

# **TeamRoom User Guide**

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November 2007  
Product Revision Level 7.0  
Document Revision 2.2

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# Prerequisites



It is assumed that:

- you have been approved to use this application with appropriate roles
- the tasks labeled **Site Owner** tasks can only be performed if you have the Site Owner role.
  - if you are working in the Site Owner section, It is assumed that you are already experienced with this application from an end-user perspective. If not, please review the help text for “members” role before proceeding.

## Roles and Privileges

Roles and privileges within TeamRoom are assigned to a user or to a group. These are defined as:

Role	Privileges	Definition
Visitor	Read-only	Can view items
Member	Contribute	Can view, add, update, and delete items
Site Owner	Full Control	Has full control of site, including the management of: <ul style="list-style-type: none"><li>• user / group access and rights</li><li>• all libraries in the site</li><li>• site layout and setup</li></ul>

## Section I: Members

### *Blogs*

#### Adding Comments to a Blog

1. Navigate to the Blog to which you wish to add a comment.
2. Click **Comments** link located in the lower right corner of the Blog.
3. Scroll to the bottom of the page.
4. In the title field, key in the title of your comment, as you wish it to appear to other readers of the blog.
5. In the body field, key in the body of your comment as you wish it to appear to other readers of the blog.
6. Click **Submit Comment**.

#### RESULT:

You have successfully added comments to a blog.

#### Editing Your Blog Comment

1. Navigate to the Blog to which you wish to edit your comment.
2. Click **Comments** link located in the lower right corner of the Blog.
3. Scroll to the comment that you posted that you now wish to edit.
4. Click **Edit** link located at the upper right corner of your comment.
5. Edit as desired.
6. Click **OK**.

#### RESULT:

You have successfully edited your blog comment.

#### Viewing a Blog

Member users are able to view and comment on Blogs. Members can also email the blog post to other users. The other users must have access to the TeamRoom application in order to view the blog.



Member users are not able to create new Blogs. Members are able to add comments to existing Blogs.

#### RESULT:

You have successfully viewed a blog.

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## Viewing Comments in a Blog

1. Navigate to the Blog you wish to view.
2. Click **Comments** link located on the bottom right of the blog (as shown in item 1 above).
3. Read the Blog and comments.
4. Click **OK**.

### RESULT:

You have successfully viewed comments in a blog.

---



## ***Working With Discussions***

### **Creating a Discussion**

1. Click **Discussions**.
2. Click **Discussion** from the New drop-down menu.
3. Key in the required fields.
4. Optionally, click **Attach File** to browse and select a file to attach to the discussion.
5. Click **OK**.

#### **RESULT:**

You have successfully created a new discussion for your team site.

### **Editing a Discussion**

1. Click **Discussions**.
2. Navigate to and click the drop-down arrow at the far right of the discussion name.
3. Click **Edit Item** from that drop-down menu.
4. Edit as desired.
5. Click **OK**.

#### **RESULT:**

You have successfully edited a discussion.

## Removing a Discussion

1. Click **Discussions**.
2. Navigate to and click on the drop-down arrow at the far right of the discussion name.
3. Click **Delete** Item.
4. Click **OK**.

### RESULT:

You have successfully deleted a discussion.

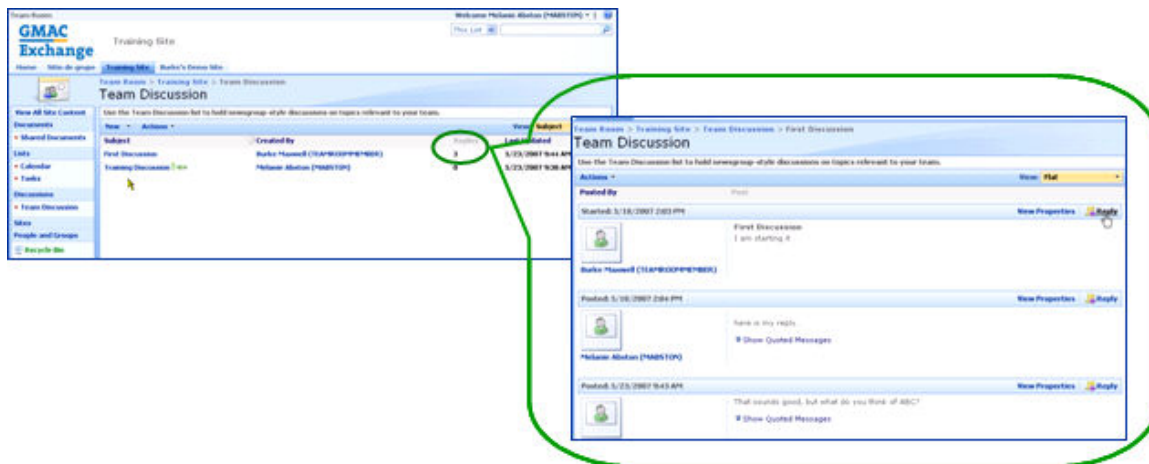
## Replying to a Discussion/Reply

1. Click on the *name of the discussion* as listed in the Subject column of the screen.
2. Read the discussion and replies, if any replies have been posted.
3. Click **Reply** to the far right of the discussion or reply to which you wish to post a reply.
4. Create a reply as desired.
5. Click **OK**.

### RESULT:

You have successfully replied to a discussion/reply.

## Viewing a Discussion/Reply



In the above example, there are three replies to the discussion.

1. Click on the *name of the discussion* as listed in the Subject column of the screen.
2. Read the discussion and replies, if any replies have been posted.

**RESULT:**

You have successfully viewed a discussion/reply.

## Working With Documents

### Checking In a Document

1. Click on a Document Library.
2. Navigate to the document you wish to check in.
3. Click **Upload Document** from the Upload menu item.
4. Click **Browse** and select the file you wish to upload.
5. Optionally, add comments.
6. Click **OK**.
7. Click **Check In**.

#### RESULT:

You have successfully checked in a document.

### Checking Out a Document

1. Click on a **Document Library** – this example uses Shared Documents.
2. Navigate to the document you wish to check out.
3. Click the drop-down arrow to the right of the item (as shown in example 4 above).
4. Click **Check Out**. This locks the file.
5. Right-click on the file name, and save the file to your desktop.
6. Modify the file as desired, and then **save** the file.



Checking out a file 'locks' the file so that other users cannot upload new versions of the file.

#### RESULT:

You have successfully checked out a document.

## Creating a New Folder

1. Click on a **Document Library**.
2. Click **New Folder** from the New menu option.
3. Key in the *name of the new folder*. All other users in your site will view the name of this folder.
4. Click **OK**.

### RESULT:

You have successfully created a new folder.

## Deleting a Document

1. Click on a **Document Library** – this example uses Shared Documents.
2. Navigate to the item you wish to delete.
3. Click the drop-down arrow to the right of the item.
4. Click **Delete**.
5. Optionally, add comments.
6. Click **OK** to confirm deletion.

### RESULT:

You have successfully deleted a document.

## Restoring a Previous Version

1. Click on a **Document Library** – this example uses Shared Documents.
2. Navigate to the document you wish to restore and click the drop-down arrow to the right of the file name.
3. Click **Version History**.
4. Click the drop-down arrow to the right of the version you wish to restore.
5. Click **Restore** from the exposed drop down menu.
6. Click **OK**.

### RESULT:

You have successfully restored a previous version.

## Uploading a New Document

1. Click on a Document Library – this example uses Shared Documents.
2. Navigate to the folder in which you wish to upload the document.
3. Click **Upload Document** from the Upload menu item.
4. Click **Browse** and select the file you wish to upload.
5. Optionally, add comments.
6. Click **OK**.
7. Click **Check In**.

### RESULT:

You have successfully uploaded a new document.

## Working With Lists

### Creating a Calendar Event

1. Click **Lists**.
2. Click **Calendar**.
3. Click **New Item** from the New drop down menu.
4. Key in all required fields of the appointment.
5. Optionally, add an attachment by clicking **Attach File**.
6. Click **OK**.



The Calendar events listed in TeamRoom for your team are for informational purposes only. These events are not synchronized with any other calendar application on your system (such as Outlook, Lotus Notes, etc.).

