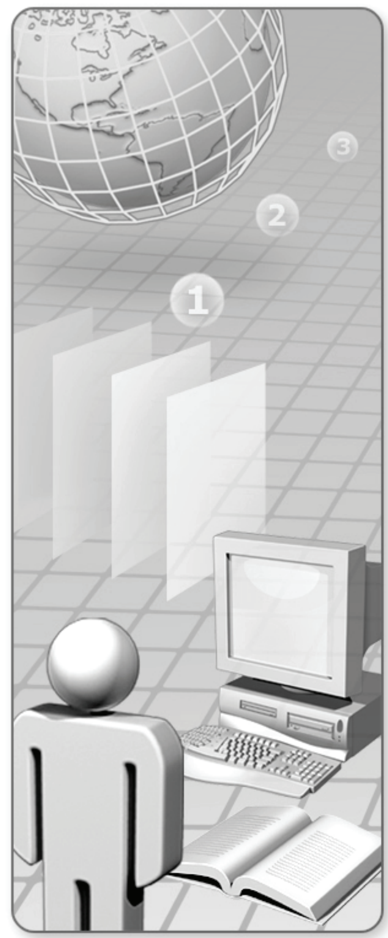
Microsoft

Demonstration Steps for Module 1: Introduction to the Windows SharePoint Services 3.0 Platform



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Lesson 1: Overview of Windows SharePoint Services 3.0

There are no demonstrations in this lesson.

Lesson 2: Collaboration Technologies Provided by Windows SharePoint Services 3.0

Demonstration: Exploring Document Storage and Management

If the virtual machine 5060A-WSS-SRV-INST-1 is not running, perform the following steps:

1. Close any other running virtual machines.
2. Start the 5060A-WSS-SRV-INST-1 virtual machine.
3. In the **Welcome to Windows** dialog box, complete the logon procedure by typing the user name **Administrator** and the password **Pa$$w0rd**.

Perform the following tasks to explore document storage and management:

▶ Edit a document in a document library

Tell the students that WSS allows them to modify the documents stored in a document library. Perform the following steps to edit a document:

1. To open the team site, type the following link in the browser, **http://wss-srv1**.
2. In the **Connect to WSS-SRV1.ADVENTURE.COM** dialog box, type the following logon details:
   - User name: **Administrator**
   - Password: **Pa$$w0rd**

> **Note:** After completing step 2, you may receive an Internet Explorer warning message stating "Content from the Web site listed below is being blocked by the Internet Explorer Enhanced Security Configuration." In this message box, ensure that the Continue to prompt when Web site content is blocked check box is selected, and then click Add. In the Trusted sites dialog box that appears, click Add, and then click Close. This would add your site to the list of Trusted sites.

3. On the **Team Site** home page, click the **My Library** link under the **Documents** section. Notice that the document library contains a file called Test.
4. Move the mouse pointer over the Test file. From the drop-down list, select **Check Out**.

> **Tip:** You can edit a document and save it as a new version without checking it out. You can later restore this version.

5. In the dialog box, click **OK** to confirm the folder location for the file.
6. Browse to the **C:\Documents and Settings\Administrator\My Documents\SharePoint Drafts** folder. Double-click the file to open it in Microsoft Word.
7. On the logon screen, type user name as **Administrator** and password as **Pa$$w0rd**.
8. After you modify the document, click **Save**. On closing Word, a message box prompting you to check in the document appears. Click **Yes**.

> **Tip:** Select Yes if you want to continue working on the document or do not want anyone else to check the document out. For example, you are going for a meeting and plan to work on the document when you get back. In this scenario, you can keep the document checked out but save your current changes up to the WSS server.

9. In the **Version Comments** dialog box, you can provide any further details and then click **OK**.
10. Close Windows Explorer.

> **Optional demos:** The following demos on “Create a document library” and “Add a document to a document library” are optional, and you may choose to demonstrate them if the students ask specific questions about creating a document library.

▶ Optional: Create a document library

Perform the following steps to create a document library:

1. On the **Quick Launch** bar, click the **Documents** link.
2. On the **All Site Content** page, click the **Create** button.
3. On the **Create** page, under the **Libraries** column, click the **Document Library** link.
4. On the **New** page, for the purpose of this demonstration, use the following values:
   - Name: **My Library1**
   - Description: **This is my library**.
   - Navigation: Yes

> **Note:** The above step displays the document library on the Quick Launch bar.

