

COMPANY LOGO HERE

**Systems Administration for the Extranet – SharePoint Designer and  
SharePoint**

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### Change History

Version	Date	Description of Change
0.1		Initial Draft
0.2		Added bit about checking in PDFs
0.3		Added bit about length of list (eg Participants)
0.4		Adding more info in general

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## 1 INTRODUCTION

### 1.1 Document scope

1.1.1 This manual describes how to maintain the Extranet from a Systems Administration point of view. It does not describe how to use the Extranet, nor how to build a website using code.

### 1.2 Audience

1.2.1 This document is to be used by members of the IT team or anyone delegated to perform maintenance on the Extranet. This document is not for general users (eg Participants, COMPANY general staff) of the Extranet.

### 1.3 Assumed knowledge

1.3.1 This manual assumes the reader has knowledge of SharePoint, basic HTML coding and CSS principles. For example, to know about check in and check out, page structure and style sheets.

1.3.2 Basic knowledge of SharePoint Designer. eg what the menus are, how to open, where to store files etc.

### 1.4 SharePoint Designer overview

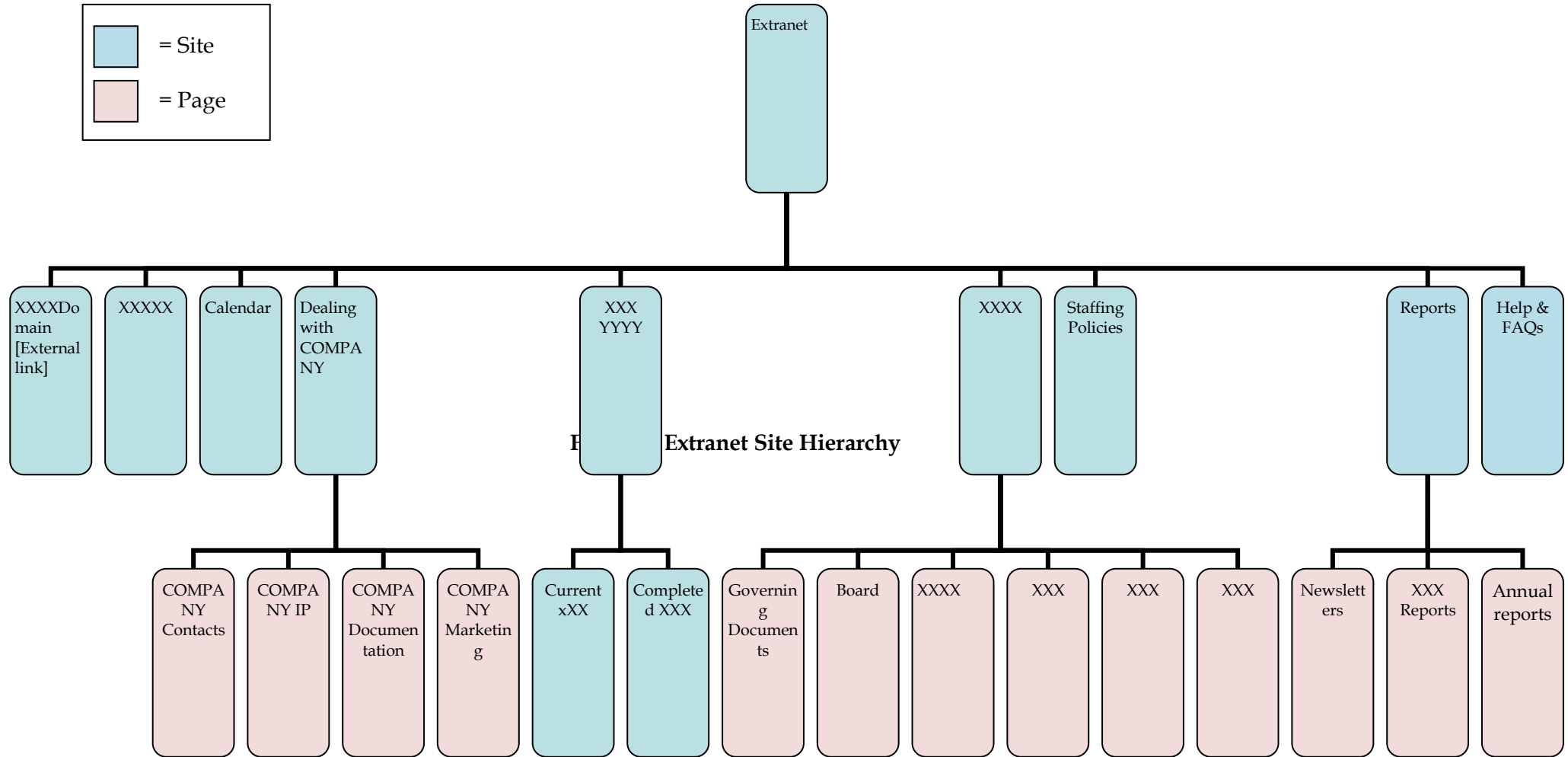
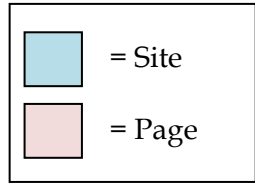
1.4.1 SharePoint Designer (SPD) is a web design interface that allows a user without knowledge of hard coding to produce a website and its contents.

