

Office and SharePoint 2007 User's Guide

Integrating SharePoint with Excel,
Outlook, Access, and Word



Michael P. Antonovich

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For my wife of 30 years, Susan, and our wonderful daughter, Natasha. I love you both.

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About the Author

■ **MICHAEL P. ANTONOVICH** graduated from Lehigh University with a bachelor's degree in chemical engineering in 1976 and an MBA in 1980, but his career almost from the start evolved toward computers and application development. He started working with large mainframe systems but quickly developed a keen interest in microcomputers when Apple introduced its Apple II, for which he wrote his first book in 1983. Over the years, he has learned many different systems, applications, and programming languages, but the first development environment he felt really strong about was FoxBase and later FoxPro. During the '90s, he published four books on FoxPro before the Internet and SQL Server bug bit him.

In addition to his full-time jobs developing applications, Michael has conducted dozens of different computer training classes for companies and universities. In 2003, he joined the IT team of Orange County Public Schools as they prepared to launch a major new student tracking system. But the lure of the Internet along with a "little" product called SharePoint pulled him back into Internet development in the fall of 2006, when he took on the task of heading up the technical team to develop a new SharePoint portal for the school district that would provide all users with a single consistent, easy-to-use interface. While portions of that project have been completed, others are still being worked on, and some are still in planning. However, the eventual goal is to support all district Internet and intranet sites via SharePoint, as well as to encourage greater collaboration through a single portal that students, parents, staff, and the community can access anywhere, anytime.

About the Technical Reviewer

■ **DAVID PYKE** is a director of Inta Networking Ltd., an established company providing enterprise content management, public key infrastructure, and process improvement consultancy to both businesses and the public sector. He has been engaged as a consultant on several Microsoft SharePoint-based projects from the very earliest versions of the product to the latest, and has a particular understanding of how to exploit the powerful Microsoft Office portfolio to provide effective information management environments. He has one wonderful son, Herbie, and lives with his lovely and ever-patient girlfriend, Liz, in the Georgian market town of Farnham in Surrey, England.

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Thanks to Kevin Goff, a good friend since my early days of FoxBase work, whose own recent book for Apress convinced me that it was time for me to give it a go again. I'm watching for your next one, buddy.

A huge thanks must go to the entire SharePoint team at Microsoft for creating such a tremendously powerful and solid application platform like SharePoint. It was a job well done. It brings together the best of the Internet with the best of Microsoft Office in a way that can boost productivity to unbelievable heights. I have been more excited about working with SharePoint than any other product since my old FoxPro days.

A great big thank-you goes out to Charles Thompson, our former CIO at Orange County Public Schools, for having the vision to see the value of a single portal for all district information access and for giving me the opportunity to get in on the ground floor of that vision.

I'd also like to shout out a huge thank-you to Scott Tarnell. We brought Scott in to handle the administration of SharePoint, and he dove into the product, becoming an expert at not only the hardware requirements, but also the software configuration, branding, security, and countless other details. I rely on the ability to bounce ideas off Scott every day to make sure we can meet our user needs even before they know what they are.

To the rest of my SharePoint Team, special thanks to Mike Healey for helping us understand web parts and workflows, a big thanks to Shelly Henriott for making sure all the pages look good and for helping the users learn how to support their own content, and huge thanks to Serena Wright for holding us all together and keeping us moving in one direction, rather than the fifty thousand we might try if left to our own devices.

The biggest thanks, though, has to go to my wife for understanding that writing a book takes a lot of time away from other things, not just for a few days, but month after month.

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Introduction

SharePoint may be the biggest thing to affect the way you and I work in our offices since . . . well . . . since Microsoft Office. Word showed us how to write and edit our writing more efficiently on a computer screen than we ever could before with a typewriter. Similarly, Excel showed us how to manipulate numbers more accurately than any accounting sheet created with pencil and paper. (Okay, I know there were some word processors before MS Word and spreadsheets before MS Excel, but just go with me for a second.)

Over the years, Microsoft Office has become so pervasive that it is almost impossible to get an office job today if you do not have a firm understanding of at least Word and Excel. But we still store hundreds of files in dozens of different directories and even different servers across our companies. Documents are created and printed and then carried from one office to another. Sometimes, dozens of copies are made and distributed. Some get lost. Some find their way into file folders in people's desks. Others get archived into boxes and stored offsite in the fear that someday, someone may want to see them again.

