right-click the main mouse button and choose the Paste command. The selected documents are moved into the destination Document Library.

View Document Versions

Exercise 7-9

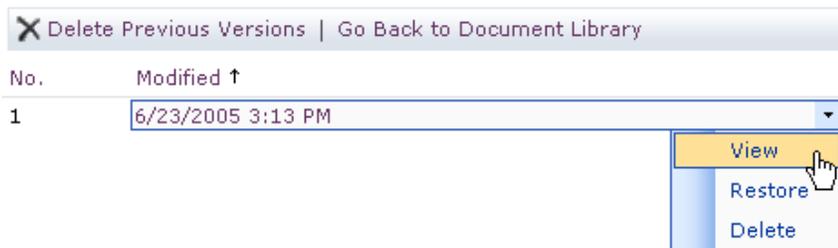
Part I: Every time a Contributor, Content Manager or Administrator checks a document out, saves changes to the document, then checks it back in, a new version of the document is created.

1. In the Document Library, locate the document you want to check the version history on.
2. Click the documents' **Edit** menu, and select the **Version History** option. The **Versions saved for** page opens for the selected document.



Note: The date and time the document was revised is shown under the *Modified* column.

3. Click the date and time **Edit** menu, and select the **View** option. The File Download dialog opens, prompting you to Open, Save, or Cancel this action.



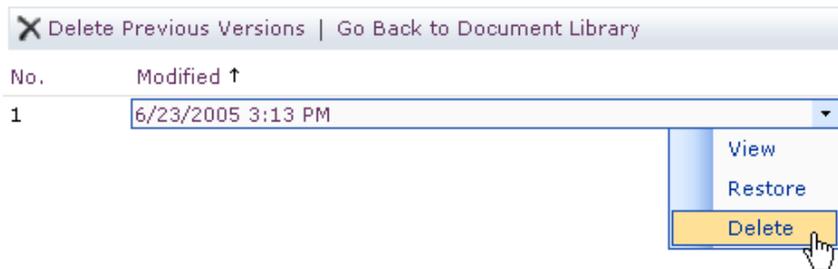
4. Click **Open** to view the selected version. The selected version opens in the applicable application.
5. Select the browser "Back" button to return to the document library.

Delete Previous Document Version

Exercise 7-10

Every time a Contributor, Content Manager or Administrator saves changes to the document, then checks it back in, a new version of the document is created. If you do not need to keep older versions, you can delete them.

1. To delete a version, click the date and time **Edit** menu, and select the **Delete** option. A message box appears telling you that *“you are about to delete this version.”*



2. Click **OK** to delete the selected version.

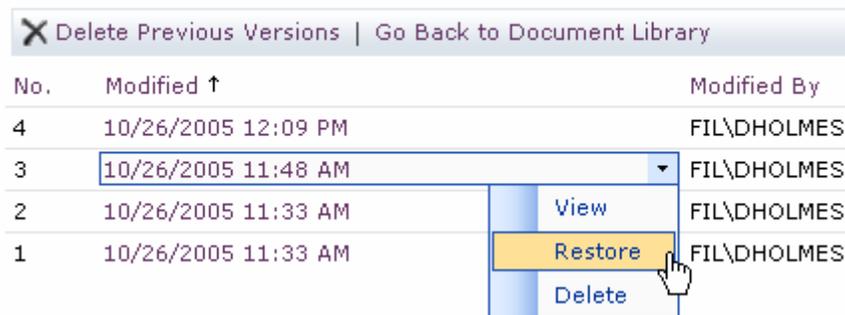
Restore Previous Document Version

Exercise 7-11

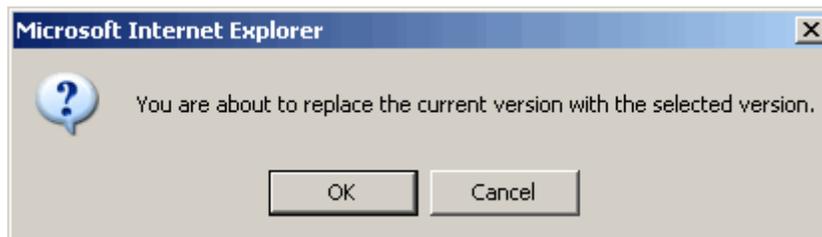
If you accidentally delete a document version, you can restore a previous document version if the document versioning option for the document library has been turned on.

1. To restore a version, click the date and time *Edit* menu for the version you want to restore. Click the **Restore** option.

Versions are currently enabled for this document library.



A message box appears prompting you to confirm the restoration.



2. Click **OK** to restore this version. The chosen version is restored.



Review Questions

1. Who can submit documents to the Portal site? Who approves or rejects the docs?
2. Who can access documents that have been approved? Who can edit them? How?
3. What kinds of files can reside in a document library?
4. What are two ways to add new documents to a library?