1.4.2 The user can set SPD to What You See Is What You Get (WYSIWYG) and add elements such as buttons, tables and links with an action rather than typing out the code.

## 2 EXTRANET OVERVIEW

### 2.1 Structure

2.1.1 The COMPANY Extranet is a group of sites and subsites with pages.



## 2.2 Components

### 2.2.1 Webpages

2.2.1.1 A basic HTML page that may have text and an image. No interactive ability. (eg upload etc). For example, Task pages.

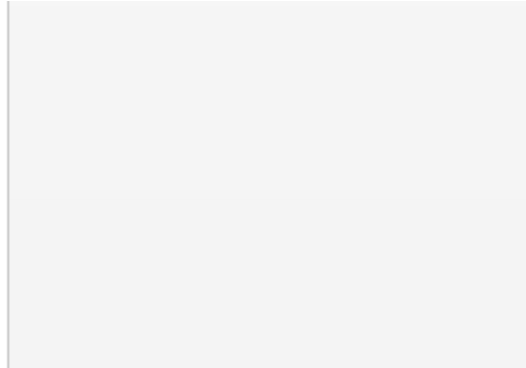


Figure 2. Example of a Webpage

### 2.2.2 Libraries

2.2.2.1 Within each page of a site there may be a SP library. This is a document repository that enables the check in and check out functionality. For example, the COMPANY documentation area.

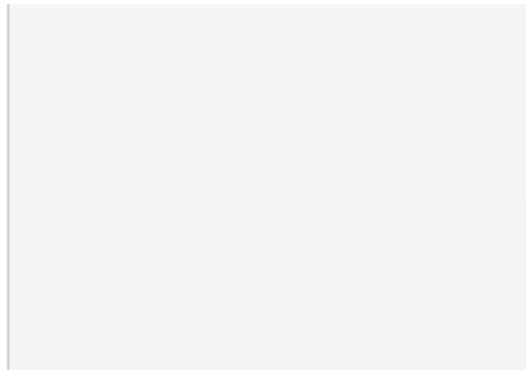


Figure 3. Example of a Library

### 2.2.3 Lists

2.2.3.1 Lists are a kind of database of data, for example names and contact details. In the Extranet, examples of list include XXXX and COMPANY Contacts.

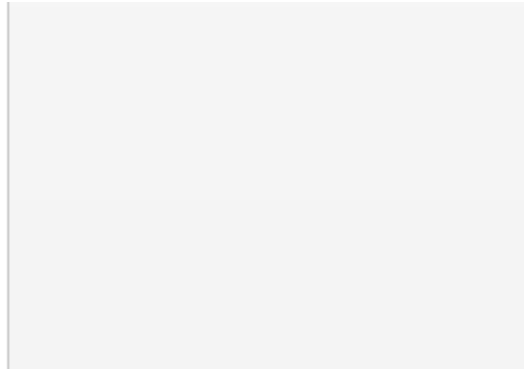
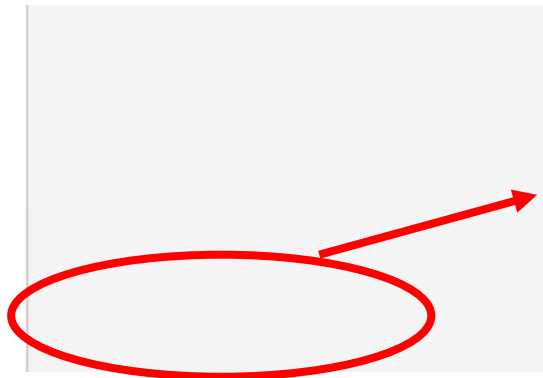


Figure 4. Example of a List

**2.2.4 Web parts**

2.2.4.1 SP allows front end editing of a webpage (ie don't need SPD) if it is composed of web parts. A web part is a function with editable features, eg an image.



2.2.4.2 In the Extranet, the following web parts are used. See Annex A for more details of other web parts.

Web part	Description
Page Viewer	Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.
Data View	This web part is configured with SharePoint Designer. It can use a wide range of data sources including XML files, web services, SQL and Oracle databases and SharePoint list/library content. The rendering is XSLT driven with SharePoint Designer providing a drag-and-drop interface to generate the XSL.
Business Data Catalog Filter	Filter the contents of web parts using a list of values from the Business Data Catalog.



