



Microsoft Office SharePoint Server (MOSS)

Roadmap to using SharePoint Server 2007

 Hide All

Are you new to Microsoft Office SharePoint Server 2007? Or do you use a SharePoint site to store documents, but now you're curious about workspaces, blogs, and wikis? Or do you want to dig deeper and share business data more efficiently by using reports, dashboards, and **key performance indicators (KPIs)** (**key performance indicator (KPI): A predefined measure that is used to track performance against a strategic goal, objective, plan, initiative, or business process. A visual cue is often used to communicate the performance against the measure.**)?

Use this roadmap as a starting point to learn about the broad capabilities of Office SharePoint Server 2007 and how to complete common tasks as a contributor to a SharePoint site. You can also find links to site owner tasks, such as setting up permissions and doing some basic customization.



The capabilities of Office SharePoint Server 2007 are focused in six areas. This roadmap briefly introduces each of these capabilities and then links to related articles where you can learn more. To download a training package to view on your desktop or install in your server environment, see [Get SharePoint training on your desktop](#).

NOTE For information about installing SharePoint Server, see the [Office SharePoint Server TechCenter](#). For information about building SharePoint Web applications, see the [SharePoint Server 2007 Developer Portal](#).

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Collaboration

You can use a SharePoint site to share information and get your work done more efficiently. A SharePoint site offers workspaces and tools that your team can use to track projects, coordinate schedules, and collaboratively create and edit documents. For more information about how you can use a team site, click the following links.

- [Introduction to collaboration with Microsoft Office SharePoint Server 2007](#)
- [Demo: Simplify collaboration with a SharePoint team site](#)

Improve team productivity by using a SharePoint site

You can use a site to store routine information for a single department or short-term information for a special project that spans several departments. By using a collaborative workspace such as a team site, your team can become more efficient and more productive.

- [Get access to a SharePoint site](#)
- [Understand groups and permissions on a site](#)
- [About controlling access to sites and site content](#)
- [Manage permissions for a list, library, folder, document, or list item](#)
- [Introduction to customizing sites and pages](#)
- [Customize pages on a site by adding Web Parts](#)

Manage projects more efficiently

You can use a site to manage projects and coordinate tasks and deadlines among team members. The Project Tasks list template includes a Gantt chart view where you can see task relationships and project status. Your team can coordinate their work with shared calendars, alerts, and notifications. You can also connect a calendar on your SharePoint site to your calendar in Microsoft Office Outlook 2007, where you can view and update it just as you do your personal calendar.

- [Use lists to manage projects on a team site](#)
- [Create a calendar](#)
- [View and update a SharePoint calendar](#)
- [Create a Meeting Workspace site](#)
- [Collaborate on a document on a Document Workspace site](#)

Create, review, and publish documents

Groups of people can create, review, and edit documents collaboratively on a SharePoint site. You can use document libraries to store and manage important documents, or use Document Workspace sites to coordinate the development of specific documents. Slide Libraries are a great place to share and reuse Microsoft Office PowerPoint 2007 slides in a central location. You can take document libraries offline in Office Outlook 2007 to enable people to

Original page: <http://office.microsoft.com/en-us/sharepointserver/HA102486841033.aspx?CTT=4&Origin=EC102184431033>

view and edit documents while they are not connected to the network.

- [Roadmap to SharePoint document library training](#)
- [Use libraries to manage content](#)
- [Open or edit a file in a library](#)
- [Open, edit, and update files from a SharePoint site](#)
- [Create a presentation from slides in a Slide Library](#)

Capture and share community knowledge

You can use a team site to capture and share collective team knowledge or important information. Teams can create and capture community knowledge or document internal processes in a wiki. You can use surveys or discussions to gather information or encourage dialog, and then share your findings in a blog. Team members can use alerts or Really Simple Syndication (RSS) to track updates to your sites.