Lesson 8 – Working with Images

Lesson Objectives

After completing Lesson 8 you will be able to:



- Create / Modify a picture library
- Upload images to a picture library
- Displaying Images in an Area

Picture libraries allow you to upload images to the portal to use for portal listings or in Image Web parts.

As with document libraries, you need to create Picture libraries before you can add new images to the portal.

Create a Picture Library

Exercise 8-1

Remember, Libraries allow you to share files with site users. To share a collection of digital pictures or graphics, use a picture library.

1. In the **Actions** list, click **Manage Content**. The *Documents and Lists* page opens.
2. On the *Documents and Lists* page, click **Create**. The *Create* page opens.
3. On the *Create* page, click **Picture Library** under the Picture Libraries section. The *New Picture Library* page opens. Use this page to define the general settings of this picture library. You can set the name, description, and whether a version of the image is stored on FILConnect.
4. Enter the **Name and Description** as you want it to appear in headings and links throughout the site. Type descriptive text to help site users identify this library.

5. Select the **Yes or No** radio button under *Navigation* to specify whether a link to this picture library appears in the Quick Launch bar.
6. Select the **Yes or No** radio button under *Picture Versions* to specify whether a backup copy, or version, is created each time you edit an image in this library.
7. When you are finished, click the **Create** button.

Modify a Picture Library

Exercise 8-2

Once a library is created, you can modify the settings associated with the library.

1. In the **Actions** list, click **Modify settings and columns**. The *Customize nnnnn* page opens.
2. On the *Customize nnnn* page, select the **Change general settings** link under the **General Settings** to modify the name, description, and to specify whether a backup copy, or version, is created each time you edit an image in this library.
3. When you are finished, click the **OK** button.

Uploading Images to a Picture Library

Exercise 8-3

Part I: Within picture libraries, you have the option of deleting, editing, and downloading existing images, or uploading new images, and filtering the folders and images within the library. In this activity, you will upload both single and multiple documents from a shared drive.

1. In the **Actions** list, click **Manage Content**.
2. On the *Documents and Lists* page, select a Picture Library under the Picture Libraries section. The chosen Library opens.
3. Within the Picture Library, click the **Add Picture** button on the toolbar.
4. On the Upload Picture page, click the **Browse** button to locate the image you want to add to the library.
5. In the *Choose File dialog* box, **select the image**, and then click the **Open** button.
6. When you are finished, click **Save and Close** on the toolbar.
The image is added to the library, with the information you provided.

Part II: In addition to uploading single images, you can add multiple images to a picture library using the Upload Multiple Files option. Remember, you can only upload 50MB at a time.

1. Within the Picture Library, click the **Add Picture** button on the toolbar.
2. On the *Upload Picture* page, click the **Upload Multiple Files**.
3. Navigate to your J: drive, select at least three image files to upload.
4. When you are finished, click the **Save and Close** button.
The files are added to your library.

Displaying / Adding Graphics

Exercise 8-4

Part I: Once a Picture Library contains graphic images, you can add and display the graphics as an icon or an image for both new or existing portal listings.

Display an image in an existing portal listing

1. From the Web page that contains the portal listing, in the **Actions** list, click **Edit Page**.
2. Hover over the portal listing you want to add the image to. Select **Edit** from the portal listings drop-down menu.
3. Click the **Display** tab.
4. Enter the URL address for the graphic in the *Image* or *Icon* field.

Part II: Add an image to a new portal listing

1. In the **Actions** list, click **Manage Content**. The *Documents and Lists* page opens.
2. On the *Documents and Lists* page, select **Portal Listings**. The *All Listings* page opens.
3. Click **Add Listing** and enter the portal listing details.
4. Enter the **URL address** for the graphic in the *Image* or *Icon* field for the new portal listing.



Open another Browser window; navigate to the applicable Picture Library; select an image; click the image name link; copy the URL address for the image by pressing CTRL+C; return to the Browser window containing the portal listing; paste (CTRL+V) the copied URL in the *Image* or *Icon* field.



Review Questions

1. Who can upload images to the Portal site? Who approves or rejects the images?
2. Who can access images that have been approved? Who can edit them?
3. What kinds of files can reside in a picture library?
4. How do you add an image to an existing portal listing?

Lesson 9 – Views

Lesson Objectives

After completing Lesson 9, you will be able to:



- Create library views
- Modify library views

About Views

Views make it quick and easy to see information in a variety of ways. You can use views in lists (such as Announcements, Contacts, and so on), and you can also use them in libraries, surveys, and discussion boards.

