

## Windows SharePoint Services 3.0 Quick Reference Guide

### Introducing Microsoft Windows SharePoint Services 3.0

Microsoft® Windows® SharePoint® Services is a versatile technology included in Microsoft Windows Server™ 2003 that enables organizations and businesses of all sizes to increase the efficiency of their processes and improve team productivity. With tools for collaboration that help people stay connected across organizational and geographic boundaries, Windows SharePoint Services gives people access to the documents and information they need.

Built on Windows Server 2003, Windows SharePoint Services also gives organizations a platform for building Web-based business applications that can scale easily to meet the changing and growing needs of your business.

### Keep Projects on Track

Use new integration and synchronization capabilities in Windows SharePoint Services 3.0 to share tasks and other list data between Windows SharePoint Services and 2007 Microsoft Office system programs, and keep track of team members with presence awareness and mobile access.

### Maintain Your Team's Discussion Board or Blog via E-Mail

Now you can add entries to discussion boards or blogs from an e-mail message. Associate an e-mail address with your discussion board or blog by creating the list with e-mail notification enabled and specifying an alias. E-mail messages sent to this address by you or other authorized users will appear in the associated list.

### Associate a Distribution List with a Team Site

When you create a team site, you can automatically generate and associate a distribution list with it, enabling you to communicate easily with team members directly via e-mail. Create a new group for the team site, and then create an e-mail distribution list for the group. Changes to the group will be reflected automatically in the distribution list.

### Take Your Documents on the Road

Take your documents with you by synchronizing your document libraries to Microsoft Office Outlook®. Click **Connect to Outlook** on the **Actions** menu to create a new folder within Outlook that contains copies of the documents in the library. Then, when you reconnect to Windows SharePoint Services, synchronize your changes to keep the rest of the team up to date.

### Get Task Notifications via E-Mail

Keep on top of your projects by receiving e-mail notification whenever an existing task is updated or a new task is

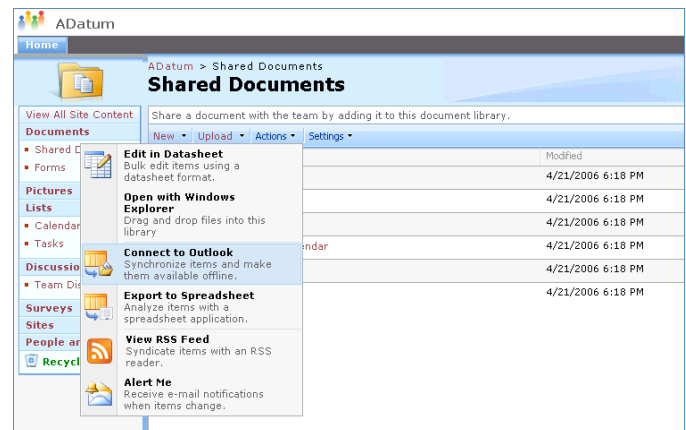
assigned to you. Select **E-mail Notification** when creating the task list, and notice of any updates will be sent to the task owner.

### View Your Team and Personal Calendars Side-by-Side in Outlook<sup>1</sup>

Manage your time more effectively by coordinating your personal and team activities. Synchronize your team's calendar by clicking **Connect to Outlook** on the **Actions** menu. Then open the Windows SharePoint Services calendar in Microsoft Office Outlook 2007 to see both your personal and team activities side-by-side. You can also overlay the calendars to identify potential conflicts.

### Synchronize Tasks, Calendar, Contacts, and Discussion Boards with Outlook

By synchronizing your Windows SharePoint Services tasks, calendar, contacts, and discussion boards with Office Outlook 2007, you can keep track of all of your team's projects and information through a single interface. To access any of these features, click **Connect to Outlook** on the **Actions** menu to set up the synchronization.



<sup>1</sup> Requires Office Outlook 2007.

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## Drag Attachments Directly into a Document Library

Manage your document libraries directly from Office Outlook 2007 using a drag-and-drop feature. If you have a document library synchronized with Outlook, you can drag e-mail attachments directly to it. Select the attachment and drag it to the folder. The attachment will automatically be sent to Windows SharePoint Services during the next synchronization.



## Browse Task Lists, Blogs, and More from Mobile Devices

Stay on top of your assignments from wherever you are. With a Microsoft Windows Mobile®, WAP, cHTML, or xHTML enabled mobile device, you can review or update your task list items, post to your blog, and even send photos from camera-equipped devices via e-mail using Microsoft Internet Security and Acceleration Server 2006.

## Keep Up-to-Date with Any SharePoint List via RSS

Track updates to any RSS-enabled SharePoint list from any RSS-compatible reader, including Office Outlook 2007 and Microsoft Internet Explorer® 7. To define an RSS feed, click **RSS Settings** under **List Settings**.

## Create Content, Share Information, and Capture Knowledge

Windows SharePoint Services 3.0 introduces new tools to help you and your team create content, share more types of information, and capture knowledge from across the enterprise.

### Capture Rich Metadata with Content Types

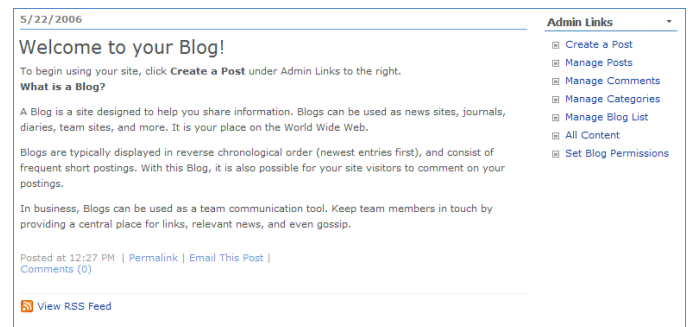
Support in Windows SharePoint Services 3.0 for content types enables you to add metadata specific to your organization to any of the standard documents or lists. Content types are integrated with 2007 Office system programs such as Microsoft Office Word, Microsoft Office Excel®, and Microsoft Office PowerPoint® through the Document Information Panel. The Document Information Panel enables content authors to update metadata directly from the client program.