- [Use blogs or wikis to share information](#)
- [Post to a blog](#)
- [Demo: Boost teamwork with a wiki](#)
- [Wiki while you work \(TechNet magazine\)](#)
- [Use discussions or surveys to gather input](#)
- [Track important changes with alerts and RSS](#)

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Portals and personalization

You can use portal sites to work collaboratively and access the people, information, and business applications that you need to do your job. Office SharePoint Server 2007 includes features that organizations can use to personalize the portal site for individuals or groups of users. For more information about portals and personalization on SharePoint sites, click the following links.

- [Introduction to portal sites and personalization features in SharePoint Server 2007](#)
- [Demo: Connect people to information with portals](#)
- [Introduction to My Site](#)
- [Manage your documents and tasks on your My Site](#)
- [Target content to specific audiences](#)

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Search

You can use search on a SharePoint site to help you find information, files, Web sites, and people. For more information about using search, click the following links.

- [Demo: Search for information on a SharePoint site](#)
- [Various articles about using search](#)

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Enterprise Content Management

Office SharePoint Server 2007 provides powerful Enterprise Content Management (ECM) features for creating, managing, and storing content throughout an enterprise. You can use **workflows** (**workflow: The automated movement of documents or items through a specific sequence of actions or tasks related to a business process. Workflows can be used to consistently manage common business processes, such as document approval or review.**) to help manage the process of creating, reviewing, publishing, and even managing the content that your organization creates. For more information about Enterprise Content Management in SharePoint Server, click the following links.

- [Introduction to Enterprise Content Management in SharePoint Server 2007](#)
- [Demo: ECM with SharePoint Server 2007](#)

Document management

Document management capabilities can help you consolidate content from multiple locations into a Document Center, which is a centrally managed repository that has consistent categorization.

- [Introduction to document management](#)
- [Manage large numbers of files by using a Document Center](#)
- [Use content types to manage content consistently across an organization](#)
- [Apply Information Rights Management to a list or library](#)
- [Introduction to workflows](#)

Records management

Integrated records management capabilities can help you store and protect business records in their final state.

- [Introduction to the Records Center site](#)
- [Introduction to information management policies](#)
- [Demo: Add a library to a Records Center site](#)
- [Create a hold to suspend records](#)

Web content management

Web content management capabilities enable people to publish Web content with an easy-to-use content authoring tool and a built-in approval process.

- [Introduction to Web content management](#)
- [Work with pages in a publishing site](#)

- [Create a page layout](#)
- [Improve the consistency and efficiency of your site design](#)
- [Create or edit a master page](#)

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Business process and forms

Office SharePoint Server 2007 provides many features that can help you integrate and streamline your business processes. You can create browser-based forms and gather data from organizations that do not use Microsoft Office InfoPath 2007. Workflows can streamline the cost of coordinating common business processes, such as project approval or document review, by managing and tracking the tasks involved with those processes. For more information about business process and forms, click the following links.

- [Introduction to business process integration with SharePoint Server 2007](#)
- [Demo: Streamline business processes with forms and workflows](#)
- [Gather information by using browser-compatible forms](#)
- [Collect feedback on a document by using a workflow](#)
- [Collect signatures in a document by using a workflow](#)
- [Design custom workflows by using SharePoint Designer](#)

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Business intelligence

Business intelligence is the process of aggregating, storing, analyzing, and reporting on business data to support informed business decisions. Office SharePoint Server 2007 provides a number of tools that can help you extract data from a variety of sources and present that data in ways that facilitate analysis and decision making. For more information about business intelligence in SharePoint Server, click the following links.

- [Introduction to business intelligence in SharePoint Server 2007](#)
- [Demo: Make better business decisions with reports and dashboards](#)
- [Share and manage connections to external data](#)
- [Working with a Report Center site](#)
- [Share Excel 2007 workbooks as interactive reports](#)
- [Share Excel 2007 worksheets and KPIs by using dashboards](#)
- [Work with filter Web Parts](#)
- [Connect Filter Web Parts to Excel Web Access](#)
- [Use the Business Data Catalog to integrate external data](#)

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