You can create custom views to do one or more of the following:

- Filter by a set of criteria
- Sort in a particular order
- Hide or show columns
- Group information based upon list data
- Display column subtotals
- Show lists with date information as calendars or tables

Creating a View

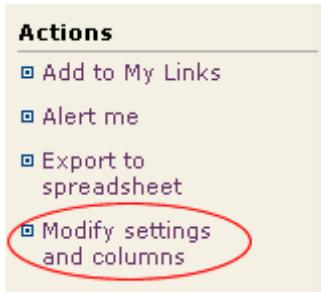
Exercise 9-1

Part I: In this activity, you will create a view for the document library you added to your site.

1. On the **Actions** menu, click **Manage Content**.
2. Locate the library you added earlier, and click its name under the Document Libraries section.



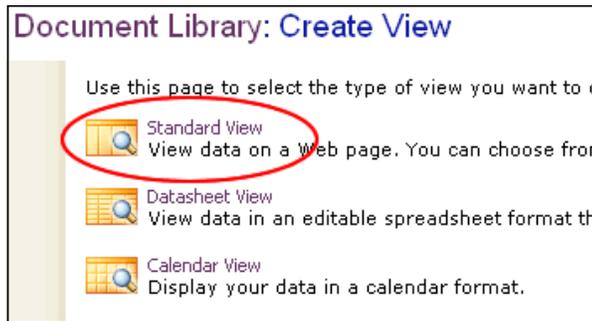
3. On the **Actions** menu, click **Modify Settings and Columns** to reach the **Customize** screen.



4. Under the **Views** section, click **Create a new view**.



5. On the **Create View** screen, click **Standard View**.



6. Name the view, "My test view" and select the owner and status options in the **Columns** and **Sort** section.
7. When you're finished, click the **OK** button.
8. Click the **Go Back to xx Document Library** link to return to your document library.
9. Click **My test view** on the **Select A View** menu.

The view you created is now associated with the library. Whenever you or any user selects the view you created, the chosen view settings are displayed.

Modifying a View

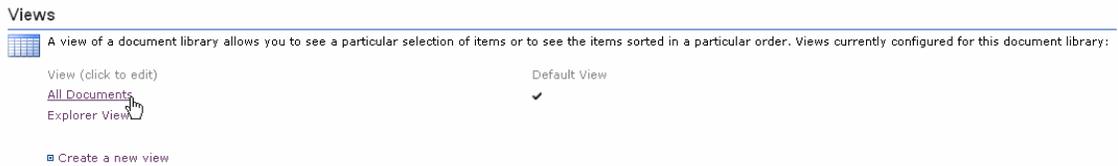
Exercise 9-2

In this activity, you will modify a view for the document library you added to your site.

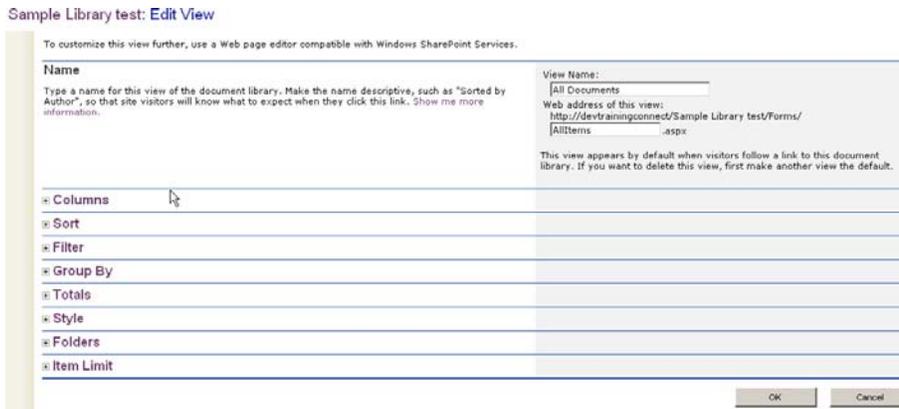
1. On the **Actions** menu, click **Modify Settings and Columns** to reach the Customize page.



2. Under the **Views** section, select the default view, **All Documents**. The *Edit View* page for the document library opens.



3. Select the **File size** and **status** options in the **Columns** section. You can change one or more of the view properties listed:



4. When you're finished, click the **OK** button.

5. Click the **Go Back to xx Document Library** link to return to your document library.

The All Documents view you modified is updated based on the choices you made. Whenever you or any users views the library, the chosen view options are displayed.

Deleting a View

Exercise 9-3

In this activity, you will delete a view from your document library.

1. On the **Actions** menu, click **Modify Settings** and **Columns**.
2. Under the Views section, select “my test view”.
3. Select the **Delete** button. A message box appears asking you to confirm the deletion.
4. Click **OK**. The view is deleted from the Library.