   - Document Version History: No

> **Note:** This ensures that versions of the document are not created every time the document is edited.

- Document Template: **Microsoft Office Word document**

> **Note:** This is the default template for all new files created in this document library.

5. After you have specified the above values, click the **Create** button. This creates the My Library document library, which is listed under the Documents section.

▶ Optional: Add a document to a document library

Perform the following steps to add a document to the My Library1 document library:

1. On the **Quick Launch** bar, click the **My Library1** link.
2. On the **My Library1** page, move the cursor over the **New** menu, click the drop-down list button, and then select **New Document**.
3. In the **Connect to WSS-SRV1-ADVENTURE.COM** dialog box, enter the user name **Administrator**, and the password **Pa$$w0rd**.
4. On the blank Word document that opens, type some text, such as "**This is a test file**".
5. Select **Save As**, name the file **test1**, and click the **Save** button. Exit Word. The file now appears in the My Library1 document library.

▶ Add a content type to a document library

Perform the following steps to add a content type to a document library:

1. On the **Quick Launch** bar, click the **My Library** link.
2. On the **My Library** page, move the cursor over the **Settings** menu and click the drop-down list button.
3. From the drop-down list, select **Document Library Settings**.
4. On the **Customize My Library** page, under the **Content Types** section, click the **Add from existing site content types** link.
5. On the **Add Content Types: My Library** page, from the **Select site content types from:** drop-down box, click **All Groups**.

> **Note:** The above step extracts the content types from all available content types groups in WSS. Alternatively, clicking **Document Content Types** in the drop-down box extracts content types for document libraries.

6. Select the content type from the **Available Site Content Types:** list. For example, click **Form** and then click the **Add** button.
7. After selecting all the content types that you require, click **OK**. This takes you back to the Customize My Library page where you can see your selected content types listed under the Content Types section.

Tip: You can modify the default content type and the order of the selected content types by using the Change new button order and default content type link. You can also configure a new content type which can use its own unique template. In addition, you can create a content type and display it under the New button by clicking the **Site content types** link in Site Settings.

▶ View the version history of a document

Perform the following steps to view the version history of a document:

1. On the **Team Site** home page, under the **Documents** section, click the **My Library** link.
2. Move the pointer over the Test file on the **My Library** page and click the **drop-down** list button.
3. From the drop-down list, select **Version History**. This displays all the versions of the document since it was created.

Optional demos: The following demos on "Apply version control to a document" and "Restore a previous version of a document" are optional, and you may choose to demonstrate them if the students ask specific questions about applying version control.

▶ Optional: Apply version control to a document

Perform the following steps to apply version control to a document:

1. On the **Quick Launch** bar, click the **My Library** link.
2. On the **My Library** page, move the cursor over the **Settings** menu and click the drop-down button.
3. From the drop-down list, select **Document Library Settings**.
4. On the **Customize My Library** page, in the **General Settings** column, click the **Versioning settings** link.
5. On the **Document Library Versioning Settings: My Library** page, for the purpose of this demonstration, use the following values.
   - Content Approval: No

Note: Setting Content Approval to "No" indicates that no approval is required for any documents in the library. When enabling content approval for the library, the Versioning History setting should be set to create either major versions only or major and minor versions, but should not be set to "No versioning." To approve or reject a document, in View Properties of the document, click the approve/reject item link depending on the status.

- Create a version each time you edit a file in this document library: **Create major versions**
- Keep the following number of major versions: **3**

> **Note:** Explain that when No versioning is selected, the options under *Optionally limit the number of versions to retain*: are not enabled. These options are enabled when you select Create major versions or *Create major and minor (draft) versions*.
>
> Major versions are considered published versions, and drafts are minor versions. In the version history list, major versions are indicated with whole numbers, such as 2.0, and minor versions are indicated as decimal numbers such as 2.1. To convert a minor version into a major version, you need to publish it by clicking the Publish button.

- Draft Item Security: Ignore this option.

> **Note:** Explain that *Draft Item Security* specify who should be able to view the draft items in the document library.

- Require Check Out: Yes. This enables you to edit the document, while others can only view it.

6. After you have specified the values, click **OK**.
7. On the **Customize My Library** page, click the **My Library link** on the bread crumb. This takes you to the My Library page.