#### RESULT:

You have successfully created a Calendar event for all users of your site to view.

### Creating a New Link

1. Click **Lists**.
2. Click **Links**.
3. Click **New**.
4. Key in the URL of the link.
5. Optionally, add a description of the web page.
6. Optionally, add notes for your team to view regarding this link.
7. Click **OK**.

#### RESULT:

You have successfully created a new link.

### Creating a Task

1. Click **Lists**.
2. Click **Tasks**.
3. Click **New**.
4. Key in the required field of Title and any optional field as desired.

5. If you wish to assign this task to a user, click in the *Assigned To* field, and search for the user by first and last name.
6. Click **OK**.



The Tasks listed in TeamRoom for your team are for informational purposes only. These tasks are not synchronized with any other Task tracking application on your system (such as Outlook, Project, etc.)

**RESULT:**

You have successfully created a new task.

## Creating an Announcement

1. Click **Lists**.
2. Click **Announcements**.
3. Click **New Item** from the *New* drop down menu.
4. Key in the **Title** of the announcement.
5. Optionally, key in the text (body) of the announcement.
6. Optionally, set an *expiration date* for this announcement via the **Calendar** icon. This is the date the announcement will be removed from the site.
7. Optionally, click **Attach File** and browse and select the file you wish to upload to this announcement.
8. Click **OK**.

**RESULT:**

You have successfully created an announcement.

## Editing a Calendar Event

1. Click **Lists**.
2. Click **Calendar**.
3. Navigate to and click on the Calendar event you wish to edit.
4. Click **Edit Item**.
5. Edit as desired.
6. Click **OK**.


**RESULT:**



You have successfully edited a calendar event.

---

## Editing a Link

1. Click **Lists**.
2. Click **Links**.
3. Navigate to and click  in the Edit column of the link wish to edit.
4. Edit as desired.
5. Click **OK**

### RESULT:

You have successfully edited a link.

---

## Editing a Task

1. Click **Lists**.
2. Click **Tasks**.
3. Navigate to and click the drop-down arrow at the far right of the link name.
4. Click **Edit Item** from that drop-down menu.
5. Edit as desired.
6. Click **OK**.

### RESULT:

You have successfully edited a task.

---

## Editing an Announcement

1. Click **Lists**.
2. Click **Announcement**.
3. Navigate to the announcement you wish to edit.
4. Click the drop-down arrow to the right of the item
5. Click **Edit Item**.
6. Edit as desired.
7. Click **OK**.

**RESULT:**

You have successfully edited an announcement.


## Expiring an Announcement

1. Click **Lists**.
2. Click **Announcement**.
3. Navigate to the announcement you wish to expire.
4. Click the drop-down arrow to the right of the version you wish to expire.
5. Click **Edit Item**.
6. Set the expiration date via the **Calendar** icon
7. Click **OK**.

**RESULT:**

You have successfully expired an announcement.

## Removing a Link

1. Click **Lists**.
2. Click **Links**.
3. Navigate to and click  in the Edit column of the link you wish to remove.
4. Click **Delete Item**.
5. Click **OK**.

**RESULT:**

You have successfully removed a link.

## Working with Wikis

### Adding Pictures to a Wiki

1. Navigate the targeted picture that is stored in your Picture Library
2. Click on the *picture*. The picture is displayed in a new window.
3. Copy the entire URL of the new window in which the picture is displayed.
4. Navigate to the location in the Wiki HTML code where the picture is to be displayed.
5. Paste the URL of the picture.
6. Click **OK**.

#### RESULT:

You have successfully added pictures to a Wiki.

### Checking In/Out a Wiki Page

Administrators of a Wiki have the option of requiring that the Wiki page be checked out prior to editing.

When this is the case, you are able to check out/in a Wiki page in the same manner as you check out/in a document. Refer to the section of this guide entitled Check Out a Document for further details.

### Creating New Wiki Pages



1. Navigate to the Wiki
2. Click **Edit** in the upper left corner of the Wiki page (see **callout 1** above). The content of the Wiki page is displayed.
3. Enclose the name of the page in double brackets. For example, type `[[My Page]]` to create a link to the page named My Page.
4. Click **OK**. The new link is displayed on the Wiki page, and is underlined with a dotted line. (Dotted line = page not yet created. See **callout 2** above).
5. Click on the new link.
6. Add content to the new page as desired.
7. Click **OK**.

**RESULT:**

You have successfully created a new wiki page.

## Editing an Existing Wiki

1. Navigate to the Wiki you wish to edit.
2. Click **Edit** in the upper left corner of the Wiki page. The content of the Wiki page is displayed. (In some cases, you may be required to perform a 'checkout' of the Wiki page prior to editing it).
3. Modify the Wiki as you wish by adding, modifying, or deleting content, links, images, etc.
4. Click **OK**.

**RESULT:**

You have successfully edited a Wiki.

## Linking to Other Wiki Pages

1. Navigate to the Wiki to which you wish to add a link to another page.
2. Click **Edit** in the upper left corner of the Wiki page. The content of the Wiki page is displayed.
3. Type the name of the page you wish to link to this page.
4. Enclose the name of the page in double brackets. For example, type `[[Home]]` to create a link to the page named Home.
5. Click **OK**.

**RESULT:**

You have successfully created links to other existing Wiki page(s).

## Restoring a Previous Version of Your Wiki

1. Navigate to the Wiki you wish to restore.
2. Click **History** in the upper right corner of the wiki page.
3. Click **Version History**. All previous versions of the page are displayed.
4. Click the drop-down arrow to the right of the version you wish to restore.
5. Click **Restore** from the exposed drop down menu.

**RESULT:**

You have successfully restored a version which will now be displayed as a new version.



## Viewing a Wiki



Member users are able to view Wikis. If the member has appropriate access, the member can also edit the Wiki. To view a Wiki, simply click on the Wiki listed in the menu on the left of the screen. This example uses the "Training Wiki".



Member users are not able to create new Wikis. Members are able to add pages to existing Wikis.

## Viewing Incoming Links

View which pages link to the current page by clicking Incoming Links at the top right corner of the Wiki.

This is particularly important to do if you are removing a page from a Wiki, as you will also want to remove all links to the page you are removing.

## Viewing Most Recent Changes To Your Wiki

1. Navigate to the Wiki page you wish to view.
2. Click **History** in the upper right corner of the Wiki page. The most recent changes to content are highlighted along with the name of the person that performed the modification.
3. Click **OK**.

### RESULT:

You have successfully viewed most recent changes to your Wiki.

## Viewing Previous Versions of Your Wiki

1. Navigate to the Wiki you wish to view.
2. Click **History** in the upper right corner of the Wiki page.
3. Click **Version History**. All previous versions of the page are displayed.
4. Click the drop-down arrow to the right of the version you wish to view.
5. Click **View** from the exposed drop down menu.

### RESULT:

You have successfully viewed previous versions.

## Adding Pictures to Your Profile

1. Navigate the targeted picture that is stored in your Picture Library
2. Click on the picture. The picture is displayed in a new window.
3. Copy the entire URL of the new window in which the picture is displayed.
4. Click **All People** in the Quick Launch menu.
5. Navigate to your profile and click on your name.
6. Click **Edit Item**.
7. Paste the URL into the Picture Web Address field.
8. Click **OK**.



Pictures in profiles are limited in size to 62x62 pixels. If your picture is not that size, it may be distorted when displayed.

### RESULT:

You have successfully added pictures to your profile.

## Creating a Picture Library

1. Click **Create** from the Site Actions drop down menu in the upper right hand corner of the screen.
2. Click **Picture Library** under the Libraries column.
3. Key in the name and description of the Picture Library.
4. Enable the *yes/no* radio button to indicate whether this library should appear on the Quick Launch menu.
5. Enable the *yes/no* radio button to indicate whether this library should be versioned.
6. Click **Create**.

### RESULT:

You have successfully created a picture library.