Review Questions

1. How do you create a new view?
2. How do you modify an existing view?
3. How do you delete a view?

Lesson 10 – Sorting and Filtering Information

Lesson Objectives

After completing Lesson 10 you will be able to:

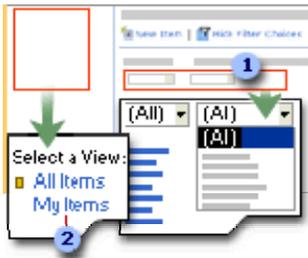


- Sort and customize ordering

The type of sorting and ordering you can do with items depends on the type of list you are working with and how it was set up. All lists, document libraries, picture libraries, and discussion boards can be arranged in an alphanumeric sort order. Some types of lists can be arranged in a custom order.

Sorting and Filtering Information

Filtering is a quick and easy way to find and work with a subset of entries in a list, document library, or discussion board. A filtered list displays only the rows that meet the criteria you specify for a column. Unlike sorting, filtering does not rearrange the items. Filtering hides rows you do not want displayed.



You can filter items in two different ways:

- 1 By applying a filter to the current view
- 2 By defining a view that displays filtered items, and then selecting that view

Filter Items

You can add and remove filters for items in a list, document library, or discussion board. You can also add, edit, or remove custom filters with multiple criteria for each column by editing the datasheet.

Add and Remove Filters

1. On the toolbar, click Filter. A drop-down list appears above each column containing all of the values for that column.
2. In the drop-down list for the column on which you want to filter, click the value for the items you want to display. Only items matching that value are displayed.
3. You can continue to apply additional filters until only the desired items are displayed.
4. To remove a filter, click All in the drop-down list for the filtered column. Other filters are unaffected.

Add, edit and remove customer filters by editing the datasheet

1. On the toolbar, click Edit in Datasheet.
2. Click the drop-down list for the column on which you want to filter, and then click Custom Filter.
3. On the Custom Filter dialog box, you can enter up to three rules.
4. Rules applied to other columns linked by And must both be true for an item to display. Rules linked by Or display if either rule is true.
5. You can edit a custom filter at any time to broaden or narrow the displayed items by clicking Custom Filter in the drop-down list for the column in the grid view.
6. To completely remove a custom filter from a column, click Show All in the drop-down list for a column. Filters on other columns are unaffected.

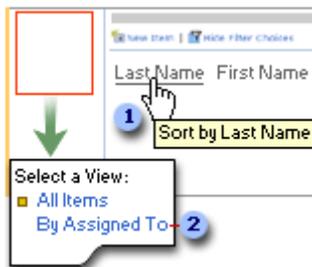


You can also use the drop down lists in the datasheet view to add, edit, or remove simple filters.

Filters added while editing in datasheet view go away if you change to the standard view, and do not return if you later go back to datasheet view.

Comparison of sorting and custom ordering

Alphanumeric sort - When you sort a list, document library, picture library, or discussion board, the rows are rearranged according to the contents of the column you choose. Sorting in ascending order arranges the rows alphanumerically from 0 to 9, A to Z, and oldest to most recent. Sorting in descending order arranges the rows from 9 to 0, Z to A, and most recent to oldest.



1. Sort items in the current view.
2. Switch to a view that displays sorted items.

Custom order: If you choose to allow a custom order, users can specify the exact position they want each item to appear in instead of specifying an alphanumeric order.

Ways to sort or customize the item order

Apply a sort order: You can quickly sort items when you view the list, document library, or discussion board in your Web browser by clicking the name of a column.

Apply a custom order: If it's available for the list you're working with, you can apply a custom order by clicking Change Order on the toolbar, and then specifying the position where you want each item in the list.

Define a view: For all lists, you can set up a public or personal view that displays the items in a default sort order that you define. For some lists, instead of specifying a default sort order, you can enable the view to allow users to apply a custom order. If you choose to specify a default sort order when you define the view, you can specify up to two columns to sort the items. The items are first sorted by the column you define as the primary sort. To sort this way, you click a hyperlink to display the view.

If you choose to allow a custom order, users viewing the list can specify the exact position they want each item to appear in.

Note: You must be a member of the Administrator site group or a member of a site group that has the Manage Lists right to define a public view.

Sort items

Exercise 10-1

You can use any column of a list, document library, picture library, or discussion board to sort items.

1. On the page that displays the list, document library, picture library, or discussion board, click the name of the column you want to use for the sort order.

Note: If you want to reverse the sort order (ascending or descending), click the name of the column again. An arrow indicates the direction of the sort.

Part I: Arrange list items in a custom order

1. Display the list. If the list is currently displayed in a Web Part, click the list name in the Web Part title bar.
2. On the toolbar, click **Change Order**. If this button doesn't appear, it is either not supported for this list or it is not enabled.
3. For each item, select the number of the position where you want it to appear in the list.
4. Click **OK**.

