

Chapter 1

Getting to Know Your Team Site

In This Chapter

- ▶ Requesting a new team site and opening it in the browser
- ▶ Participating in a team site
- ▶ Changing your team site's home page

One of the fundamental kinds of Web sites that SharePoint 2010 allows you to create is a team site. A *team site* is a SharePoint site that you can use to collaborate with your coworkers. If the team site is hosted in your company's extranet or by a public hosting company, you may even be able to collaborate with people outside your organization. In most cases, an administrator will create a team site for you.

Many kinds of teams can use a SharePoint team site to collaborate. For example:

- ✓ Department members can use document libraries to upload document files and enter meetings in a team calendar.
- ✓ Project members can use a team site home page to post announcements and track important dates.
- ✓ Corporate communications can use a team site to store the documents and track the tasks required for preparing the company's annual report.

You need to know your way around some of the basic features of a team site, which is exactly what I show you in this chapter.

Requesting Your Team Site

Most organizations have a process for requesting a team site. I've seen everything from the simple process in which you send an e-mail addressed to someone in your IT department to very detailed wizards that walk you through the site creation process. One company requires that you write a justification for why you want the team site and then submit prototypes.

Whatever you have to do to get your SharePoint 2010 team site, get one. At a minimum, you need to provide your SharePoint administrator with this information to get a team site:

- ✓ **The site name:** The friendly caption that appears in the header of your site and in any site directory where your site may be listed.
- ✓ **The site template:** The template determines what kind of site SharePoint makes for you. SharePoint includes dozens of predefined site templates. Your company may even create its custom site templates. Tell your administrator you want a team site, which is the most popular of all the SharePoint 2010 site templates.
- ✓ **The Web address or URL:** The unique location where your team site is hosted. In most organizations, all team sites are located off the same root Web address. Some examples I've seen include

```
http://intranet.company.com/sites  
http://portal/projectsites  
http://sharepoint/sites
```

Your organization may also ask who has permission to access the site. Your site's users must be connected physically to your network or have permission from your network administrator to access your network remotely. Some companies set up a special kind of deployment for SharePoint, or an *extranet*, that provides a secure way for non-employees to log into their SharePoint team sites without actually being on the internal company network.

Setting up SharePoint in an extranet environment can be done in lots of ways and is outside the scope of this book. As I like to say, setting up SharePoint in an extranet environment is a networking problem, not a SharePoint problem. The good news is that a number of third-party companies host SharePoint team sites on the Internet for a small monthly fee. If your IT department can't support an extranet at this time, you might explore the option of using a hosted team site instead. These are usually very secure, and you can usually get your content out of the remote site and into your internal site when that time comes.

All SharePoint team sites have three basic kinds of users:

- ✓ **Visitors** have Read Only permission. They can view your site without making any contributions.
- ✓ **Members** can participate in your team site by uploading and editing documents or adding tasks or other items.
- ✓ **Owners** have Full Control permission to customize the site. As the person requesting the team site, the SharePoint administrator will likely assume that you're the proud owner unless you specifically tell him who owns the site.

Viewing Your Team Site in the Browser

You access your team site using a Web browser, such as Internet Explorer or Mozilla Firefox. You need the Web address or URL of your team site, which you can get from your SharePoint administrator. You also need a network user account with permissions.

In my case, the Web address for my team site is

```
http://myteamsite
```

To access your team site:

1. **Open your Web browser.**
2. **Type the Web address for your team site in the address bar and press Enter.**

Figure 1-1 shows the home page for a SharePoint team site.

