



Creating Just-In-Time Business Solutions with Windows SharePoint Services 2.0

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Abstract

What are the most common types of solutions that Windows SharePoint Services is used to solve? This is one of the frequently asked questions asked by IT professionals and sophisticated business users.

This white paper is written for IT professionals, business analysts, and sophisticated business users who are asked to quickly create and deploy customized business for themselves or the clients they support. Windows SharePoint Services provides a broad range of features and capabilities for creating business solutions using multi-purpose Web site templates that are easy to create, deploy, and manage.

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Introduction

This white paper is written for IT professionals, business analysts, and sophisticated business users who are asked to quickly create and deploy customized business for themselves or the clients they support. Windows® SharePoint® Services provides a broad range of features and capabilities for creating business solutions using multi-purpose Web site templates that are easy to create, deploy, and manage.

Following a detailed overview of the key features of Windows SharePoint Services 2.0 that make it easy to create and deploy just-in-time business solutions, examples of the ready-to-use business solutions included in Windows SharePoint Services 2.0 are presented. In addition, several additional solutions can be download from the Microsoft® Download Center are also discussed. A full list of these solution templates can be found in Appendices A and B.

SharePoint security is discussed next. Following this discussion, the development of a real just-in-time business solution, the Action Request and Tracking System (ARTS), is presented.

Finally, a number of strategies are presented for saving the ARTS business solution as template that can be used to rapidly create new instances of the ARTS solution or add ARTS functionality to an existing SharePoint site.

Understanding SharePoint Sites, Lists, Web Parts, and Templates

A key to quickly building just-in-time business solutions using Windows SharePoint Services 2.0 is understanding the platform's core building blocks:

- Sites
- Lists
- Web Parts
- SharePoint Site and List Templates

SharePoint Sites

A SharePoint site is a multi-purpose Web site that is easy to create and manage without having to involve a programmer, HTML Web designer, or a Windows system administrator.

A SharePoint site is comprised of Web pages, SharePoint lists and document libraries, and one or more Web Parts. Lists are used to store different types of data such as tasks, contacts, and calendar items, as well as different types of documents (including Office documents, Adobe PDF files, images, and XML documents). To display the data from a list in a SharePoint site, a Web Part is placed in one of the SharePoint site's Web Pages. SharePoint lists are created in a SharePoint site to store different types of data and documents, and Web Parts are used to display the list data to a user of the SharePoint site.

Web pages in a SharePoint site are called Web Part Pages. Web Part Pages can be divided into one or more regions called Web Part Zones. The most common arrangement of Web Part Zones in a Web Part Page includes a Left Zone and Right Zone (as illustrated in Figure 1).

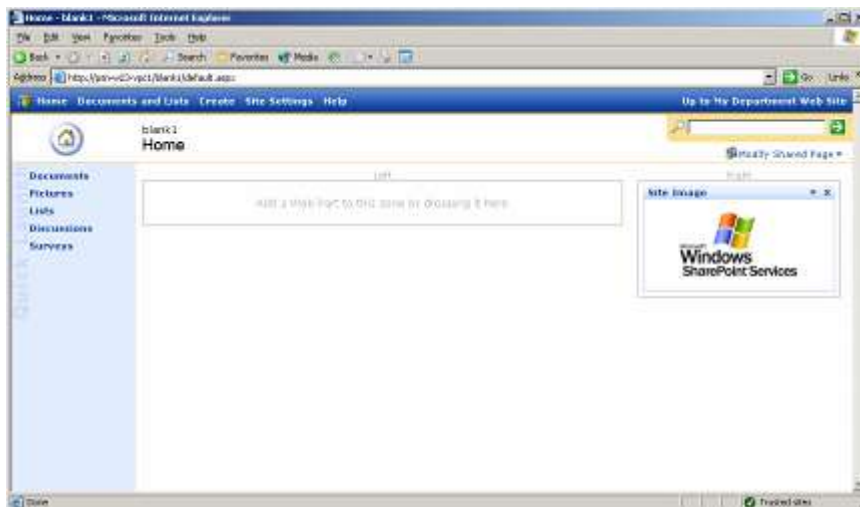


Figure 1. Web Part Zones - Default Configuration

Virtually any number of Web Parts can be added to a Web Part Zone. Web Part Pages containing more advanced arrangements containing several Web Part Zones can also be used in a SharePoint site (see Figure 2).

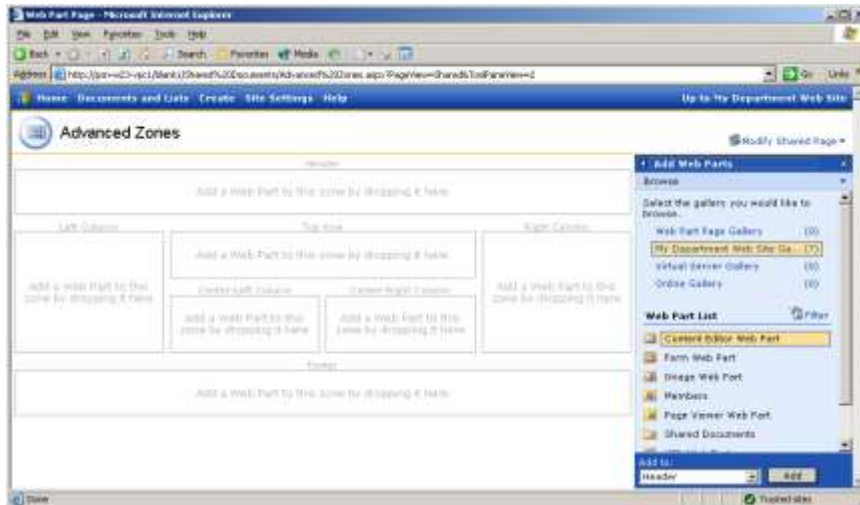


Figure 2. Advanced Web Part Zone Sample Configuration

Windows SharePoint Services supports role-based security permissions on a site-by-site basis. Security in Windows SharePoint Services is discussed in more detail in the section Understanding SharePoint Security.

SharePoint Web Parts

The list of available Web Parts to be added to a Web Part Page is stored in a special document library called a Web Part gallery. A particular SharePoint site collection usually has a collection of Web part galleries as illustrated in Figure 2.

When a Web Page is in Browse Web Parts mode, the list of available Web Part galleries and the Web Parts in the currently selected gallery appear on the right side of the Web Part Page (see Figure 2). Once a Web Part is selected in a gallery, it can be dragged onto any of the available Web Part Zones. A Web Part Zone expands vertically to make room for the Web Parts that are dragged into it. A Web Part can be dragged from the gallery — more than once if needed — to any Web Part Zone on a Web Part Page. Each Web Part on a Web Part Page is configured independently of the other Web Parts.

There are four basic categories of Web Parts:

- Content Viewer Web Parts
- List Web Parts
- Internal Web Parts
- Custom Web Parts

Content viewer Web Parts are used to display HTML, image, or XML content. The content displayed in a content viewer Web Part is usually stored external to the SharePoint site (versus data that is stored in a SharePoint list, for example). The content viewer Web Parts included with Windows SharePoint Services are listed in the following table.

| Content View Web Part | How To Use It |
|-----------------------|---|
| Page Viewer Web Part | Accepts a URL parameter for an HTML page and causes the content of the HTML page to be displayed in the Web Part. |
| Image Web Part | Accepts a URL parameter for an image file and causes the image to be displayed in the Web Part. |

| | |
|-------------------------|--|
| XML Viewer Web Part | Accepts two parameters: a URL to an XML document and a URL to an XML Stylesheet Transform (XSLT) document. The Web Part downloads both files, applies the XSLT to the XML and displays the result as HTML. |
| Content Editor Web Part | Can be used to edit and store XHTML (XML rich text) content and display the result in the Web Part. |

List Web Parts are used to display the data stored in a SharePoint list (see the section SharePoint Lists). A List Web Part is created in the Web Part gallery for each SharePoint list that has been added to the SharePoint site. A List Web Part can be configured to display any of the data views defined on the SharePoint list. List views enable SharePoint list data to be filtered, sorted, and grouped when it is displayed in a Web Part.

Internal Web Parts are used to display SharePoint data that is not stored as a SharePoint list. The most common example of an internal Web Part is the Members Web Part. This Web Part displays a list of all the people that have been invited to become members of a SharePoint site.

Custom Web Parts are Web Parts created by developers using Visual Studio® 2003 and .NET Framework to display customized views of the data that is stored in a Windows SharePoint Services list, internal SharePoint data source, database, or line-of-business application.

SharePoint Lists

SharePoint lists are virtual database tables that provide support for:

- Rich set of data types for defining the properties of each column in the SharePoint list
- Dynamically adding new columns to the SharePoint list
- Defining multiple list views of the list data, including how the displayed list data is sorted, filtered, and grouped.
- Individual list-level security permissions (in addition to the role-based permissions supported at the SharePoint site level).

SharePoint Lists vs. SharePoint Web Parts

SharePoint lists are frequently confused with the SharePoint Web Parts that are used to display the list data on a Web Part Page. Whenever a new SharePoint list is created, Windows SharePoint Services adds a Web Part to the Web Part Gallery to make it easy to drag a view of the list data onto a Web Part Zone on a Web Part Page. Once the list Web Part has been placed on the Web Part Page, a different view can be selected or the current view can be customized.

SharePoint List Column Properties

A SharePoint list is not implemented as a physical table in a SQL Server™ database. Rather, all of the SharePoint lists for a group of SharePoint sites are stored in the same, fixed set of SharePoint tables in a content database (stored in SQL Server).

Each list can have one or more columns. Each column has particular data type associated with it:

- Single line of text
- Multiple lines of text
- Choice
- Number

- Currency
- Date and Time
- Lookup
- Yes/No
- Hyperlink or Picture
- Calculated

Each list column can have mandatory values, requiring a user to enter a value when creating a new item or editing an existing item. Each list column can also have a default value.

| Column Data Type | Description |
|------------------------|---|
| Single line of text | Simple, single-line text property. |
| Multiple lines of text | Multi-line text property. |
| Choice | Choice allows the solution developer to enter a fixed list of values that the user can choose from. Radio buttons, drop-down lists, and checkboxes are supported with the latter allowing the selection of multiple values. |
| Number Currency | Number and Currency provide control over the number of decimals to be stored as well as minimum and maximum values for the column. |
| Date and Time | Date and Time can be configured to store both date and time values or a date only. |
| Lookup | Lookup column values can be selected from a column of values from another list in the same SharePoint site. The latter list acts as a lookup table, providing a list of values that can be selected from a Lookup column. |
| Yes/No | Yes/No is a Boolean value column data type that can have the values Yes or No. |
| Hyperlink Picture | Hyperlink or Picture columns can be used to store a URL value. |
| Calculated | Calculated is a column data type whose values are calculated based on the values of other columns. |

By default, a blank SharePoint list (created with the Custom List template) contains one customizable field: Title. Every item in SharePoint list or Document Library has a name and this value is stored in the Title column. All SharePoint lists include an ID column property as well as a Title column property. A SharePoint list also contains an additional five system columns that are not customizable (see the following table).

| System Columns | Data Type | Description |
|----------------|---------------|---|
| Attachments | Yes/No | Does the item include an attachment |
| Created | Date and Time | Date and time when the item was created |
| Created By | String | Windows account that created the item |
| Modified | Date and Time | Data and time when the item was last modified |
| Modified By | String | Windows account that last modified the item |

The way in which the list items and columns are stored in the underlying SharePoint content database tables can be configured by specifying the collection of list columns and their data types in a SharePoint list. As a convenience, it is also possible to specify one or more views for each list.

SharePoint List Views

Each list view for a SharePoint list defines the set of columns to be displayed in each of the list's Web Parts; either all of the columns or a subset of the columns can be specified in a view.

In addition, a list view includes properties for specifying:

- Whether all or a subset of the items in the list are to be displayed when this view is selected
- How the items are to be sorted
- How the items are to be grouped
- Whether subtotals and totals are to be calculated and displayed for number columns

SharePoint Site and List Templates

Windows SharePoint Services includes the ability to save a customized SharePoint list or SharePoint site as a template file. Templates enable a customized list or site design to be re-used to create new lists or sites that are identical to the original.