## Managing Alerts Site-Wide

1. Click **Site Actions**.
2. Click **Site Settings**.
3. Click **People and Groups**.

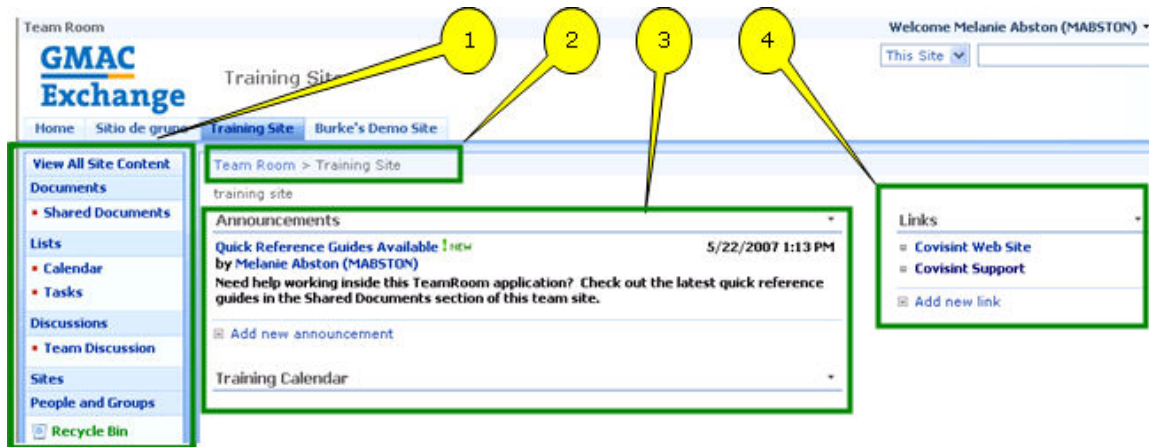


4. Click on your name.
5. Click **My Alerts**.
6. Click **Add Alerts**.
7. Enable the radio button of the library upon which you are setting an alert.
8. Click **Next**.
9. Set frequency.
10. Click **OK**.
11. If desired, repeat steps 5 - 10 for each additional library.

### RESULT:

You have successfully managed alerts.

## Navigating the Home Screen



1. **Navigation Menu** - includes Documents, Lists, Discussions, and Recycle Bin)
2. **Location Path** – used to identify ‘where’ in the site you are currently working, as well as a navigation menu. Click the items in this path to go back / forward.
3. **Announcements and Calendar** for your team – add or read Announcements pertaining to users of this site, and view a calendar of events for users of this site.



The Calendar of Events and To Do Tasks in this TeamRoom application are not synchronized with any other calendar or task list on your computer.

4. **Links** – add or view links pertaining to users of your site.

## ***Permanently Deleting Items from the System***

1. Click **Recycle Bin**.
2. Enable the checkbox of each item you wish to permanently delete from the system. (Items older than 30 days are automatically removed from the system).
3. Click **Delete Selection**.
4. Click **OK**.

### **RESULT:**

You have successfully deleted items.

## ***Requesting Access to a Site***

This option is only available if the Site Owner elected to 'show' the site title on the page.

1. Click the **Welcome <Your Name>** drop down menu in the upper right hand corner of every screen.
2. Click **Request Access**. An email form is displayed.
3. Key in the details regarding the site to which you wish to request access.
4. Click **OK**. An e-mail request is sent to the administrator of that site.

### **RESULT:**

You have successfully requested access to a site.

## ***Requesting Access to TeamRoom***

1. Login to your portal.
2. Click **Manage Your Account** link.
3. Request the TeamRoom Service package inside this administration tool.
4. Your administrator must approve your access request. You will receive an email stating this approval.
5. The TeamRoom link will appear under the Applications list on your portal screen. Click this link to access the TeamRoom application.



NOTE: Your administrator must add your profile information to the TeamRoom application. If you click the TeamRoom link in your Applications list and your administrator has not yet added your profile, you will receive an error message.

**RESULT:**

You have successfully requested access to TeamRoom.

## ***Restoring from the Recycle Bin***

1. Click **Recycle Bin**.
2. Enable the checkbox of each item you wish to restore.
3. Click **Restore Selection**.
4. Click **OK**. All versions of the item are restored.

**RESULT:**

You have successfully restored an item.

## ***Setting Alerts***

You are able to set alerts at the top level, such as 'all documents', or at the item level. For example, if you wish to receive an alert every time a particular document is modified, you are able to do that via alerts. Alternately, you may wish to be alerted each time any action is taken on any item in an entire document library.

1. Navigate to the *item* for which you wish to create an alert. (For example, if you wish to receive an alert for Lists, then click Lists).
2. Navigate to and click the drop-down arrow at the far right of the link name.
3. Click **Alert Me** from the drop-down menu that is displayed.
4. Select the radio button for the type and frequency of alert.
5. Click **OK**.

**RESULT:**

You have successfully set alerts.

## ***Uploading Pictures to Library***

1. Click on your *Picture Library* in the Quick Launch menu. (Refer to the section of this guide entitled Creating a Picture Library if you do not yet have a picture library).
2. Navigate to the folder (if applicable) to which you wish to add this picture.
3. Click **Upload**.
4. Browse and select the picture you wish to upload.
5. Click **OK**. The Properties form is displayed.
6. Optionally, key in property details as desired.

7. Click **OK**.

**RESULT:**

You have successfully uploaded pictures to the Library.

## ***Viewing Groups with Access to the Site***

1. Click **People and Groups**.
2. Click **Groups**. A list of all groups of people that have access to this site is displayed.

**RESULT:**

You have successfully viewed groups with access to your site.

## ***Viewing People with Access to the Site***

1. Click **People and Groups**.
2. Click **All People**. A list of all individuals that have access to this site is displayed.

**RESULT:**

You have successfully viewed people with access to the site.

## Section II: Site Owners

### *Creating and Managing a Site*

#### Adding Communications, Tracking, and Custom Lists

1. Click **Create** from the All Site Content screen.
2. Click on the **Communication type** (Announcements, Contacts, Discussion board).
3. Key in the name and description of the communication.
4. Enable the yes/no radio button indicating that this should/should not appear on the *Quick Launch*.
5. Click **Create**.



If you wish to create a survey, proceed to the section of this help entitled Creating a Survey.

#### **RESULT:**

You have successfully added communications, tracking, and custom lists.

#### Adding Web Parts

1. Navigate to the *Site* to which you wish to add web parts.
2. From the *Site Actions* menu, click **edit page**.
3. Click **Add a web part** in either the Left column window or the Right column window.
4. Enable the checkbox of each web part you wish to add to the page.
5. Click **Add**.
6. Optionally, you may move a web part up or down in the window, or into the opposite (right or left) window. To do so, click on the title of the web part and drag it to the new location.
7. Once satisfied with the web parts and layout, click **Exit Edit Mode**.

#### **RESULT:**

You have successfully added a web part.

#### Canceling an Alert for Another User

1. From the Site Actions drop down menu, click **Site Settings**.

2. From the Site Administration menu, click **User alerts**.
3. In the list next to *Display alerts for*, select the person whose alerts you want to cancel.
4. Click **Update**.
5. Select the check box next to the alert or alerts that you want to cancel.
6. Click **Delete Selected Alerts**.
7. When you are prompted to confirm the deletion, click **OK**, if you are sure that you want to cancel the selected alerts.

### RESULT:

You have successfully cancelled an alert for another user.

## Changing the Name of a Site

1. Navigate to the site you wish to rename.
2. From the Site Actions menu, click **Site Settings**. The Site Settings screen is displayed.
3. Click **Title, Description, and Icon** link in the *Look and Feel* column.
4. Perform one or more of the following:

If you wish to...	Then...
<b>modify the title and description of the site</b>	<ul style="list-style-type: none"> <li>• a. Enable the checkbox of the group to which you wish to add.</li> <li>• b. From the New drop down menu, click <b>Add Users</b>. Refer to the section entitled Adding Users to a Group or Site for further details.</li> </ul>
<b>remove user/group permissions to this document</b>	<ul style="list-style-type: none"> <li>• a. Enable each checkbox of the user and/or group for whom you wish to remove permissions.</li> <li>• b. From the Actions drop down menu, click <b>Remove User Permissions</b>.</li> <li>• c. Click <b>OK</b> to confirm.</li> </ul>
<b>edit user/group permissions to this document</b>	<ul style="list-style-type: none"> <li>• a. Enable the checkbox of the user and/or group for whom you wish to edit permissions.</li> <li>• b. From the Actions drop down menu, click <b>Edit User Permissions</b>.</li> <li>• c. Enable the checkbox of the permission you wish to assign.</li> <li>• d. Disable the checkbox of the permission you wish to remove.</li> <li>• e. Click <b>OK</b> to confirm.</li> <li>• f. Repeat steps a - e for each additional user or group.</li> </ul>

If you wish to...	Then...
allow the document to inherit permissions from the parent site (any custom permissions will be lost)	<ul style="list-style-type: none"> <li>a. From the Actions drop down menu, click <b>Inherit Permissions</b>.</li> <li>b. Click <b>OK</b> to confirm.</li> </ul>

### RESULT:

You have successfully changed the name of a site.