The electronic revolution of the 1990s and early 2000s did not free us from paper. Rather, it seems to have buried us deeper in a rising tide of paper that comes into our inbox faster than we can file it, much less read it.

We've all heard of the utopia of a paperless society where information flows at the speed of light from its point of creation to each user who must review and approve it. Perhaps the tools were just not ready before. Perhaps we were simply missing that keystone piece that makes it all come together into a compelling argument for a new way of working with information. The Internet was not the solution, although it was an enabling piece of technology that may make our vision of the office of the future possible.

So what is the next revolution that will bring our dream of a paperless environment into reality?

I believe that SharePoint collaboration and content management is that next revolution.

Oh, you say you have heard of SharePoint, but thought that it was a portal for a company's web site. Yes, that is true, but that is only one facet of a many-faceted tool.

SharePoint sits on top of the many technologies of the past. It borrows a lot from web development. But it also integrates tightly into many of the Microsoft Office products, giving them the ability to accomplish goals like the following:

- Create shared document libraries that can be accessed from anywhere a person can get an Internet connection.
- Present electronic forms for people to interactively fill in, rather than having to print the form, write on the form, send it back, and then have someone enter the data into a computer program interface.
- Store multiple versions of documents so a revision history can be retained.
- Display business information in Excel-style pages that you can even change interactively to help managers make better decisions.

Currently, a large number of IT people worldwide are beginning to use SharePoint. They are creating web sites and collaboration sites. And that is all good. However, SharePoint will not reach its full potential until every computer user who knows how to use Microsoft Office becomes as familiar with SharePoint from a user perspective as they currently are with their favorite Office application, such as MS Word or MS Excel.

No, this does not mean you need to know how to install SharePoint or even how to configure it (although understanding a little of the configuration would not hurt). However, it does mean that you need to know how to create and use libraries, lists, and many other features. It means that you should learn how to use Office tools like Word, Outlook, Excel, and Access to not only create and maintain your own files on a SharePoint site, but also store files on a centralized server at your company that you can access from anywhere you can get an Internet connection. It should not matter whether you are at home connected through your home computer or on vacation using your laptop and wireless connection at your resort. You could even be at your local library using its computer. Anywhere. Anytime. The dream of having access to your corporate data is only a connection away.

But there is more to it than just accessing your files. You can share your files with colleagues or even the project consultant who works in a different city. I will show you how you can share files with people who do not have access to your network. You can also create workflows without programming so that when a document is created, you can automatically send it to someone else to review or approve. You will see how you can consolidate your lists, calendars, and tasks from multiple sources. You will discover how easy it is to create forms for others to use through their browser. But most of all, you will see how you can become more productive and efficient using your favorite Microsoft Office tools together with SharePoint, without needing to learn programming first.

The revolution has begun. You already know how to use the basic tools. Now, let me show you how you can capitalize on those tools to take you to a new level of productivity and freedom from that paper avalanche on the side of your desk.

Who This Book Is For

This book is for anyone who wants to reap the benefits of working with SharePoint and Microsoft Office without having to learn programming. Sure, there are many additional things you can do with SharePoint if you have programming skills. There are many other books on the market that take you down that road. When you are ready to get more into programming, I recommend *Pro SharePoint Solution Development: Combining .NET, SharePoint, and Office 2007* by Ed Hild and Susie Adams (Apress, 2007), and *Microsoft SharePoint: Building Office 2007 Solutions in VB 2005* and *Microsoft SharePoint: Building Office 2007 Solutions in C# 2005*, both by Scot P. Hillier (Apress, 2007). However, there are far more office workers out there who use Microsoft Office every day who can benefit from using SharePoint without necessarily going into programming. You know who you are. You are the power users of Microsoft Office. You are the ones other people in the office come to when they need to do something in Office but don't quite know how. You are ready to take the next step in Office productivity to promote increased collaboration between members of a project or department, to build the content for intranet and even Internet sites, to replace the passing of paper in your office with electronic forms driven by workflows from person to person. You dream of a day when you will not need a single sheet of paper on your desktop to get your work done. If this sounds like I'm describing you, then this book is your starting point toward that future.

Contacting the Author

You can contact the author by e-mail at mike@micmin.org. I will be establishing a blog to go along with this book at <http://mpantonovich.spaces.live.com/default.aspx>. From time to time I will post additional tips and tricks related to collaboration between Microsoft Office and SharePoint.



