SHAREPOINT 1, 2, 3!

PART OF THE TRAINING 1, 2, 3! SERIES

LEVEL 100 COURSE MATERIALS
HANDS-ON LAB LESSON GUIDE

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DAN ATTIS, SENIOR DEVELOPER
MATT RANLETT, SENIOR SYSTEMS ANALYST
KEITH ROME, CONSULTANT
BRENDON SCHWARTZ, COLLABORATION EVANGELIST

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WINDOWS SHAREPOINT SERVICES

Objectives	After completing this lab, you will understand the steps required to install and use Windows SharePoint Services 1. Install WSS on a clean Windows Server 2003 machine 2. Create a blank team site 3. Configure, customize, and use a WSS site, including lists, document libraries, and workspaces.
Scenario	This lab walks you through the steps to install Windows SharePoint Services and set up your first blank team site. With your blank team site you will begin to add the components most commonly used by business users
Setup	The lab machine requires the following software be pre-installed before beginning this lab: • Windows Server 2003 + Service Pack 1 o Install IIS and create an application server. o Remove FrontPage 2000 server extensions • SQL Server 2000 + Service Pack 4 • Reporting Services + Service Pack 2 • Microsoft Office 2003 Professional

Estimated time to complete this lab: 120 minutes

EXERCISE 1: INSTALLING WINDOWS SHAREPOINT SERVICES

SCENARIO

It is difficult to understand how a Windows SharePoint Server has its team sites and workspaces laid out. To help us understand what we are working with, we need a web part that shows us exactly what sites have been built off of the root..

Tasks	Detailed Steps
1. Create a new machine user	1. Right-click 'My Computer' 2. Select Manage 3. System Tools…Local Users and Groups…Users 4. Action…New User 5. Fill out the UserName and Password 6. Uncheck 'User must change password at next logon' 7. Check 'User cannot change password' and 'Password never expires'
2. Add the new user to the Administrator group	1. In the Computer Management dialog, select System Tools…Local Users and Groups…Groups 2. Double click Administrators 3. Click Add 4. Type your new user name into the text box and click Check Names to prevent typos 5. Click OK
3. Add the same user to SQL Server as a SQL Login	1. Open Enterprise Manager 2. Open the (local) server 3. Select Security…Logins 4. Right-click logins and select New Login 5. Fill in the new user name you added above. 6. Select Windows Authentication, fill in the domain name and select Grant access under the security access section. 7. Leave the database and language selections at the default values.
4. Assign this new SQL Login rights as a database creator	1. In the New Logon dialog, select the Server Roles tab 2. Check Database Creators 3. Select OK
5. Run en_stsv2.exe	1. Open My Computer…Local Disk (C:)…Downloads 2. Double-click 'en_stsv2.exe' to run the installer
6. Accept the license agreement	1. Check the box, 'I accept the terms of the license agreement' 2. Press 'Next'
7. Choose Server Farm	1. Select 'Server Farm' instead of 'Typical Installation' 2. Press 'Next'
8. Click Install	1.

9. In the newly installed SharePoint Central Administration site, select the current user for the application pool	1. In the 'Configure Administrative Virtual Server' dialog, type 'SharePointConfigAppPool' 2. Select Configurable security account 3. Fill in the User Name and Password dialogs with the name and password of the newly created user 4. Press 'OK'
10. Click OK to restart IIS	1.
11. Enter SQL Server connection information	1. Enter the name of the local machine for the database server 2. Enter 'SharePointConfig' for the name of the SQL Server database name 3. Select to use Windows authentication for the database connection type 4. Select the choice that 'Users already have domain accounts. Do not create active directory accounts. 5. Press 'OK'
12. Extend the virtual server	1. Choose 'Configure Virtual Server Settings' on the Central Admin page 2. Choose the web site you want to extend on the Virtual Server list ('Default Web Site') 3. Select 'Extend and create content database'
13. Choose the content database name	1. On the Extend and Create Content Database page, give your application pool a name ('SharePointContentAppPool') 2. Select Configurable security 3. Fill in the user name and password for the new admin user 4. Fill in the admin user as the site owner and e-mail address 5. In the Database Information section, fill in the machine name as the database server and type 'SharePointContent' for the database name 6. Select No Quota (default) 7. Leave the language selection at English 8. Select OK and watch the animated gears turn 9. Select OK at the screen telling you that your virtual server has been successfully extended
14. Create a top level site	1. In the Central Administration, select 'Create Top Level Web Site'
15. Choose a blank site template	1. In the Template Selection screen, choose the Blank Site and press OK
16. Browse to http://localhost/ to see your blank team site.	1.

EXERCISE 2: WORKSPACE & SITES

SCENARIO

In this exercise, you will create a team site – a sales portal. You will grant access to some users and do some simple layout customizations to your new SharePoint portal..

