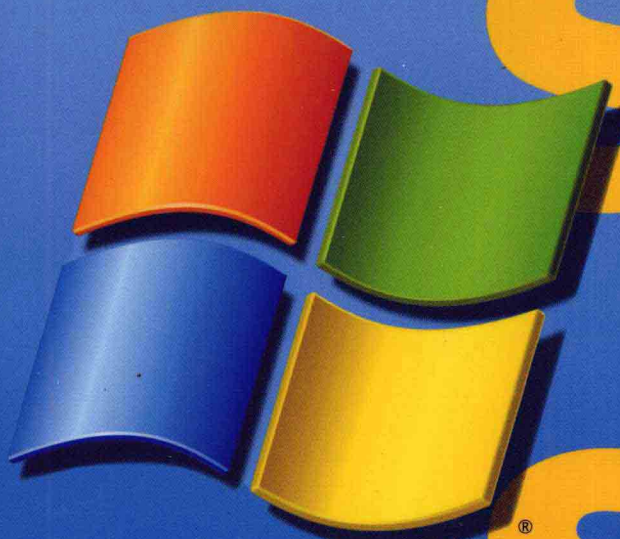*Microsoft*

Step by Step

China Edition
Published by Shanghai World Publishing Corporation

Microsoft Windows

SharePoint Services
由入门到精通

- **Learn at your own pace**
- **Build exactly the skills you need**
- **Practice with real-world examples**

Olga Londer, Todd Bleeker,
Penelope Coventry, and James Edelen

世界图书出版公司

Microsoft

Microsoft® Windows® SharePoint® Services Step by Step

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Microsoft Windows SharePoint Services：由入门到精通

[美]奥尔加·伦德尔　托德·布雷克　佩内洛普·考文垂　詹姆斯·艾登　著

Getting Help

Every effort has been made to ensure the accuracy of this book and the contents of its CD-ROM. If you run into problems, please contact the appropriate source for help and assistance.

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Outside the United States, for support information specific to your location, please refer to the Worldwide Support menu on the Microsoft Help and Support Web site for the site specific to your country:

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Using the Book's CD-ROM

The CD-ROM inside the back cover of this book contains practice files you'll use as you work through the exercises in this book. The CD-ROM also contains site templates that you might use if you choose to do exercises independently. By using practice files and site templates, you won't waste time creating your own samples files and sites—instead, you can jump right in and concentrate on learning how to get the most of your Microsoft Windows SharePoint Services implementation.

The CD-ROM also includes two supplemental chapters that provide valuable information. "Using Windows SharePoint Services with InfoPath 2003" (UsingInfoPath.pdf) covers how to create a form library from InfoPath 2003, modify an existing form library, fill out a form, and edit an existing form. "Finding Information on the SharePoint Site" (FindingInformation.pdf) explores Microsoft Windows SharePoint Services search at three levels: searching an entire site, searching a specific list or document library, and searching multiple document libraries simultaneously. Be sure to explore the contents of these supplemental PDFs.

Finally, the CD-ROM also includes an electronic version of the book in PDF format and the Microsoft Office System Reference Pack to help you get the most out of your SharePoint experience.

Minimum System Requirements

Client Computer

To use this book, your client computer should meet the following requirements:

- **Operating System** Although you can use any Microsoft operating system, Microsoft Windows XP Professional Edition is recommended.

- **Software** Microsoft Internet Explorer 5.01 SP1 or later; Internet Explorer 5.5 or later is recommended.

  Microsoft Office Word 2003, Microsoft Office Excel 2003, Microsoft Office Access 2003, Microsoft Office Outlook 2003, and Microsoft Office InfoPath 2003.

Server Computer

To use this book, you must have access to a server running Windows SharePoint Services. The server computer should meet the following requirements:

- **Operating System** Microsoft Windows Server 2003

- **Software** Microsoft Windows SharePoint Services 2.0

Note The CD-ROM for this book does not contain the Windows Server 2003 operating system or the Windows SharePoint Services software. You must have access to a working Windows SharePoint Services site before using this book. Microsoft Windows SharePoint Services 2.0 can be downloaded from Microsoft's Web site for no cost.

Installing the Practice Files

You must install the practice files on your hard disk before you can use them in the chapters' exercises. Follow these steps to prepare the CD's files for your use:

Important Installing the practice files requires the privileges of a local system administrator.

1   Insert the CD-ROM into the CD-ROM drive of your computer.

An End User License Agreement should appear automatically.

Important If the End User License Agreement does not appear, open a window for your CD-ROM drive, and then double-click the StartCD executable file.