## Creating a Site

1. Click **View All Site Content** (At the upper left of screen).
2. Click **Create**.
3. Click **Sites and Workspaces** from the Web Pages column.
4. Key in the Site Title, and description of site.
5. Key in the URL of the new site. (Most of the URL is pre-created for you, based on the parent site).
6. Click the **Collaboration** tab.
7. Select the template for the site. (Blank Site is most commonly used)
8. Set **User Permissions** to *Use same permissions as parent site* by enabling the radio button. \*Do not select *Unique Permissions*.
9. Configure **Navigation settings**.
10. If you wish to make the new Site a 'tab' in the top navigation bar, click **YES** in the navigation inheritance section at the bottom of the screen. Otherwise click **NO**.
11. Click **Create**.

### RESULT:

You have successfully created a Site. Next, set permissions on your site. Then add libraries, wikis, users, etc., to your site.

## Deleting a Site

1. From the Site Hierarchy in the left menu, click on the *name of the site* you wish to delete.
2. From the Site Actions drop down menu, click **Site Settings**.
3. Click **Delete this site** in the Site Administration column.



Deleting the website will permanently destroy all content and user information

- documents and document libraries
- lists and list data, including surveys, discussions, announcements, and calendar items
- website settings and configurations
- permission levels and security information relating to this site
- groups created in this site

4. Click **Delete**.
5. Click **OK** to confirm site deletion.

#### RESULT:

You have successfully deleted a site. Click the back arrow in your internet toolbar to go back to the site above.

## Managing Access Request Capabilities

1. Navigate to the site you wish to manage.
2. From the Site Actions drop down menu, click **Site Settings**.
3. From the Users and Permissions column, click **Advanced Permissions**.
4. From the Settings drop down menu, click **Access Requests**.
5. Perform one of the following:
  - a. Allow users to request access to this site:
    - i. Enable the Allow Request for Access checkbox. All requests for access will be sent to the email address listed in the following field.
    - ii. Key in the email address of the Site Owner to whom requests should be delivered. The owner of the email address should have the Full Control permission level.
  - b. Disable users from requesting access to this site:
    - a. Uncheck the Allow Request for Access checkbox.
    - c. Click **OK**.

#### RESULT:

You have successfully managed access request capabilities.



## Managing Requests for Access to Your Site



Access requests are delivered to you via email. There are links within the email that point directly to the Add User to Site page. Alternately, you may follow the steps below.

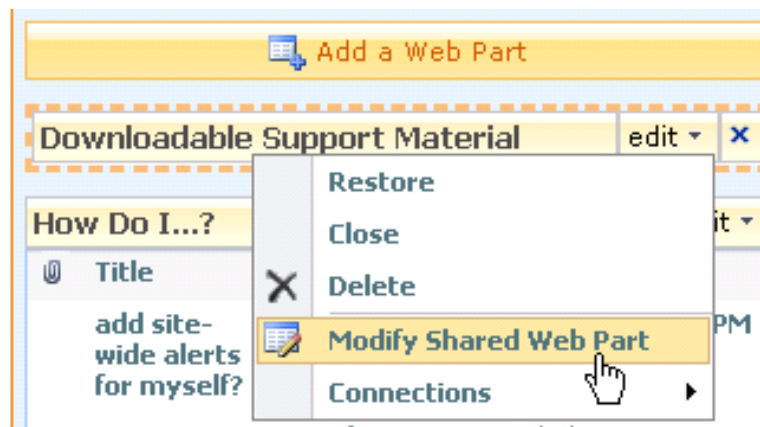
1. Navigate to the Site to which you wish to grant a user access.
2. From the Site Actions drop down menu, click **Site Settings**.
3. Click **Advanced permissions**.
4. From the New drop down menu, click **Add Users**. (Refer to the section entitled Adding Users to a Group or Site for further details).

### RESULT:

You have successfully managed access requests for access to your site.

## Modifying a Web Part

1. Navigate to the *Site* to which you wish to modify web parts.
2. From the *Site Actions* menu, click **edit page**.
3. Click the **Edit** drop down menu to the left of the Web Part title (this example uses *Downloadable Support Material*).



4. Click **Modify Shared Web Part** from the drop down menu. The Edit window pane opens to far right of your screen.
5. Modify as desired.
6. Scroll to the bottom and click **Apply**.



Note: You control whether users are able to minimize and / or delete a web part from their personal views. To do so, click the + Advanced link, and then enable/disable via the appropriate checkboxes.

**RESULT:**

You have successfully modified a web part. Refer to Appendix A for details on modifying a Content Editor web part.

## Modifying Columns in a View

1. Navigate to the *Item* to which you wish to add a column.
2. From the **View** drop down menu, click **modify this view**.
3. Enable the checkbox of each column you wish to add to the view.
4. Disable the checkbox of each column you wish to remove from this view.
5. Optionally, set the order (position in numbered order) of each column (from left to right) as you wish it to appear on the screen via the drop down menu per item.
6. Optionally, configure how the page is sorted, if by column, and then by order (for example, sort by date modified in ascending order).
7. Click **OK**.

**RESULT:**

You have successfully modified columns in a view.

## Creating and Managing Libraries

### Adding a Library

1. Click **Create** from the All Site Content screen.
2. Click on the **Library type** (document, form wiki, or picture).
3. Key in the name and description of the library.
4. Enable the **yes/no** radio button indicating that this library should/should not appear on the Quick Launch. (If you are creating a Wiki library, skip steps 5 – 6).
5. Enable the **YES** radio button to require that versions are created each time the file is edited.
6. Select **NONE** in the document template drop-down menu.
7. Click **Create**.



If you wish to add a Wiki as a SITE and not a Library, proceed to the section of this help entitled Creating a Site.

#### RESULT:

You have successfully added a library.

### Defining Types of Libraries

The type of library that you use depends on the kinds of files that you are sharing:

- **Document library** For many file types, including documents and spreadsheets, use a document library. You can store other kinds of files in a document library, although some file types may be blocked for security reasons.
- **Picture library** To share a collection of digital pictures or graphics, use a picture library. Although pictures can be stored in other types of libraries, picture libraries have several advantages. For example, from a picture library you can view pictures in a slide show, download pictures to your computer, and edit pictures with graphics programs that are compatible with SharePoint. Consider creating a picture library if your team reuses lots of graphics, such as logos and corporate images, or if you want to store pictures of team events or product launches.
- **Wiki page library** To create a collection of connected wiki pages, use a wiki page library. A wiki enables multiple people to gather routine information in a format that is easy to create and modify. You can add to your library wiki pages that contain pictures, tables, hyperlinks, and internal links. For example, if your team creates a wiki site for a project, the site can store tips and tricks in a series of pages that connect to each other.

- **Form library** If you need to manage a group of XML-based business forms, use a form library. For example, your organization may want to use a form library for expense reports. Setting up a form library requires an XML editor or XML design program that is compatible with SharePoint.

## Deleting a Folder

1. Click on the Folder you wish to delete.
2. From the Settings drop down menu, click **Document Library Settings**.
3. Click **Delete** this document library.



NOTE: This folder, and all documents within the folder will be deleted.

4. Click **OK** from the confirmation pop up box.

### RESULT:

You have successfully deleted a folder.