An Introduction to SharePoint

SharePoint is Microsoft's enterprise-level application solution for organizations wanting to deploy any combination of an internet, intranet, or extranet with a consistent user experience. By heavily leveraging other Microsoft Office family products, SharePoint allows teams to work together and collaborate when separated across the country or even the globe. SharePoint is currently one of Microsoft's fastest growing products with over 75 million licenses sold. Perhaps most important to business planners is that Forrester lists SharePoint as the number one portal product on the market and Gartner places SharePoint 2007 as a leader in their "Magic Quadrant for Horizontal Portal Products in August 2007."

Microsoft envisions SharePoint as the single portal that an organization needs to deploy for its internet, intranet, and extranets. Tight integration with other Microsoft Office family products enables SharePoint to boost the productivity of employees by reducing the time and effort needed to create and maintain sites. It allows more people to participate in the creation of site content. It provides a framework from which everyone within an organization can share information, conduct meetings, and track tasks. It enables you to work remotely while storing files centrally, yet work on them anywhere you have access to the Internet; and even when you don't have access to the Internet, you can check out documents ahead of time, work on them while disconnected, and then synchronize your changes when you connect to the Internet again.

While no single book can cover everything there is to know about SharePoint, this book focuses on helping you to work with SharePoint using many of the common Microsoft Office tools such as Outlook, Word, Excel, PowerPoint, and Access. You will even get a look at some of the newer Office tools such as InfoPath and Groove. This book concentrates more on collaboration-type activities as opposed to Internet site development. However, many of the same techniques for working with web pages, web parts, libraries, and lists apply to both areas.

In this chapter, you will look at how to create a SharePoint site and come to understand the flexibility of building a hierarchy of sites within a site collection. You will also see how to define permissions for users, allowing some users to create new content and edit existing content while restricting other users to viewing the published content. Next, you will build a document library and learn how to use Microsoft Word to add and edit documents stored in that library. Then I will show you how to preserve the integrity of your editing through the use of the check-out and check-in facility for documents. Finally, you will explore the use of versioning to control the publishing of information that others can view.

In subsequent chapters, you will explore SharePoint's other features, from lists through web pages, from the point of view of how to integrate your current knowledge of Microsoft Office tools. My goal is not to make you a SharePoint administrator. Rather my goal is make you a power user when it comes to working with SharePoint through Microsoft Office.

Site Collections, Sites, and Subsites

Think of a *site* within SharePoint as a group of related pages, libraries, and lists that you can view using a web browser such as Internet Explorer, Firefox, or several others. A department within an organization may want to have a site on the Internet to publish information about what services or products that department provides. Similarly, a *site collection* is a collection of sites. For example, the company internet might be a site collection consisting of individual department sites. At the site collection level, you can store common objects that all sites within it can use. For example, you might store the organization's logo at the site collection level so that all department sites can reference that logo from one place.

A site typically focuses on specific topics, groups of people, or activities. Just like a web site, a SharePoint site has a home page, sometimes called its *default page*, which links to other pages in the site. This page can provide navigation to the other pages in the site either through menus or links. Each page supports content of various types ranging from lists to libraries to simple text and images, all organized in what could look like a regular web page found on the Internet.

As a content creator within SharePoint, you have the freedom to control the appearance and content of pages within a site. No longer must you submit content changes to a web design person and then wait for him to incorporate the changes into your organization's web pages. You can collaborate with any number of people in your organization, from one to many thousands who have direct access to updatable lists, documents, and even content pages on your intranet or internet sites.

A site can also have one or more *subsites*. While a subsite inherits many of its properties from its parent site, it also can have its own identity, properties, and objects. Subsites further subdivide the focus of the higher-level site. If a site represents a department, a subsite might represent a project or a team.

For example, suppose you create a SharePoint site for your entire organization. In this top-level site, you create content pages that pertain to your organization as a whole. However, since each group within your organization wants to create its own set of pages and content, you create subsites for each division, department, or workgroup beneath this top-level site. Each subsite may have additional subsites beneath it representing individual projects, groups, or activities. You may even build subsites that represent projects that cross department or division boundaries.