After you accept the End User License Agreement, a menu screen appears.

2   Click **Install Practice Files**.

3   Follow the on-screen instructions to install the practice files to *My Documents \Microsoft Press\SharePoint Services SBS*.

Using the Practice Files

Each exercise is preceded by text that lists the files needed for that exercise. The text also explains any preparation you need to take before you start working through the exercise, as shown here:

USE the Plants_Price.xls document in the practice file folder for this chapter. This practice file is located in the *My Documents\Microsoft Press\SharePoint Services SBS\Chapter 11* folder.

Wherever possible, we start each chapter with a standard Windows SharePoint Services team site. It doesn't mean that if you follow all exercises in all chapters in sequence, you have to start with a new team site for every chapter—you can use the same site throughout the whole book.

However, if you choose to do exercises independently and not in sequence, be aware that there are exercises in some chapters that depend on other exercises performed earlier in the book. If this is the case, we will tell you where the prerequisite exercise is located in the book, so that you can complete the prerequisite exercises, as shown below:

BE SURE TO complete the "Adding Documents" exercise in Chapter 5 on page XXX.

Alternatively, if you have sufficient rights, you can create new starting sites for chapters by using the site template STP files that are provided on the CD-ROM for those chapters that have dependencies on exercises earlier in the book. The site template will have the prerequisite exercises already completed for you. This option is for advanced users who might not want to do a prerequisite exercise in another chapter. For exercises that require a prerequisite exercise to be completed, we will tell you the name and location of the STP site template, as shown below:

Alternatively, you can create a practice site for this chapter based on site template Chapter 6 Starter.stp in the practice file folder for this chapter. The practice file folder is located in the *My Documents \Microsoft Press\SharePoint Services SBS\Chapter 06* folder. See "Using the Book's CD-ROM" on page vii for instructions on how to create a practice site.

If you choose to use the provided site template STP files, please refer to "(*Optional*) Using the STP Site Templates" later in this section for instructions on how to create a practice site.

The following table lists the practice files and optional site templates, if the chapter or supplemental material requires them.

Folder	Chapter	Practice Files and STP Files
Chapter 01	Introduction to Windows SharePoint Services	No practice files
Chapter 02	Navigating a SharePoint Site	No practice files
Chapter 03	Creating and Managing Sites	No practice files
Chapter 04	Working with Lists	No practice files
Chapter 05	Creating and Managing Libraries	NeedlepointHolly.doc pjcov.JPG Purchase Order Template.xsn WaterOak.doc
Chapter 06	Working with Library Settings	Chapter 6 Starter.stp
Chapter 07	Working with Document Workspaces	Chapter 7 Starter.stp
Chapter 08	Working with Meeting Workspaces	Chapter 8 Starter.stp
Chapter 09	Working with Surveys and Discussion Boards	GardenSurvey.xls
Chapter 10	Using Windows SharePoint Services with Outlook 2003	Chapter 10 Starter.stp
Chapter 11	Using Windows SharePoint Services with Excel 2003 and Access 2003	GardenCo.mdb Plants_Price.xls Sales_Figures.xls
Chapter 12	Working with Web Parts	Chapter 12 Starter.stp

Folder	Chapter	Practice Files and STP Files
Supplemental Material	Using Windows SharePoint Services with InfoPath 2003 (UsingInfoPath.pdf)	Purchase Orders Template.xsn
Supplemental Material	Finding Information on the SharePoint Site (FindingInformation.pdf)	Finding Information Starter.stp

Uninstalling the Practice Files

After you finish working through this book, you can uninstall the practice files by following these steps:

1 In Control Panel, open **Add or Remove Programs**.

2 In the list of installed programs, click **Microsoft Windows SharePoint Services Step by Step**, and then click the **Remove** button.

3 Click **Yes** when the confirmation dialog box appears.

(*Optional*) Using the STP Site Templates

To create a practice site for a chapter based on a site template STP file provided on the CD-ROM, perform the following steps:

BE SURE TO verify that you have sufficient rights to upload a site template to a top-level site and to create a site in the site collection. If in doubt, see the Appendix on page 260.

OPEN the top-level SharePoint site to which you'd like to upload the site template STP file. If prompted, type your user name and password, and then click OK.

1 On the top link bar, click **Site Settings** to display the **Site Settings** page.

2 In the **Administration** section, click **Go to Site Administration** to display the **Site Administration** page.

3 In the **Site Collection Galleries** section, click **Manage site template gallery** to display the **Site Template Gallery** page.