▶ Optional: Restore a previous version of a document

> **Note:** Before restoring the previous version of the document, ensure that it has been checked out.

Perform the following steps to restore a previous version of a document:

1. Move the pointer over the Test file on the **My Library** page.
2. From the drop-down list, select **Version History**.
3. Move the cursor over the date/time link of one of the previous versions of the **Test** file and click the drop-down link.
4. Click **Restore**.
5. In the pop-up message box, click **OK** to confirm that you want to replace the current version with the selected version.

▶ Restore a document from Recycle Bin

Perform the following steps to restore a deleted document from the Recycle Bin:

1. On the **Quick Launch** bar, click the **Recycle Bin** link. Observe that a deleted document called Sample.docx is in the Recycle Bin page.
2. Select the check box next to the Sample.docx file and click the **Restore Selection** link.
3. In the pop-up window that informs you about the restoration, click **OK**. Observe that the document is back on the My Library page.

▶ Restore a document from the site collection Recycle Bin

Perform the following steps to restore a deleted document from the site collection Recycle Bin:

1. On the **Quick Launch** bar, click the **My Library** link.
2. On the **My Library** page, delete the Sample file. Move the cursor over the file name, click the drop-down, and select **Delete**.
3. On the **Quick Launch** bar, click the **Recycle Bin** link.
4. Select the check box next to the Sample file and click the **Delete Selection** link.
5. In the pop-up window that informs you about the deletion, click **OK**.

> **Note:** The Sample.docx file no longer appears in the Recycle Bin, but it is still recoverable. When performing this step, explain to the students that one requires administrative rights to restore documents from the site collection Recycle Bin.

6. Click the **Site Collections Recycle Bin** link above the selection bar.
7. Select the **Deleted from end user Recycle Bin** view.
8. Select the check box next to the Sample file and click the **Restore Selection** link. In the pop-up window that informs you about the restoration, click **OK**. Observe that the document is back on the My Library page.

> **Note:** Ensure that the Deleted from end user Recycle Bin view is selected.

▶ Optional: Delete a document

Perform the following steps to delete a document:

1. On the **Quick Launch** bar, click the **My Library** link.
2. Move the pointer over the Test file. From the drop-down list, select **Delete**.
3. In the pop-up window that informs you of the deletion, click **OK**. This sends the document to the Recycle Bin. Observe that the Test file is no longer listed on the My Library page.

▶ Edit a project task tracking list

As the project progresses, you can update the status of the items in the project to reflect the current status of the items. Perform the following steps to edit a project task tracking list:

1. On the **Team Site** home page, under the **Lists** section, click the **Track_project** link. Notice that the Track_project list contains Track_file.
2. To edit the file, click the **Track_file** link.
3. Click the **Edit Item** link.
4. On the **Track_project: Track_file** page, change the value of % Complete to **50**, and then click **OK**. This takes you back to the Track_project page. Observe that the % Complete column gets updated.

> **Optional demo:** The following demo on “Create a task tracking list” is optional, and you may choose to demonstrate it if the students ask specific questions about creating and configuring the Project Task Tracking list.

▶ Optional: Create a task tracking list

Perform the following steps to create a task tracking list for a project:

1. On the **Quick Launch** bar, click the **Lists** link.
2. On the **All Site Content** page, click the **Create** button.
3. On the **Create** page, in the **Tracking** column, click the **Project Tasks** link.
4. On the **New** page, for the purpose of this demonstration, use the following values:
   - Name: **Track_project1**
   - Description: **This is a test task.**
   - Navigation: Yes
5. After you have specified the values, click the **Create** button.

6. On the **Track_project1** page, you now need to add items such as files or folders to the project to track them. To add a file, click the **New** link.
7. On the **Track_project1: New Item** page, for the purpose of this demonstration, use the following values:
   - Title: **Track_file1**
   - Priority: **High**
   - Task Status: **In Progress**

> **Note:** Also explain the situations when the student should select other options such as Not Started, Completed, Deferred, or Waiting on someone else.

   - % Complete: **5**

> **Note:** Explain that % Complete indicates that the specified percentage of the task has been completed.

   - Assigned To: **DPark**
   - Description: **This is a test tracking list.**
   - Start Date: **10/15/2006**

> **Note:** You can also click the Calendar icon and select a due date.

8. After you have specified the values, click **OK**. This takes you back to the Track_project1 page. Observe that Track_file1 has been added to the project tracking list.