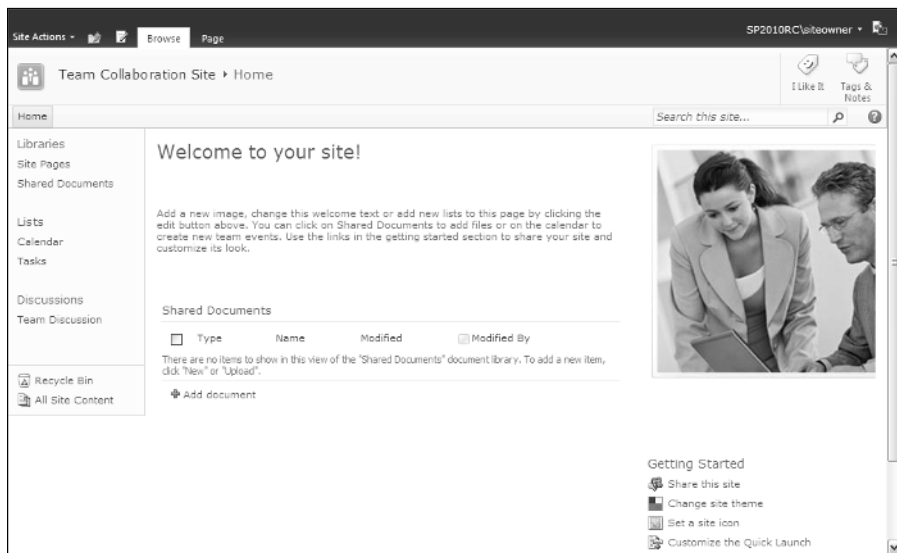


Figure 1-1:
A
SharePoint
team site
home page.

All SharePoint team sites have the same features. If you're using a new team site, your site should match the one in Figure 1-1. If your site has been customized, it may look slightly different. Never fear: All the same features are still there. You may just have to hunt a little bit to find them.

Choosing between IE and Firefox

Which browser should you use with SharePoint? Firefox and Internet Explorer browsers have some differences; for instance, some pages look better in Firefox than in Internet Explorer. Because Firefox was designed to be OS-agnostic, it supports Mac users as well as

PC users. If any of your SharePoint user audience uses Macs, I recommend developing your SharePoint sites to display in Firefox. (The Microsoft SharePoint development team even uses Firefox to check how their sites look!)

You can think of the SharePoint page as having the following the major sections:

- ✓ **Header:** The header spans the entire top of the page. You can think of the header in a SharePoint page like the menu in a traditional Windows application, such as Microsoft Word. SharePoint 2010 even features the Ribbon in the page header, similar to how the Ribbon appears in the top of many Office applications.
- ✓ **Left navigation pane:** The navigation pane provides quick access to the site's document libraries, lists, and discussion boards. You can even add links to content you create, such as documents and Web pages.
- ✓ **Page content:** The content displays in the body of the page.

Generally speaking, the header and left navigation pane stay fairly consistent, whereas the body of the page changes to display the content for the Web page. This is very similar to how most Web sites work.



Microsoft has spent a lot of money on usability research to determine how best to lay out the pages in SharePoint. That's why I usually encourage my clients to use the layouts provided by Microsoft instead of creating their own custom layouts.

Contributing to a Team Site

One of the main purposes of a team site is to allow its members to collaborate. But collaborate on what? Think of all the stuff that you do with Outlook and e-mail right now — all the documents you send as attachments, contacts you track, and messages you send with announcements. Now imagine doing all those same tasks in a Web site you share with your coworkers or project members.

Now take that one step further. Think about any public Web sites you use to network with other people, such as MySpace, LinkedIn, or Facebook. You can use your team site along with other features in SharePoint to create a community of people that you collaborate with at work.

Uploading documents

Most teams need to share documents. You probably use e-mail to send documents as attachments. With your new SharePoint 2010 team site, you can upload your files to the team site and send your team members a link to the document.

SharePoint 2010 uses a special kind of container — a *document library* — for storing files. Your team site has a document library dubbed Shared Documents where you can put documents you want to share with others. You can create additional document libraries and give them any name you want. See Chapter 2 for more details on working with files and document libraries in SharePoint 2010.