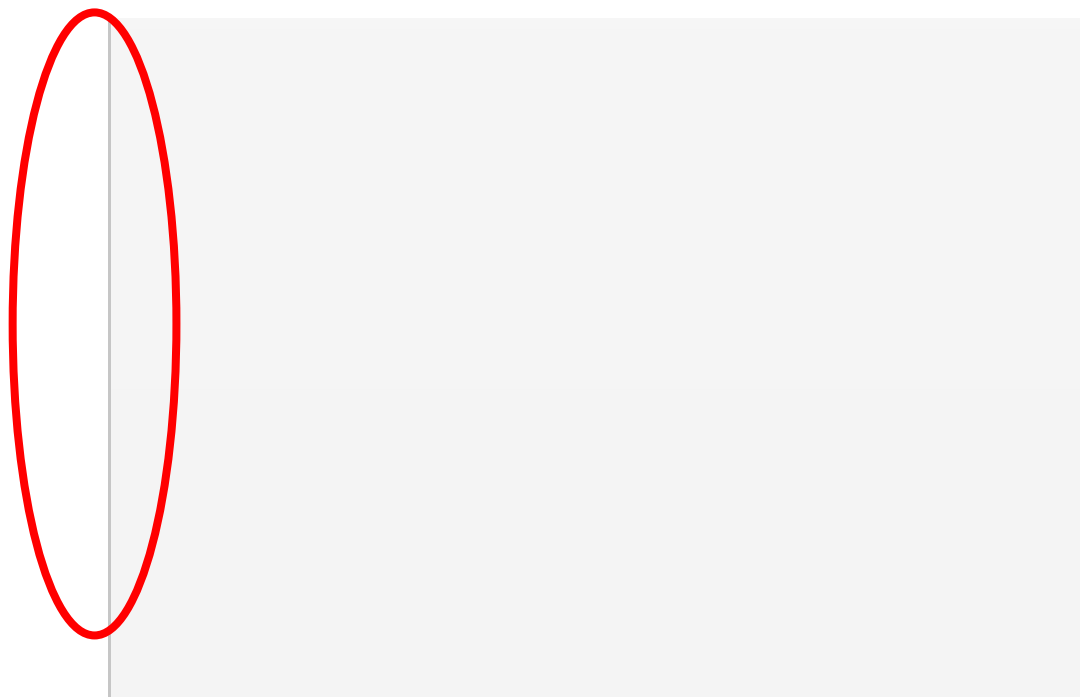
### 3 EXTRANET ACTIONS/HOW TO

#### 3.1 Create a site

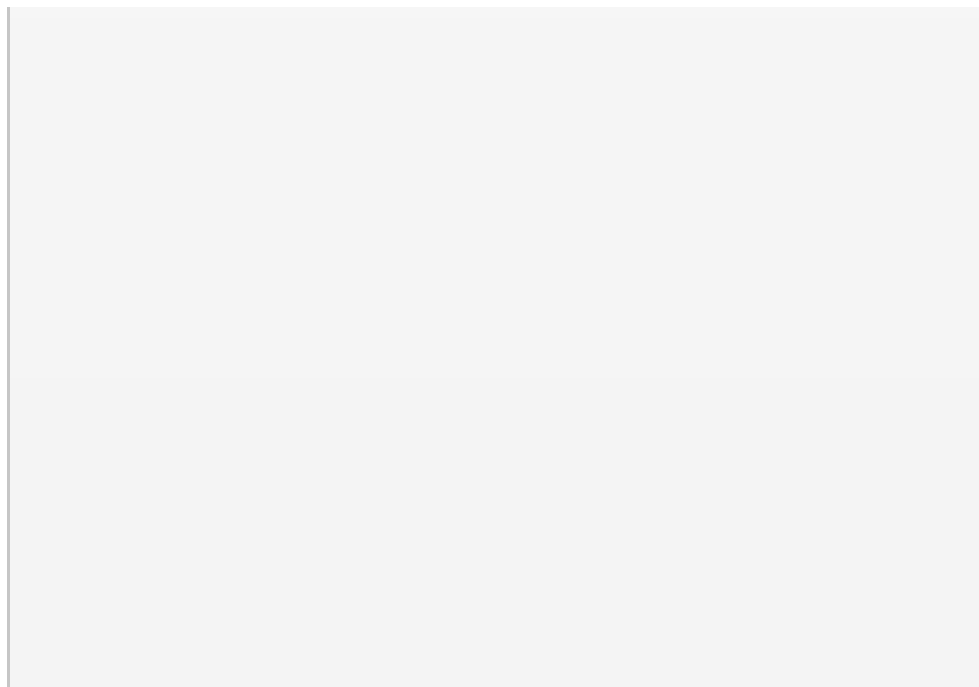
3.1.1 Creating a site is possible via Sharepoint **or** via SPD.

