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Index
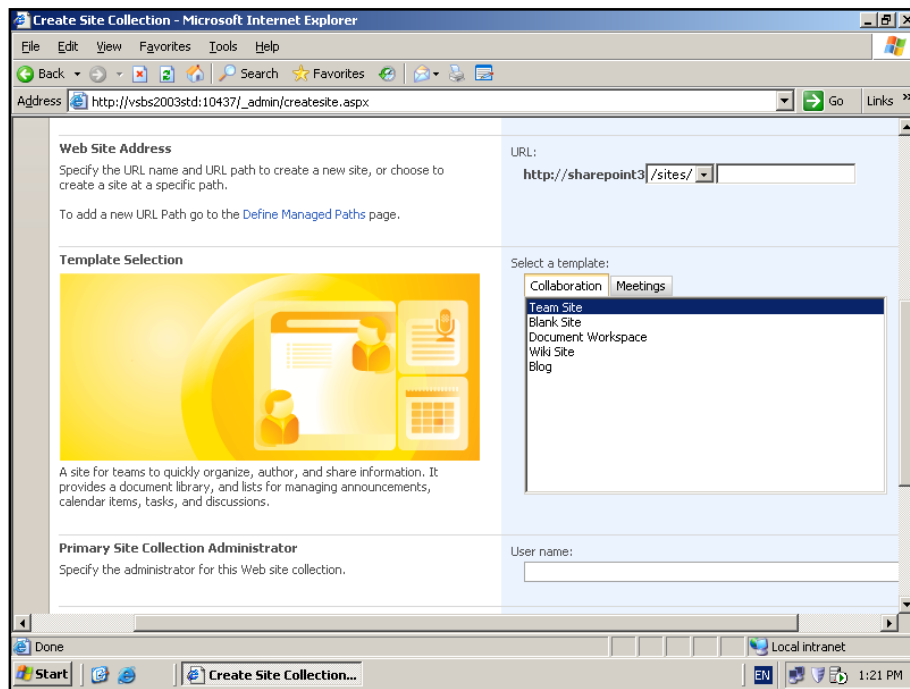
10.1   Scope