To upload a document to the Shared Documents library in your team site:

1. **Click the Shared Documents link in the left navigation pane of your team site.**

The Shared Documents library appears.

You can click the All Site Content link in the left navigation pane to view a list of all the document libraries that you have permission to access.

2. **Click the Upload Document button on the Documents tab of the SharePoint Ribbon.**

The Upload Document window appears.

3. **Click the Browse button and in the Choose File dialog box, select a file to upload.**

4. **Click OK to upload the file to the document library.**

When the file is uploaded, SharePoint displays the document's properties in a new window, as shown in Figure 1-2.



Figure 1-2: SharePoint displays a document's properties in a new window.

5. **Type the filename, title, and any keywords that you want to tag the document with in the Name, Title, and Enterprise Keywords text boxes, respectively.**

See Chapter 2 for details on working with document properties.

6. **Click the Save button to save the properties you've entered for the document.**

The uploaded document appears in the document library.

Adding calendar items

SharePoint 2010's team sites provide you with a calendar for tracking your team events. You can access the calendar by clicking the Calendar link in the home page's left navigation pane.

The calendar displays events in the Calendar view. You can use the Ribbon to change the view from month, to week, or day view and to add new events. To add a new event to the team calendar:

1. **Click the Calendar link in the left navigation pane.**
2. **Click the Events tab in the Ribbon and then click the New Event button.**

A new window appears for you to enter your new calendar item, as shown in Figure 1-3.

3. **Type the information for your event.**

The Title, Start Time, and End Time fields have asterisks next to them indicating they are required fields.

To customize the fields that appear on this form, see Chapter 9.

4. **Click the Save button to save the event to the calendar.**



You can add tasks, contacts, announcements, and even new discussion topics just as easily as adding new calendar events. See Chapter 3 for details on this.

Social networking

SharePoint 2010 lets you do some exciting things with *social networking*, which is a fancy way of referring to ways that people can share ideas, insights, and information among groups of users, such as sharing links with your friends on Facebook.

Figure 1-3:
Adding
a new
calendar
event to
your team's
calendar.

For example, SharePoint 2010 lets you tag things so that you can find them later and that people with whom you share your tags and notes also can see them. So for example, if you find a document that you like and want to encourage others in your network to read, you can apply a tag to the document and then that tag is associated with you so others viewing your profile can see the tag.

Don't panic: SharePoint 2010 tags and notes can be made private so that only you can see them, and you can also delete your tags whenever you want.

To tag a document:

1. Browse to the library containing the document and then select the document using the check box in the list view, as shown in Figure 1-4.

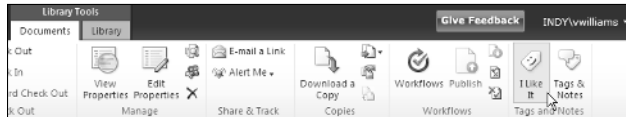
Figure 1-4:
Select a
document
to tag.

Type	Name	Modified	Modified By	Approval Status	Zendo Proposal Workflow
Document	Zendo Marketing Plan - rev	1/28/2010 1:21 PM	System Account	Pending	In Progress

2. Click the I Like It button on the Document tab, as shown in Figure 1-5.

SharePoint briefly displays the Add Tag confirmation message, and the item is saved to your tags and notes, visible to your colleagues in your profile Tags and Notes tab.

Figure 1-5:
Click the
I Like It
button.



To view your tags and notes:

1. Click the arrow beside your name in the upper-right corner of the page and choose My Profile from the drop-down list.

Your profile page displays.

2. Click the Tags and Notes tab, as shown in Figure 1-6.

In the Activities For: section of the page, you see an entry for the tag you just entered.

3. Select the Make Private check box beside any activity so that only you can see it.

Now only you can see the item you marked as private.