### Add a Wiki to Your Team Site to Capture Group Insights and Best Practices

Based on a “group editing” model, wikis are great tools for capturing knowledge because they encourage everyone to contribute. Wikis can be used as forums for brainstorming ideas, to manage knowledge bases, to create designs or instruction guides, or to gather information in an easy-to-edit format. Wikis are easy to create, modify, and annotate, and can track contributions and changes. To add a wiki to your SharePoint site, click **Create** under **Site Actions**, and then click **Wiki Page Library**.

## Broadcast Important Information with a Blog

Blogs have become an indispensable tool for both broadcasting information through posts and interacting with diverse communities. Within your team, a blog can help you keep everyone up to date and on track. To add a blog to your SharePoint site, click **Create** under **Site Actions**, and then click **Site and Workspaces**. Within **Template Selection**, click **Blog**.



## Post to Your Blog Directly from Within Office Word 2007

Spice up your blog with familiar tools and rich editing capabilities. Office Word 2007 supports editing of Windows SharePoint Services blogs, so you can compose entries by using the full capabilities of Word, and then publish directly to your blog.

## Help Ensure Data Integrity

Security and data integrity enhancements help protect important information assets and ensure that data isn't lost.

### Fine-Tune Document Access with Folder-Level and Item-Level Permissions

Security can now be defined all the way down to the folder and item level, so you can control access to important documents. From the folder or document menu, click **Manage Permissions**, and then click **Edit Permissions** on the **Actions** menu to establish unique permissions for the folder or document.

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## Help Ensure Consistency of Shared Documents by Requiring Document Check-out Before Editing

Don't let overlapping edits ruin your day. Requiring document check-out before editing helps ensure that updates are applied in the correct order. From the **Settings** menu, click **Document Library Settings**, then **Versioning Settings**, and then select **Require Check Out**.

## Help Protect Critical Information with Two-Stage Recycle Bin

Don't let valuable documents disappear from your site. The new Recycle Bin provides two levels of protection against accidental deletions. A document marked by a user for deletion is moved to the user's personal Recycle Bin, from which it can be restored if needed. If the user deletes it from their Recycle Bin, the document is moved to the sitewide Recycle Bin, managed by the site administrator. From there, the document can be either restored or deleted.



## Discover an Improved User Interface Experience

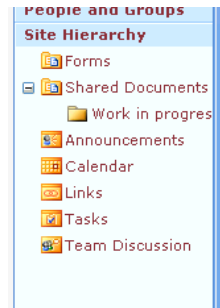
Improvements to the user interface, rich new collaboration features, and architectural support for distributed user communities help ensure that Windows SharePoint Services is ready to support you as your needs grow.

## Focus on Important Information Using Display Filters

Filters can now be defined within views, giving you quick access to the right information. Extraneous documents or list items can be excluded from the display, letting you focus your attention on what's important. From the **Settings** menu, select **Edit View** to define a filter.

## Customize Quick Launch and the Top Link Bar with Your Favorite URLs

Now you can add your own links to enable fast access to your favorite sites. Both the Top Link bar and the Quick Launch area can be customized with your URLs. From the **Site Actions** menu, click **Site Settings**, and then click either **Top Link bar** or **Quick Launch** to add your own links.



## Get Fast Access to Folders and Sub-folders in Tree View

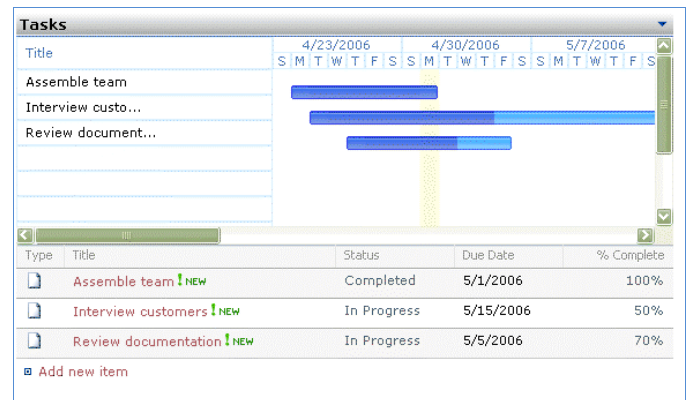
On the **Site Actions** menu, click **Site Settings**, and then click **Navigation Options**. Select **Enable Tree View** and a hierarchical view will appear under **Site Hierarchy** in the Quick Launch area.

## Use "Extranet Mode" for Distributed Communities

New for Windows SharePoint Services 3.0, "Extranet mode" simplifies the process of opening up SharePoint sites to external access. Support for third-party authentication providers has also been enhanced.

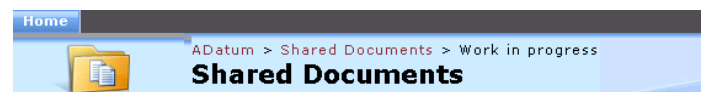
## Track Project Status at a Glance by Adding a Gantt Chart View

Use the new Gantt chart view to track your project tasks. Adding this view to your project's team site enables your coworkers to see at a glance if everything is on track. From the **Settings** menu, click **Create View**, and then select **Gantt View** to create a Gantt chart view of any task list.



## Keep Track of Where You Are by Using Breadcrumbs

The new "breadcrumb" feature of the user interface helps you keep track of where you are within a SharePoint site:



Clicking any of the components in the breadcrumb trail will take you directly to that area of the site