Each subsite in the preceding scenario represents a unique and distinct area or portion of the entire organization. This group of sites and subsites forms a hierarchy referred to as a site collection. By dividing your information into multiple sites and subsites, you control the features, access rights, and settings appropriate for each one. But by placing all of them under a single umbrella, you can provide a single entry point or portal for all content as well as inheritance of selected features from the top site. No longer will each department, project, or group need to store its information in a separate database, file structure, or server completely separate from all others. This type of data silo inhibits the cross-flow of information and makes searching for specific information difficult or impossible. A single portal approach for all of an organization's information facilitates features like document searching, provides a common look and feel, simplifies navigation and support, and encourages collaboration and agility to respond quickly between members of ad hoc groups.

SharePoint also stores the information for all the sites within a site collection within a single SQL Server database. The site collection lets you share objects among the sites it contains. For example, you can share images, templates, site columns, content types, and permissions defined at the site collection level with any site within the site collection. Since each site collection represents a separate SQL Server database, you can provide separate backup and restore operations for the collection.

Tip If you are using SQL Server Express as your back-end database engine, you might also consider using separate site collections due to the current limit of 4GB on the size of individual databases.

Creating a site from scratch may sound a little intimidating at first. Indeed, before SharePoint, the prospect of creating sites across an entire organization would probably require a team of developers and months of time. However, SharePoint simplifies the process by providing a collection of *templates* for various object types to get you started. Of course, as you progress in your SharePoint knowledge, you can add to these templates with your own or those from third-party developers. While the book will explore some of these in more detail later, here I'll give you a quick overview of the types of sites you can create out of the box with SharePoint, starting with collaboration sites, which exist in both Windows SharePoint Services (WSS) 3.0 and Microsoft Office SharePoint Server (MOSS) 2007.

Collaboration Site Templates

WSS 3.0 and MOSS 2007 supply five major collaboration site templates as shown in Figure 1-1. Each template provides a unique starting point for creating a new site. However, just because site templates initially define specific unique features and web parts does not limit what you can do to customize a site. SharePoint allows you to customize a site based on one template with features that may be found in another. In fact, you can create your own custom templates starting from one of the supplied templates. So let's take a brief look at what each collaboration site template provides.

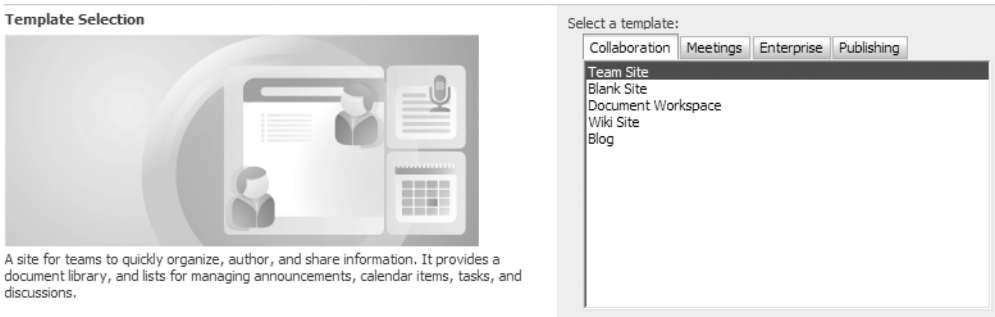


Figure 1-1. Collaboration site templates

Team Site

The Team Site template serves as a fast, out-of-the-box starting point for work teams that center around projects. It provides for creating and sharing of information through document libraries, establishing project calendars, tracking of individual and project tasks, and facilitating of discussions among the site members.

Figure 1-2 shows a WSS 3.0 team site that I will use as the basis to illustrate many of the examples in the next few chapters. This figure identifies several key areas that you need to become familiar with, as I will refer to them often in the following text.

Note A team site created within MOSS 2007 may also include a **My Site** link and a **My Links** link in the upper-right corner of the screen if those features are enabled. Also in both MOSS 2007 and WSS 3.0, the **Site Actions** button appears only for those users who have permission to edit site content. Users who can only view the site will not see this button. The examples will assume that you have the necessary permissions to edit site content.