Part II: Allow or prevent custom ordering of items

This feature is not available for all lists.

1. On the page that displays the list, click **Modify settings and columns**. If the list is in a Web Part, click the list name in the Web Part title bar first.



Review Questions

1. How do you sort items in a list or library?
2. Who do you arrange items in a custom order?
3. How do you prevent custom ordering of items?

Appendix A – Web Part Properties

Web Part Properties

Each Web Part shares a set of common properties organized into sections in the tool pane that control its appearance (such as the title, height and width), layout (such as the Web Part order in the zone and the direction of the content), and advanced characteristics (such as the image icon and description).

Many Web Parts also have custom properties that are unique to the Web Part. These are usually displayed either above or below the common Web Part properties in the tool pane. For example, the Image Web Part has additional custom properties, including the image link, it's horizontal and vertical alignment, and background color.

Appearance

Title (Title)

Specifies the title of the Web Part displayed in the Web Part title bar.

Type a string in the text box. To make it easier to edit a long string, click **Text Builder** .

Height (Height)

Specifies the height of the Web Part.

Do one of the following:

To specify a fixed height, select **Yes**, type a positive number in the text box, and then select a unit of measurement. The following are valid units of measurement: **Centimeters**, **Inches**, **Millimeters**, **Points**, **Picas**, and **Pixels** (the default).

To automatically adjust the height of the Web Part in the zone, select **No**. This is the default.

Width (Width)

Specifies the width of the Web Part.

Do one of the following:

To specify a fixed width, select **Yes**, type a positive number in the text box, and then select a unit of measurement. The following are valid units of measurement: **Centimeters**, **Inches**, **Millimeters**, **Points**, **Picas**, and **Pixels** (the default).

To automatically adjust the width of the Web Part in the zone, select **No**. This is the default.

Frame State (FrameState)

Specifies the initial state of the Web Part frame.

Do one of the following:

To display only the Web Part title bar, select **Minimized**.

To display the entire Web Part, select **Normal** (the default).

Frame Style (FrameType)

Specifies the style of the Web Part frame.

Do one of the following:

To use the value of the **FrameType** Web Part zone property specified, select **Default** (the default).

To display the content, but not the title bar and frame, select **None**.

To display the title bar, content, and frame, select **Title Bar and Border**.

To display the title bar and content, but no frame, select **Title Bar Only**.

Layout

Visible on Page (IsVisible)

Specifies whether the Web Part is displayed or hidden when browsing the Web Part Page. The Web Part is still visible when you are designing the page and has the suffix **(hidden)** appended to the title.

You might make a Web Part hidden if you want to use it to provide data to another Web Part through a Web Part connection, but don't need to display the Web Part.

Do one of the following:

To display the Web Part, select the check box. This is the default.

To hide the Web Part, clear the check box.

Direction (Dir)

Specifies the direction of the text in the Web Part content. For example, Arabic and Hebrew are right-to-left languages; English and most other European languages are left-to-right languages.

Do one of the following:

To automatically choose a text direction based on the language setting of the site or subsite the Web Part Page is located in, select **Default**. This is the default.

To set the text direction to read left to right, select **Left to Right**.

To set the text direction to read right to left, select **Right to Left**.

Zone (ZoneID)

Specifies the zone on the Web Part Page where the Web Part is located.

To choose a zone, select a zone name from the list.



Zones on the Web Part Page are not listed in the list box when you do not have permission to modify the zone.

Part Order (PartOrder)

Specifies the position of the Web Part in a zone when the zone contains more than one Web Part.

To specify the order, type a positive integer in the text box.

A value of 1 means the Web Part is placed at the top of the zone, if the Web Parts in the zone stack from top to bottom, or to the left of the zone, if the Web Parts in the zone stack from left to right.

For example, when you add a Web Part to an empty zone that stacks from top to bottom, the Part Order is **1**. When you add a second Web Part to the bottom of the zone, its Part Order is **2**. To move the second Web Part to the top of the zone, type **1**, and then type **2** for the first Web Part.



Each Web Part in the zone must have a unique Part Order number. Therefore, changing the Part Order value for the current Web Part can also change the Part Order value for other Web Parts in the zone.

Advanced

Allow Minimize (AllowMinimize)

Specifies whether or not the Web Part can be minimized.

Do one of the following:

To allow a Web Part to be minimized, select the check box. This is the default.

To prevent a Web Part from being minimized, clear the check box.

Allow Close (AllowRemove)

Specifies whether or not the Web Part can be removed from the Web Part Page.

Do one of the following:

To allow a Web Part to be closed, select the check box. This is the default.

To prevent a Web Part from being closed, clear the check box.