3.1.2 The following procedure describes how to do in SPD.

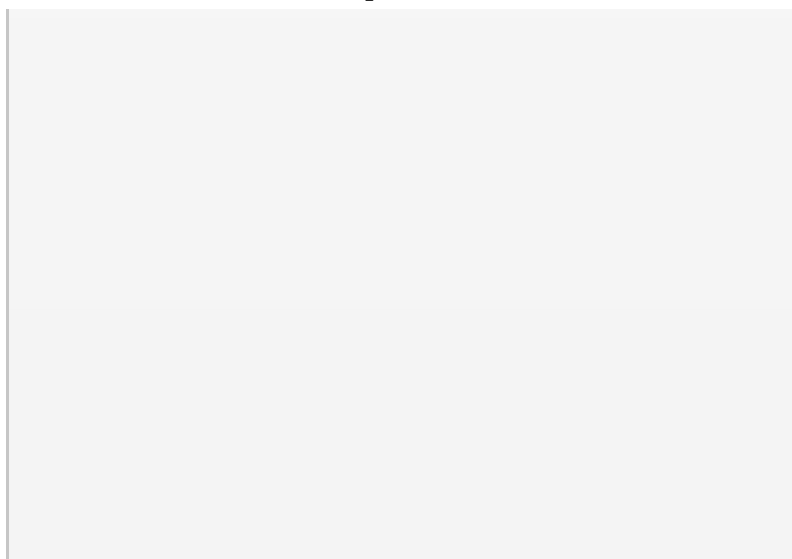
1. Open SPD.
2. From the **File** menu, select the **Open** menu item.
3. From the directory, open the parent site to house the new site.
4. The folder configuration for the parent site opens on the left of the screen.



5. From the **File** menu, select the **New** menu item. The **New** window opens.



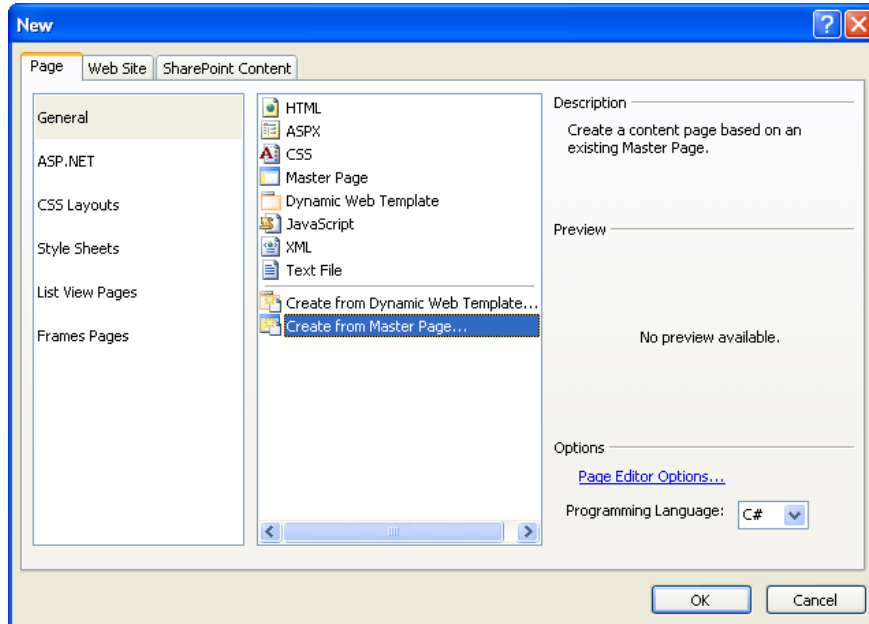
6. Select the **Web Site** tab, then the **General** option. The right side display shows web site types.
7. Select the **One Page Web Site** option.
8. In the **Specify the location of the new Web site** text entry field, use the **Browse** button to choose a site to which the new site should belong.
9. Rename the site to something relevant to the content, eg instead of *Extranet Help2*, have *FAQs*
10. Press the **OK** button.
11. SPD creates a new site and opens it in a new window.



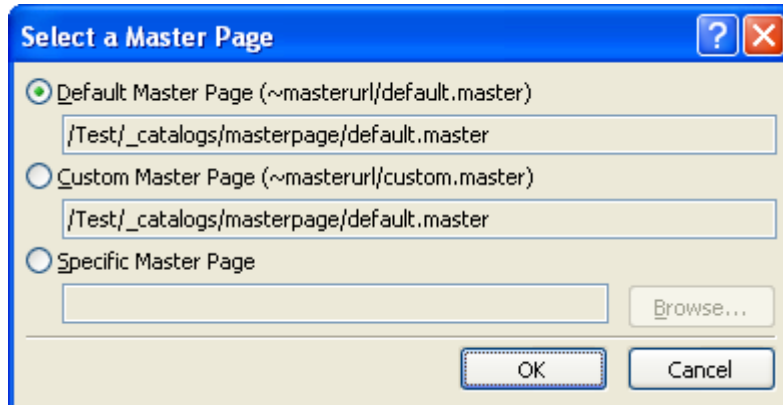
### 3.2 Create a new page

3.2.1 As with creating a new site, creating a new page can be done via SP or SPD. The following instruction applies to the SPD method.

1. Open the site to which the page needs to belong.
2. From the **File** menu, select the **New** menu item. The **New** window opens.



3. From the **Page** types list. Select the **General** option.
4. From the list of General web sites, select the **Create from Master Page** option. The **Select a Master Page** option opens.