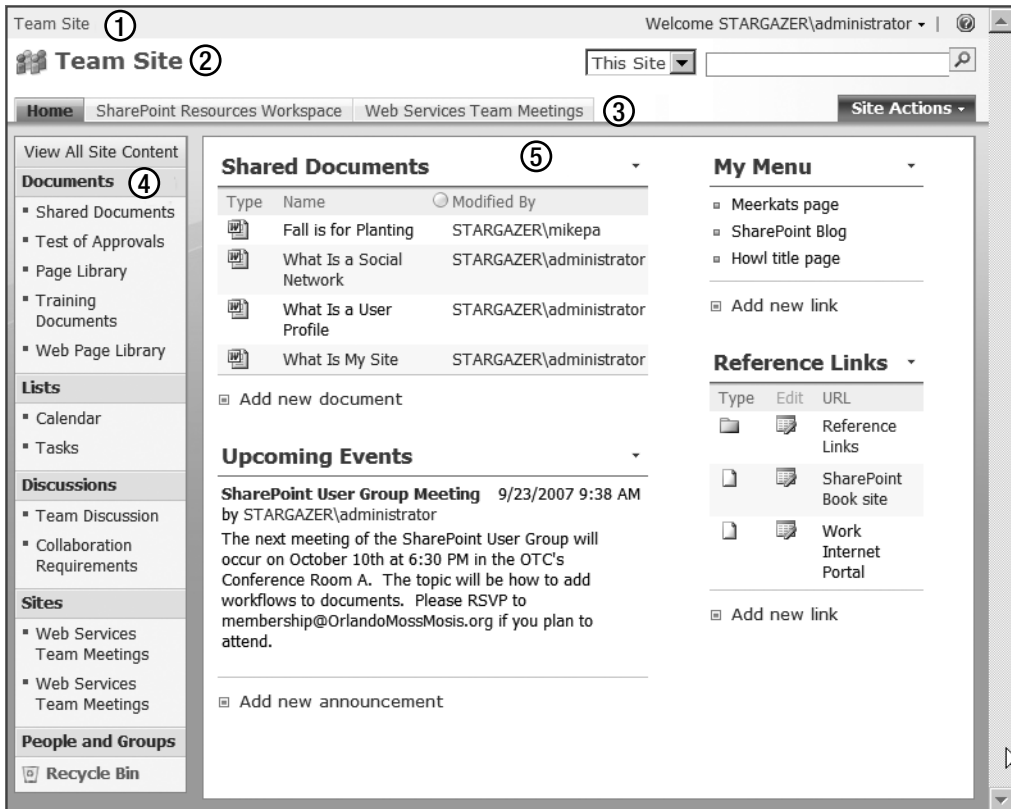


Figure 1-2. The major sections of a SharePoint page

1. The **Global Links Bar** contains a reference to the home page of the top-level site on the left. On the right, a **Welcome** menu displays the name of the current user. The arrow to the right of the user's name displays a menu with options to personalize the current page, change user settings, send the site administrator a request for more permissions, and log on with a different account if you have more than one or allow a different user to log in. The last item on the far right is the **Help** link icon. Click this icon at any time to find help topics via a **Contents** list or by typing in keywords in a search engine.

■ **Tip** The site developers in some organizations have multiple accounts representing different permission sets so that they can log in and view pages as other users would see them.

2. The **Title** area displays the name of the site along with a site logo (image). On the right side, the **Search** feature allows you to search for content by keywords either in the current site and subsites or when using MOSS 2007 across all sites in your enterprise.
3. The **Navigation Bar** normally lists the sites available to the user. On the right side, the **Site Actions** button displays a menu of site management options available to the user.
4. The **Quick Launch** area located on the left side of the page provides one-click access navigation to selected sites, documents, and lists. Depending on your permissions, you can customize what appears in this area and the **Navigation Bar**.
5. The **Main Content** area takes up the rest of the page. SharePoint divides this area into one or more sections called *web part zones* depending on the site template. You can add content in each zone consisting of libraries, lists, and other web parts to customize your page.

Blank Site

The Blank Site template is like a blank piece of paper. The person creating the site has total control over what appears on the site and where it appears. Until you have developed some familiarity with the other site templates and have customized them, you may not want to begin with a blank site. On the other hand, experienced site developers often prefer the Blank Site template because they do not have to waste time deleting or moving web parts and features that they do not want to use or that they want to appear elsewhere. Instead, they can focus on adding what they do want.

Document Workspace

SharePoint provides a Document Workspace template designed around creating a place where groups of people can work collaboratively on documents. It facilitates this through a document library and adds task lists for to-do items and link lists to track resources consisting of people and things.