Allow Zone Change (AllowZoneChange)

Specifies whether or not the Web Part can be moved to a different zone.

Do one of the following:

To allow a Web Part to be moved to a different zone, select the check box. This is the default.

To prevent a Web Part from being moved to a different zone, clear the check box.

Allow Export Sensitive Properties (ExportSensitiveProperties)

Controls whether a user can export to a Web Part description file (.dwp) the values of one or more specific properties when making changes to a Web Part Page in personal view. This property also controls whether a Web Part property can be accessed by the Web Part Services Component (WPSC) that runs on the client computer or used in the default web service.

The **ExportControlledProperties** property is useful for preventing the viewing and distribution of one or more property values that may contain sensitive information, such as a social security number, a credit card number, or a connection string.

To enable the **ExportControlledProperties** property, the developer of the Web Part must mark the specific Web Part properties with the **ControlledExport** attribute by setting the attribute value to **True**.

After the Web Part is installed at a site and uploaded to a Web Part gallery, the **ExportControlledProperties** property of the Web Part is **False** by default, which means one or more of the Web Part's properties marked as sensitive by the **ControlledExport** attribute cannot be exported in personal view, accessed through the WPSC, and used in the default web service. However, a site administrator or user with permission can still set the **ExportControlledProperties** property to **True**, if desired or necessary. For more information about how to use this property, see the Windows SharePoint Services Software Development Kit.

Do one of the following:

To prevent a user from exporting values of the specified properties in personal view, access by the Web Part Services Component (WPSC) that runs on the client computer, or used in the default web service, clear the check box (The sets the property value to **False**). This is the default.

To allow a user to export values of the specified properties in personal view, access by the Web Part Services Component (WPSC) that runs on the client computer, or used in the default web service, select the check box (This sets the property value to **True**).

Detail Link (DetailLink)

Specifies the URL of a file containing additional information about the Web Part. The file is displayed in a separate browser window when you click the Web Part title.

Type a file path or hyperlink in the text box. To make it easier to edit a long string, click **Text Builder**

Description (Description)

Specifies the ScreenTip that appears when you rest the mouse pointer on the Web Part title or Web Part icon. When you search for Web Parts by using the Search command on the Find Web Parts menu of the tool pane, the value of this property is used when searching the following Web Part galleries: Site, Virtual Server, and Web Part Page.

Type a string in the text box. To make it easier to edit a long string, click **Text Builder**

Help Link (HelpLink)

Specifies the location of a file containing help information about the Web Part. The help information is displayed in a separate browser window when you click the **Help** command on the Web Part menu.

Type a file path or hyperlink in the text box. To make it easier to edit a long string, click **Text Builder**

Icon File (Large) (PartImageLarge)

Specifies the location of a file containing a large Web Part icon. The image size must be 16 by 16 pixels. Type a file path or hyperlink in the text box. To make it easier to edit a long string, click **Text Builder** .

Icon File (Small) (PartImageSmall)

Caution: This property is reserved for future use by Microsoft, and the value is not saved if you enter it in the tool pane.

Missing Assembly Error (MissingAssembly)

Specifies a message that appears if the Web Part assembly file is missing or incorrect.

Type a string in the text box. To make it easier to edit a long string, click **Text Builder** .

Is Included Filter (IsIncludedFilter)



The name of this property in the tool pane can be customized by a site administrator or Web Part developer and may be different than the name "Is Included Filter."

Specifies a query string with criteria defined by a developer or site administrator to determine whether or not to display the Web Part. This property is used by developers who want to customize Microsoft Windows SharePoint Services to target the display of Web Parts for certain groups of people. This property is not displayed in the tool pane if it is not used, and it is always the last property displayed in the **Advanced** section of the tool pane.

For more information about how to use this property, see the Windows SharePoint Services Software Development Kit. Type a string in the text box. To make it easier to edit a long string, click **Text Builder** .

Appendix B - Portal Governance

Portal Control Board (Governance Committee)

- ✚ Benefits of Governance
 - ✚ Mitigates conflicts
 - ✚ Establishes criteria for prioritizing activities
 - ✚ Creates boundaries, reinforces authority, clarifies roles and responsibilities
 - ✚ Resolves ambiguities; outlines a common set of principles and a framework within which to achieve shared goals
 - ✚ Ensures consistent decision-making that supports the long-term vision of the portal
 - ✚ Helps speed development, saving time and money
- ✚ Responsibilities
 - Ensure portal meets organization’s objectives and all user’s needs
 - Develop and govern high-level procedures on how NOT to break the portal
 - Prioritize growth
 - Monitor feedback
 - Continuous marketing
 - Leads Taxonomy Team (Content Managers)
- ✚ Policies on: (Simple – not too loose, not too tight)
 - **Strategic direction; portal management**
 - ✚ Set boundaries for development and management authority
 - ✚ Prioritize requests for modifications and new development
 - ✚ Team site standards
- ✚ Global content standards
 - ✚ Enterprise taxonomy management
 - ✚ Metadata standards
 - ✚ Document publishing standards
 - ✚ Document retention standards
- ✚ Technology decisions
 - ✚ Security model and architecture
 - ✚ Portal application and upgrades
 - ✚ Infrastructure design and management
 - ✚ Backup and recovery