5. Select the radio button for Default Master Page. Click the **OK** button.
6. SPD creates a new page called 'Untitled1.htm'

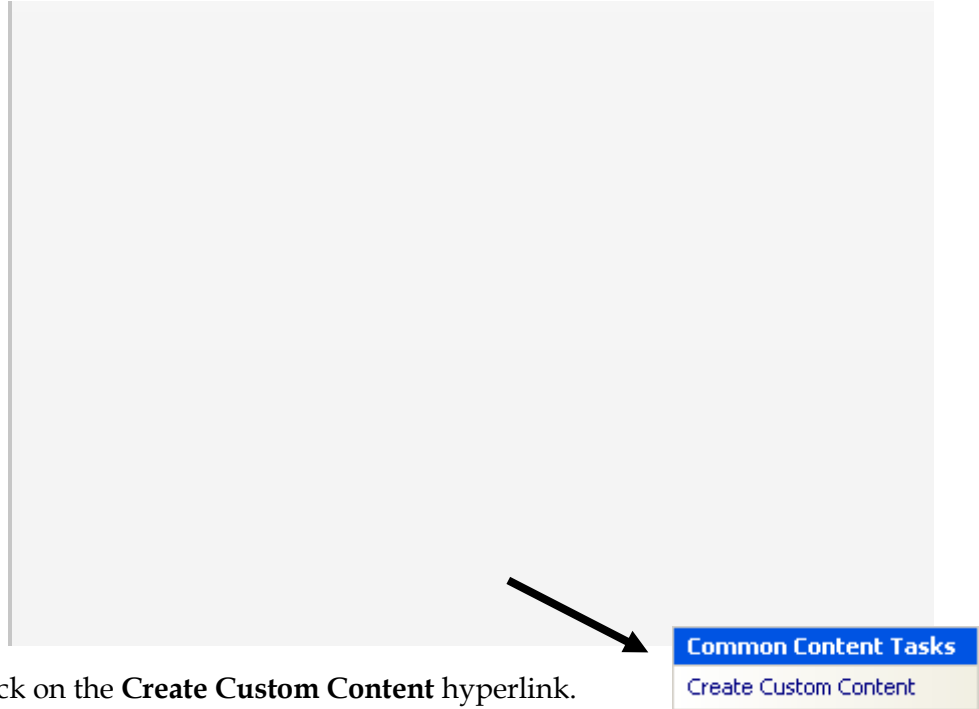
NOTE: Remember to add the page to the Site Map and link from a parent site.

**TIP:** You can create a page that is not referenced by a parent site and does not appear in navigation. This is useful when needing to share large data amounts such as wmv files that can't be sent in an email. Just send them the URL.

### 3.3 Edit a page

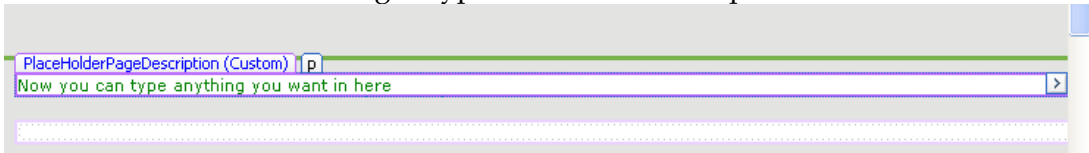
3.3.1 The majority of Extranet pages have content within the custom content area available from a page based on the Master content.

1. On the page to be edited, click the arrow '>' in the page's centre. The Common Content Tasks dialog box opens.



2. Click on the **Create Custom Content** hyperlink.

The area becomes editable, eg to type text or insert web parts.