Much like a Word template, Windows SharePoint Services v3 (WSS v3) templates allow you to create a predefined site rather than having to build the whole site from scratch.
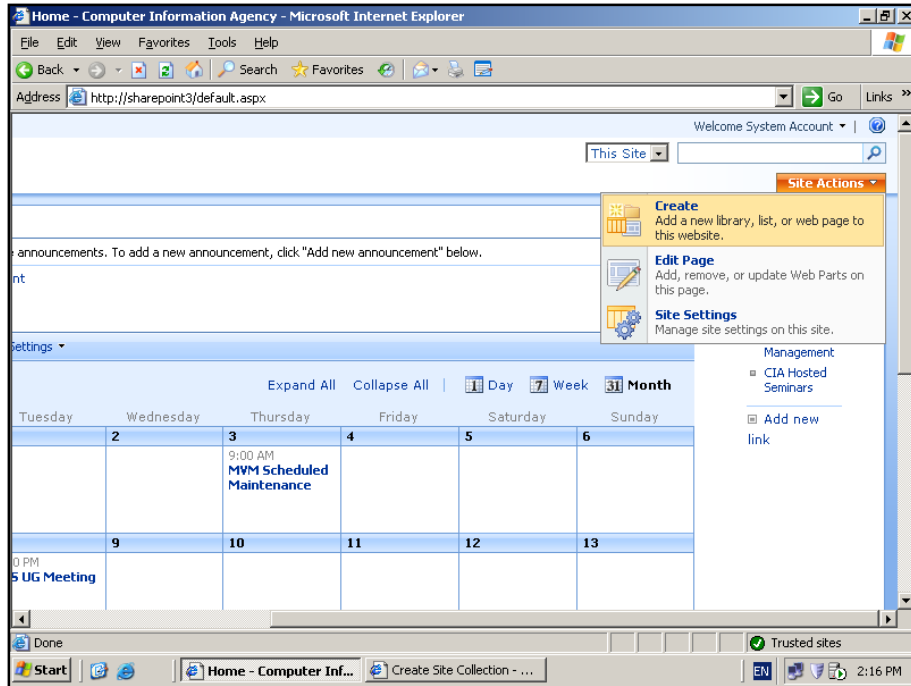
With WSS v3 it is possible to not only add templates to your site but also create templates from your site to use elsewhere. The aim of this chapter is to show you firstly how to add additional templates to your WSS v3 installation and then secondly how you can create templates from your site to be used elsewhere.
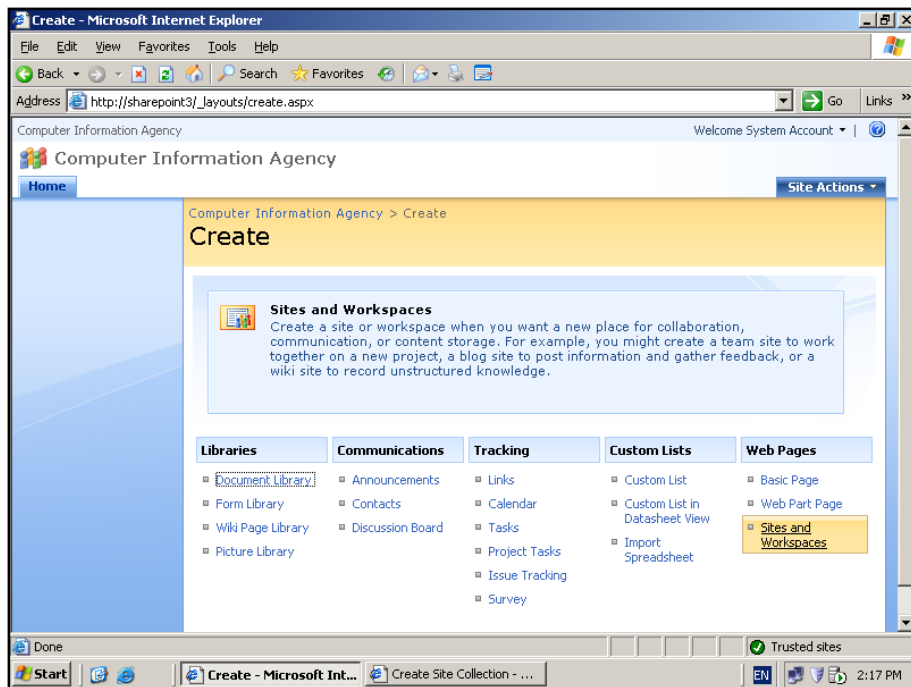
10.2   Using Site templates

Site templates are available in two places. When you create a new site collection via the SharePoint Central Administration site.
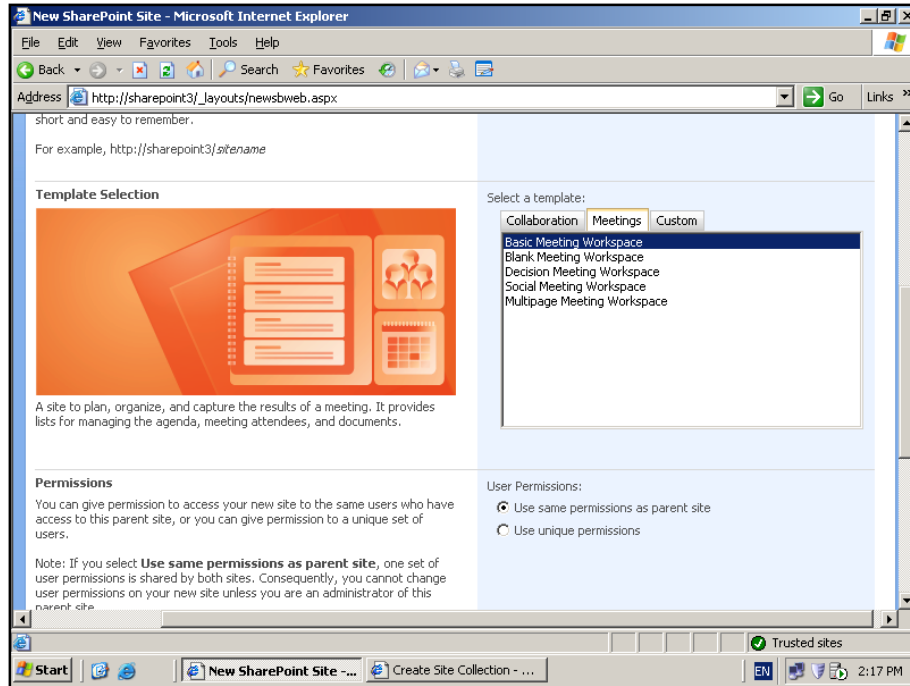
They are also available when you create a new sub-site in WSS v3, which can be accessed by **Site Actions | Create** from your WSS v3 home page.