▶ Edit an issue list

You can update the items in the issue list to reflect the current status of the issue. Perform the following steps to edit an issue list:

1. On the **Quick Launch** bar, click the **Track_issue** link.
2. Move the mouse pointer over the Track_issue_one link and click the **drop-down** button.
3. Click **Edit Item**.
4. On the **Track_issue: Track_issue_one** page, assuming that the issue has been addressed, change the value of Issue Status to **Resolved**, and then click **OK**. This takes you back to the Track_issue page. Observe that the Issue Status column reflects the change.

Optional demos: The following demos on "Create an issue list" and "Add an issue to an issue list" are optional, and you may choose to demonstrate them if the students ask specific questions.

▶ Optional: Create an issue list

Perform the following steps to create an issue list:

1. On the Quick Launch bar, click the **Lists** link.
2. On the **All Site Content** page, click the **Create** button.
3. On the **Create** page, in the **Tracking** column, click the **Issue Tracking** link.
4. On the **New** page, for the purpose of this demonstration, use the following values:
   - Name: **Track_issue1**
   - Description: **This is a test issue tracking list.**
   - Navigation: **Yes**
5. After you have specified the values, click the **Create** button. This creates an issue tracking list, which appears on the Quick Launch bar.

▶ Optional: Add an issue to an issue list

To track issues, you need to add them to an issue list. Perform the following steps to add an issue to the Track_issue1 list:

1. On the **Quick Launch** bar, click the **Track_issue1** link.
2. On the **Track_issue1** page, click the **New** link or select **New Item** in the drop-down button.
3. On the **Track_issue1: New Item** page, for the purpose of this demonstration, use the following values:
   - Name: **Track_issue_two**
   - Assigned To: **DPark**
   - Issue Status: **Active**

Note: Explain that an "Active" status indicates that the issue is alive. If an issue has been addressed, you can edit it and select Resolve.

- Priority: **High**
- Category: **Category 2**

> **Note:** You need to explain related issues. Related issues are secondary issues that are related to the primary issue. For example, a primary issue is that the DHCP server is not responding. The related issue could be that users are unable to access the Financial server. If there are no other issues in the list, then the related issues list box on the left side will be empty. To add a secondary issue, you need to create a new issue. Then, you can add it as a related issue by clicking the Add button in the Related Issues section.

- Comments: **Issue list for test**
- Due Date: **12/12/2006**

4. After you have specified the values, click **OK**. This adds the issue to the Track_issue list.

Demonstration: Exploring Collaboration

Perform the following tasks to explore collaboration:

▶ Add a blog entry

Perform the following steps to add a blog entry:

1. On the **Quick Launch** bar, click the **test_blog** link.
2. The **Admin Links** Web Part on the **blog** page contains a set of links that help you edit and maintain your blog. For example, if you want to post some content, click the **Create a post** link.
3. On the **Post: New Item** page, enter the Title, Body, and Category details and click the **Publish** button. Publishing a blog entry approves it for public viewing.

> **Tip:** You can also save a blog entry as a draft instead of publishing it. You can access the draft later by selecting Manage posts and then publishing it. In addition, you can use the other links provided in the Admin Links Web Part to manage posts, comments, content, and permissions. You can also provide links to other blogs, photos, and archives in your blog site.

▶ Delete a blog

Perform the following steps to delete a blog:

1. On the **test_blog** page, click the **Site Actions** button.
2. From the drop-down list, select **Site Settings**.
3. In the Site Administration column, click the **Sites and workspaces** link.

4. Select the **delete** icon next to the test_blog site you wish to delete. On the **Delete This Site** page, click the **Delete** button.
5. In the pop-up window, click **OK**.

> **Optional demo:** The following demo on “Create a blog” is optional, and you may choose to demonstrate it if the students ask specific questions about creating a blog.

▶ Optional: Create a blog

Perform the following steps to create a blog:

1. On the **Quick Launch** bar, click the **Sites** link.
2. On the **All Site Content** page, click the **Create** button.
3. On the **Create** page, in the **Web Pages** column, click the **Sites and workspaces** link.
4. On the **New SharePoint Site** page, for the purpose of this demonstration, use the following site details:
   - Title: **test_blog1**
   - Description: **This is a test blog**.
   - URL name: **http://wss-srv1/test_blog1**
   - Select a template: select **Blog** from the **Collaboration** tab
   - User Permissions: **Use same permissions as parent site**

> **Tip:** Selecting Use same permissions as parent site applies the permissions of the parent site to the blog. Selecting Use unique permissions takes you to the Set Up Groups for this Site page, where you can specify access permissions.