### 3.3.2 Check in and publish master page

3.3.2.1 It is extremely important to check in and publish a master page, or any page that is under source control.

3.3.2.2 If you do not, then other users will not see the updated content, nor be able to see the master page in SPD.

3.3.2.3 There are two methods for checking in and publishing a page.

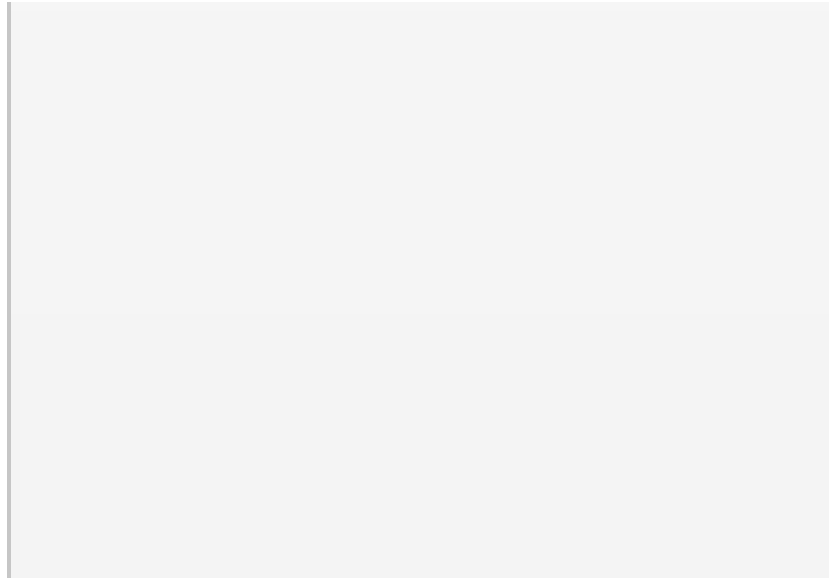
- a. Via SPD
- b. Via Explorer/web

3.3.2.4 The following steps describe how to check in and publish a page via Explorer.

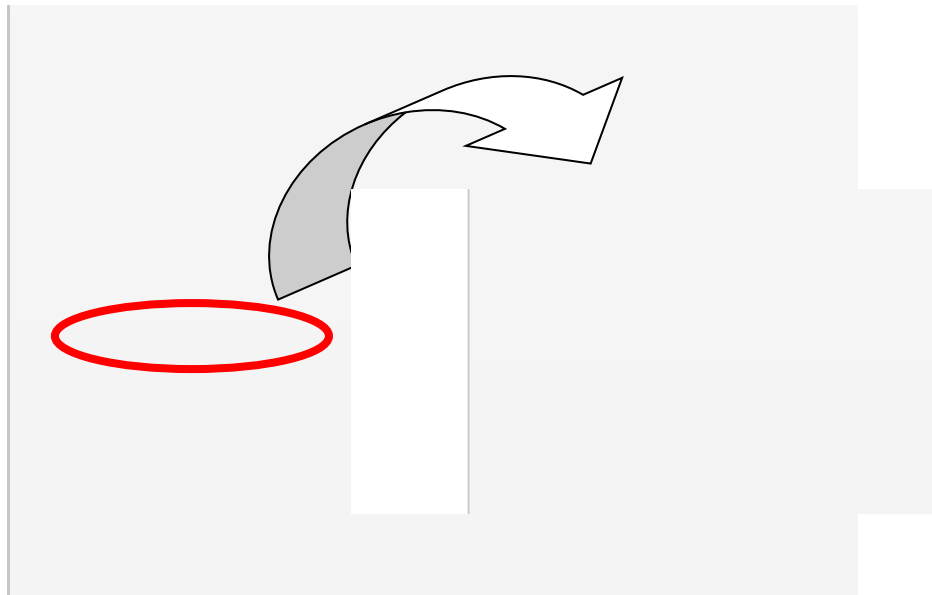
**NOTE:** to check in and publish a master page, you must go via the parent site>Site actions>Modify Site settings>[Galleries]Master pages and page layouts. Then check in and approve.

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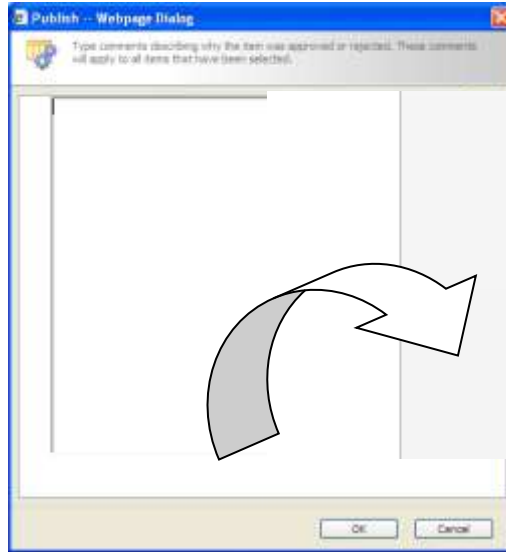
- 3.3.2.5 From the site's **Site Actions** drop down, select the **Manage Content and Structure** menu item.



3. The Site Content and Structure screen opens. Open the folder which contains the page (usually 'Pages').
4. In the dropdown menu of the page, select the **Check In** menu item.



5. A dialog box opens with a text entry box. If required, type in some text as to what was changed from the previous page. Press OK.
6. The screen returns to the list of pages. Click the dropdown menu again, this time select the **Publish** menu item.
7. The **Publish** dialog box opens. If required type n some text about the changes. Click **OK**.



3.3.2.6 The page is now checked in and published, for all users to see the updates.

### 3.4 Update master page

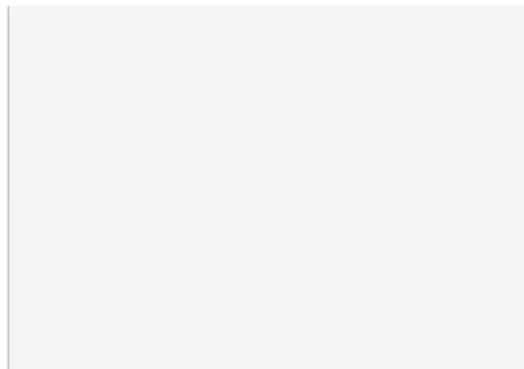
**NOTE:** master pages are highly sensitive. DO NOT delete web parts. It is OK to hide (disable visibility) but do not delete. This is because the browser is looking for web parts/code and it is not there, then the page has an error.