## Working with Libraries

There are many ways that you can work with libraries. As the Site Owner, you are able to:

- **Create and manage views** *You can use a view (view: A set of columns on a Web page that displays items in a list or document library. The view can display sorted or filtered items, a selection of columns, or a custom layout.) to see the items in a library that are most important to you or that best fit a purpose. The contents of the actual library don't change, but the files are organized or filtered to make them easier to find and to browse in a meaningful way.*
- **Require document approval** *You can specify that approval for a document is required. Documents remain in a pending state until they are approved or rejected by someone who has permission to do so. You can control which groups of users can view a document before it is approved.*
- **Track versions** *If you need to keep previous versions versioning: The process of creating a numbered copy of a file or an item whenever a revision is saved to the library or list. of files, libraries can help you track, store, and restore the files. You can choose to track all versions in the same way. Or you can choose to designate some versions as major, such as adding a new chapter to a manual, and some versions as minor, such as fixing a spelling error. To help manage storage space, you can optionally choose the number of each type of version that you want to store. For example, a travel agency might use a document library to manage its files. While team members develop a new sales proposal, they track minor versions of the file. If they make a mistake in one version, they can restore a previous version. When they finish the proposal, they can create a major version and then publish it for approval by*

*their legal department and their manager. When the file is approved, other employees in the company can view the file.*

- ***Require check-out of files** When you require check-out check out: To lock a file while editing it to prevent others from overwriting or editing it inadvertently. Only the user who checks out a document can edit the document. of a file, you ensure that only one person can edit the file until it is checked in check in: To release the lock for editing and enable other users to view the updated file or check out the file. . Requiring documents to be checked out prevents multiple people from making changes at the same time, which can create editing conflicts and lead to confusion. Requiring check-out can also help to remind team members to add a comment when they check a file in, so that you can more easily track what has changed in each version.*
- ***Stay informed about changes** Create e-mail alerts, so that you are notified when files change.*
- ***Edit files offline** If you prefer to work on your files on your hard disk, you can check them out and work offline.*
- ***Copy documents easily to another location** Easily send a file to another location on the site. When you update the original document, you can choose to be prompted to update the file in the other locations.*
- ***Specify unique permission** You can specify unique permission for a library, or even a file within a library.*
- ***Create workflows** A document library or content type can use workflows that your organization has defined for business processes, such as managing document approval or review.*

## Restoring from the Recycle Bin

1. Click **Recycle Bin**.
2. Enable the checkbox of each item you wish to restore.
3. Click **Restore Selection**.
4. Click **OK**. All versions of the item are restored.

### RESULT:

You have successfully restored an item.

## Permanently Deleting Items from the System

1. Click **Recycle Bin**.
2. Enable the checkbox of each item you wish to permanently delete from the system. (Items older than 30 days are automatically removed from the system).

3. Click **Delete Selection**.
4. Click **OK**.

**RESULT:**

You have successfully deleted items.

## Managing People and Groups

### Adding Users / Groups to a Group or Site

1. From the Site Actions drop down menu, click **Site Settings**.
  2. Click **People and Groups**.
  3. From the New drop down menu, click **Add Users**.
  4. Select new Users / Groups by clicking on the address book icon.
  5. Type in name/partial name of user or group you wish to add, then click the magnifying glass icon to start the search.
  6. From the results, click the *name of the user or group* you wish to add to the site.
  7. Click **Add**.
  8. Click **OK**.
  9. Give permission to the user/group by performing one of the following:
    - a. Add the user to an existing group:
      - i. enable the *Add users to a SharePoint group* radio button.
      - ii. select the group from the drop down menu
    - b. Add the user to the site as an individual:
      - i. enable the *Give users permission directly* radio button.
      - ii. enable the checkbox of the one of the following control types you wish to assign to this user in this site:
- | PERMISSION:         | DEFINITION:                        |
|---------------------|------------------------------------|
| <b>Full Control</b> | Has full control of site.          |
| <b>Contribute</b>   | Can view, add, update, and delete. |
| <b>Read</b>         | Can view only.                     |
10. Optionally, click the *send email to user/group* checkbox, and type in the personal message you wish to send in the email.
  11. Click **OK**.

#### RESULT:

You have successfully added a user or group to a site.

### Creating New Groups

1. Navigate to the Site.
2. Click **People and Groups**.
3. From the New drop down menu, click **New Group**.
4. Key in the *name* and *description* of the new group.
5. Optionally, change the owner of this group from yourself to another person or group. (Only one user or group can be the owner).
6. Determine who can view the membership of the group by enabling one of the following radio buttons:

- a. Group Members
  - b. Everyone
7. Determine who can edit the membership of the group by enabling one of the following radio buttons:
  - a. Group Members
  - b. Everyone
8. Specify whether to allow users to request membership in this group by enabling the yes/no radio button.
9. Specify whether to allow users to request to leave the group by enabling the yes/no radio button. (this option is not available if you selected No to the task in step 8).
  - a. If yes, key in the email address to which all requests will be sent. If auto-accept is enabled, users will automatically be added or removed when they make a request.



**Caution:** If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.

10. Specify the permission level that you want members of this group to have on this site by enabling the appropriate checkbox. ( If you do not want to give group members access to this site, ensure that all checkboxes are unselected).
11. Click **Create**.

#### RESULT:

You have successfully created a new group. Optionally, add users to the group.

## Deleting Users from a Group

1. From the Site Actions drop down menu, click **Site Settings**.
2. Click **People and Groups**.
3. Click on the name of the group for which you wish to delete user(s).
4. Enable the checkbox of each user you wish to remove.
5. From the Actions drop down menu, click **Remove Users from Group**.
6. Click **OK** to confirm.

#### RESULT:

You have successfully deleted a user from a group.



## Sending Email to People or Groups

1. Navigate to the **People and Groups** section of the lower left navigation menu.
2. If you want to select from a particular group of users, select that *group name*.
3. If you want to select from all the users on the site click on the **All People** link. You will be presented with the profiles of all the users.
4. Click the check box of each user/group you want to e-mail. If you want to select all of the users on the list click the cascading check box located on the header bar above the check box for the first user on the list.
5. Select the **Actions** link from the main header menu.
6. Click on **E-mail Users**. Your e-mail client will open up a new mail message with all the users you checked in the To: field.

### RESULT:

You have successfully emailed people/groups.

## Specifying Existing Groups that can Access Your Site

1. Navigate to the Site.
2. Click **People and Groups**.
3. Click **Set Up Groups** from the Settings drop down menu.
4. Enable the Use an existing group radio button.
5. Select the existing group from the drop down menu.
6. Click **OK**.

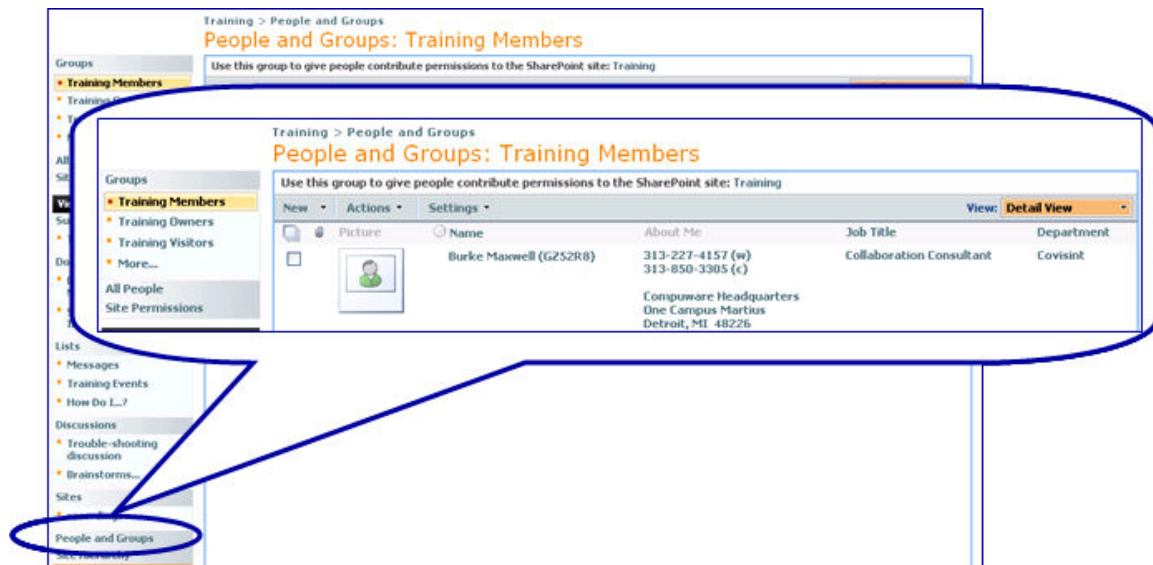


If a site is using the same permissions as its parent site, and the Parent site has no access to this site, then groups selected on this page will not automatically get permission to this site. To give a group permission to this site you need to give the group permission on the parent site.