   - In the **Navigation** section, click **Yes** for displaying this site on the Quick Launch bar of the parent site. Click **No** for displaying this site on the top link bar of the parent site.
   - In the **Navigation Inheritance** section, click **No** for using the top link bar in the parent site.
5. After you have specified the site details, click the **Create** button. This creates a new blog, which appears as one of the links on the Quick Launch bar.

▶ Edit a wiki

Perform the following steps to edit a wiki:

1. On the **Quick Launch** bar, click the **Test_wiki** link.
2. On the **Test_wiki** page, click the **Edit** link.
3. On the **Wiki Pages: Home** page, which contains a text editor that allows you to make changes to the wiki content, edit the content, and then click **OK**.

▶ View the version history of a wiki

Perform the following steps to view the version history of a wiki:

1. On the **wiki** page, click the **History** link. The page reflects the additions and deletions you made to the wiki content.
2. To view the versions of the wiki, click the **Version History** link. This opens the Versions saved for the Home.aspx page, and you can observe all the versions of the Home page maintained here. You can further view, restore, or delete any of the versions.

> **Note:** Explain to the students that they can manage permissions, check out, apply, and delete alerts to a wiki. For each of these activities, there are links available.

> **Optional demo:** The following demo on "Create a wiki" is optional, and you may choose to demonstrate it if the students ask specific questions about creating a wiki.

▶ Optional: Create a wiki

Perform the following steps to create a wiki:

1. On the **Quick Launch** bar, click the **Sites** link.
2. On the **All Site Content** page, click the **Create** button.
3. In the **Web Pages** column, click the **Sites and workspaces** link. On the **New SharePoint Site** page, for the purpose of this demonstration, use the following site details:
   - Title: **Test_wiki1**
   - Description: **This is a test wiki.**
   - Url name: **http://wss-srv1/test_wiki1**

- Select a template: select **Wiki Site** from the **Collaboration** tab
- User Permissions: **Use same permission as parent site**
- In the **Navigation** section, leave at default settings
- In the **Navigation Inheritance** section, select **No**

4. After specifying the site details, click the **Create** button. This creates a new wiki, and you will be directed to your wiki home page.

Demonstration: Exploring Information Management and Communication

Perform the following tasks to explore information management and communication:

▶ Create an alert

Perform the following steps to create an alert:

1. On the **Team Site** home page, click the **Welcome <System Account>** button.
2. From the drop-down list, select **My Settings**.
3. On the **User Information** page, which helps you to configure your account settings, click the **My Alerts** link.
4. On the **My Alerts on this Site** page, which lists all the alerts on your WSS site, click the **Add Alert** link.
5. On the New Alert page that contains all the items within your WSS site, you can either add an alert to track the changes made to lists or to individual items within those lists. To add an alert to track the changes made to the **Test.docx** file within My Library, click the **View this list…** link.

> **Note:** Explain that selecting an item from the New Alert page also takes you through the same set of steps as in the case of individual items for the entire list.

6. On the **My Library** page, move the mouse pointer over a file name and click the drop-down list button.
7. From the drop-down list, select **Alert Me**.
8. On the **New Alert** page, which by default contains values, you can modify the values. For the purpose of this demonstration, specify the following values:
   - Send Alerts For These Changes: **Anything Changes**
   - When to Send Alerts: **Send e-mail immediately**
9. After you have specified the values, click **Cancel**. Your alert would be listed in the My Alerts on this Site page. Every time the status of the Test.docx file changes, the selected users will be notified through an e-mail message.

> **Note:** Inform the students that alerts can only function if the outgoing e-mail settings are suitably configured. To explain the use of alerts, delete the **Test.docx** file from My Library. Notice that you have received an alert message notifying you that the **Test.docx** file has been deleted.

▶ Check the settings of an RSS feed

By default, RSS feeds are set to On. Perform the following steps to check the settings of an RSS feed:

1. On the **Team Site** home page, click the **Site Actions** drop-down button.
2. Select **Site Settings**.
3. On the **Site Settings** page, in the **Site Administration** column, click the **RSS** link. The RSS page displays where you can enable or disable RSS settings for your site.