From the *Create* menu select **Sites and Workspaces** under the *Web Pages* heading.

If you then scroll down to the *Template Selection* you should find the list of templates that are available. Note that the available templates may appear under a number of tabs (here three tabs exist – *Collaboration*, *Meetings* and *Custom*).
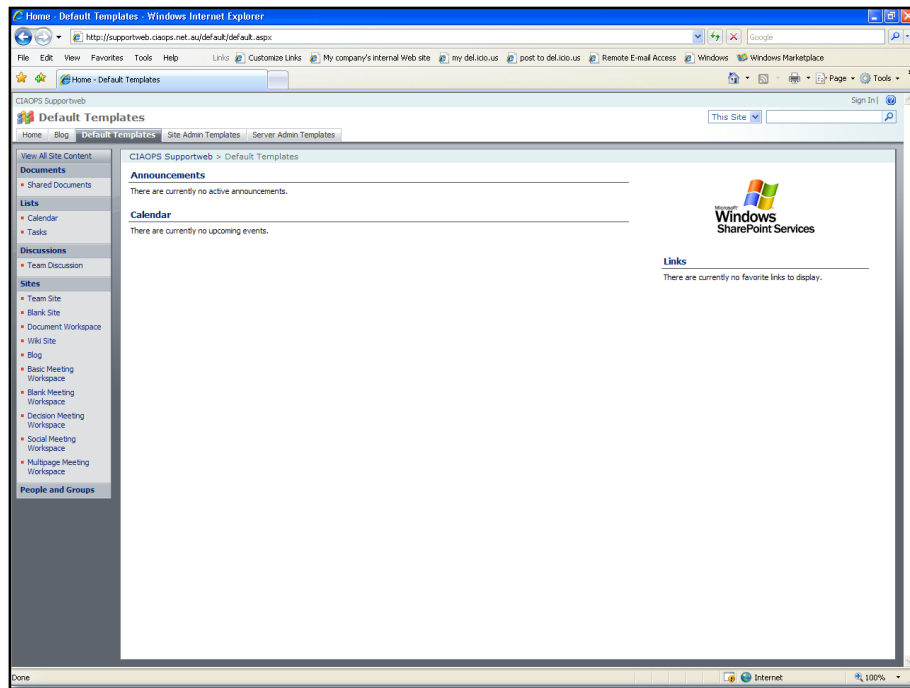
All templates can be modified in two ways: either through a web browser or Microsoft SharePoint designer. In both cases this is only possible if you are a site owner or designer.