Note If you see a Go to Top-level Site Administration link in the Site Collection Administration section at the bottom of the page, you are not on the top-level site administration page. A site template can only be uploaded to the site template gallery on a top-level site. To display the Site Administration page for the top-level site, click Go to Top-level Site Administration and then repeat the previous step.

4 Click **Upload Template** to display the **Site Template Gallery: Upload Template** page.

5 Click the **Browse** button to display the **Choose File** dialog box.

6   Navigate to *My Documents\Microsoft Press\SharePoint Services SBS\Chapter XX* (where *XX* is the chapter number), click the STP file that you want to use to create the new site, and then click the **Open** button.
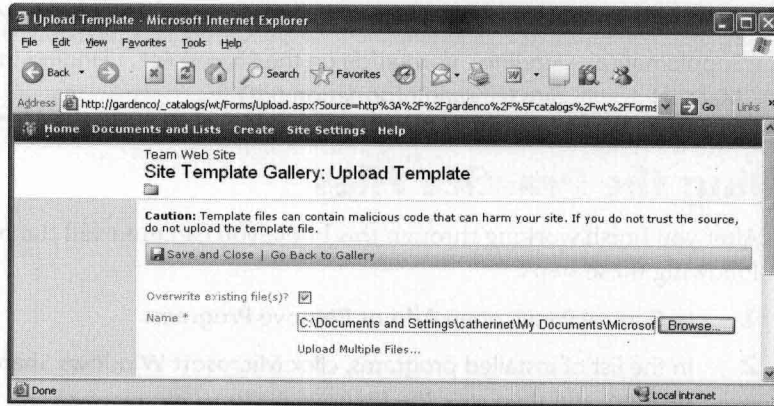

**7**   Click **Save and Close** to complete the upload and redisplay the **Site Template Gallery** page.
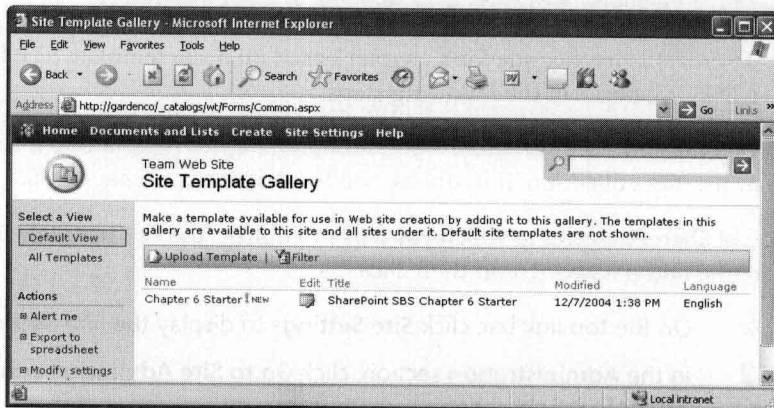
You can now create a new child site based upon the uploaded template.

8   Open the SharePoint site that you'd like to create the new practice site within.

9   On the top link bar, click **Site Settings** to display the **Site Settings** page.

10   In the **Administration** section, click **Manage sites and workspaces** to display the **Sites and Workspaces** page.

11   Click **Create** to display the **New SharePoint Site** page.

12   In the **Title** text box, type a logical name for the new site; you could simply provide the chapter number, for example Chapter06.

13   Optionally, in the **Description** text box, type a description, for example SharePoint SBS Chapter 6 Practice Site.

14 In the **URL name** text box, repeat the same name as you typed into the **Title** text box.

15 In the **Permissions** section, leave the default **Use same permissions as parent site** option selected.
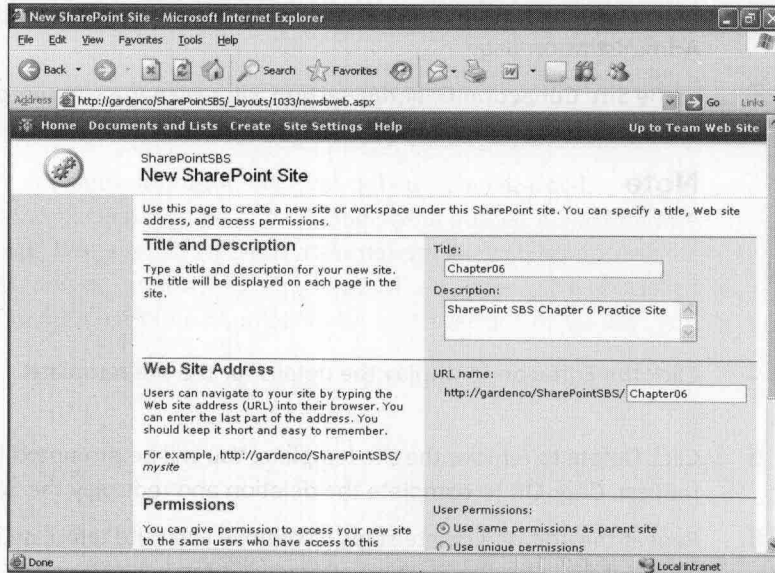
16 Click the **Create** button to display the **Template Selection** page.