Wiki Site

Wiki means *quick* or *fast* in Hawaiian, and therefore the Wiki Site template provides a quick way for teams to share and discuss information. The users of these sites can easily edit the content and link new pages using keywords in the topic text. Wiki sites generally consist of a set of collaborative web pages that users can easily contribute content to. Links between the pages of a wiki site allow readers to branch from the main topic to related topics as they appear in the text as hyperlinks. For example, you might use a wiki to publish tricks and tips for various applications within your organization. Links might refer to similar tricks described on other pages. You can also use pages to present definitions for technical terms your organization uses, organizational information, project definitions, and many more useful pieces of information.

Blog

While SharePoint administrators design wiki sites so anyone who can access them can contribute, edit, and add to them, blog sites, which you can create through the Blog template, generally exist for an individual or team to post major ideas or observations. Blog sites do not allow users to edit prior postings by others, but you can always post comments to any blog entry. Also unlike wiki sites, blog sites cannot easily be linked together based on topic words. Blog entries typically appear in reverse chronological order, making it easier for readers to see the most recent entries, whereas most newsgroups use a chronological hierarchy beginning with the initial entry and flowing down to more recent entries.

Bloggers (as some people refer to blog site contributors) use blog sites to discuss their projects or favorite subjects, or to provide additional information or viewpoints. In some ways, you might consider blogging as an alternative to using newsgroups based on a news server. Some organizations use internal blog sites to document the work effort on projects by creating daily or weekly entries detailing the progress made since the last entry. For those *Star Trek* fans out there, a blog site corresponds to a kind of Captain's Log.

Meeting Templates

Meeting templates provide predefined configurations that include different web parts in the default site template. SharePoint refers to these sites as *workspaces* rather than sites because they provide tools, web parts, and resources specifically oriented toward facilitating the activities of workgroups. Meeting workspaces include lists and documents, links, and team member information. While each template has a unique combination of web parts that defines its character, always remember that you can customize the appearance of your meeting workspace to include web parts contained in other templates. So let's take a look at the provided templates as listed in Figure 1-3.

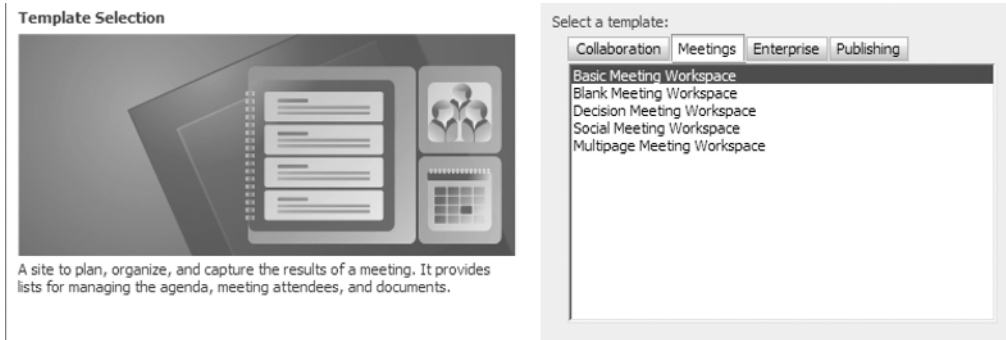


Figure 1-3. Meeting templates

Basic Meeting Workspace

Most meetings have common requirements to help members plan, conduct, and document them, and the Basic Meeting Workspace template takes these into account. Things like agendas, attendee lists, and libraries for documents reviewed in preparation for the meeting, during the meeting, or as follow-up to the meeting define a few of the important components of a basic meeting workspace.

Blank Meeting Workspace

The Blank Meeting Workspace template, like its name implies, starts with no predefined pages containing specific web parts. This template best suits the experienced site designer who prefers to start with a clean site rather than spending time deleting web parts from a predefined template.

Decision Meeting Workspace

People call meetings for a variety of purposes. You might hold some meetings to brainstorm new ideas or plan out the steps of a project. You could hold informational meetings to inform your staff about activities in other groups or departments. You might even call a meeting to evaluate lessons learned after a project ends. But you probably also call many meetings to make a decision.

The Decision Meeting Workspace template includes web parts to document objectives, agendas, and attendees. It includes a document library that holds documents relevant to the decision at hand. It also provides a means to document the decision as well as to create follow-up tasks or even tasks needed prior to the decision meeting such as research or testing tasks.

Social Meeting Workspace

The Social Meeting Workspace template includes features that help plan for special events such as company picnics and awards presentations, or even prepare for a company conference. This workspace includes discussion boards, picture libraries, directions to the event, and lists of things to bring.