3.4.1 A master page is like any other page except that it contains all the default SP web parts and asp content that browsers need.

### 3.5 Attach master page to a page

3.5.1 Instead of having to create a menu every time have to do a page, instead attach the master page. It is like a generic shell to wrap around specific content.

1. From the main menu, click Format>Master Page>Attach Master Page. The **Select a Master Page** dialog box opens.



2. In the dialog box, select an option. Usually the *defaultCOMPANY.master* is set as the default. If not, click on the radio button for Specific Master page, then the **Browse...** button to find the master page.
3. Click the **OK** button.

4. SPD updates the page to have the master page formatting integrated to the code.

### 3.6 Applying styles

1. The Extranet has a CSS so that it has the 'green' look. 'customgreen.css'

When typing text, the main styles to apply are:

HTML class	COMPANY Name	Example Code
H1	h1	<h1 class="h1">Heading 1 Text</h1>
H2	h2	<h2 class="h2">Heading 2Text</h2>
H3	h3	<h3 class="h3">Heading 3 Text</h3>
paragraph	p	<p class="p">Paragraph text</p>
Block quote	Blockquote	<blockquote><p>Text here </p></blockquote>

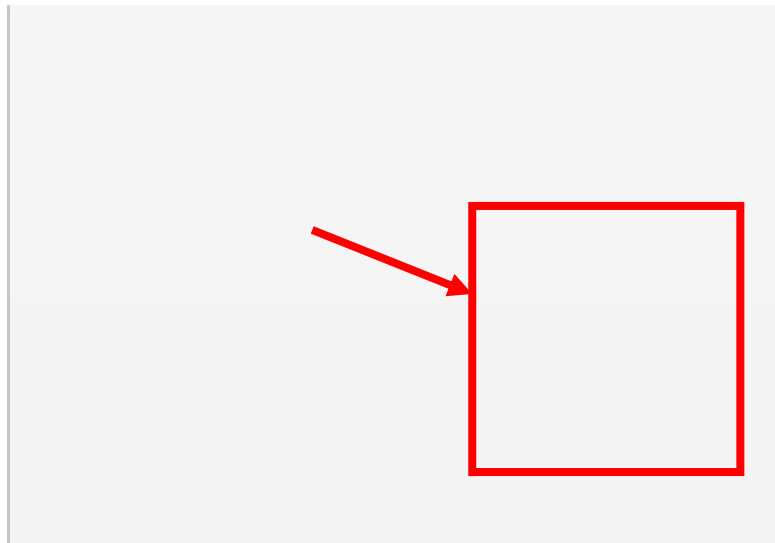
**Note:** do not detach the core.css from a page. It is still needed for some styles that are not obvious/visual.

### 3.7 Link site and subsite to parent

- 3.7.1 If you want a subsite to have the same 'behaviour' and user permission as the parent site, then must set the parent site to this.

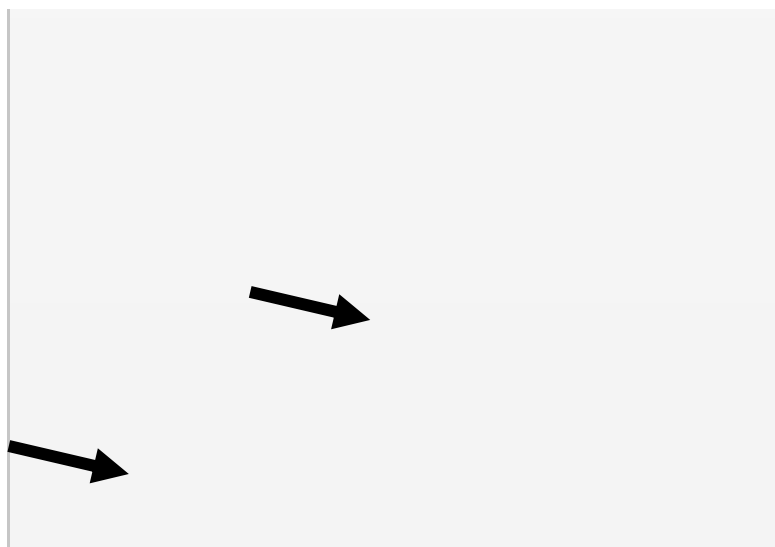
#### 3.7.2 Navigation same as parent:

1. Within the sub site via the browser, go to Site actions>Site settings>modify navigation.



The **Navigation Setting** page opens.

2. On the left side of the page, find the area for **Global Navigation**.



3. Select the radio button for **Display the same navigation items as the parent site.**
4. On the left side of the page, find the area for **Current Navigation.**
5. Select the radio button for **Display the same navigation items as the parent site.**
6. Scroll to the bottom or the top of the Navigation Settings page and click the **OK** button.

.....Rest of manual redacted.