17 In the **Template** list, choose the name of the template that you just uploaded, for example SharePoint SBS Chapter 6 Starter, and then click the **OK** button.
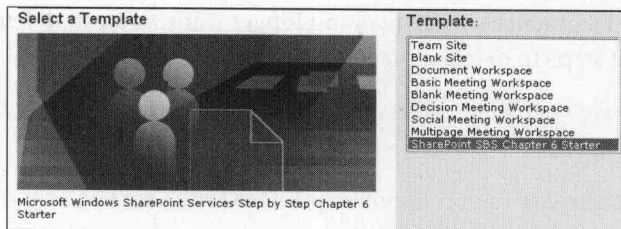
The Home page of the new practice site is displayed.

CLOSE the browser.

(*Optional*) Removing the STP Site Templates

To remove the chapter starter templates from the site template gallery, perform the following steps:

BE SURE TO verify that you have sufficient rights to delete a site template from the top-level site template gallery. If in doubt, see the Appendix on page 260.

OPEN the top-level SharePoint site where you previously uploaded the site template STP files. If prompted, type your user name and password, and then click OK.

1 On the top link bar, click **Site Settings** to display the **Site Settings** page.

2 In the **Administration** section, click **Go to Site Administration** to display the **Site Administration** page.

3 In the **Site Collection Galleries** section, click **Manage site template gallery** to display the **Site Template Gallery** page.

> **Note** If you see a Go to Top-level Site Administration link in the Site Collection Administration section at the bottom of the page, you are not on the top-level site administration page. A site template can only be removed from the site template gallery on a top-level site. To display the Site Administration page for the top-level site, click Go to Top-level Site Administration and then repeat the previous step.

Edit
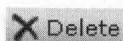
4 Click the **Edit** icon to display the details for the site template.

✕ Delete

5 Click **Delete** to remove the site template. You will be prompted to confirm your request. Click **OK** to complete the deletion and redisplay the **Site Template Gallery**.

6 Repeat the edit and delete steps to remove each site template that you no longer want available for the creation of practice sites.

CLOSE the browser.

(*Optional*) Deleting a Practice Site

If you created a practice site that you no longer want, you can delete it. Perform the following steps to delete a practice site:

BE SURE TO verify that you have sufficient rights to delete a site. If in doubt, see the Appendix on page 260.

OPEN the parent SharePoint site where you previously created the practice site. If prompted, type your user name and password, and then click OK.

1 On the top link bar, click **Site Settings** to display the **Site Settings** page.

2 In the **Administration** section, click **Manage sites and workspaces** to display the **Sites and Workspaces** page.

✕ Delete

3 In the list of sites, click the **Delete** icon to delete the site and to display the **Delete Web Site** page.

**4** Click the **Delete** button to delete the site.

CLOSE the browser.

Conventions and Features

You can save time when you use this book by understanding how the *Step by Step* series shows special instructions, keys to press, buttons to click, and so on.

Convention	Meaning
1 **2**	Numbered steps guide you through hands-on exercises in each topic.
●	A round bullet indicates an exercise that has only one step.
(CD icon)	This icon at the beginning of a chapter reminds you to install the files used in the exercises.
Tip	These paragraphs provide a helpful hint or shortcut that makes working through a task easier.
Important	These paragraphs point out information that you need to know to complete the procedure.
Troubleshooting	These paragraphs show you how to fix a common problem that might prevent you from continuing with the exercise.
❌ Close	When a button is referenced in a topic, a picture of the button appears in the left margin.
Alt + Tab	A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, "press Alt + Tab" means "hold down the Alt key while you press the Tab key."
Black bold type	In steps, program items that you click or press are in black bold type.
Blue italic type	Terms explained in the glossary are shown in blue italic type.
Blue bold type	Text that you will type appears in blue bold type in the procedures.
Italic type	Folder paths, URLs, and emphsized words appear in italic type.
BE SURE TO	These words are found at the beginning of paragraphs preceding or following step-by-step exercises. They point out items you should check or actions you should carry out either before beginning an exercise or after completing an exercise.
USE OPEN	These words are found at the beginning of paragraphs preceding step-by-step exercises. They draw your attention to practive files that you'll need to use in the exercise.
CLOSE	This word is found at the beginning of paragraphs following step-by-step exercises. They give instructions for closing open files or programs before moving on to another topic.