### RESULT:

You have successfully specified access rights to groups.

## Viewing and Managing All People and Groups



Manage Users by clicking **People and Groups** menu option at the bottom left of the screen. The People and Groups screen is displayed.

In the above example, There are three groups listed in the left navigation window. Those are; Members, Owners, and Visitors (the Training Members Group is displayed on the main screen). Optionally, you may choose to view all People in your organization by clicking All People.

You are also able to manage site-wide permissions from this screen. From the Site Permissions screen, you are able to:

- add new users and groups
- assign or modify permissions per user or group
- configure new permissions for groups
- enable/disable the 'access request' option. This is the option that allows a user to request access to a site. If this is turned on, a user can see the name of a site, but cannot see the content. If this option is turned off, the user cannot see the site at all.



Take note of what site you are working in before clicking People and Groups. The results listed in People and Groups pertain to the particular site in which you are working. For example, if there are 'child' sites belonging to the site in which you are working, the People and Groups listed for that parent site may not include people and groups in the Child site, if those people and groups do not have access to the parent site.

# Managing Permissions

## Configuring Site-level Permissions

1. Navigate to the site you wish to configure.
2. From the Site Actions drop down menu, click **Site Settings**.
3. Modify Site-level permissions by clicking any of the corresponding links to which you have access, in any of the following categories:
  - *Users and Permissions*
    - People and groups
    - Advanced permissions
  - *Look and Feel*
    - Title, description, and icon
    - Tree view
    - Site theme
    - Top link bar
    - Quick Launch
    - Reset to site definition
  - *Galleries*
    - Master pages
    - Site content types
    - Site columns
  - *Site Administration*
    - Regional settings
    - Site libraries and lists
    - Site usage report
    - User alerts
    - Search visibility
    - Sites and workspaces
    - Site features
    - Delete this site

### RESULT:

You have successfully configured site-level permissions.

## Inheriting Site Permissions from Parent Site

1. Navigate to the intended site.
2. From the Site Actions drop down menu, click **Site Settings**.
3. Click **Advanced Permissions**.
4. From the Settings drop down menu, click **Permission Levels**.
5. Click **Inherit Permission Levels from Parent Web Site**.
6. Click **OK** to confirm. (All custom permissions are removed).

### RESULT:

You have successfully inherited site permissions from the parent site.

## Configuring Document Library Level Permissions

1. Navigate to the document library for which you wish to configure permissions.
2. From the Settings drop down menu, click **Document Library Settings**.
3. Click **Permissions for this document library** in the Permissions and Management column. The list of current users/groups that have access to this document library is displayed.
4. Perform one or more of the following:

If you wish to...	Then...
<b>add users/groups to an existing group</b>	<ol style="list-style-type: none"> <li>a. Enable the checkbox of the group to which you wish to add.</li> <li>b. From the New drop down menu, click <b>Add Users</b>. Refer to the section entitled Adding Users to a Group or Site for further details.</li> </ol>
<b>remove user/group permissions to this document library</b>	<ol style="list-style-type: none"> <li>c. Enable each checkbox of the user and/or group for whom you wish to remove permissions.</li> <li>d. From the Actions drop down menu, click <b>Remove User Permissions</b>.</li> <li>e. Click <b>OK</b> to confirm.</li> </ol>
<b>edit user/group permissions to this document library</b>	<ol style="list-style-type: none"> <li>f. Enable the checkbox of the user and/or group for whom you wish to edit permissions.</li> <li>g. From the Actions drop down menu, click <b>Edit User Permissions</b>.</li> <li>h. Enable the checkbox of the permission you wish to assign.</li> <li>i. Disable the checkbox of the permission</li> </ol>

If you wish to...	Then...
	you wish to remove. j. Click <b>OK</b> to confirm. k. Repeat steps a - e for each additional user or group.
<b>allow the document library to inherit permissions from the parent site (any custom permissions will be lost)</b>	l. From the Actions drop down menu, click <b>Inherit Permissions</b> . m. Click <b>OK</b> to confirm.
<b>enable/disable user's ability to request access to the document library (if available)</b>	n. From the Settings drop down menu, click <b>Access Request</b> . o. Enable/Disable the <i>Allow requests for access</i> checkbox as appropriate. p. Click <b>OK</b> to confirm.

### RESULT:

You have successfully configured document library level permissions

## Managing Permissions on a Document

1. Navigate to the document for which you wish to manage permissions.
2. Click the triangle at the far right of the file name to expose a drop down menu.
3. Click **Manage Permissions**.



Unless otherwise configured, a document inherits permissions from its parent folder or library. To manage permissions directly, click Edit Permissions from the Actions menu as described in the remaining steps.

4. From the Actions drop down menu, click **Edit Permissions**. A dialog box is displayed, confirming that you understand that you are creating unique permissions for this single document, and that future changes in permissions at the parent or document library level will not affect permissions on this document.
5. Click **OK**.
6. Perform one or more of the following:

If you wish to...	Then...
<b>add users/groups to an existing group</b>	a. Enable the checkbox of the group to which you wish to add. b. From the New drop down menu, click <b>Add Users</b> . Refer to the section entitled Adding Users to a Group or Site for

If you wish to...	Then...
	further details.
<b>remove user/group permissions to this document</b>	c. Enable each checkbox of the user and/or group for whom you wish to remove permissions. d. From the Actions drop down menu, click <b>Remove User Permissions</b> . e. Click <b>OK</b> to confirm.
<b>edit user/group permissions to this document</b>	f. Enable the checkbox of the user and/or group for whom you wish to edit permissions. g. From the Actions drop down menu, click <b>Edit User Permissions</b> . h. Enable the checkbox of the permission you wish to assign. i. Disable the checkbox of the permission you wish to remove. j. Click <b>OK</b> to confirm. k. Repeat steps a - e for each additional user or group.
<b>allow the document to inherit permissions from the parent site (any custom permissions will be lost)</b>	l. From the Actions drop down menu, click <b>Inherit Permissions</b> . m. Click <b>OK</b> to confirm.

### RESULT:

You have successfully managed permissions on a document.

## Modifying Group Permissions

1. Click **People and Groups**.
2. Click on the *name of the group* listed in the left menu.
3. From the Settings drop down menu, click **Group Settings**. The Change Group Settings screen is displayed.
4. Scroll down to the Permissions section of the screen, and enable the checkbox of the one of the following permissions you wish to assign to this group in this site:

PERMISSION:	DEFINITION:
<b>Full Control</b>	Has full control of site.
<b>Contribute</b>	Can view, add, update, and delete.
<b>Read</b>	Can view only.

5. Click **OK**.

### RESULT:

You have successfully managed group permissions.

---

## Surveys

### Configuring Advanced Survey Settings

1. From the home page of your Site, click the ***name of the survey*** from the menu options on the left of the screen.
2. Click **Survey Settings** from the Settings drop down menu.
3. Perform one or more of the following:

If you wish to...	Then...
<b>change the name, navigation, or options</b>	3.1.1 Click the title, description, navigation link in the General Settings column. 3.1.2 Modify as desired. 3.1.3 Click <b>Save</b> .
<b>allow participants read and/or edit access</b>	3.2.1 Click the advanced settings link in the General Settings column. 3.2.2 Enable the appropriate radio buttons. 3.2.3 Click <b>OK</b> .
<b>delete the survey</b>	3.3.1 Click Delete this survey link in the Permissions and Management column. 3.3.2 Click <b>OK</b> to confirm.
<b>save the survey as a template</b>	3.4.1 Click <b>Save survey as template</b> in the Permissions and Management column. 3.4.2 Key in the new file name of the template, the survey name, and all other fields as required. 3.4.3 Click <b>OK</b> to confirm.
<b>change inherited permissions</b>	3.5.1 Click <b>Permissions for this survey</b> in the Permissions & Management column. 3.5.2 Click <b>Manage Permissions</b> from the Actions drop-down menu, then click <b>OK</b> . 3.5.3 Modify permissions as desired.
<b>modify or delete a question on the survey</b>	3.6.1 Click on the question link as listed at the bottom of the Survey Settings screen. 3.6.2 Modify as desired. 3.6.3 Click <b>OK</b> to save the question, or click <b>Delete</b> to remove question from survey.