List template files are automatically saved in the List Template Gallery in the top-level site for a particular SharePoint site. SharePoint site template files are automatically saved in the SharePoint site Template Gallery in the top-level site for a particular SharePoint site. Template files can be downloaded from either gallery to your local hard drive. Downloaded list template files can be uploaded into the List Template Gallery in other SharePoint site collections on the same physical Windows Server 2003 server or any other Windows Server 2003 server where Windows SharePoint Services is installed. SharePoint site template galleries and list template galleries are implemented using SharePoint document libraries.

SharePoint site templates include configuration information describing all of the lists and Web Parts configured in the original SharePoint site as well as any visual customizations. SharePoint site templates do not include any security-related information such as the current members of the original SharePoint site.

List templates include all of the configuration information describing all of the list columns and their data types as well as the list views that have been created for the list.

SharePoint list and site templates are ideal mechanisms for packaging, distributing, and deploying custom business solutions created with Windows SharePoint Services.

Just-In-Time Business Solutions

In addition to the broad range of features and capabilities for creating business solutions using multi-purpose Web site templates, Windows SharePoint Services includes a set of standard site templates that can be deployed with little effort – either immediately before or after they have been customized. In addition, Microsoft has developed and made available a large collection of SharePoint site templates that can be uploaded and stored in the SharePoint site Template Gallery on your own Windows SharePoint Services server.

Standard SharePoint Site Templates

The list of standard site templates included with Windows SharePoint Services is displayed when you click **Create** on the top navigation bar and select **Sites and Workspaces** at the bottom of the Create page. If additional custom site templates are configured on your server, these will also appear in the site template list on this page.



Figure 3. Standard SharePoint Site Templates

These standard site templates provide support for the most common types of collaboration sites and workspaces, including:

- Team site
- Blank site
- Document workspace
- Basic meeting workspace
- Blank meeting workspace
- Decision meeting workspace
- Social meeting workspace
- Multi-page meeting workspace

Applications for Windows SharePoint Services

In addition to the standard site templates that are included with Windows SharePoint Services, Microsoft has published a large number of application site templates on the Microsoft TechNet public Web site. The list of application site templates is based on extensive research of the most common

business applications used in small, medium, and large enterprises, including public sector, private sector, and professional services organizations. The current list of applications available from Microsoft for Windows SharePoint Services can be found in the following table. A description of each application can be found in Appendix B – Applications for Windows SharePoint Services. The site templates for these business solutions can be downloaded from the following Web site:

<http://www.microsoft.com/technet/prodtechnol/sppt/wssapps/default.mspx>.

| Absence and Vacation Schedule | Board of Directors | Case Work Management |
|---------------------------------------|-----------------------------------|---------------------------------|
| Change Management | Classroom Management | Competitive Intelligence |
| Employee Activities SharePoint Site | Employee Timesheet and Scheduling | Employee Training |
| Event Coordination | Expense Reimbursement | Help Desk |
| HR Programs and Services | IT Developer Team SharePoint Site | Legal Document Review Workflow |
| Loan Initiation Management | Marketing Campaigns | Meeting Management |
| New Product Development | Performance Review | Professional Services Contracts |
| Professional Services SharePoint Site | Project Team SharePoint Site | Public Official Activity |
| Public Relations Work SharePoint Site | Publication Editorial Review | Recruiting Resource Center |
| Request for Proposal Management | Room and Equipment Reservation | Travel Request |

In January 2006, Microsoft released three new application templates for Windows SharePoint Services:

- Discussion Database
- Document Library
- Team Work SharePoint Site

Four of the most popular applications for Windows SharePoint Services from Microsoft are:

- Request for Proposal Management
- Publication Editorial Review
- IT Developer Team SharePoint Site
- Travel Request

Sample home page screen shots for these applications are can be found in Figure 4 through Figure 7.

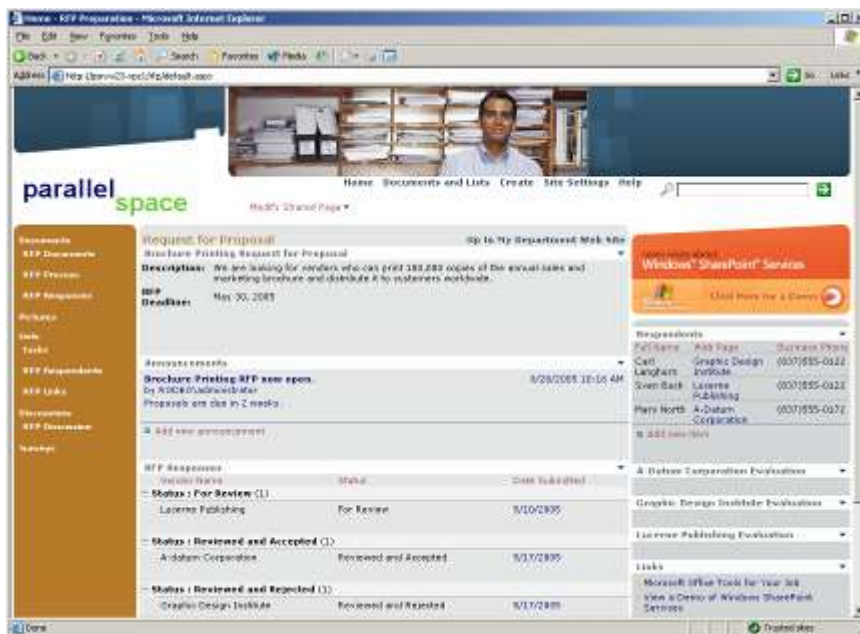


Figure 4. Request for Proposal Management

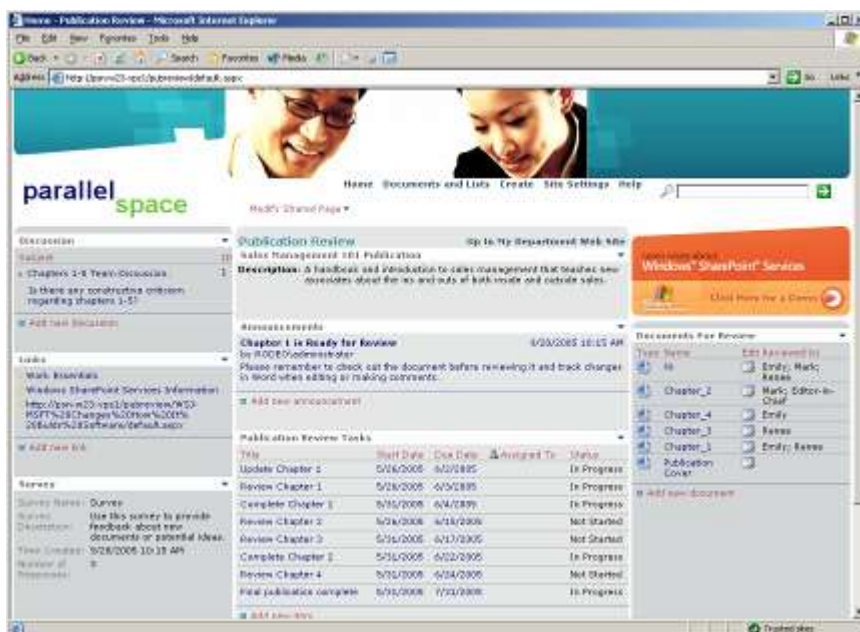


Figure 5. Publication Editorial Review

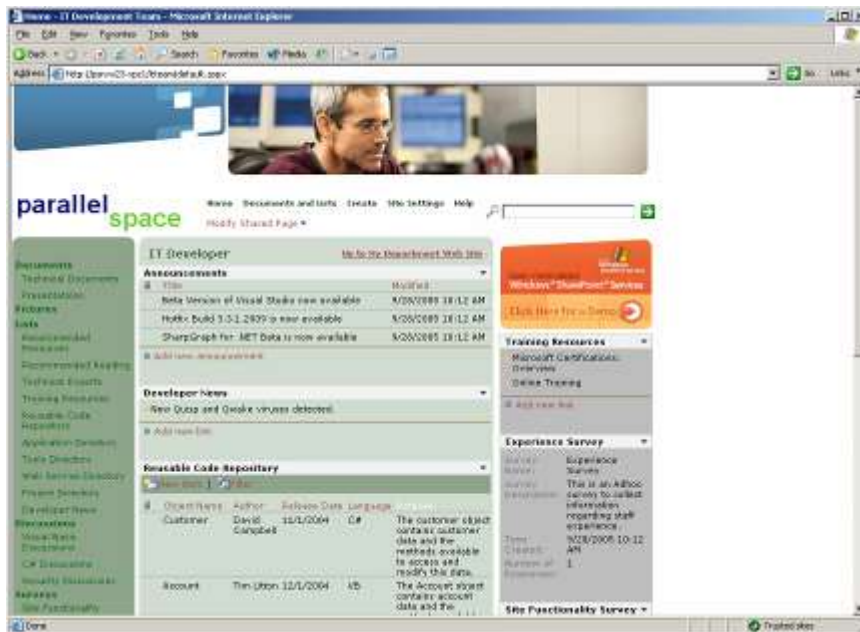


Figure 6. IT Developer Team SharePoint Site

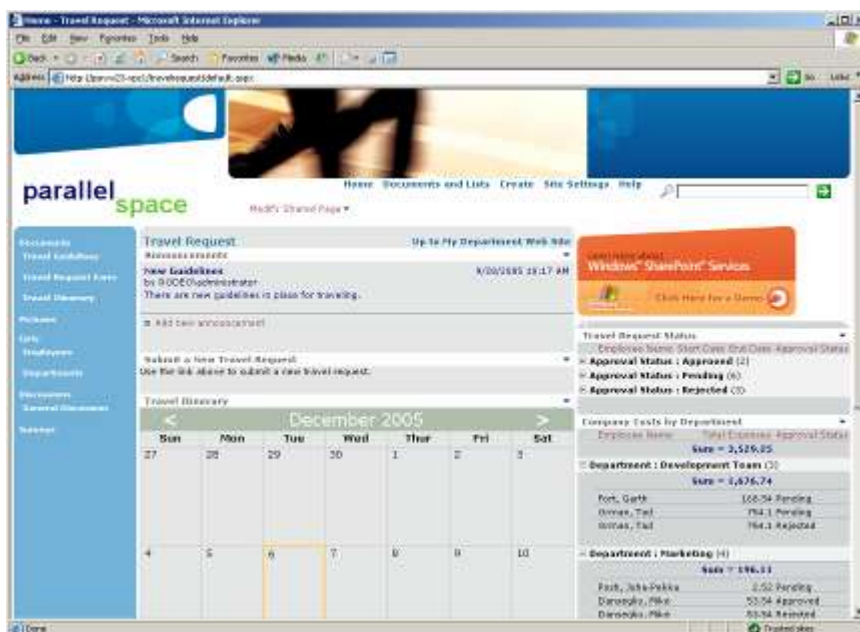


Figure 7. Travel Request

Understanding SharePoint Security

The following introduction will help to make you aware of the security and access controls that are available for SharePoint sites and lists. It is not intended to be a comprehensive discussion of the security and access controls in Windows SharePoint Services.

SharePoint Site Security

SharePoint site access controls are based on the concept of SharePoint site groups. Every user who can access a SharePoint site must belong to a SharePoint site group (as a named user) or as a member of a SharePoint cross-site group or Active Directory group that is a member of the site group.

Each SharePoint site group provides role-based access to selected resources and functionality based on the list of SharePoint rights that are assigned to the site group. The Manage Users administration page is illustrated in Figure 8. This page has actions for adding users, removing users, and editing the site groups a selected user belongs to.

