

Contents

Introduction	xxiii
Part I: Microsoft SharePoint Server 2007	
Using SharePoint	2
Chapter 1: Microsoft Office SharePoint Services 2007 (MOSS)	5
<hr/>	
Why All the Hype?	5
Site Structure	6
What Is MOSS 2007?	7
Web Parts	8
Windows SharePoint Services (WSS) Version 3	9
Blogs	11
Wikis	11
Project Management	12
Surveys	12
Web-Based Discussions	12
Calendars	12
Offline Access	13
Integration with Microsoft Office	14
Alerts	14
Item-Level Security	14
Customization	15
Mobile Device Access	15
Email Updates	15
Workflow	15
Microsoft Office SharePoint Server 2007	16
Enterprise-Level Search	16
People Search	17
MySite	17
Audiences	17
Excel Services	18
Forms Server	18
Business Data Catalog	18
Presence Management	19
Reporting	19
Document Center	19

Contents

Security	19
Site Owner Permissions	20
Site Member Permissions	20
Site Visitor Permissions	20
Document-Level Permissions	21
Comparing WSS and MOSS Features	21
On the Other Hand	22
Accessibility	22
Navigation	22
Microsoft Solution	22
Browser Support	23
Desktop to Internet	25
Summary	25
Chapter 2: Sites and Workspaces	27
A Little Planning	27
Creating a Team Site	29
Site Owners	31
Create Menu	31
Edit Page	32
Site Settings Menu	32
Quick Launch	34
Default Quick Launch Links	35
Global Menu	37
Site Templates	37
Team Site	38
Blank Site	38
Document Workspace	38
Wiki Site	40
Blog	40
Meeting Workspaces	41
Basic Meeting Workspace	41
Blank Meeting Workspace	41
Decision Meeting Workspace	41
Social Meeting Workspace	42
Multipage Meeting Workspace	42
Creating a Meeting Workspace	42
Create a Meeting Workspace from an Event	43
The Enterprise Tab	43
Publishing	46
Free Application Templates	46
Site Administrator Templates	47

Server Administrator Templates	50
GroupBoard Workspace	52
Preconfigured Document Library Templates	53
Basic Site Customization	54
Summary	55
Chapter 3: Lists and Libraries	57
<hr/>	
Shared Documents Library	58
Exploring the Default Items	58
Shared Documents	58
Working with Document Libraries	61
Uploading a Document	61
Datasheet View	62
Settings Menu	65
Create a View	67
Document Library Settings	70
Library Columns	71
Library Management	72
Document Edit Menu	74
Workflows	79
Alerts	84
Form Library	84
Picture Library	85
Lists	86
Communication Lists	86
Tracking	89
Custom Lists	97
Key Performance Indicators Lists	98
Summary	99
Chapter 4: Web Parts	101
<hr/>	
Web Parts in Relation to MOSS 2007 and WSS	101
Web Parts in SharePoint	102
Creating Web Pages in SharePoint	103
Adding a Web Part	104
Contact Details	106
Business Intelligence	121
Additional Web Parts	123
Search Web Parts	127
Summary	133

Contents

Chapter 5: SharePoint and You **135**

MOSS 2007 MySite	135
Social Networking	136
MOSS 2007 MySite	138
Blogs	146
Adding Web Parts to MySite	148
My Profile	149
Managing Your MySite	150
Customize MySite	155
Personalization Using MOSS Audiences	156
Personalization with Team Sites	159
Personalization Sites	162
Alerts and Regional Settings	163
Summary	163

Part II: From Desktop to Internet

Office as a Desktop Application Set	166
Microsoft Office Groove 2007	167
Information Management	168
Business Knowledge Management	168
The Web Browser as an Information Delivery Tool	169
Access to Corporate Data	171
Summary	171

Chapter 6: Microsoft Office Word 2007 **173**

What's New in Microsoft Word 2007?	173
New Menus	174
Microsoft Office Word 2007 and Document Libraries	175
Using Metadata and Content Types within Word Documents	188
Document Check-In and Check-Out	189
Working with Document Versions	191
Document Management Task Pane	192
Adding Tasks	194
Interacting with Colleagues	195
Workflow from Word 2007	196
Blogging with Microsoft Word 2007	198
Office Live Workspace	201
Summary	201