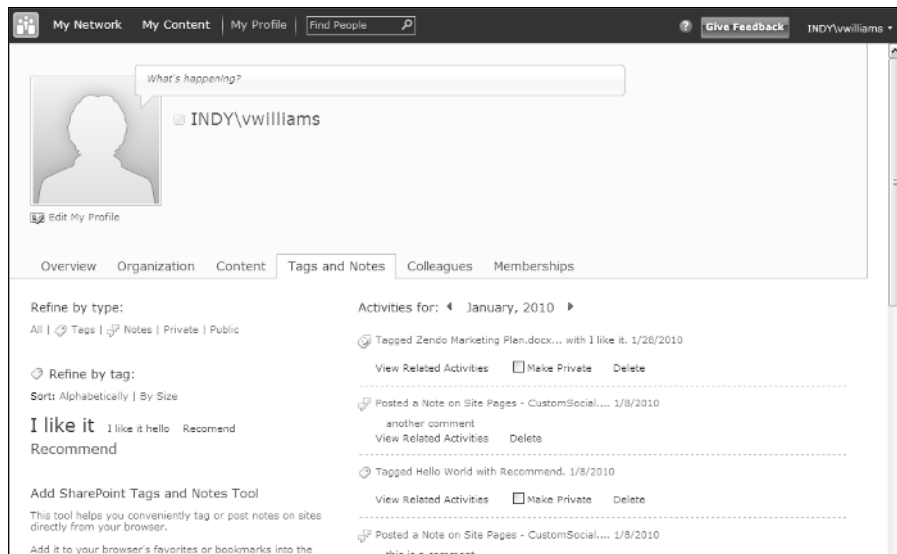
SharePoint 2010 has other social networking features in addition to tags; you can see some of them by exploring your profile, and I talk a little more about them in Chapter 7, too.

Why properties?

You may wonder why SharePoint 2010 prompts you to enter properties for your document. The properties that you enter — properties like the filename, title, and keywords — can be used to make it easier for other site users to find your document. SharePoint 2010's search feature indexes these properties so that users can search for them. You can also add new properties

to your documents to make them easier to search for. In addition to search, you can use properties to create a list of documents that match a certain property's value. For example, say you have a set of documents with a Sales Territory property. You could display a subset of those documents on your team site's home page that match a certain territory's name.

Figure 1-6:
The Tags
and Notes
profile page.



Customizing Your Team Site

Most teams want to change their team site right away. As the site owner, you'll likely be asked to make these changes. Some of the changes you can make include adding and removing text and images from the home page and adding new lists and libraries. You can even change the site's color scheme and logo, which I discuss how to do in Chapter 19.

For now, stick to changing the home page. Later chapters in this part walk you through the process of working with lists and libraries.

Introducing the Ribbon

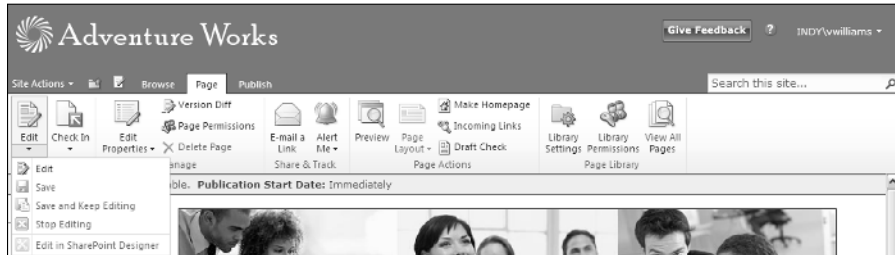
The header of the SharePoint 2010 team site page boasts the Ribbon. The Ribbon was introduced in Office 2007 and is a convenient way to display many menu items in a small amount of screen space.

The Ribbon in SharePoint 2010 features menu items that are relevant to the kind of page you're viewing, arranged in tabs. For example, the home page displays three tabs: Browse, Page, and Publish. You find most of the menu commands you need to use on the Ribbon, and some Ribbon buttons contain drop-down lists. Figure 1-7 shows the Ribbon with the Page tab active and the Edit drop-down list displayed.