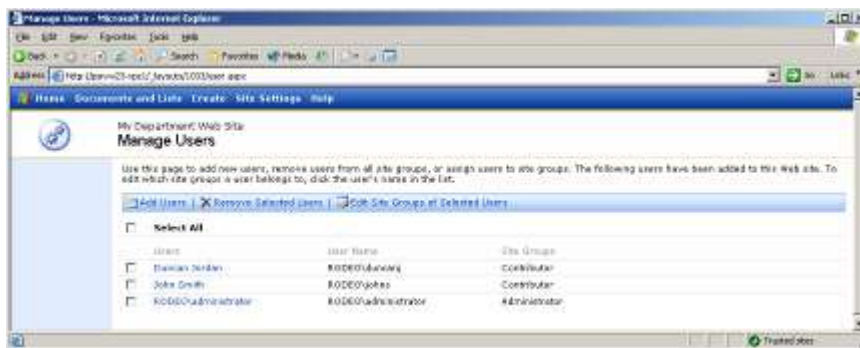


Figure 8. Managing Users Administration Page

Clicking Add Users on the Manage Users page displays the Add Users administration page shown in Figure 9.

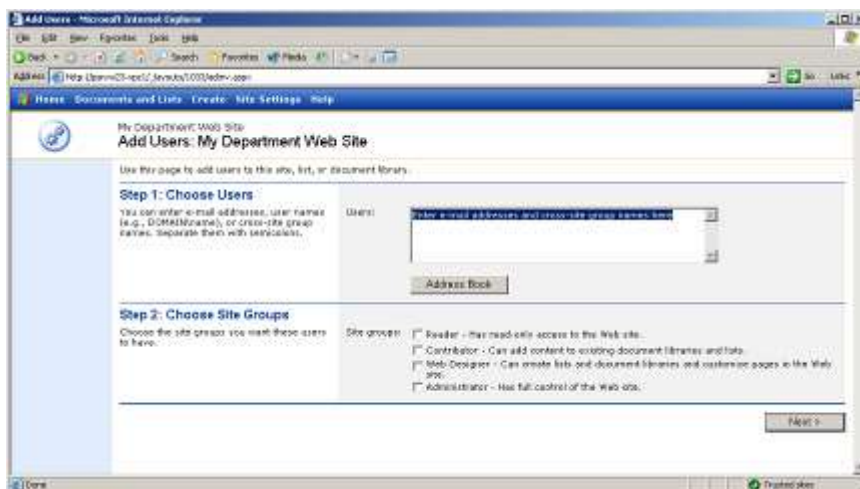


Figure 9. Add Users (and Choose SharePoint Site Groups) Administration Page

Figure 10 is an illustration of the Manage SharePoint Site Groups administration page and is used to add new site groups to a SharePoint site or to delete an existing site group.

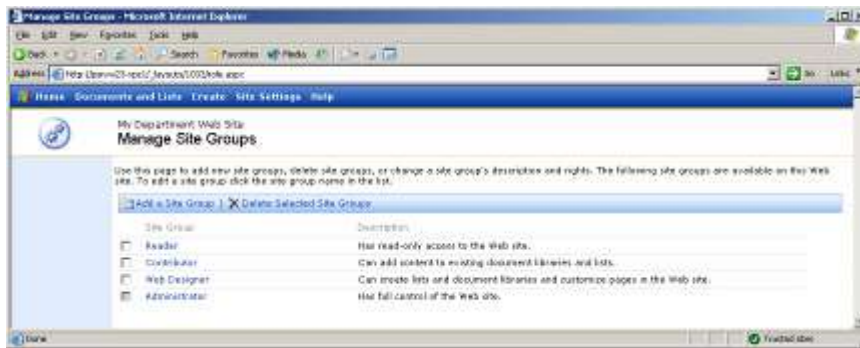


Figure 10. Managing SharePoint Site Groups Administration Page

Adding a site group to a site also allows the administrator to select the individual rights (permissions) for the new site group. This is shown in Figure 11. There are a large number of fine-grained rights that can be selected. The list of rights is organized into several categories: List Rights, SharePoint Site Rights, and Person Rights.

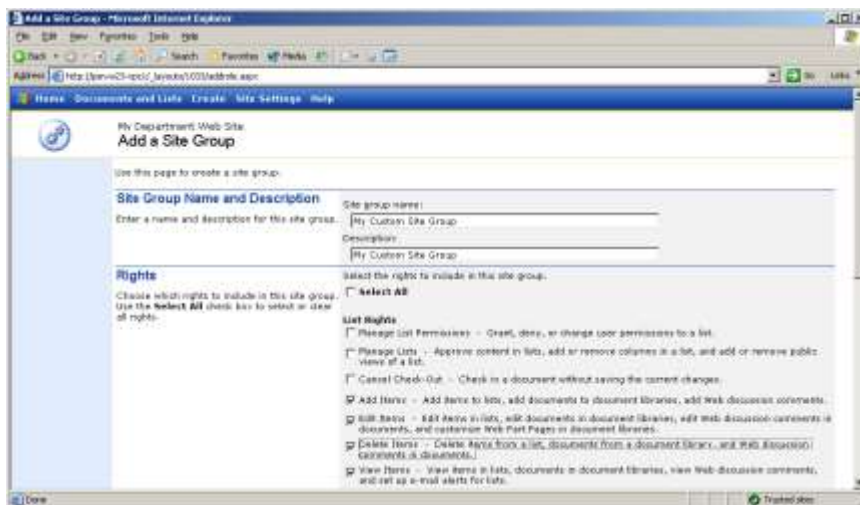


Figure 11. Add a SharePoint Site Group Administration Page

The scope of a site group is the individual SharePoint site where the site group was created. The scope can extend to each SharePoint site created underneath the site where the site group was created (i.e. to each "subsite"). Whether or not a particular site inherits the security permissions from its parent site is first determined when the subsite is created. At this time, the administrator can choose to have the subsite inherit permissions from the parent site or whether a new, empty set of permissions is to be used for the newly created subsite. Any time after a subsite is created, the administrator can choose whether or not to inherit permissions from the parent site using the SharePoint site's SharePoint Site Settings administration pages.

What about when you would like to have a common set of site groups or users to be used across multiple SharePoint sites and their subsites? Windows SharePoint Services supports this through a feature called cross-site groups. The cross-site group administration page for a SharePoint site collection is illustrated in Figure 12. A cross-site group is a list of people (or Active Directory domain groups). A cross-site group needs to be added to a site group for a particular site before the members of the cross-site group can access the SharePoint site (unless they were previous members of the site

group as individual users). Cross-site group members inherit the rights associated with the site group that the cross-site group is a member of.

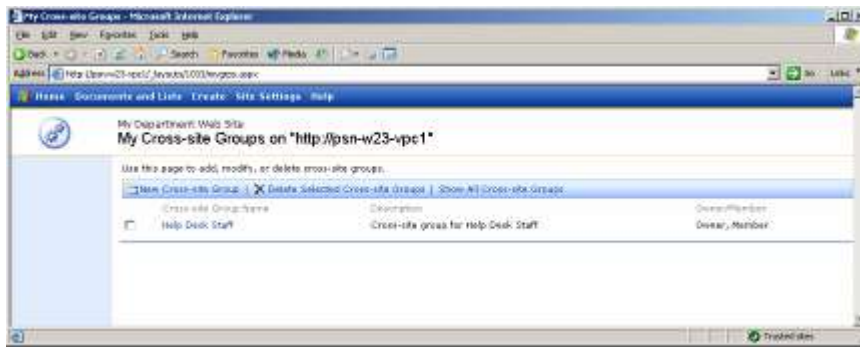


Figure 12. Managing Cross-SharePoint Site Groups Administration Page

SharePoint site groups and cross-site groups can have the following types of members:

- Individual users
- Active Directory domain groups
- Cross-site groups

SharePoint List Security

In addition to SharePoint site-level permissions, a little-known feature allows permissions to be specified at the level of an individual list or document library in a SharePoint site. Figure 13 is an illustration of the Change List Permissions administration page.

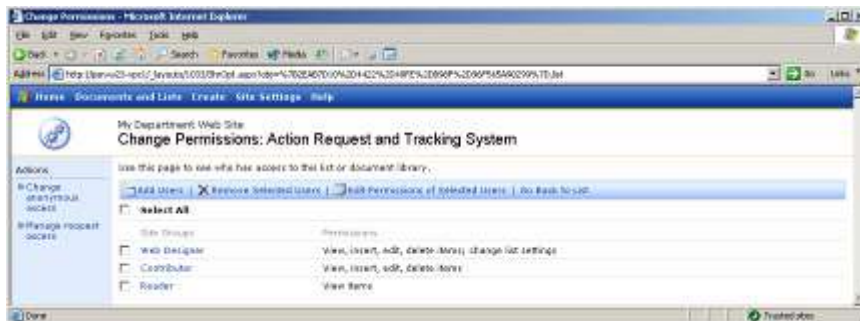


Figure 13. Change List Permissions Administration Page

SharePoint list permissions work differently than SharePoint site permissions. SharePoint site permissions are based entirely on site groups and the rights granted to each particular site group. Users or groups of users (Active Directory domain groups or cross-site groups) can only access a SharePoint site if they belong to a site group for a site.

However, with SharePoint lists, individual users, site groups, cross-site groups, or Active Directory groups can be given individual rights – the users do not have to belong to a site group as they do with SharePoint site security.

NOTE: Given the flexibility of SharePoint list security and the fact that it is not commonly used or well understood, it should be used with care. In a site collection with many sites and many lists, it is difficult to locate lists that have list-specific security settings. The use of a SharePoint security inventory tool like PSNVulture, a free source SharePoint utility available at <http://workspaces.gotdotnet.com/vulture> or

<http://www.opencanal.com/community> is recommended. This tool is recommended on an “as-is” basis, with no formal support, and no support at all from Microsoft.

Building an Action Request and Tracking System

The following illustrates how an Action Request and Tracking System (ARTS), a real just-in-time business solution, was created using Windows SharePoint Services 2.0. The Problem Statement section describes the scenario this solution was trying to solve. The Solution Concept and Building the Solution sections describe how the ARTS solution was built using Window SharePoint Services 2.0.

Problem Statement

A project consisting of a team of people with particular goal, for example, creating or executing a marketing program, developing a software product, or planning an event, often needs to track issues and concerns related to the many parts of the project. In a software-related project, these can include tracking software defects found during analysis, design, or testing. Other projects may simply want to track items that require action. In the Action Request and Tracking System (ARTS), issues and concerns are called action requests.

An action request is simply a record of a request for work to be performed. The ARTS solution built with Windows SharePoint Services is used by a project team to track the lifecycle of an action request through a simple workflow process.

Solution Concept

An ARTS solution consists of an ARTS SharePoint list, which can possibly include additional project-specific SharePoint document libraries and lists. The status of an action request is determined by the value of the Status column property. The solution presented below uses the following list of Status column property values.

| Status | Interpretation |
|-----------------|--|
| New | All new action requests have a status of New and are usually assigned to the project leader. |
| To Be Completed | The project leader will change the status of an action request to To Be Completed when an action request is assigned to a team member to be worked on. |
| To Be Verified | Once a team member has completed the action request, the person changes the status of the action request to To Be Verified and assigns to the appropriate person for verification or testing. |
| To Be Closed | When an action request is both completed and verified, the action request status is changed to To Be Closed and assigned back to the project leader for final verification and closure. |
| Closed | The project leader closes an action request by changing the status to Closed. |
| Deferred | Some action requests are of lower priority or need to be deferred to the next version or release of a project. The project leader can choose to defer an action request at any time during its lifetime by setting the status of the action request to Deferred. |

The lifecycle of an action request is show in Figure 14.

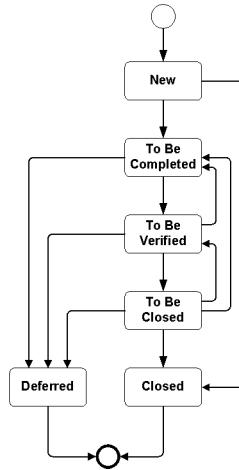


Figure 14. ARTS Action Request Lifecycle (Action Request Status)

With Windows SharePoint Services, it is extremely easy to add or change the list of allowed Status values. In the ARTS solution, the list of allowed values is configured to use second SharePoint list as a lookup table. This will be discussed later. The ARTS workflow process is described in Figure 15.