> **Note:** To view RSS feeds on a library or list, click the **library** or **list** link from the **Quick Launch** bar. Click the **Actions** drop-down button, and then select **View RSS Feed**.

▶ Performing a search

To search sites and lists within WSS, type the text you want to search in the Search text box in the Team Site home page and click the lens icon. The search results are displayed on the page. For example, to search for the Test.docx file, specify **test** in the Search text box, and then click the **lens** icon. The result is displayed on the Search Results page.

For additional security, lists can be exempted from search. This requires you to set up an exclusion when creating the list or exclude the search path in the search settings. In addition, if a user does not have rights to a list, the user cannot search the list.

▶ Add a topic to a discussion board

Perform the following steps to add a topic to a discussion board:

1. On the **Quick Launch** bar, click the **Test_discussion_board** link.
2. Click the **New** drop-down button, and then select **Discussion**.
3. On the **New Item** page, type the subject and a brief description about the discussion in the Subject and Body text boxes, respectively, and then click **OK**. This creates a new discussion within the discussion board.

> **Note:** You can further edit the discussion, manage its permissions, delete it, or request for alerts. Users with appropriate permissions can participate in this discussion.

Optional demo: The following demo on "Create a discussion board" is optional, and you may choose to demonstrate it if the students ask specific questions about creating discussion boards and discussions.

▶ Optional: Create a discussion board

To conduct a discussion, you need to create a discussion board and then add discussions to it. Perform the following steps to create a discussion board:

1. On the **Quick Launch** bar, click the **Discussions** link.
2. On the **All Site Content** page, click the **Create** button.
3. On the **Create** page, in the **Communications** column, click the **Discussion Board** link.
4. On the **New** page, for the purpose of this demonstration, use the following values:
   - Name: **test_discussion_board1**
   - Description: **This is a test discussion board.**
   - Display this list on the Quick Launch?: Yes
5. After you have specified the values, click the **Create** button. The discussion board appears on the Quick Launch bar.

▶ Respond to a survey

Perform the following steps to respond to a survey:

1. On the **Quick Launch** bar, click the **Test_survey** link.
2. On the **Test_survey** page, click the **Respond to this Survey** link.
3. On the **Test_survey: Respond to this Survey** page, provide your inputs appropriately to the questions to the survey. For example, the default answer to the question, Have you used WSS 2.0 before?, is Yes because the check box appears selected. If your answer is No, clear the check box and click the **Finish** button.

Note: You can also view a graphical summary of the responses by clicking the **Show a graphical summary of responses** link. To view all responses, click the **Show all responses** link.

Optional demos: The following demos on "Create a survey" and "Add questions to a survey" are optional, and you may choose to demonstrate it if the students ask specific questions about creating a survey.

▶ Optional: Create a survey

Perform the following steps to create a survey:

1. On the **Quick Launch** bar, click the **View All Site Content** link.
2. Click the **Create** button.
3. On the **Create** page, in the **Tracking** column, click the **Survey** link.
4. On the New page, for the purpose of this demonstration, use the following values:
   - Name: **test_survey1**
   - Description: **This is a sample survey.**
   - Display this survey on the Quick Launch: No
   - Show user names in survey results: Yes
   - Allow multiple responses: Yes
5. After you have specified the values, click the **Next** button. This creates the survey for you.

▶ Optional: Add questions to a survey

Perform the following steps to add questions to a survey:

1. On the **New Question: test_survey1** page, enter a sample question in the **Question** text box.
2. Select the type of answer you want from participants. For example, **Choice**.
3. You can provide further question settings such as:
   - Require a response to this question: Yes
   - Type each choice on a separate line: **First Choice**
   - Display choices using: **drop-down menu**
   - Allow ‘Fill-in’ choices: No
   - Default value: Choice

> **Note:** You can also specify the branching logic to the questions by configuring the Survey Settings page. Branching logic works with questions of type Choice. This means that you can create multiple questions, edit the question that should branch, and select the choice that should trigger the question.

4. If you want more than one question to be polled, click the **Next Question** button. Otherwise, click the **Finish** button.
5. On the **Customize** page, change the general setting, permissions and policies, and communications for the survey. You can also add further questions to the survey and change its order. The survey is listed on the Survey page.