Multipage Meeting Workspace

The Multipage Meeting Workspace template includes many of the features found in a basic meeting workspace but is organized over multiple pages. Of course, the other workspace templates permit the addition of more pages, but you may like to start with preconfigured pages.

Enterprise Site Types in MOSS 2007

All the previously mentioned, site templates come with both WSS 3.0 and MOSS 2007. However MOSS 2007 adds additional templates applicable to larger organizations. I will touch on some of these later, but for now let's take a quick look at what MOSS 2007 adds to the prior template list to help the enterprise user. Figure 1-4 shows the enterprise templates added by MOSS 2007 to SharePoint.

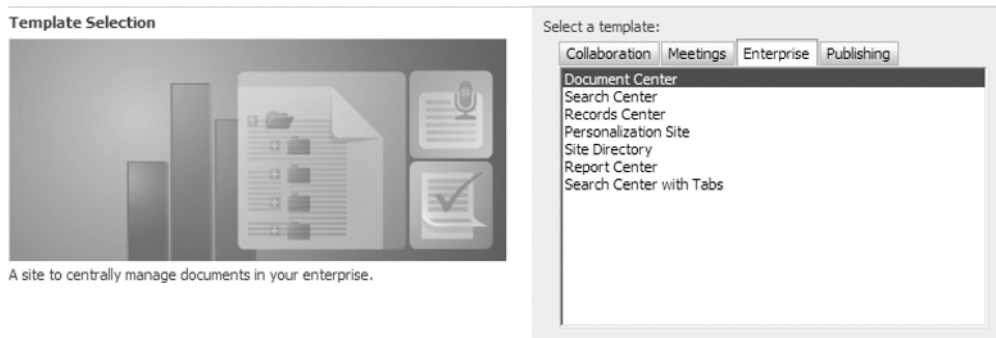


Figure 1-4. *Enterprise templates*

Document Center

The Document Center template is used to manage from a central location documents with a large volume of content and/or a large number of documents.

Search Center

The Search Center site template allows users to perform searches. This site does not include other content such as lists or libraries. Rather it allows users to define search criteria and to return the results of that search.

Records Center

The Records Center template supports records routing and can track and route records based on rules. It can hold records based on a date or approval status, store records with incomplete information separately so you can address them manually, and store records separately that do not match any existing routing rules. Unlike content added to most other SharePoint sites, you cannot edit records after you add them to the Records Center repository.

RECORDS CENTERS

Most organizations have a Records Center—a central repository where documents are sent for long-term storage. These documents typically must be retained either for legal reasons or tax reasons for a specified number of years so that they can be retrieved at a future time.

Users do not create records in a Records Center. They create records in document libraries. Once they no longer actively need the document, they can send it to the Records Center where it will be stored and managed until such time as it can be destroyed. Typically your organization's legal department will have some level of control over the operation of the Records Center.

Personalization Site

The Personalization Site template allows users to create custom views of available site information. Users of a personalized site can define navigation to pages important to them, bypassing the navigation of the main site to which it belongs.

Site Directory

The Site Directory template lists and categorizes sites within the SharePoint installation. It includes the ability to list the top sites, the sites deemed the most important. It also supports a site map to provide a visual depiction of the sites within the entire SharePoint installation.

Report Center

The Report Center site template gathers together in one place reports, dashboards, and presentations of key performance indicator information as well as metrics and business intelligence data.

Search Center with Tabs

The Search Center with Tabs site template extends the capabilities of the Search Center site by adding tabs that allow different search scopes. For example, out of the box, SharePoint provides a tab that searches content and another that searches for people. However, you can add tabs for custom search scopes unique to your site.

Publishing Sites

In addition to enterprise sites, MOSS 2007 adds three special sites, shown in Figure 1-5, related to publishing content that can be inserted into a site collection, and two portal templates, shown in Figure 1-6, that can only be used as the top-level site for a site collection. These site templates apply primarily to those organizations creating internet or intranet sites either for the entire organization or for specific groups within the organization. These templates support features such as the page editing toolbar, content editor, and web parts specific to creating internet and intranet portals. While this book does not focus on creating web portals, it may be useful to know what publishing sites offer so you know when to use them.

Template Selection



A blank site for expanding your Web site and quickly publishing Web pages. Contributors can work on draft versions of pages and publish them to make them visible to readers. The site includes document and image libraries for storing Web publishing assets.