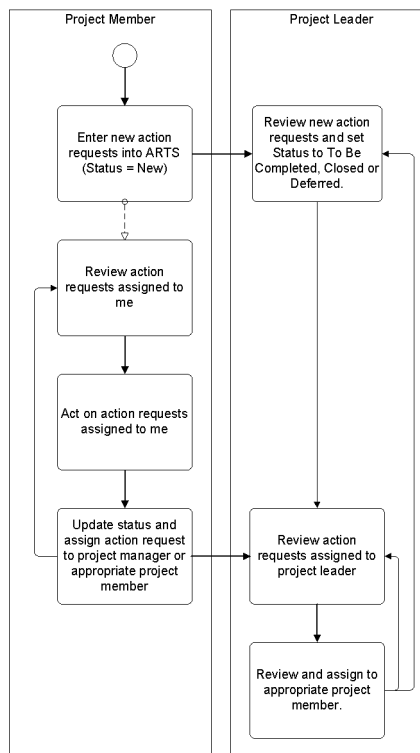


Figure 15. ARTS Workflow

Figure 16 is a screen capture of the three sample action requests that were entered into the ARTS SharePoint list and displayed using the SharePoint list Web Part. The list Web Part displays a particular view of the data stored in the ARTS SharePoint list.

| Action Request and Tracking System | | | |
|---|-------------------------------------|--|--------------|
| Status | Assigned To | Title | Severity |
| Status : 2. To Be Completed (1) | | | |
| Assigned To : Duncan Jordan (1) | | | |
| 2. To Be Completed | Duncan Jordan | Need to correct spelling error in BABU field | 3. Important |
| Status : 3. To Be Verified (1) | | | |
| Assigned To : John Smith (1) | | | |
| 3. To Be Verified | John Smith | Rename Master PST file | 3. Important |
| Status : 5. To Be Closed (1) | | | |
| Assigned To : RODEO\administrator (1) | | | |
| 5. To Be Closed | RODEO\administrator | Upgrade the server memory o 2GB | 3. Important |
| Add new item | | | |

Figure 16. ARTS SharePoint List and Web Part

The ARTS list Web Part uses a custom view to display the action requests organized and displayed using various views. Figure 16 shows three action requests displayed with the Workflow Status custom view. This view (described later) is used to filter, sort, and group the active action requests in the ARTS SharePoint List.

NOTE: No software development effort was required to create the ARTS SharePoint list Web Part. It was automatically configured when Windows SharePoint Services created the ARTS SharePoint list. A Web Part is the presentation layer view of the data stored in the SharePoint list.

The Building the Solution section includes an overview of the process for building the ARTS solution. The sections Reusing the ARTS List Template and Reusing the ARTS SharePoint Site (beginning on page 27) describe how to package the solution as a SharePoint list template and a SharePoint site template as well as how to deploy new instances of the ARTS solution.

Building the Solution

Create a New SharePoint Site

To start building the ARTS solution, it is best to start with a new SharePoint site. Use a standard SharePoint site template or one of your own. For this solution, we recommend you use the Blank SharePoint site template (a standard SharePoint template that contains no predefined lists or Web Parts). Once the ARTS list and Web Part has been configured added to the blank site, the basic ARTS site can be used as the basis for new project sites and site templates by adding additional lists and document libraries to the basic site.

To create the new, blank SharePoint site, click Create on the top navigation bar, scroll to the bottom of the Create Page and click Sites and Workspaces. Follow the directions for creating a new site. Select Blank SharePoint site on the Template Selection administration page.

Create Blank (Custom) SharePoint List

When Windows SharePoint Services has finished creating the new site, the home page for the site will be displayed. To create a blank SharePoint list in the new site, click Create on the top navigation bar, scroll down the Create Page administration page and click Custom List in the Custom Lists section of this page (see Figure 17).



Figure 17. Create Page Administration Page

Enter ARTS as the name of the new list and “ARTS – Action Request and Tracking System” into the Description field. Click **Create** to create the blank SharePoint that will be used as the basis for the ARTS SharePoint List.

Customizing the Blank SharePoint List

To configure the SharePoint list column properties, click **Modify settings and columns** on the left side of the ARTS blank list you just created. This will display the **Customize list administration** page.

The Customize list administration page is divided into three sections: General Settings, Columns, and Views, as illustrated by the screen captures in Figure 18 through Figure 26.

The General Settings section is used for:

- Configuring general settings, such as name, description, navigation, content approval and the use of attachments
- Saving the list as a list template
- Managing list-level permissions
- Deleting the list from the SharePoint site

No changes need to be made to the general settings for the ARTS SharePoint List. Later, in the [Creating an ARTS SharePoint List Template](#) section, the Save list as template action will be used to create a list template for the final version of the ARTS list.

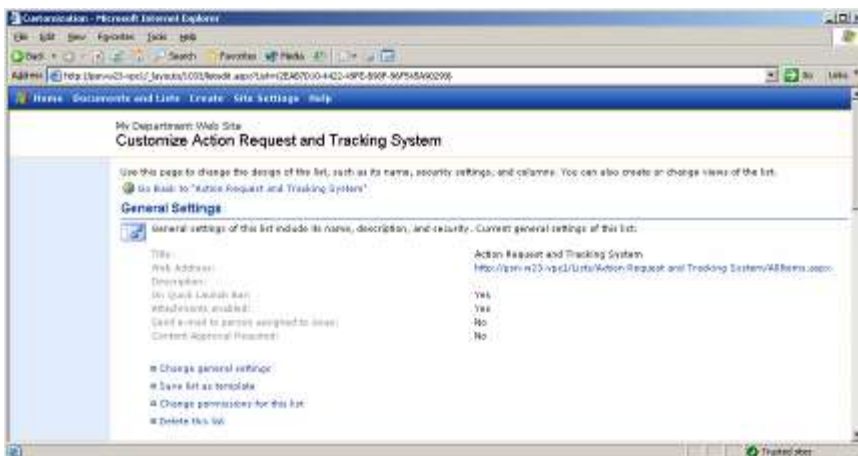


Figure 18. Customize SharePoint List Administration Page: General Settings

The Columns section of the Customize list administration page is used to add new columns to the blank list. Several new columns will need to be added to the blank list to store the data fields needed for the ARTS solution, as shown in Figure 19.

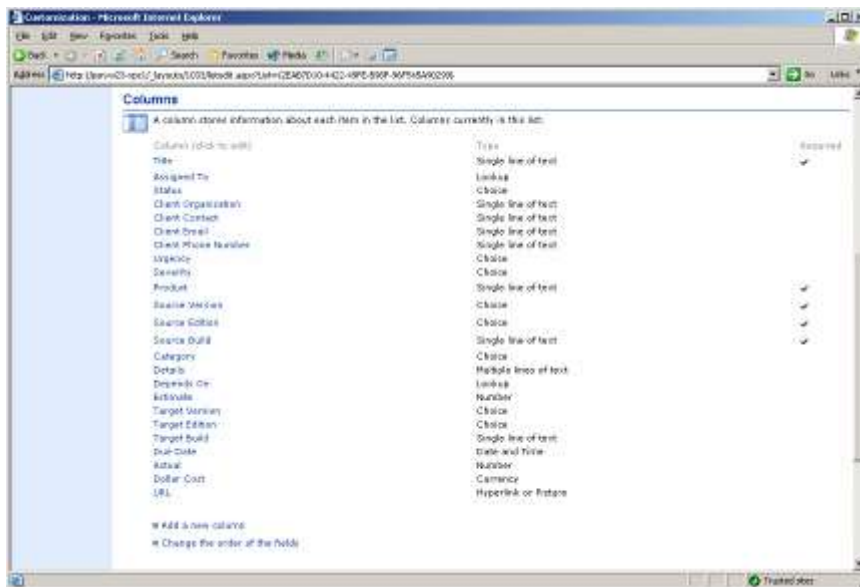


Figure 19. Customize SharePoint List Administration Page: Column Settings

The complete list of new columns needed for the ARTS solution (including the column name, data type and whether a data value for a column is mandatory) is provided in the following table.

| Column | Data Type | Mandatory |
|---------------------|------------------------|-----------|
| Title | Single line of text | Yes |
| Assigned To | Lookup | |
| Status | Choice | |
| Client Organization | Single line of text | |
| Client Contact | Single line of text | |
| Client Email | Single line of text | |
| Client Phone Number | Single line of text | |
| Urgency | Choice | |
| Severity | Choice | |
| Product | Single line of text | Yes |
| Source Version | Choice | Yes |
| Source Edition | Choice | Yes |
| Source Build | Single line of text | Yes |
| Category | Choice | |
| Details | Multiple lines of text | |
| Depends On | Lookup | |
| Estimate | Number | |
| Target Version | Choice | |

| | | |
|----------------|----------------------|--|
| Target Edition | Choice | |
| Target Build | Single line of text | |
| Due Date | Date and Time | |
| Actual | Number | |
| Effort | Number | |
| URL | Hyperlink or Picture | |

More details on the columns with Choice and Lookup data types are found in the following table.

| Column | Choice Values | Lookup Values |
|----------------|--|---------------------------------|
| Assigned To | | User Information / Display Name |
| Status | 1. New 2. To Be Completed 3. To Be Verified 4. To Be Closed 5. Closed 6. Deferred | |
| Urgency | 1. Critical 2. Serious 3. Important 4. Suggestion | |
| Severity | 1. Critical 2. Serious 3. Important 4. Suggestion | |
| Source Version | 0-0-x 1-0-x 1-1-x 1-5-x 2-0-x 2-1-x 2-5-x 3-0-x 3-1-x 3-5-x | |
| Source Edition | Standard Professional Enterprise | |
| Category | Function Usability Performance Reliability Installation | |

| | | |
|----------------|--|--|
| | Migration/Co-existence Documentation Security | |
| Depends On | | ARTS – Action Request and Tracking System / ID |
| Target Version | 0-0-x 1-0-x 1-1-x 1-5-x 2-0-x 2-1-x 2-5-x 3-0-x 3-1-x 3-5-x | |
| Target Edition | Standard Professional Enterprise | |

The Views section of the Customize list administration page is used to configure predefined views that enable ARTS users to filter, sort, and group action requests in a SharePoint list. The current version of the ARTS solution is configured with three views:

- All Action Requests
- My Action Requests
- Workflow Status



Figure 20. Customize SharePoint List Administration Page: Views

The All Action Requests view is configured using the settings in Figure 21 through Figure 26.

Name

Type a name for this view of the list. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link. [Show me more information.](#)

View Name:

Web address of this view:

This view appears by default when visitors follow a link to this list. If you want to delete this view, first make another view the default.

Columns

Select or clear the check box next to each column you want to show or hide in this view. To specify the order of the columns, select a number in the **Position from left** box.

| Display | Column Name | Position from Left |
|-------------------------------------|---------------------------------------|--------------------|
| <input checked="" type="checkbox"/> | Attachments | 1 |
| <input checked="" type="checkbox"/> | Issue ID (linked to item) | 2 |
| <input checked="" type="checkbox"/> | Title (linked to item with edit menu) | 3 |
| <input checked="" type="checkbox"/> | Assigned To | 4 |
| <input checked="" type="checkbox"/> | Status | 5 |
| <input checked="" type="checkbox"/> | Urgency | 6 |
| <input checked="" type="checkbox"/> | Category | 7 |
| <input checked="" type="checkbox"/> | Product | 8 |
| <input checked="" type="checkbox"/> | Source Version | 9 |
| <input checked="" type="checkbox"/> | Source Edition | 10 |
| <input checked="" type="checkbox"/> | Source Build | 11 |
| <input checked="" type="checkbox"/> | Estimate | 12 |
| <input checked="" type="checkbox"/> | Depends On | 13 |

Figure 21. All Action Requests View – Columns Settings

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Show me more information.](#)

First sort by the column:

☒ Show items in ascending order (A, B, C, or 1, 2, 3)

☐ Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

☒ Show items in ascending order (A, B, C, or 1, 2, 3)

☐ Show items in descending order (C, B, A, or 3, 2, 1)

Figure 22. All Action Requests View – Sort Settings

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Views of issues lists use a default filter with **Current** set to **YES** so only the current version of each issue is displayed. [Show me more information.](#)

☐ Show all items in this view

☒ Show items only when the following is true:

Show the items when column:

☐ And ☒ Or

When column:

Figure 23. All Action Requests View – Filter Settings

The My Action Requests view is configured in the same way as the All Action Requests view described above, except for the filter settings. The filter settings for this view select the ARTS SharePoint List items where the value of the Assigned To column property is equal to "[Me]", a special SharePoint list value that represents the Windows account of the current user. The My Action Requests view filter settings are shown in Figure 24.