If you wish to...	Then...
<b>add another question to the survey</b>	3.7.1 Click <b>Add a question</b> as listed at the bottom of the Survey Settings screen. 3.7.2 Configure the question as desired. (Refer to "Creating a Survey" for details). 3.7.3 Click <b>Finish</b> .
<b>change the order in which questions are listed in the survey</b>	3.8.1 Click Change the order of questions link as listed at the bottom of the Survey Settings screen. 3.8.2 Using the drop down menus next to each question, order each question as you wish it to appear in the survey. 3.8.3 Click <b>OK</b> .

**RESULT:**

You have successfully configured advanced settings on a survey.

## Creating a Survey

1. Click **Create** from the All Site Content screen.
2. Click **Survey**.
3. Key in the name and description of the survey.
4. Enable the yes/no radio button indicating that this should/should not appear on the Quick Launch.
5. Enable the yes/no radio button to indicate that user names should/should not be included in survey results.
6. Enable the yes/no radio button indicating that users are / are not allowed to respond to the survey more than once.
7. Click **Next**.
8. Key in the first question of your survey in the open text box.
9. Enable the radio button to indicate the type of question you are creating. The screen will refresh, and the remaining sections of the survey creation change dynamically, depending upon question type selected.
10. Enable the yes/no radio button to indicate whether an answer to the question is required.
11. Key in all other Additional Question Settings as necessary.
12. Repeat Steps 8 – 11 as desired, then click **Finish**.

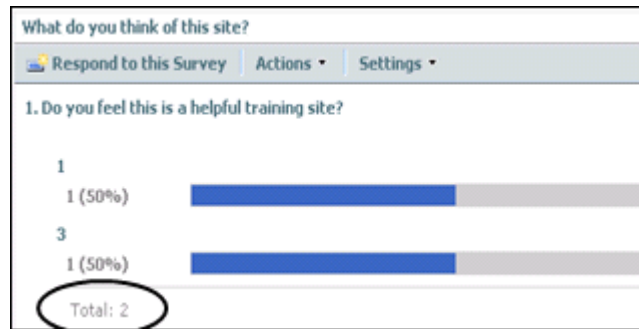
**RESULT:**

You have successfully created a survey, and the survey is posted on your site. To add 'advanced' features to your survey, proceed to Configuring Advanced Survey Settings.



## Viewing Graphical Summary of Survey

1. From the home page of your Site, click the *name of the survey* from the menu options on the left of the screen.
2. Click **Show a graphical summary of the survey** link.



From this screen, you are able to view the percentage of votes per answer to a question, as well as the total number of responders per question. In this example, for question number 1, a total of two people responded. One person selected the answer of "1" and one person selected "3".

### RESULT:

You have successfully viewed a graphical summary of a survey result.

## Viewing All Responses to a Survey

1. From the home page of your Site, click the *name of the survey* from the menu options on the left of the screen.
2. Click **Show all responses**. Responses are listed per user. If the user is to remain anonymous, the user's name will not appear.

What do you think of this site?			
Respond to this Survey Actions Settings			View: All Responses
View Response	Created By	Modified	Completed
View Response #1	Jane Doe	6/13/2007 10:29 AM	Yes
View Response #2	Jack Doe	6/13/2007 11:50 AM	No

From this screen, you are able to view the:

- total number of responses (2). (View each answer to each question per response by clicking on the item in the View Response column)
- name of each responder (if applicable)
- date the survey was modified by user

- completion status of survey by user (in this example, Jack Doe did not complete the survey)

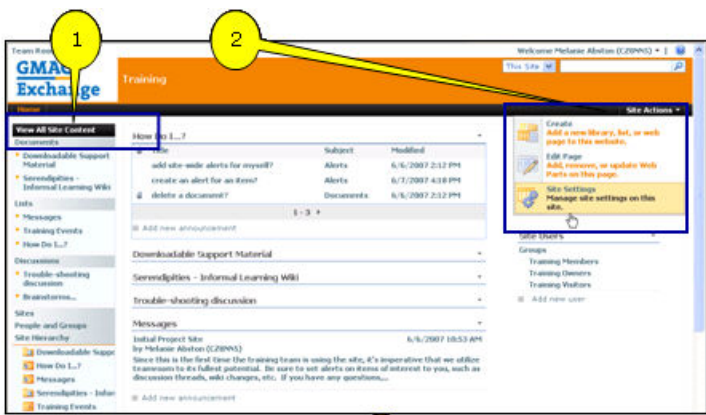
## RESULT:

You have successfully viewed all responses to a survey.

## Site Administration Overview

Site Administration can be accessed from many locations. The two main places to access site administration are:

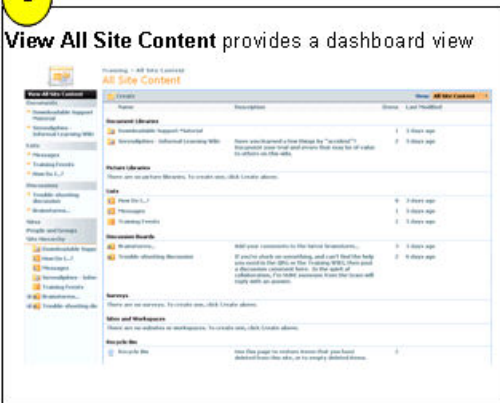
1. View All Site Content
2. Site Actions drop-down menu



The screenshot shows the 'Training' site interface. A yellow circle labeled '1' points to the 'View All Site Content' link in the left sidebar. A yellow circle labeled '2' points to the 'Site Actions' drop-down menu in the top right corner.

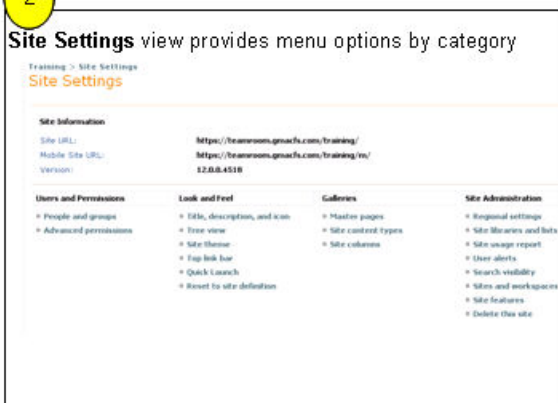
**1**

**View All Site Content** provides a dashboard view



**2**

**Site Settings** view provides menu options by category



## Viewing Site Owner Report

1. From the *Site Actions* menu on the home page of your site, click **Site Settings**.
2. Click **site usage report** in the Site Administration column.
3. Select the type of report data you wish to view from the drop-down menus:
  - a. User or Site page
  - b. Daily or Monthly totals
4. Click **Go**.

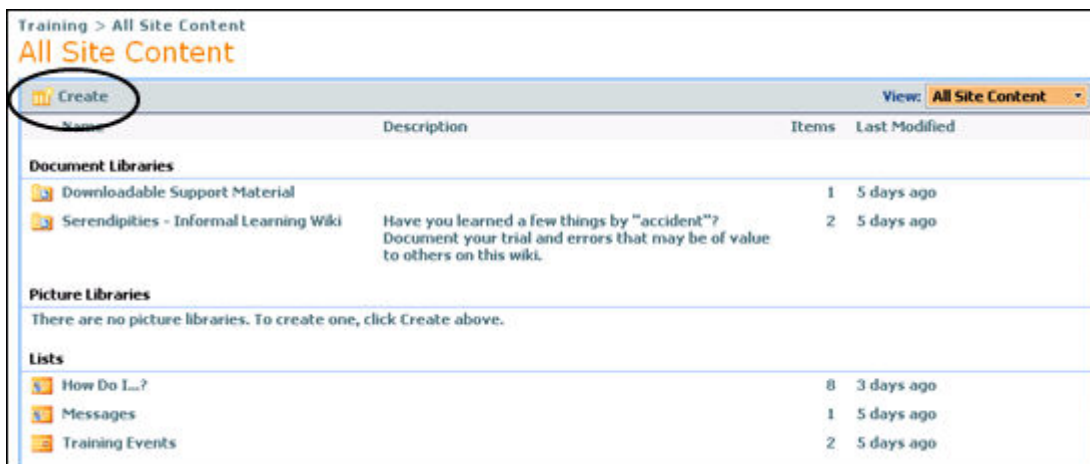


Note: Ignore the following two pages; Default.apx and owssvr.dll. These are system generated values and has no relevance to you or your site.