## Annex A. Web Parts

Table from: <http://www.wssdemo.com/Pages/webparts.aspx>

Content Editor Web Part	Use for formatted text, tables, and images.
Form Web Part	Use to connect simple form controls to other Web Parts.
Image Web Part	Use to display pictures and photos.
Members	Use the Members Web Part to see a list of the site members and their online status.
Page Viewer Web Part	Use to display linked content, such as files, folders, or Web pages. The linked content is isolated from other content on the Web Part Page.
Relevant Documents	Use this webpart to display documents that are relevant to the current user.
User Tasks	Use this webpart to display tasks that are assigned to the current user.
XML Web Part	Use for XML, and XSL Transformation of the XML.
List View Web Part	A list view web part is provided for every list created in a site (a list template may include more than one view). The list view renders the CAML markup defined in the view.
Data View Web Part	This web part is configured with SharePoint Designer. It can use a wide range of data sources including XML files, web services, SQL and Oracle databases and SharePoint list/library content. The rendering is XSLT driven with SharePoint Designer providing a drag-and-drop interface to generate the XSL.
<u>Business Data</u>	
Business Data Actions	Display a list of actions from the Business Data Catalog.
Business Data Item	Display one item from a data source in the Business Data Catalog.

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Business Data Item Builder	Creates a Business Data item from parameters in the query string and provides it to other web parts. This web part is only used on Business Data profile pages.
Business Data List	Display a list of items from a data source in the Business Data Catalog.
Business Data Related List	Display a list of items related to one or more parent items from a data source in the Business Data Catalog.
<u>Content Rollup</u>	
Colleague Tracker	Displays your list of colleagues and any recent changes they made have had.
Memberships	Displays your site and distribution list memberships.
My Links	Use to display your links
My SharePoint Sites	Use to display documents authored by you on sites where you are a member and sites of your choice.
My Workspaces	Displays sites created under your My Site.
Site Aggregator	Use to display sites of your choice.
Table of Contents	You use the Table of Contents Web Part to automatically generate a site map that point to various parts of your Office SharePoint Server 2007 site collection. You can specify which part of your site collection the Web Part should generate links to, how the links are presented, and how the links are organized.
<u>Dashboard</u>	
Key Performance Indicators	Shows a list of status indicators. Status indicators display important measures for your organization, and show how your organization is performing with respect to your goals.

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KPI Details	Displays the details of a single status indicator. Status indicators display an important measure for an organization and may be obtained from other data sources including SharePoint lists, Excel workbooks, and SQL Server 2005 Analysis Services KPIs.
<u>Other</u>	
Excel Web Access	Use the Excel Web Access to interact with an Excel 2007 workbook as a Web page. (Enterprise Feature)
I need to...	Displays tasks and tools from a list
IView Web Part	Displays iViews from SAP portal servers. (Enterprise Feature)
RSS Viewer	Renders RSS Feed
This Week in Pictures	Use to display the images library in the News web
WSRP Consumer Web Part	Displays portlets from web sites using WSRP 1.1. (Enterprise Feature)
<u>Filters</u>	
Authored List Filter	Filter the contents of web parts using a list of values entered by the page author.
Business Data Catalog Filter	Filter the contents of web parts using a list of values from the Business Data Catalog.
Current User Filter	Filter the contents of web parts by using properties of the current page.
Date Filter	Filter the contents of web parts by allowing users to enter or pick a date.
Filter Actions	Filter Actions
Page Field Filter	Filter the contents of web parts using information about the current page.

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Query String (URL) Filter	Filter the contents of web parts using values passed via the query string.
SharePoint List Filter	Filter the contents of web parts by using a list of values from a Office SharePoint Server list.
SQL Server 2005 Analysis Services Filter	Filter the contents of web parts using a list of values from SQL Server 2005 Analysis Services cubes.
Text Filter	Filter the contents of web parts by allowing users to enter a text value.
<u>Misc</u>	
Contact Details	Use to display details about a contact for this page or site
<u>Outlook Web Access</u>	
My Calendar	Use to display your calendar. This part works with Microsoft Exchange Server 2003 and above.
My Contacts	Displays your contacts using Outlook Web Access for Microsoft Exchange Server 2007.
My Inbox	Displays your inbox using Outlook Web Access for Microsoft Exchange Server 2003 or later.
My Mail Folder	Displays your calendar using Outlook Web Access for Microsoft Exchange Server 2000 or later.
My Tasks	Displays your tasks using Outlook Web Access for Microsoft Exchange Server 2003 or later.
<u>Search</u>	
Advanced Search Box	Entry point for advanced search
People Search Box	Entry point for people search
People Search Core Results	Web part to display the people search results.

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Search Box	Entry point for search.
Search Core Results	Web part to display the search results.
Search High Confidence Results	Web part to display the special term and high confidence results.
Search Paging	Displays search paging.
Search Statistics	Displays search statistics.
Search Summary	Displays search summary.
<u>Site Directory</u>	
Categories	Displays categories from the Site Directory
Sites in Category	Displays sites in the Site Directory
Top Sites	Display the top sites from Site Directory
<u>Publishing</u>	
Content Query	Displays items from any site in current site collection based on site, list, column criteria