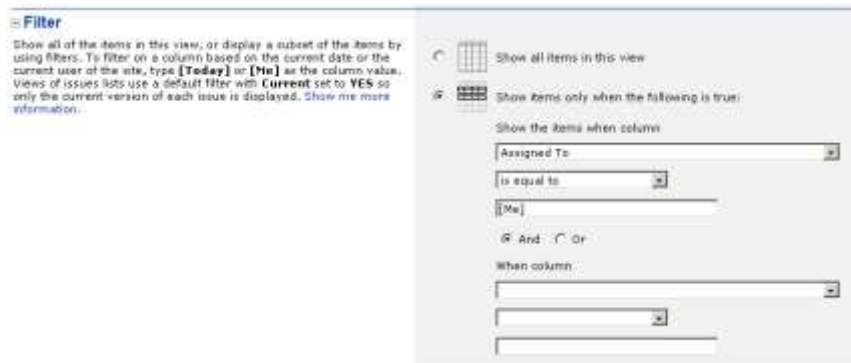


Figure 24. My Action Requests View – Filter Settings

Figure 25 illustrates the Group By settings used for the Workflow Status view. The remainder of the view settings are the same as the All Action Requests view.



Figure 25. Workflow Status View - Group by Settings

The other groups of view settings include Totals, Style, and Item Limit as shown in Figure 26. For the All Action Requests view (and the other views used in the ARTS solution), these three groups of settings are left unchanged. You may choose to create additional views that use, for example, Totals to create simple reports.

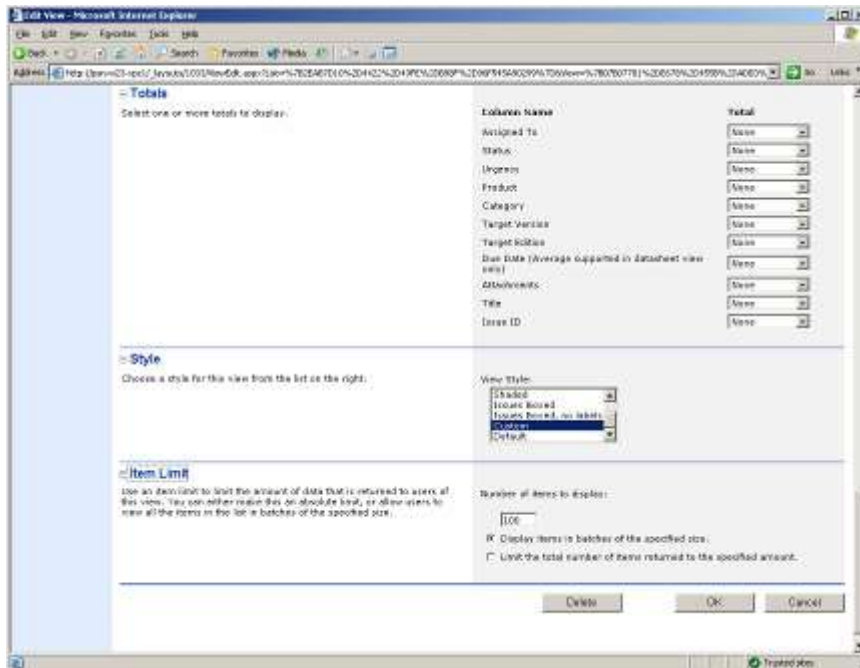


Figure 26. Edit View Administration Page: Totals, Style, and Item Limit

Once the ARTS SharePoint List has been configured and the appropriate views have been defined, it is time to test the solution. Click the Action Request and Tracking System link to display the ARTS SharePoint List. In the top navigation bar for the ARTS SharePoint List, click New Item to display the New Item data entry form shown in Figure 27.

All of the column properties that are defined for the SharePoint list will appear in the New Item data form. Values for the mandatory column properties must be entered into the data entry form before it can be saved. The mandatory column properties are marked with a red asterisk (*). The data entry control (for example, drop-down lists, text fields, or radio buttons) used for each column property in the New Item data entry form is based on the column property's data type (see the section SharePoint List Column Properties).

When values have been entered for all of the mandatory fields as well as the optional fields, click Save and Close to save the values as a new item in the SharePoint list.

The new item will automatically appear when the ARTS SharePoint List Web Part is displayed. The list items will be displayed using the default view that the ARTS list Web Part has been configured with.

Figure 27. Sample New Item Data Entry Form

Once the column properties and views for the ARTS SharePoint List are configured in the way you want them to be, the SharePoint list is ready to be used. It is also ready to be saved as a SharePoint list template and immediately re-used in any SharePoint site as a just-in-time business solution.

To save the ARTS SharePoint list as a SharePoint list template, click on the Action Request and Tracking System in any SharePoint site that uses it. In the QuickLaunch menu on the left side of the ARTS SharePoint List, click Modify Settings and Columns, then click Save List as Template to display the Save List as Template administration page, as shown in Figure 28.

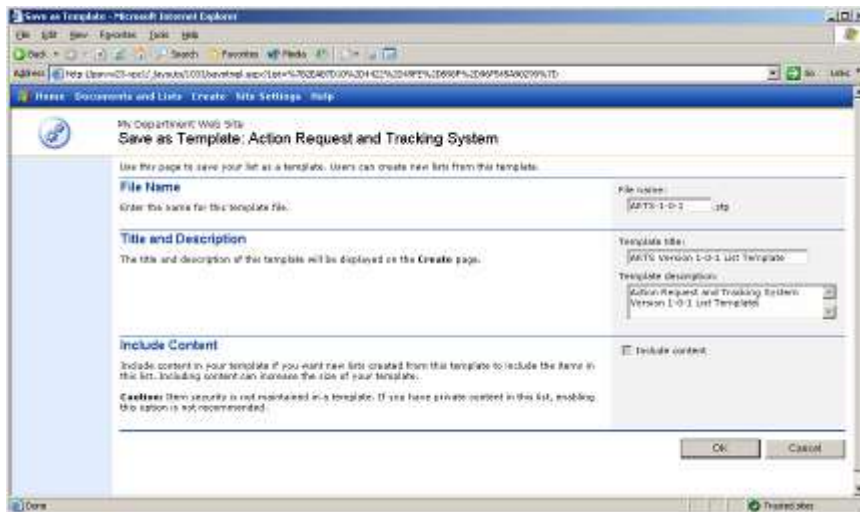


Figure 28. Save SharePoint List as Template Administration Page

In the Save SharePoint List as Template administration page, enter the filename, title, and description to be used by Windows SharePoint Services when creating the SharePoint Template (.stp) file and saving it into the site collection's list template gallery. Click **OK**.

The SharePoint list template gallery (which contains all of the list templates for a SharePoint site collection) can be displayed by clicking SharePoint site Settings, Go to SharePoint Site Administration, Manage List Template Gallery. Figure 29 depicts the SharePoint list gallery containing the ARTS SharePoint List template that was saved in Figure 28.

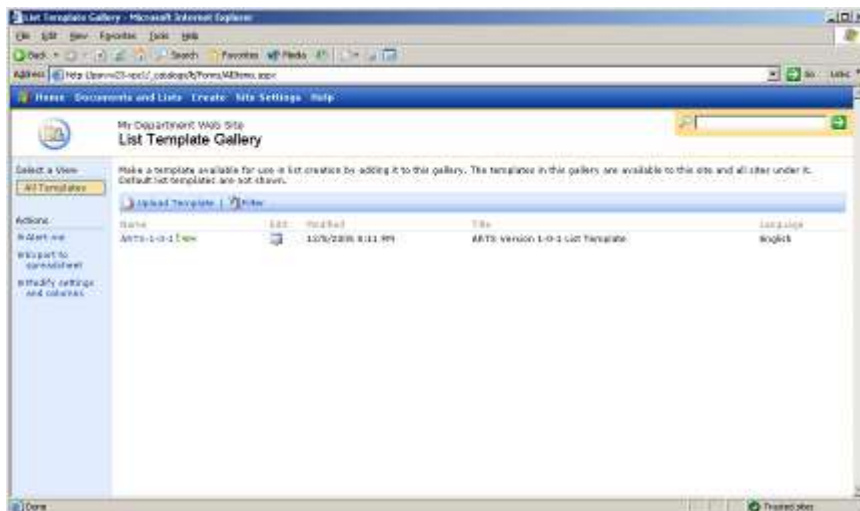


Figure 29. SharePoint List Template Gallery

More details on re-using the ARTS SharePoint list template are provided in the section Reusing a SharePoint Solution.

Reusing a SharePoint Solution

In this section, the ARTS solution created in the previous section will be saved as both a SharePoint list template and a SharePoint site template.

Reusing the ARTS List Template

A SharePoint list template can be used to save an existing list as a reusable template. The list template can then be used to add a new list to an existing SharePoint site. The new list will have all of the features and structure found in the original SharePoint list. Optionally, the list template can also include all of the list items from the original SharePoint list.

Creating an ARTS SharePoint List Template

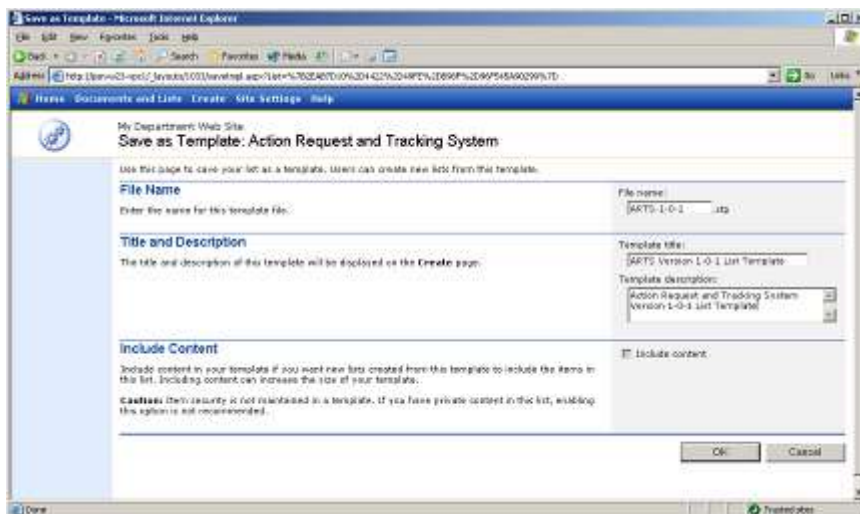
After creating and configuring a sample ARTS SharePoint list with the desired column properties and views for sorting, filtering, grouping, tallies, styles and limits, this list configuration can be saved as a SharePoint list template in the SharePoint list template gallery. To create a list template from an existing list,

- Click **Home** on the top navigation bar
- Click on the name of the list (ARTS) in the quick launch bar on the left side of the browser
- Click **Modify settings and columns** in the Actions menu near the left side of the browser

The following list configuration page will be displayed.