### RESULT:

You have successfully viewed the Site Owner report.

## Viewing the All Site Content Screen



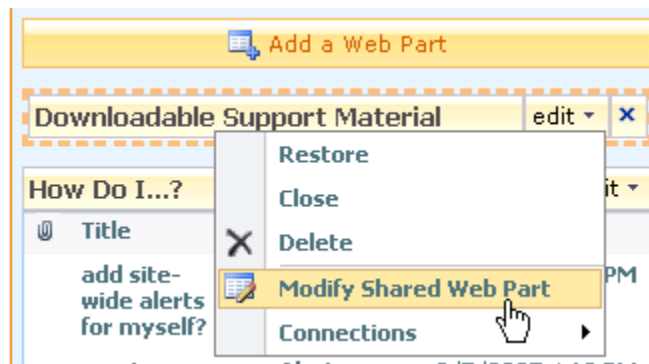
Training > All Site Content			
All Site Content			
Create	View: All Site Content		
Name	Description	Items	Last Modified
<b>Document Libraries</b>			
Downloadable Support Material		1	5 days ago
Serendipities - Informal Learning Wiki	Have you learned a few things by "accident"? Document your trial and errors that may be of value to others on this wiki.	2	5 days ago
<b>Picture Libraries</b>			
There are no picture libraries. To create one, click Create above.			
<b>Lists</b>			
How Do I...?		8	3 days ago
Messages		1	5 days ago
Training Events		2	5 days ago



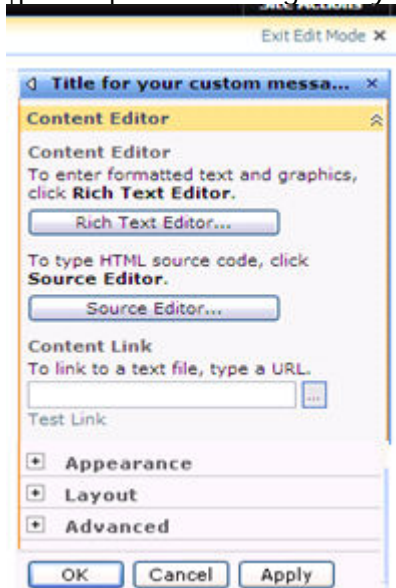
From this view you are able to view the number of items in each site category, as well as last time that an item was modified.

## Appendix A: Modifying a Content Editor Web Part

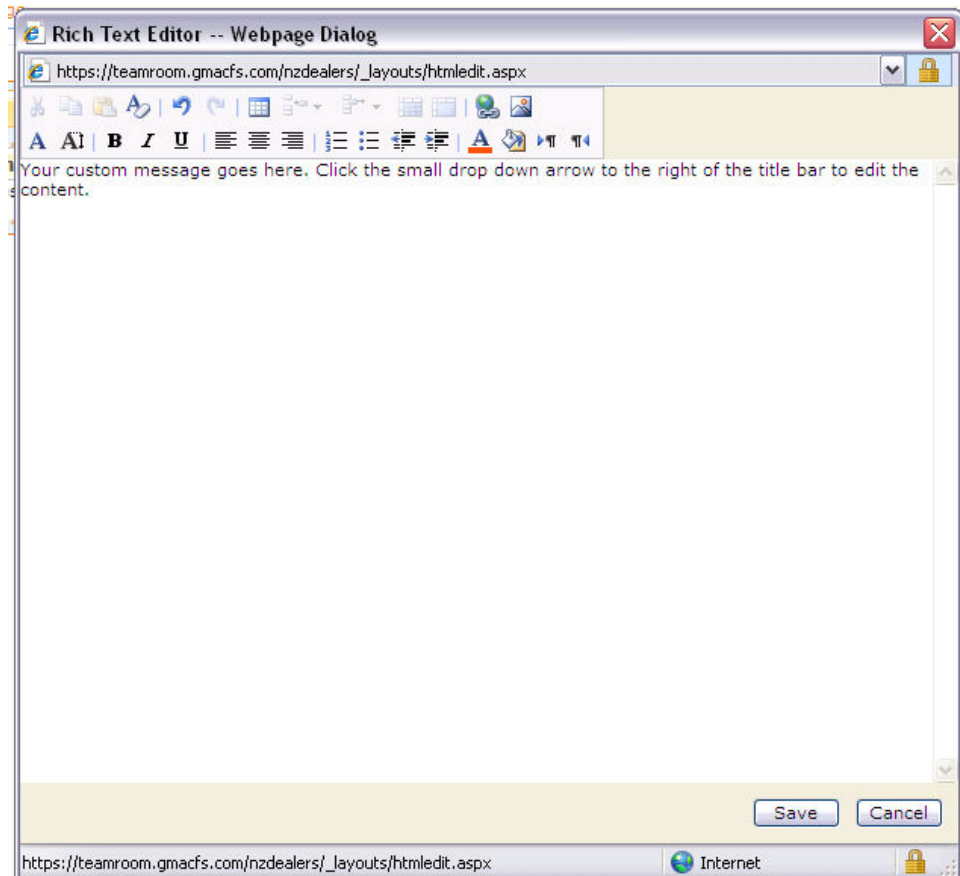
1. Navigate to the Site to which you wish to modify web parts.
2. From the Site Actions menu, click **edit page**.
3. Click the **Edit** drop down menu to the left of the Web Part title (this example uses Downloadable Support Material).



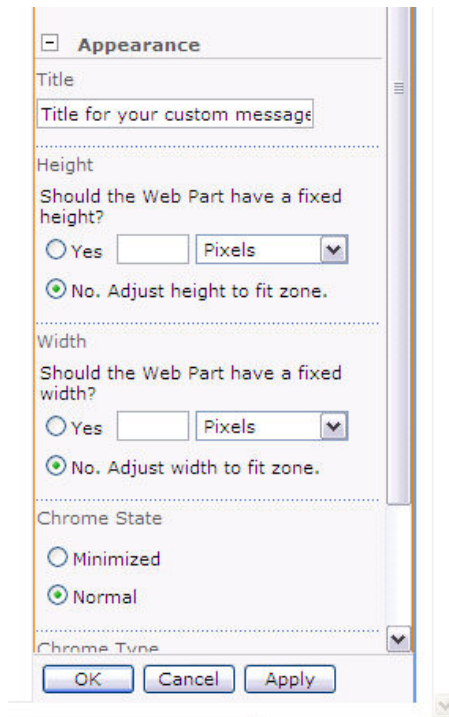
4. Click **Modify Shared Web Part** from the drop down menu. The Edit window pane opens to far right of your screen.



5. Optionally, modify the *Content*.
  - i. Click **Rich Text Editor...** The WYSIWYG Editor is displayed.



- ii. Modify the content as desired.
- iii. Click **Save**.
- 6. Optionally, modify the *Appearance*.
  - i. Click **Appearance**. The options are displayed.



- ii. Key in the portlet title.
  - iii. Determine if the web part should be fixed in height and width. If yes, set size.
  - iv. Select the radio button to configure Chrome State.
  - v. Select the radio button to configure Chrome Type.
7. Scroll to the bottom and click **Apply**.



Note: You control whether users are able to minimize and / or delete a web part from their personal views. To do so, click the + Advanced link, and then enable/disable the via the appropriate checkboxes.

**RESULT:**

You have successfully modified a Content Editor web part.

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