Select a template:

Collaboration Meetings Enterprise Publishing

Publishing Site
Publishing Site with Workflow
News Site

Figure 1-5. Site publishing templates

Template Selection



A starter site hierarchy for an intranet divisional portal. It includes a home page, a News site, a Site Directory, a Document Center, and a Search Center with Tabs. Typically, this site has nearly as many contributors as readers and is used to host team sites.

Select a template:

Collaboration Meetings Enterprise Publishing

Collaboration Portal
Publishing Portal

Figure 1-6. Top-level site publishing templates

Publishing Site

SharePoint designed publishing sites specifically to display basic content on web pages. Developers of internet or intranet sites often use the Publishing Site template as a starting point. However, you can include document and image libraries as well as lists and other web part objects.

Publishing Site with Workflow

SharePoint bases the Publishing Site with Workflow template on the Publishing Site template but adds the ability to include workflows. Workflows might require documents to have approval before making them available for the general user to view.

Note Within a Publishing Site with Workflow, you can only build subsites using the Publishing Site with Workflow template.

News Site

The News Site template manages all types of news from basic news article pages to RSS feeds and photos. It also supports archiving of old news items rather than deleting them so they can always be searched later.

If it is the case that you do not have the Create Subsite permission, you will not be able to create your own sites. However, if you are responsible for content and working within one or more sites to add and maintain content, you should still have a basic understanding of the available site templates. For the purposes of much of this book, I will focus on several of the basic web site types that specialize in collaboration and interaction using Microsoft Office. By specifying the capabilities you need in a site and perhaps even the web part features, you can select the best site template for your needs.

Collaboration Portal

You must use the Collaboration Portal template to create the first site in a new site collection. Collaboration portals can form the framework around building an organization's intranet. They can include subsites, news sites, Search Centers, team sites, and others where the organization's employees can collaborate on projects and publish documents and lists of information that they want only other employees of the organization to see.

Publishing Portal

The Publishing Portal template differs from the Collaboration Portal template in that it has an outward-facing orientation or internet pages. Often SharePoint developers will customize the look and feel of these sites to establish a "branding" through the use of themes, custom master pages, and CSS files. Being outward facing, organizations use the Publishing Portal template to publish information that they want the general public to see.

Note The top-level site publishing templates described here can only be created from SharePoint's Central Administrator site.

Library Types

One of the most basic objects that you can add to most sites is a library. Libraries store documents, images, reports, and other objects. Some libraries serve as a general collection point for many different types of documents. You can create other libraries for very specific purposes with only particular file types allowed. Thus the type of library you need depends on what type of information you want to store in the library. Let's examine the basic library types shown in Figure 1-7 and how you can use them.

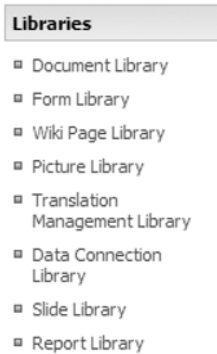


Figure 1-7. *Library templates*

Document Library

The Document Library is the most common library type. It can hold any document type that you would normally find in a directory on your computer's hard disk. A document library, like a disk directory, typically stores various file types with little or no relationship to each other. However good file management applies as much to SharePoint libraries as it does to your hard disk. Just as you would create different directories for different types of files, projects, or applications, you should consider organizing your document libraries so all files in one document library have a common focus, perhaps even a common type.

Form Library

The Form Library stores the XML source documents for forms created with Microsoft Office InfoPath. Users with InfoPath installed on their local computer can form definitions stored here and then publish them as templates for other libraries. I cover working with InfoPath and form libraries in more detail in Chapters 9 and 10.

Wiki Page Library

The previous section briefly described wiki sites, and you saw that they provide a forum for users to add their own content on individual topics. So it should come as no surprise that wiki sites need a special type of library to support that user collaboration. SharePoint uses the Wiki Page Library as the storage container to hold all wiki page content.

Picture Library

The Picture Library provides a common place to store images for content pages in your site. You might also use a picture library to store images or photographs for your sales or marketing staffs to help them provide a consistent message. Picture libraries also provide a storage location for pictures used in web pages. You will learn more about picture libraries in Chapter 12.

Translation Management Library (MOSS 2007 only)

The Translation Management library is found only in MOSS 2007, where advanced site designers use it to manage translation workflows. A Translation Management workflow manages the