Document libraries and lists display commands on the Ribbon that provide additional configuration options. These commands are *contextual* because the commands that appear depend on the context of where you are in the site.

Figure 1-7:
Use the
Ribbon to
access
menu com-
mands.



Modifying the home page

A SharePoint 2010 team site creates a home page that you can modify to better meet your team's needs. You can add text or images, or display your announcements, tasks, or calendar items.

You must be logged into your site as a user with permissions to modify the site's pages. That usually means you need to belong to the site's Members group.



The site's Members group has contribute permissions by default, which includes add, edit, and delete. See Chapter 12 for details on managing permissions.



The home page of a team site is a wiki page. Wiki pages provide a richer content editing experience than Web Part pages. I discuss the kinds of Web pages in SharePoint in Chapter 9.

To put the home page in Edit mode:

1. **Browse to the home page of your team site and then click the Page tab in the Ribbon.**

The Ribbon displays a set of editing options for the Web page.

2. **Click the Edit button in the Edit section of the Ribbon.**

The page appears in Edit mode.



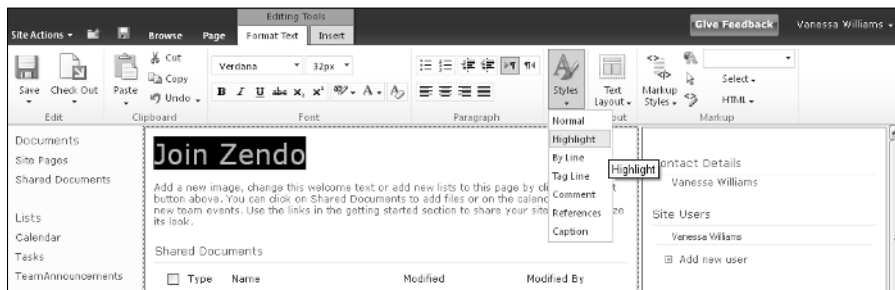
If you want to lock the page so no one else can edit it at the same time, click the Check Out button in the Edit section of the Ribbon before placing the page in Edit mode.

With the page in Edit mode, you can place your cursor anywhere inside the rectangular boxes in the page's body to edit the content. For example, to change the default text that appears on the home page, with your page in Edit mode, do the following:

1. Place your cursor in front of the Welcome . . . text.
2. Delete the placeholder text and type your new text.
3. Use the formatting options displayed in the Ribbon's Format Text tab to apply changes to your text, such as changing the font and adding bullet points.

You can even apply styles, as shown in Figure 1-8.

Figure 1-8:
Apply
formatting
changes to
your text
with the
Ribbon.



SharePoint 2010 provides tools for formatting and editing your text in the browser. See Chapter 16 for details on using and customizing these tools.

4. Click the Stop Editing button to save your changes.

If you have your page checked out, click the Check In button when you're done making changes.

To add a table, image, link, or Web Part to your home page:

1. Place your page in Edit mode by clicking the Edit button on the Page tab in the Ribbon.
2. Click the Insert tab on the Ribbon to display your insert options and then place your cursor on the page where you want to insert an item from the Ribbon.



You must place your cursor inside one of the rectangular boxes within the page's body.

3. Click the button for the content item you wish to add (see Figure 1-9):

- *For a table*, click the Table button and then select the number of rows and columns you want in your table.
- *For an image*, click the Image button and then select whether you want to upload the image from your local computer or from another Web address. See Chapter 21 for more details on working with images.
- *For hyperlinked text*, click the Link button to add it to your page.
- *For a Web Part*, click the Web Part button to add it to your page. See Chapter 10 for more details on working with Web Parts.

4. Click the Edit tab and then click the Stop Editing button to save your changes.

Figure 1-9:
Use the
Ribbon to
add links,
images, and
tables.