Taxonomy

Definition

- ✚ Taxonomy is a classification scheme – often hierarchical – of information components (terms, concepts, graphics, sounds, etc.) and their interrelationships.
- ✚ A good taxonomy is:
 - Intuitive
 - Consistent
 - Logical
- ✚ Contains categories that taken together are:
 - Mutually exclusive
 - Collectively exhaustive

Key Benefits

- ✚ Provide employees with an alternative mechanism to access information that can't be easily characterized (articulated and structured) into a well-qualified search (one that will return highly relevant results).
- ✚ Enable people with less experience or skill in using search techniques to find relevant information, despite their lack of search skills.
- ✚ Improve communication (consistent terminology is used across the user base)
- ✚ Speed the discovery (surfing) or direct retrieval of information (navigation) by providing a summarized view into what is available
- ✚ Improve decisions, when all or most of the relevant information can be easily gathered
- ✚ Improve the return on investment of information, which is made accessible and usable
- ✚ Cross-pollinate ideas when users become aware of information and knowledge assets

Best Practices

- ✚ Keep your audience in mind –
 - ✚ Recognize that users may think about and look for information in different ways.
 - ✚ Understand your business practices and use the most appropriate categorization methods.
 - ✚ Use familiar vocabulary and organizational schemes to ensure a logical browsing experience.

- ✚ Try to use subject-based categorization
 - ✚ Strive for a noun-oriented approach –
Animals>Mammals>Dogs>Cocker Spaniel
 - ✚ May require cultural change – corporate users tend to think along organization, functional, or document type lines

- ✚ Be Consistent
 - ✚ Try to use a single approach, but if it makes sense to combine approaches, keep it consistent on the sibling level.

Organs
Digestive System Organs
Stomach
Large Intestine
Duodenum
Colon
Nervous System Organs
Brain
Cerebellum
Cortex

- ✚ Use consistent vocabulary
- ✚ Maintain consistent degree of generality in sibling categories

Automotive Parts
Engines
Transmissions

NOT

Automotive Parts
Engines
Lug nuts

Control Depth and Breadth

Depth

- A “flat” taxonomy ensures that users can find information quickly
- Avoid deep taxonomies – may frustrate users with too many clicks or may indicate too much specification or too much information
- Guideline: 3-6 levels

Breadth

- A focused taxonomy ensures that users can easily “digest” the scope of information
- Avoid overly broad taxonomies – may frustrate users with too many initial options and may indicate your categories are too specific
- Guideline: 10-15 top-level categories

Appendix C - Glossary

**Alert**

A feature that notifies a user by e-mail when there is a change to an item, document, list, or document library on the Web site.

Approve

To accept a submitted item for publication.

Area(s)

Areas provide a flexible way to both describe and find information on the portal site. Areas define the structure of the portal site as a hierarchy that can be used to intuitively organize and browse the content on the portal site.

Documents, lists, and other items on the portal site and in other Web sites or file shares can be associated with one or more areas by using listings. Users can find information by browsing or searching the relevant areas for items of interest to them.

Audience

A custom group used to target content to people based on membership within the group.

Breadth

An effect of unified, encompassing vision in an artistic composition.

Check in

To release the lock for editing and enable other users to view the updated file or check out the file.

Check out

To lock a file while editing it to prevent others from overwriting or editing it inadvertently. Only the user who checks out a document can edit the document.

Datasheet view

View data in an editable spreadsheet format. Is for bulk editing and quick customization.

Depth

Intellectual complexity or penetration; complete detail; thoroughness.

Discussion thread

In a discussion board or Web discussions, a series of messages or comments in which replies are nested under the message or comment instead of being arranged in chronological or alphabetical order.

Document library

A folder where a collection of files is stored and where the files frequently use the same template. Each file in a library is associated with user-defined information that is displayed in the content listing for that library.

Extranet

An external Web site for an organization; usually secured so that only authorized users can access it.

Gallery

A collection of Web Parts, list templates, or site templates.

Highlight

A listing or document selected as the best recommendation for a specific portal area.

Home page

The main page of a Web site. A home page usually has links to other pages, both inside and outside the site.

Hyperlink

A colored and underlined block of text or a graphic that a user clicks to go to a file, a location in a file, an HTML page on the World Wide Web, or an HTML page on an intranet. Hyperlinks can also go to newsgroups and to Gopher, Telnet, and FTP sites.