Quick Reference

3   In the **Links** tool pane, make your modifications.

4   Click **Apply** to apply the modification, and then click **OK**.

Chapter 3   Creating and Managing Sites

Page 32   To create a child site

1   On the top link bar, click **Site Settings**.

2   On the **Site Settings** page, in the **Administration** section, click **Manage sites and workspaces**.

3   On the **Sites and Workspaces** page, click **Create**.

4   On the **New SharePoint Site** page, specify the settings for the new site.

5   Click the **Create** button.

6   On the **Template Selection** page, select a template from the **Template** list, and then click **OK**.

Chapter 4   Working with Lists

Page 60   To browse the lists for a site

1   On the top link bar, click **Documents and Lists**.

2   On the **Documents and Lists** page, explore the lists.

60   To browse list templates available

1   On the top link bar, click **Create**.

2   On the **Create Page** page, explore the list templates.

62   To create a list

1   On the top link bar, click **Create**.

2   On the **Create Page** page, in the **Lists** section, click a list template.

3   On the **New List** page, specify settings for the list, and then click the **Create** button.

62   To modify the settings for a list

1   Open the list for which you want to modify the settings.

2   On the left side of the page in the **Actions** section, click **Modify settings and columns**.

3   On the **Customize** page, in the **General Settings** section, click **Change general settings**.

4   On the **List Setting** page, modify the settings for the list, and then click **OK**.

65 To add a new item to a list

1 Open the list to which you want to add a new item.

2 On the list page, click **New Item**.

3 On the **New Item** page, specify the settings for the new item.

4 Click **Save and Close** to save the list item.

65 To edit an item in a list

1 Open the list for which you want to edit an item.

2 On the list page, move your mouse over the list item, and then click the down arrow that appears.

3 In the menu, click **Edit Item**.

4 On the item page, edit the settings for the new item.

5 Click **Save and Close** to save the list item.

65 To delete an item in a list

1 Open the list for which you want to delete an item.

2 On the list page, move your mouse over the list item, and then click the down arrow that appears.

3 In the menu, click **Delete Item**.

4 In the dialog box that appears, click **OK** to confirm the deletion.

70 To attach a file to a list item

1 Open the list to which you want to attach a file.

2 On the list page, move your mouse over the list item, and then click the down arrow that appears.

3 In the menu, click **Edit Item**.

4 On the item page, click **Attach File**.

5 On the page to add attachments, click **Browse**.

6 In the **Choose File** dialog box, select a file, and then click the **Open** button. Once selected, the location of the selected document is displayed in the **Name** text box.

7 Click **OK** to attach the document to the list item.

8 Click **Save and Close** to complete the process of attaching the document to the list item.

75 To add a new column to a list

1   Open the list to which you want to add a new column.

2   On the left side of the page in the **Actions** section, click **Modify settings and columns**.

3   On the **Customize** page, in the **Columns** section, click **Add a new column**.

4   On the **Add Column** page, in the **Column name** text box, type a name for the new column.

5   Select a column type.

6   In the **Optional Setting for Column** section, specify other column settings.

7   Click **OK** to add the new column to the list.

75 To edit a column in a list

1   Open the list for which you want to edit a column.

2   On the left side of the page in the **Actions** section, click **Modify settings and columns**.

3   On the **Customize** page, in the **Columns** section, click the name of the existing column you want to edit.

4   On the **Change Column** page, edit the settings for the column.

5   Click **OK** to save the changes to the column.

75 To delete a column in a list

1   Open the list for which you want to delete a column.

2   On the left side of the page in the **Actions** section, click **Modify settings and columns**.

3   On the **Customize** page, in the **Columns** section, click the name of the existing column you want to delete, and then click the **Delete** button.

4   In the dialog box that appears, click **OK** to delete the column.

75 To change the order of the columns displayed on the new and edit list item pages

1   Open the list for which you want to change the column order.

2   On the left side of the page in the **Actions** section, click **Modify settings and columns**.

3   On the **Customize** page, in the **Columns** section, click **Change the order of the fields**.

4   On the **Change Field Order** page, use the drop-down lists to change the order of the columns, and then click **OK** to save the change.