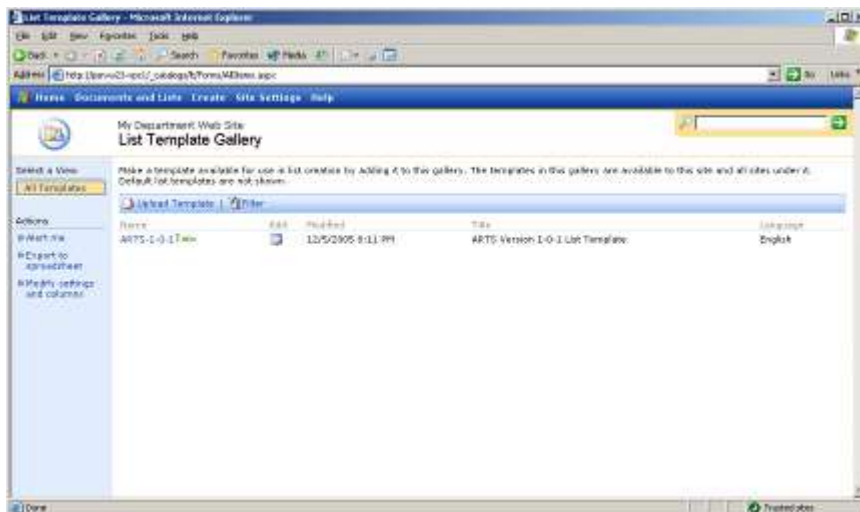


Click **Save list as template** to display the **Save as template** page.



Enter the above settings for the file name, template title, and template description. Click **OK** to save the ARTS SharePoint List as a SharePoint list template. On the confirmation page that is displayed next, click the list template gallery link to display the SharePoint list template gallery for this server.

NOTE: Make sure to include a version-naming convention in the filename, tile, and description values used to create the list template file in the list template gallery. One example of a convention appends three numbers separated by dashes to the filename (for example, mylisttemplate-1-2-3.stp) to represent the major version, minor version, and revision or build level, respectively.



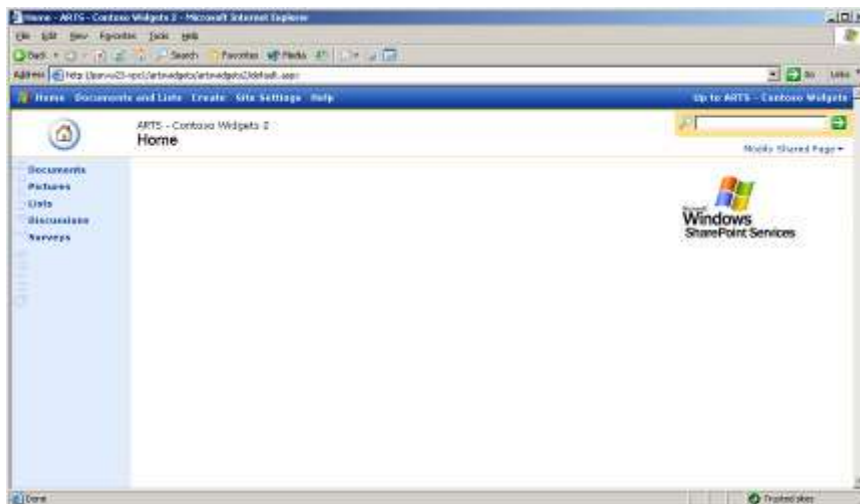
The ARTS SharePoint List template is now ready to be used in any SharePoint site.

Using the ARTS SharePoint List Template in a SharePoint Site

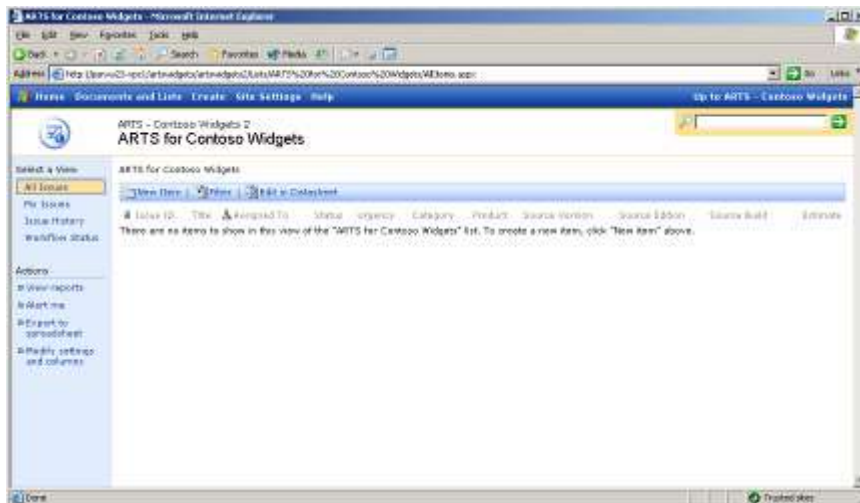
Start by creating a new SharePoint site using any site template; for example, the Blank SharePoint site template. Click **Create** on the top navigation bar and select **Sites and Workspaces** at the bottom of the Create page. When the list of standard and custom site templates is displayed, select Blank SharePoint site and click **OK**.



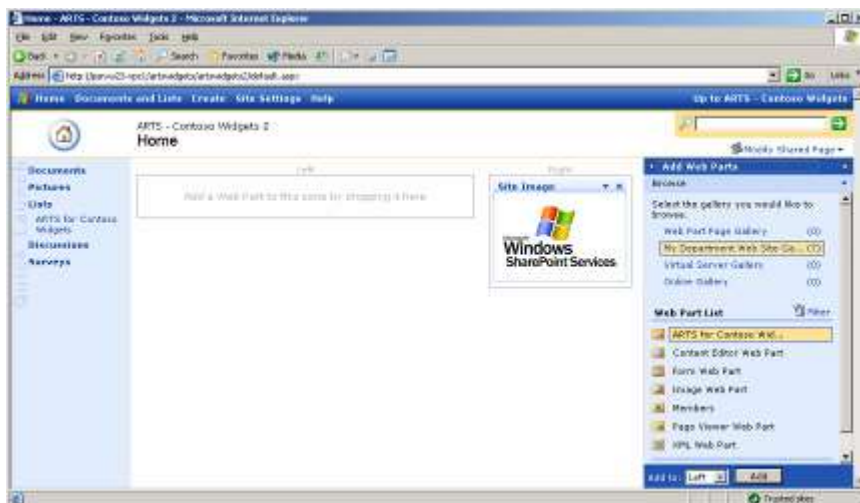
The following blank SharePoint site will be displayed. A blank SharePoint site does not contain any pre-configured SharePoint lists.



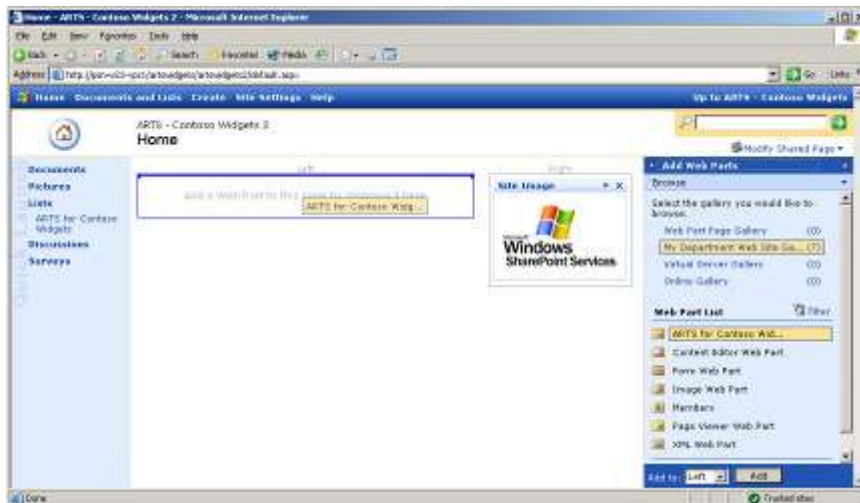
To add a new list based on the ARTS list template, click **Create** on the top navigation bar and scroll down the page until you can click ARTS Version 1-0-1 List Template.



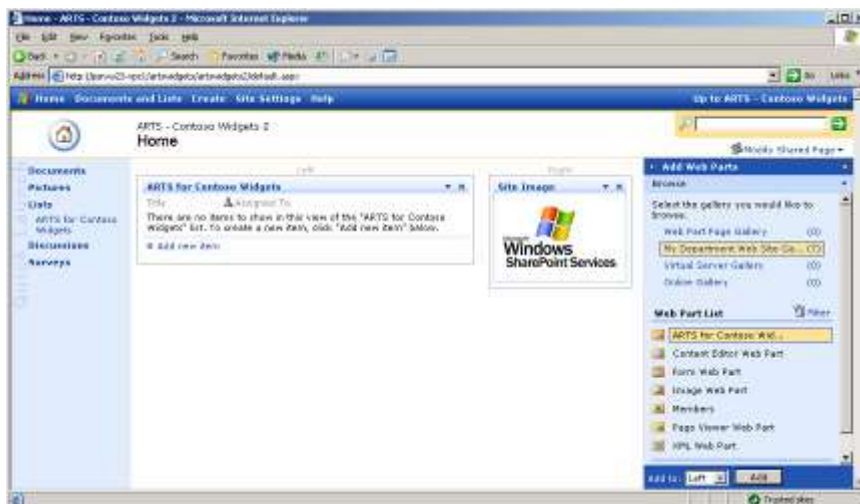
To add the ARTS list Web Part to the site home page, click **Home** on the top navigation bar; then click **Modify Shared Page** located in the top-right corner of the browser. Select **Add Web Parts**, then **Browse**. The Web Gallery for this SharePoint site will be displayed on the right side of the browser. The regions of the Web Part page where Web Parts from the gallery can be dragged and dropped are displayed as light grey rectangles.



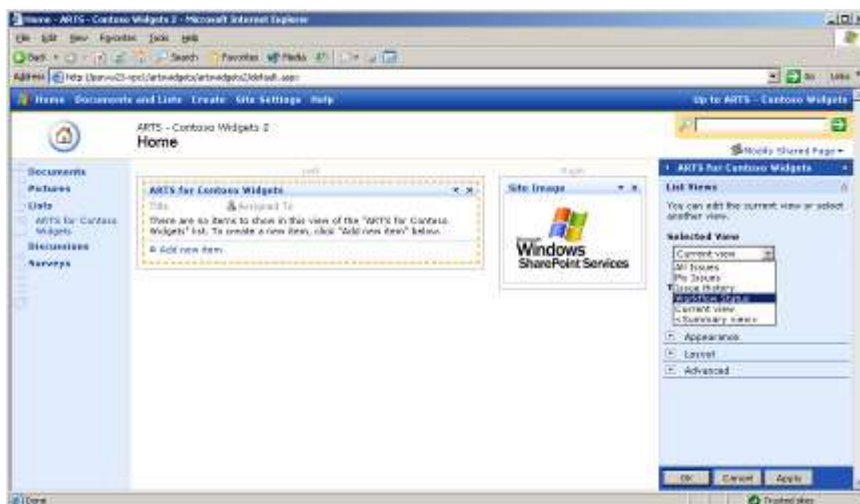
Drag the **ARTS for Contoso Widgets** Web Part from the gallery over top of the Left Web Part zone and release it.



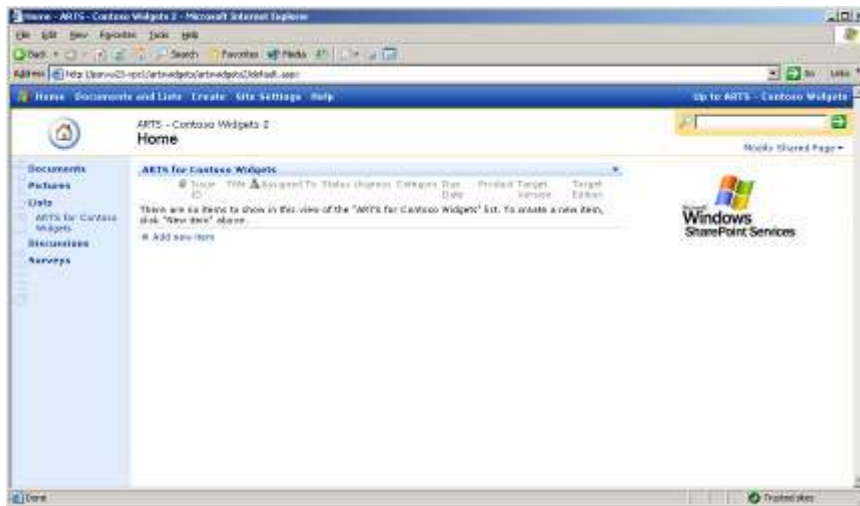
A default view for the ARTS SharePoint List appears in the ARTS list Web Part.