Item

An entry in a list or portal area. An item can contain content or be a link to content stored elsewhere.

Keyword

Metadata that facilitates effective search queries on content included in a full-text index.

Keyword synonyms

Words that are identified as having the same or similar meaning as a specific keyword.

Library

Repository within FILConnect for documents or images.

List

A Web site component that stores and displays information that users can add to by using their browsers. Requires a Web server that is running Windows SharePoint Services or SharePoint Portal Server 2003.

Listing

A listing can be text-based content or a link to an existing item, displayed within a listing Web part.

Listing group

A listing group is used to organize multiple listings in an area, and is displayed within a group listing Web part.

Meeting workspace site

A Web site based on a Meeting Workspace site template that is used for planning, posting, and working together on meeting materials and following up after a meeting or series of meetings.

Metadata

Data about data. For example, the metadata for a file can include the title, subject, author, and size of the file.

Personal view

A view of a list, SharePoint document library, or Web Part Page that is available only to a particular user. The personal view of a Web Part Page uses a combination of shared property values and personalized property values. Changes made to a personal view apply only to the list, library, or page in that view and are therefore visible to that user only.

Personalize

To change the layout, view, content, etc. for yourself but not for others.

Personalized web part

A shared Web Part that has been modified by a user in personal view. The changes made to a personalized Web Part are visible only to the user who made the changes.

Portal Listing

A portal listing can be text-based content or a link to an existing item, displayed within a group listing Web part.

Portal Governance

A portal strategy that is aligned with critical business objectives.

Private web part

A Web Part added to a Web Part Page by a user who is working on the page in personal view. Private Web Parts are available only to the user who added or imported the Web Part.

Rank

The relevance of a file to a search query.

Rights

File-level and folder-level permissions that allow access to a Web site.

Role

See site group.

Shared view

A view of a list, document library, or Web Part Page that every user with the appropriate permissions on a site can see. The shared view of a Web Part Page uses shared property values. Changes made to a shared view apply to the list, library, or page as it appears to all users.

Shared web part

A Web Part added to a Web Part Page by a user who is working on the page in shared view. Shared Web Parts are available to all users of a Web Part Page who have the appropriate permissions.

Site

A group of related Web pages that is hosted by an HTTP server on the World Wide Web or an intranet. The pages in a Web site typically cover one or more topics and are interconnected through links. Most Web sites have a home page as their starting point.

Site group

A custom security group that applies to a specific Web site. Users are assigned to site groups to grant them permissions on a FILConnect site.

Static web part

A Web Part that is added to a Web page (.aspx file) and that is not in a Web Part zone.

Survey

A Web site component that presents users with a set of questions specified by the creator of the survey and collects user responses. Results are tallied in a graphical summary. A survey requires a Web server that is running Windows SharePoint Services or SharePoint Portal Server 2003.

Taxonomy

Classification scheme – often hierarchical – of information components (terms, concepts, graphics, sounds, etc.) and their interrelationships.

Tool pane

A task pane on a Web Part Page used to browse, search for, and import Web Parts from Web Part galleries, and to modify custom and common Web Part properties.

Tool part

A control in the tool pane that allows users to set properties, execute commands, invoke wizards, and manipulate Web Parts on a Web Part Page.

Top-level web site

The default, top-level site provided by a Web server or virtual server. To gain access to the top-level Web site, you supply the URL of the server without specifying a page name or sub-site.

Uniform Resource Locator (URL)

An address that specifies a protocol (such as HTTP or FTP) and a location of an object, document, World Wide Web page, or other destination on the Internet or an intranet. For example: <http://www.microsoft.com/>.

User profile

A collection of properties known about a person within a portal site and related data such as documents the person has written, teams the person belongs to, and links the person has shared.

Versioning

The process of creating a backup copy of a document or picture whenever a revision is saved to the library.

Web address

The path to an object, document, file, page, or other destination. An address can be a URL (Web address) or a UNC path (network address) and can include a specific location within a file, such as a Word bookmark or an Excel cell range. Also known as address.

Web discussion

Comments that users attach to Web pages and documents. Known as Web discussions to differentiate them from discussion boards. Web discussions require a Web server that is running Windows SharePoint Services.

Web part

A Web Part is a modular unit of information that has a single purpose and that forms the basic building block of a Web Part Page.

Web part page

A special type of Web page that contains one or more Web parts. A Web Part page consolidates data, such as lists and charts, and Web content, such as text and images, into a dynamic information portal built around a common task or special interest.

Web part zone

A container with a set of properties that can be configured to control the organization and format of Web Parts on a Web Part Page. Web Part zones can also be used to provide protection against changes to Web Parts.