Tasks	Detailed Steps
1. Create a site	1. Click "Create" 2. Click "Sites and Workspaces" 3. Give it the following title and description: "SharePoint123 Sales Portal Demo" 4. Give it the following URL: "SalesPortal" 5. Check "Use unique permissions" 6. Click "Create" 7. Choose a "Blank Site" template 8. Click OK
2. Grant access to users	1. Click "Site Settings" 2. Click "Manage Users" 3. Click "Add Users" 4. Type MachineName\Linda1, MachineName\Brian4, MachineName\David3 in "Users" textarea, separated by semicolons 5. Check "Reader" and "Contributor" 6. Click "Next" 7. Add Emails for users (linda@adventure-works.com, brian@adventure-works.com, david@adventure-works.com 8. Leave unchecked "Send the following e-mail to let these users know they've been added" (the absence of an SMTP mail server will cause an error in SharePoint – setting this mail server up is beyond the scope of this lab) 9. Click "Finish"
3. Simple layout customization	1. Click "Modify Shared Page" 2. Click "Add Web Parts" 3. Click "Browse" 4. Drag various instances of the web parts into content pane (announcements, events, links)

EXERCISE 3: DOCUMENTS

SCENARIO

In this exercise, you will add a document library to your sales portal site. You will add Office documents to this document library.

Tasks	Detailed Steps
1. Create a document library	1. Click "Create" 2. Click "Document Library" 3. Give it a name and description of "Sales Partner Documentation" 4. Check "Yes" to display on the "Quick Launch" bar 5. Check "Yes" for versioning 6. Select a "Document template" 7. Click "Create"
2. Add document to document library	1. Click "New Document" 2. Populate Word document with copy 3. Click "Save" 4. Give document filename 5. Click "Save" 6. Modify document copy 7. Click "Save" 8. Modify document copy 9. Click "Save" 10. Close document 11. Look at "Version History" using dropdown 12. Click "Go Back to Document Library" 13. Look at both "Explorer View" and "All Documents" views 14. Add additional Word documents
3. Upload single document	1. Click "Upload Document" 2. Browse for "OneToTen.xls" (My Documents) 3. Click "Save and Close"
4. Upload Multiple documents	1. Click "Upload Document" 2. Click "Upload Multiple Files..." 3. Check "Even.xls" and "Odd.xls" (My Documents) 4. Click "Save and Close" 5. Click "Yes" in confirm box
5. Save directly to Document Library	1. Open new Word document and add copy 2. Click "Save As" 3. In SharePoint, browse to document library and copy URL from

	location bar 4. Paste URL into filename textbox 5. Remove path and file following document library (remove "/Forms/AllItems.aspx") 6. Type in a filename 7. Click "Save" 8. Close document 9. Refresh if necessary
6. Create a document workspace and collaborate	1. Click on document library 2. Select "Create Document Workspace" from drop down next to one of your documents 3. Click "OK" 4. View workspace 5. Open document in workspace 6. Modify document 7. Save document 8. Select "Publish to Source Location" from drop down next to the document 9. Click "OK" 10. Click "Home" 11. Click "Up to SharePoint123 Sales Portal Demo"

EXERCISE 4: PICTURE LIBRARY

SCENARIO

In this exercise, you will create a team site – a sales portal. You will grant access to some users and do some simple layout customizations to your new SharePoint portal..

Tasks	Detailed Steps
1. Create Picture Library	1. Click "Create" 2. Click "Picture Library" 3. Give it a name and description of "Promotion Pictures" 4. Check "Yes" to display on the "Quick Launch" bar 5. Check "No" for versioning 6. Click "Create"
2. Upload single picture	1. Click "Add Picture" 2. Browse for "photo1.jpg" (My Pictures) 3. Click "Save and Close"
3. Upload Multiple documents	1. Click "Add Picture" 2. Click "Upload Multiple Files..." 3. Select "photo2.jpg", "photo3.jpg", "photo4.jpg" and "photo5.jpg" (My Pictures) 4. Choose whether to upload originals or to optimize for web 5. Click "Update and Close" 6. Click "Go back to "Promotion Pictures"" 7. Look at "All Pictures", "Selected Pictures" and "Explorer View" views 8. Click "View Slide Show" to view slide show

EXERCISE 5: LISTS

SCENARIO

In this exercise, you will create a team site – a sales portal. You will grant access to some users and do some simple layout customizations to your new SharePoint portal..