To change the view to the **Workflow Status** view, click on the blue triangle on the right side of the ARTS list Web Part to display the Web Part action menu. Select **Modify Shared Web Part** to display the Web Part property page on the right side of the browser.



In **Selected View** drop-down list, click the blank triangle and select **Workflow Status** as the new default view. Click **OK** at the bottom of the Web Part property page. The new Workflow Status view will appear in the ARTS list Web Part.



Reusing the ARTS SharePoint Site

A SharePoint site template can be used to save an existing site (including all of the site's SharePoint lists and libraries) as a reusable template. The site template can then be used to create a new SharePoint site. The site template will have all of the features and structure found in the original SharePoint site, including all of the site's lists and libraries. Optionally, the site template can also include all of the items found in the original site's lists and libraries.

Saving the ARTS Solution as SharePoint Site Template

To make it easy to create additional copies of the site that includes all of SharePoint lists in the site (and optionally, all of the content in the lists), Windows SharePoint Services has the ability to save a SharePoint site as a custom site template in the SharePoint site template gallery. The custom site templates in the SharePoint site template gallery are displayed in the same list as the standard site templates when a new SharePoint site is being created (see below).

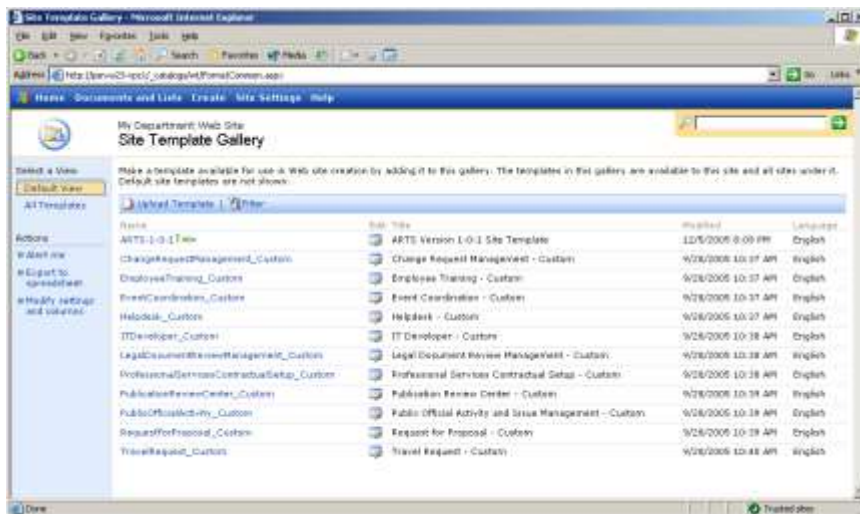
To save a SharePoint site as a site template,

- Click SharePoint Site Settings on the top navigation bar
- Click Go to SharePoint Site Administration
- Click Save site as template to display the **Save SharePoint site as template** page.



Enter the above settings for the file name, template title, and template description. Optionally, click the **Include Content** checkbox to have all the content of the SharePoint lists in the site saved into the SharePoint site template. Click **OK**.

On the confirmation page that is displayed next, click the site template gallery link to display the SharePoint list template gallery for this site collection.



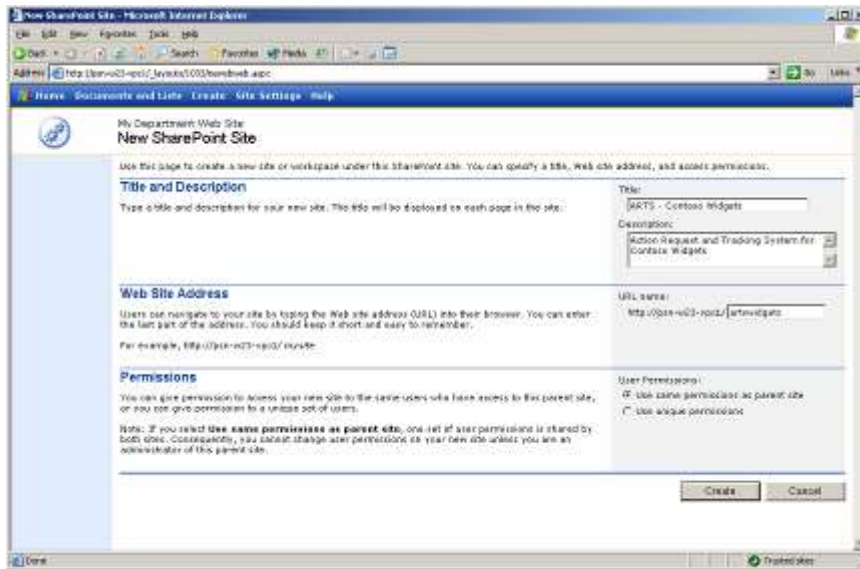
The above SharePoint site template gallery lists the new ARTS site template as well as several of the application site templates downloaded from the Microsoft TechNet site and uploaded into this site template gallery.

The ARTS SharePoint site template is now ready to be used to create new SharePoint sites that are identical to the original ARTS SharePoint site.

Deploying the ARTS Solution SharePoint Site Template for a New Team or Project

To deploy the ARTS solution site template, it is a simple process of creating a new SharePoint site and specifying the ARTS site template as the template to be used to configure the appropriate SharePoint lists and Web Parts.

To start, click **Create** on the top navigation bar and select **Sites and Workspaces** at the bottom of the Create page. Enter the following settings for the title, description, and URL name. Optionally, select **Use Unique Permissions** if you want this site to have its own set of access permissions that are different from the new site's parent SharePoint site. Click **Create**.



When the list of standard and custom site templates is displayed, select **ARTS Version 1-0-1 SharePoint Site Template**. Click **OK** to apply the selected site template.



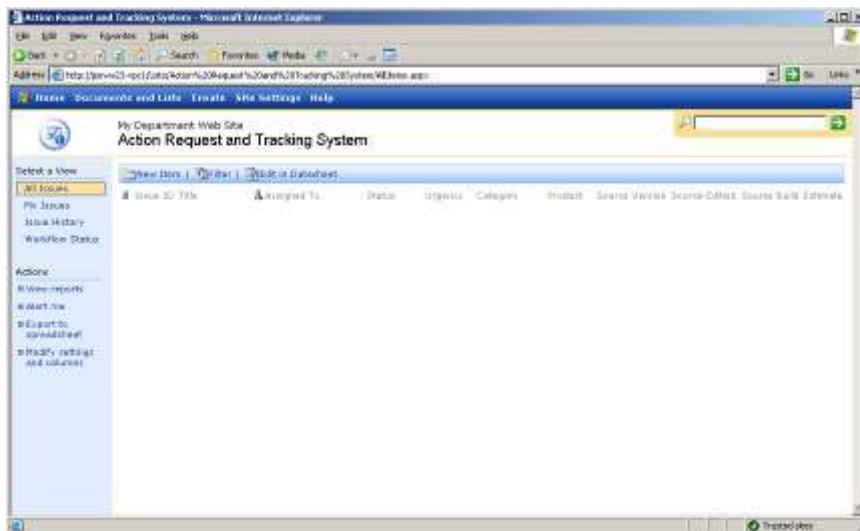
The new SharePoint site will be displayed with the ARTS SharePoint List and Web Part pre-configured in the new site.



The ARTS solution is ready to use.

Using the ARTS Solution

Click **Action Request and Tracking System** on the Quick Launch bar (or in the Web Part title) to display the **All Items** view of the ARTS SharePoint List.



Click **New Item** to create a new action request. Enter the information for the new action request and click **Save and Close**.

My Department Web Site
Action Request and Tracking System: New Item

Save and Close | Attach File | Go Back to List

Title *

Add Related Issue
Type the Issue ID of the issue

Assigned To
(None)

Status
1. New

Client Organization

Client Contact

Client Email

Client Phone Number

Urgency
☐ 1. Critical
☐ 2. Serious
☒ 3. Important
☐ 4. Suggestion

Severity
☐ 1. Critical
☐ 2. Serious
☒ 3. Important
☐ 4. Suggestion

Product *

Source Version *

Source Edition *

Source Build *

Category

Details

Depends On
(None)

Estimate

Target Version

Target Edition

In addition, you can select one of the reporting views in the Quick Launch menu at the left side of the browser.

Conclusion

This white paper has described the key features of Windows SharePoint Services 2.0 that enables IT professionals to quickly and reliably create just-in-time business solutions. In this white paper, you have learned how to create a new solution, the Action Request and Tracking System, and how to deploy the solution as both a SharePoint list template and SharePoint site template – enabling quick re-use of the ARTS solution in an existing SharePoint site or as new SharePoint site for your project or team.

Related Links

For more information on Microsoft SharePoint Products and Technologies, please visit the following Web sites.

Technical Resources

- Coexistence and Interoperability Guide for SharePoint Products and Technologies
<http://office.microsoft.com/en-us/assistance/HA011607771033.aspx>
- Microsoft Developers Network (MSDN) Developer Center for Microsoft SharePoint Products and Technologies
<http://msdn.microsoft.com/sharepoint>
- Microsoft TechNet SharePoint Portal Server 2003 Technical Resources
<http://www.microsoft.com/technet/prodtechnol/office/sps2003/default.aspx>
- Microsoft TechNet Windows SharePoint Services Technical Resources
<http://www.microsoft.com/technet/prodtechnol/windowsserver2003/technologies/sharepoint/default.aspx>
- Microsoft TechNet Downloadable Resources for Microsoft SharePoint Products and Technologies
<http://www.microsoft.com/technet/downloads/sharepnt.aspx>
- Microsoft IT Showcase Deployment White Papers
<http://www.microsoft.com/itshowcase>
- WSS FAQ Web SharePoint site
<http://wss.collutions.com/default.aspx>

Product Information

- SharePoint Products and Technologies product Web site
<http://www.microsoft.com/sharepoint>
- Windows SharePoint Services and SharePoint Portal Server 2003: Product Information
<http://www.microsoft.com/office/sharepoint/prodinfo/relationship.aspx>
- Benefits of Microsoft Office SharePoint Portal Server 2003
<http://www.microsoft.com/office/sharepoint/prodinfo/benefits.aspx>
- SharePoint Portal Server 2003 Customer Evaluation Guide
<http://www.microsoft.com/office/sharepoint/prodinfo/guide.aspx>
- Implementing Rich Collaboration Infrastructure Using Windows SharePoint Services and SharePoint Portal Server 2003
<http://www.microsoft.com/sharepoint/evaluationoverview.asp>
- Microsoft Web Enterprise Portal
<http://www.microsoft.com/downloads/details.aspx?FamilyID=ac26898b-6893-48b9-8ec0-667f1ba22d6b&DisplayLang=en>

Analyst and Research Reports

- Process Goldmine: Microsoft Office System Integrated Solutions Deliver Business Value, Navigant Consulting Inc., September 2003.
<http://www.microsoft.com/office/business/value.aspx>
- The Secret(s) Behind SharePoint Portal Server 2003, Microsoft Watch, December 2004.
<http://www.microsoft.com/office/sharepoint/prodinfo/microsoftwatch.aspx>

For the latest information about Windows Server 2003, see the [Windows Server 2003 Web site](http://www.microsoft.com/windowsserver2003) at <http://www.microsoft.com/windowsserver2003>.

Appendix A – Standard SharePoint Document Library and List Templates

The following SharePoint document library and list templates are included as standard components of Windows SharePoint Services.