Chapter 7: Microsoft Office Access 2007	203
What's New with Access 2007	204
A Brief Database Design Primer	204
Multi-value	206
Attachment	206
Append Only Fields	206
Data	207
General Access Advice	207
Access Objects	208
Tables	208
Queries	209
Forms	209
Reports	209
Lookup Values	210
SharePoint and Access	210
Create the Contact List	210
Creating Access Views with SharePoint	215
Changing Data in Access and Synchronization to SharePoint	218
Exporting Lists to Access	221
Working from Access 2007	222
Creating a Database in Access and SharePoint	223
Importing a SharePoint List from Access 2007	224
Creating an Access Database on SharePoint	225
Moving a Database to SharePoint	230
Keeping an Object in Access	235
Access 2007 and Workflows	235
Building Basic Access Objects	235
Common Gotchas	241
Summary	242
Chapter 8: Microsoft Office Outlook 2007	243
What's New in Outlook 2007	243
Lists and Libraries	245
Linking Your Documents to Outlook 2007	245
Opening a Document in Outlook 2007	247
Using and Linking Calendars	248
Tasks and Outlook 2007	251
Contacts	253
Managing Your SharePoint Alerts from Outlook	254
Planning a Meeting	256

Contents

Outlook 2007 and Workflow	257
Saving Emails	258
SharePoint and RSS	260
Discussion Lists and Outlook 2007	261
Summary	263
Chapter 9: Microsoft Office Excel 2007	265
What's New in Excel 2007	265
New Menus	267
Importing Your Excel Worksheet to a Custom List	268
Export an Excel List to SharePoint	269
Export a SharePoint List to Excel 2007	270
Excel Services in MOSS 2007	271
Limitations	272
Publishing Excel 2007 Files	273
Using a Pivot Table in the Browser	275
Using SQL Server Data and Publishing to SharePoint	277
Moving the Connection to SharePoint	281
Excel Web Part	283
Excel Web Part Menu	286
Using Filters with Excel Services	286
SharePoint Reporting Site	292
Key Performance Indicators	293
Summary	296
Chapter 10: Microsoft Office Groove 2007	297
Groove 2007 Feature Set	298
SharePoint Features with Groove	298
Getting Started with Microsoft Groove 2007	299
Creating a Workspace	300
Inviting Colleagues	302
Workspace Properties and Permissions	303
Workspace Tools	304
Meetings Tool	307
SharePoint Files	309
Local Files and Folders	312
Using Instant Messaging in a Workspace	312
Issue Tracking	313
Other Tools	315
Downloadable Tool Templates for Groove	315
Summary	315

Chapter 11: SharePoint Add-ins	317
Free SharePoint Software	318
Community Kit for SharePoint	318
SharePoint Learning Kit	318
Podcasting Kit for SharePoint	319
Document Library Tree View	319
Telerik RadEditor Lite	320
Commercial Web Parts	324
Calendar Plus	324
SharePoint Forum Web Part	325
Wiki Plus	326
InfoPath Form Viewer	326
SharePoint List Aggregator	326
Other Useful Software	329
Summary	329
Chapter 12: SharePoint Designer 2007	331
Skills Required	332
HTML	332
CSS	333
Getting Started with SharePoint Designer 2007	335
Folder Pane	336
Getting Started with Customization	338
Site Administration with SharePoint Designer 2007	344
Workflows with SharePoint Designer	346
Edit a Workflow	352
Working with Data Sources	352
Displaying SQL Server 2005 Data	353
Connecting Data From Web Parts	355
Summary	359
Chapter 13: Records Management	361
Planning for Records Management	362
Retention Plan	364
Information Management Policies and Auditing	365
Content Types and Information Management Policy	372
Creating a General Site Collection Policy	372
Moving on to Full Records Management	375
Record Center Structures	375

Contents

Records Center Process	376
Record Routing	376
Moving Up Market	380
Summary	381
Appendix A: Microsoft Office Word, Access, and Excel 2003–2007 Command Reference	383
Appendix B: Useful SharePoint Links	405
Index	407