Tasks	Detailed Steps
1. Announcements Lists	1. Click "Create" 2. Click "Announcements" 3. Give it a name and description of "Company News" 4. Check "Yes" to display on the "Quick Launch" bar 5. Click "Create" 6. Click "New Item" 7. Add title, body and an expiry date 8. Click "Save and Close" 9. Click "Edit in Datasheet" 10. Click "New Row" 11. Add more announcements (only required fields display in Datasheet view). Make "Body" required and have it display in Datasheet view. 12. Click "Modify settings and columns" 13. Click on "Body" in "Columns" section 14. Check "Yes" for required column 15. Click "OK", column will now appear in "Datasheet" view
2. Links List	1. Click "Create" 2. Click "Links" 3. Give it a name and description of "Company Links" 4. Check "Yes" to display on the "Quick Launch" bar 5. Click "Create" 6. Click "New Item" 7. Add URL, description and notes 8. Test the link by clicking "Click here to test" 9. Click "Save and Close" 10. Add additional links
3. Event List	1. Click "Create" 2. Click "Events" 3. Give it a name and description of "Company Links" 4. Check "Yes" to display on the "Quick Launch" bar 5. Click "Create" 6. Click "New Item"

	7. Add title, begin date, description and location 8. Click "Save and Close" 9. Add additional events 10. Look at "Calendar" view
4. Discussions	1. Click "Create" 2. Click "Discussion Board" 3. Give it a name and description of "Sales Team Discussion Board" 4. Check "Yes" to display on the "Quick Launch" bar 5. Click "Create" 6. Click "New Discussion" 7. Add subject and text 8. Click "Save and Close" 9. Click on newly created discussion 10. Click "Post Reply" 11. Add subject and text 12. Click "Save and Close" 13. Click "Expand/Collapse" 14. Look at "Threaded" view as well as "Flat" view
5. Survey	1. Click "Create" 2. Click "Survey" 3. Give it a name and description of "Sales Team Discussion Board" 4. Check "Yes" to display on the "Quick Launch" bar 5. Check "No" for both survey options 6. Click "Create" 7. Add Questions (many types) and Answers (many types) 8. Click "Finish" after adding last question/answer 9. Click "Go Back to "Sales Department Survey"" 10. Click "Respond to this Survey" 11. Answer questions, click "Save and Close" 12. Look at different views (Overview, Graphical Summary, All Responses) 13. Try exporting results to a spreadsheet
6. Custom List	1. Click "Create" 2. Click "Custom List" 3. Give it a name and description of "Volume Discounts" 4. Check "Yes" to display on the "Quick Launch" bar 5. Click "Create" 6. Click "Modify settings and columns" 7. Click on existing column (Title) 8. Make "Column name" and "Description" to "ProductID" 9. Click "OK" 10. Click "Add new column"

11. Make “Column name” and “Description” to “Product Name”
12. Check “Single line of text”
13. Make column required
14. Click “OK”
15. Click “Add new column”
16. Make “Column name” and “Description” to “SKU”
17. Check “Single line of text”
18. Make column required
19. Click “OK”
20. Click “Add new column”
21. Make “Column name” and “Description” to “Quantity”
22. Check “Choice (menu to choose from)”
23. Make column required
24. Add “1-100”, “101-250” and “250+” to choices, each on a separate line
25. Check “Drop-Down Menu”
26. Enter default
27. Click “OK”
28. Click “Add new column”
29. Make “Column name” and “Description” to “Price”
30. Check “Number (1, 1.0, 100)”
31. Make column required
32. Select 2 decimal places
33. Click “OK”
34. Click “Add new column”
35. Make “Column name” and “Description” to “Discount”
36. Check “Number (1, 1.0, 100)”
37. Make column required
38. Select 2 decimal places
39. Enter 0 for default value
40. Click “OK”
41. Click “Add new column”
42. Make “Column name” and “Description” to “Expires”
43. Check “Date and Time”
44. Make column required
45. Click “OK”
46. Click “Add new column”
47. Make “Column name” and “Description” to “Unit Price”
48. Add “Price” and “Discount” to “Formula”
49. Enter “=Price-Discount”
50. Check “Number (1, 1.0, 100)” as return data type
51. Select 2 decimal places
52. Click “OK”
53. Click “Go Back to "Volume Discounts"” to view empty custom

	list 54. Click “New Item” 55. Enter ProductID (8), Product Name (Mountain-500 Black, 40), SKU (BK-M18B-40), Quantity (1-100), Price (399.00), Discount (0.00), Expires (12/31/2005) 56. Click “Save and Close” 57. Click “New Item” 58. Enter ProductID (8), Product Name (Mountain-500 Black, 40), SKU (BK-M18B-40), Quantity (101-250), Price (399.00), Discount (50.00), Expires (12/31/2005) 59. Click “Save and Close” 60. Click “New Item” 61. Enter ProductID (8), Product Name (Mountain-500 Black, 40), SKU (BK-M18B-40), Quantity (251+), Price (399.00), Discount (100.00), Expires (12/31/2005) 62. Click “Save and Close” 63. Click “Modify settings and columns” 64. Click “All Items” under “Views” 65. Expand “Group By” 66. Select “SKU” as 1st group by column 67. Click “OK” 68. Click “Go Back to "Volume Discounts"” to view grouped list