Document Libraries

| | |
|------------------|---|
| Document Library | Create a document library when you have a collection of documents or other files that you want to share. Document libraries support features such as sub-folders, file versioning, and check-in/check-out. |
| Form Library | Create a form library when you have XML-based business forms, such as status reports or purchase orders, that you want to manage. These libraries require a Windows SharePoint Services-compatible XML editor, such as Microsoft Office InfoPath. |

Picture Libraries

| | |
|-----------------|---|
| Picture Library | Create a picture library when you have pictures you want to share. Picture libraries provide special features for managing and displaying pictures, such as thumbnails, download options, and a slide show. |
|-----------------|---|

Lists

| | |
|---------------|--|
| Links | Create a links list when you have links to Web pages or other resources that you want to share. |
| Announcements | Create an announcements list when you want a place to share news, status, and other short bits of information. |
| Contacts | Create a contacts list when you want to manage information about people that your team works with, such as customers or partners. You can share information between your contacts list and Windows SharePoint Services-compatible contacts programs. |
| Events | Create an events list when you want a calendar-based view of upcoming meetings, deadlines, and other important events. You can share information between your events list and Windows SharePoint Services-compatible events programs. |
| Tasks | Create a tasks list when you want to track a group of work items that you or your team needs to complete. |
| Issues | Create an issues list when you want to manage a set of issues or problems. You can assign, prioritize, and follow the progress of issues from start to finish. |

Custom Lists

| | |
|-------------------------------|---|
| Custom List | Create a custom list when you want to specify your own columns. The list opens as a Web page and lets you add or edit items one at a time. |
| Custom List in Datasheet View | Create a custom list when you want to specify your own columns. The list opens in a spreadsheet-like environment for convenient data entry, editing, and formatting. It requires a Windows SharePoint Services-compatible list datasheet control and ActiveX control support. |

| | |
|--------------------|--|
| Import Spreadsheet | Import a spreadsheet when you want to create a list that has the same columns and contents as an existing spreadsheet. Importing a spreadsheet requires a spreadsheet application compatible with Windows SharePoint Services. |
|--------------------|--|

Discussion Boards

| | |
|------------------|---|
| Discussion Board | Create a discussion board when you want to provide a place for newsgroup-style discussions. Discussion boards provide features for managing discussion threads and ensuring that only approved posts appear |
|------------------|---|

Surveys

| | |
|--------|---|
| Survey | Create a survey when you want to poll other Web site users. Surveys provide features that allow you to quickly create questions and define how users specify their answers. |
|--------|---|

Appendix B – Applications for Windows SharePoint Services

The following list of SharePoint site templates from Microsoft is available for download from <http://www.microsoft.com/technet/prodtechnol/sppt/wssapps/default.mspx>. Each template represents a solution that can be used immediately or tailored to address the needs and requirements for specific business processes or sets of tasks for organizations of any size.

Table 1. Microsoft Applications for Windows SharePoint Services (December 2005)

| | |
|---|---|
| Absence Request and Vacation Schedule Management | The Employee Absence Cover application for Windows SharePoint Services provides a central place for managers and employees to see when team members will be out of office, make vacation requests, and find links to individual job sites so a co-worker can easily cover for someone while they are out. |
| Board of Directors | A Board of Directors or Executive Board may use this application for Windows SharePoint Services to track tasks required by the Board, keep member information, manage a calendar of meetings and activities, host discussions about key issues, and store mission, financial, business, meeting minutes, and other information. |
| Case Work Management | The application for Windows SharePoint Services for Case Work Management provides a single site for case workers such as social workers to manage their case loads of clients and client information; instead for one case worker managing multiple cases. This is designed to simplify the process of executing new case interviews, creating reports, organizing case information, and managing case load issues. |
| Change Management | This application for Windows SharePoint Services provides a platform for managing the Change Order process related to a particular professional services project and serves as a mechanism for tracking past changes along with their reasons and impacts. |
| Classroom Management | Using this application for Windows SharePoint Services, teachers may post all information about a single class including lesson plans, assignments, tasks, key contacts, grading forms and student information. The site is useful to any substitute teacher covering the class while the instructor is out. |
| Competitive Intelligence Resource Dashboard | The Competitive Intelligence (CI) Dashboard application for Windows SharePoint Services is designed to improve organization of CI-related materials, and communication about competitive issues among sales, public relations, marketing, product or service management, and executive personnel. It features automatic news feeds from MSNBC, placeholder for competitive graphics, a list for tracking competitive profiles and rankings, and discussions, surveys, and document libraries related to CI. |
| Discussion Database *Released January 2006 | This application for Windows SharePoint Services allows team members to create, review, and reply to discussion topics. Team members can send discussion items to other team members for review, attach documents to discussion items, and set alerts to receive notification when a discussion item is added or changed. |
| Document Library *Released January 2006 | This application allows team members to create, upload, checkout, review, and modify documents. Team members can send documents to other team members for review, assign documents to other team member members, and set alerts to receive notification when a document is modified. In |

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| | addition to the standard SharePoint search functionality, this application allows the user to see additional views of the document library, including By Category, By Author, and By Review Status |
| Employee Activities SharePoint Site | The Employee Activities SharePoint site application for Windows SharePoint Services is a central site for communicating information to employees about company clubs, teams, and events. With this application, employees can sign up for activities, access contact and schedule information, participate in discussions and surveys, and view activity photos. Now companies can more easily keep employees up to date on activities in which they may participate, and employees can quickly access the information they need to get involved. |
| Employee Timesheet and Scheduling Management | Managers of businesses with hourly employees use this application for Windows SharePoint Services for reviewing and approving timesheets, posting shift and schedule information, making announcements, storing key documents, and surveying their team for feedback on various issues. Employees use this site for submitting their timecard, viewing their assigned shifts, getting updates on job-related information, and requesting schedule changes using discussions to which other employees may reply. |
| Employee Training | The Employee Training application for Windows SharePoint Services is a central go-to site for employees to easily find and sign up for training opportunities related to their role or department. Human Resources or training managers can keep track of information such as training location schedules, number of attendees, and required reading materials. They may also post announcements or send surveys about training issues. |
| Event Coordination | The Event Coordination application for Windows SharePoint Services is a central site for managing the entire event coordination process from event scoping, to organizing tasks and key dates, storing vendor information, posting event-related documents, inviting attendees, and evaluating the event. |
| Expense Reimbursement Request | This application for Windows SharePoint Services is designed to manage the expense report process. It allows the ability to submit new expense reports, post and find expense guidelines and helpful links, and view expense reports according to department, person, type, date, and status. |
| Help Desk Dashboard | This application for Windows SharePoint Services features several tools to assist a help desk or customer service team in managing requests from customers and in improving team communication. It features an issue tracker, document library for posting helpful materials such as telephone scripts, technical how-to guides, and knowledge-base articles, and provides a forum for discussions between help desk staff. |
| HR Programs and Services Forms | This application for Windows SharePoint Services is a central site for employees to sign up, using InfoPath forms, for Human Resources (HR) programs and services such as ID badges, parking permits, 401K, healthcare benefits, and more. It also allows an HR manager or benefits administrator to easily view new requests to review and keep track of all past requests. |
| IT Developer Team SharePoint Site | The IT Developer Team SharePoint site application for Windows SharePoint Services provides a central place for developers to access code snippets, track assignments and key dates, manage issues, store contact information, maintain a knowledge base, and communicate via discussions, surveys and announcements. The IT manager can easily adapt the document libraries, |

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| | lists, issue tracker, and calendar to manage their own essential developer team information. |
| Legal Document Review Workflow Management | This application for Windows SharePoint Services is for company legal departments to post legal documents and templates, communicate requirements and processes, and provide contact information. It also features a legal document review tool for managing, prioritizing, and tracking employee requests to review contracts and documents. |
| Loan Initiation Management | This application for Windows SharePoint Services is designed to help small brokers and banks track documentation and progress on home, car, and other loans. It provides a central site for accessing financial calculators, forms, announcements, team surveys, and discussions. |
| Marketing Communications Campaign SharePoint Site | The Marketing Communications Campaign application for Windows SharePoint Services is a central site for marketing managers to manage the creation of marketing plans and presentations, tracking tasks, maintaining a campaign events calendar, organizing contacts, and communicating the goals, objectives, and key deliverables for a particular marketing communications campaign. |
| Meeting Management SharePoint Site | The Meeting Management SharePoint site application for Windows SharePoint services is a central place for meeting facilitators to post announcements, schedules, attendee lists, supporting materials, objectives, location information, and minutes from past meetings. This gives attendees quick access to essential information about the meeting. |
| New Product Development | The New Product Development application for Windows SharePoint Services provides a collaboration tool for product development teams to share contact information, links to important sites, a task list and calendar, and new product planning documents. It also provides one place for executive management to go to view details about the new product development process and status. |
| Performance Review Management | This application for Windows SharePoint Services is to be used by human resource managers to manage the performance review process across an organization. It is a central site for organizing performance review forms, employee performance history, and related information. |
| Professional Services Contractual Setup Management | This application for Windows SharePoint Services is a single site for Professional Services organizations to manage the initiation step of a client engagement. It provides a collaboration platform for team members to communicate on the timeline, process, and issues related the drafting, approval, and completion of engagement contractual documentation. It also includes InfoPath forms to simplify and automate the creation of new Statements of Work and other project initiation documents. |
| Professional Services SharePoint Site for Engagement Team Resourcing | Finding the right people and knowing who is available to work on a client engagement is critical to the success of a professional services project. This application for Windows SharePoint Services is designed to organize the resource request and approval process using simple-to-use InfoPath forms with built-in request and approval functionality. It also provides the ability to search for resources according to specific business areas or other criteria. |
| Project Team SharePoint Site | The Project Team SharePoint site application for Windows SharePoint Services provides a central location for the project manager and team to collaborate during all phases of the project lifecycle from initiation to close-out. It is designed to help the project manager easily track the status of tasks, issues, key dates, deadlines, costs, and best practices through the |

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| | use of customized lists, document libraries, surveys, and discussions. |
| Public Official Activity and Issue Management | The Public Official Activity and Issue Management application for Windows SharePoint Services allows any Public Official to keep track, all in one place, their key tasks, calendar, documents, links, and communication with constituents and special interest groups. |
| Public Relations Work SharePoint Site | The Public Relations (PR) application for Windows SharePoint services allows PR departments to centrally organize media contacts store press releases, market research, and other data; collaborate on PR campaigns documents and activities; track tasks and events; and communicate goals and objectives. |
| Publication Editorial Review | The Publication Editorial Review application for Windows SharePoint Services provides a central place for editors, staff, and contributors to collaborate on the editing process for a publication such as a magazine, newspaper, or book. Using this application, it is easy to see the status of the various chapters or articles, who is writing or editing each one, and who has already reviewed them. Discussion threads may also be generated to facilitate discussion about the goals, content, or ideas for various documents. This tool would allow reviewers to track changes and document history, manage the review process, display the publication schedule, make assignments, and gather qualitative feedback about each section, article or chapter. |
| Recruiting Resource Center | The Recruiting Resource Center application for Windows SharePoint Services provides an easy, organized way to handle the recruiting process including opening job requisitions, reviewing resumes, managing candidates, facilitating interview cycles, and collecting post-interview feedback. It also features document libraries for storing documents related to recruiting, and discussions for communicating with others about recruiting activities. |
| Request for Proposal Management | This application for Windows SharePoint services is a central portal for managing the Request for Proposal (RFP) process, from writing the RFP document to inviting prospects, managing the timeline and project plan, tracking RFP responses, and evaluating the proposals submitted. |
| Room and Equipment Reservation | This application for Windows SharePoint Services provides one go-to place for organizing conference room, conference call, and meeting equipment availability, and for making requests to reserve them. |
| Team Work SharePoint Site | This application provides an Announcement List to keep team members informed of important news, a Discussion Board to support and encourage discussions regarding topics of team interest, a central Task List to record and monitor team tasks and their progress, an Events List for scheduling and supporting team meetings, and a central Document Library for the storage and retrieval of important team reference documents. |
| Travel Request | The Travel Request application for Windows SharePoint Services is designed to organize the travel request and approval process. It includes a calendar displaying when workers are out and where, a travel request form, and summaries for managers of requests that need to be approved. It is also a central site for posting travel guidelines and policies, finding links to helpful travel sites, and initiating discussions about travel. |