10.3   Default Templates

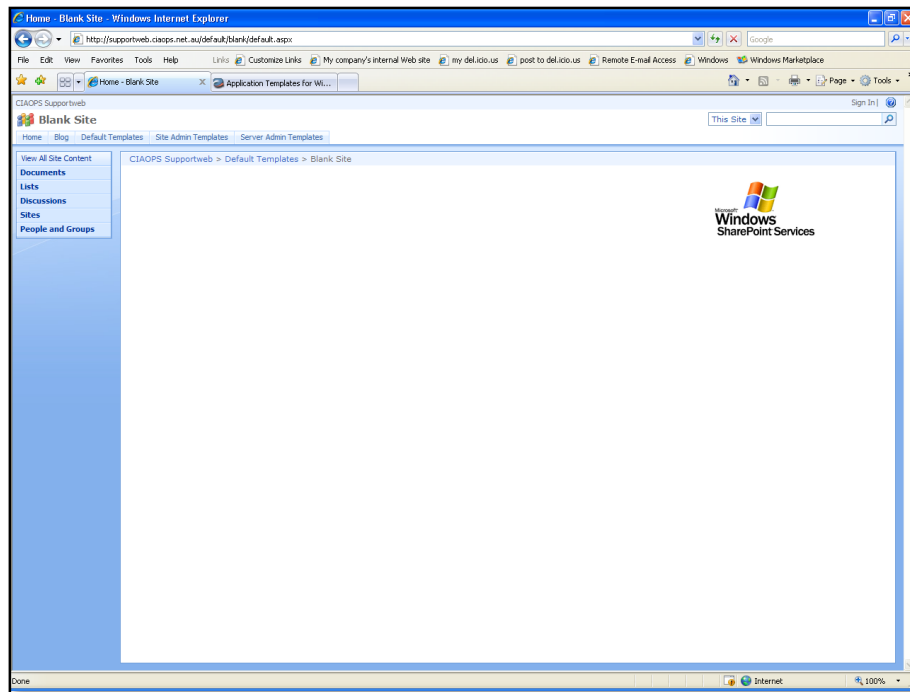By default WSS v3 comes with a number of predefined templates you can use. These include:

Team site

This is the standard template. It comes with a document library called *Shared Documents*, two lists called *Calendar* and *Tasks*, a *Team Discussion*. It also comes configured with a Home page that is a web part page that displays *Announcements*, *Calendar*, *Links* and a graphic.
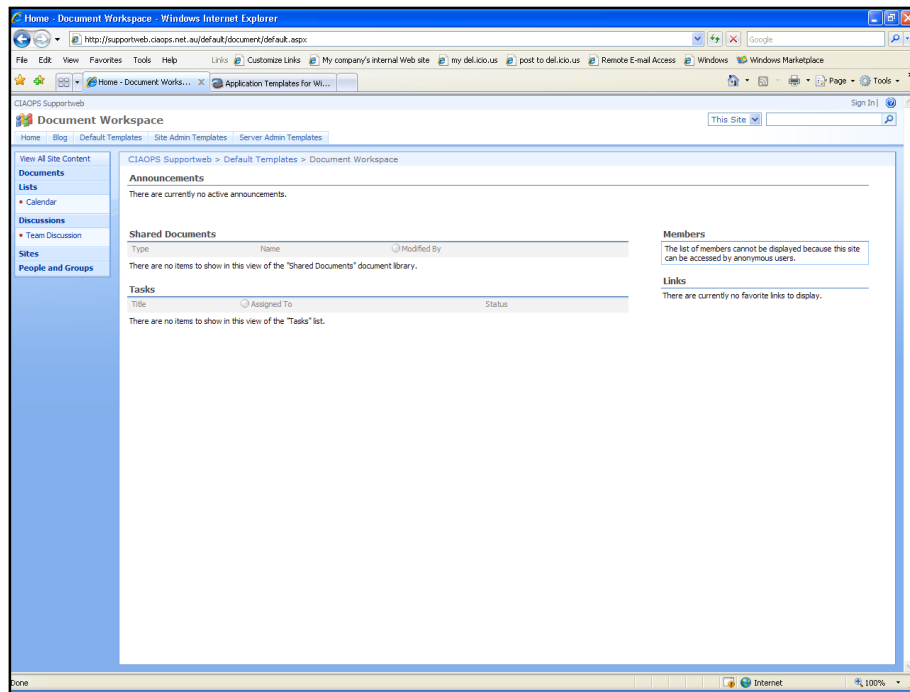
Blank Site

This is very similar to the team site but contains no pre-configured document lists or libraries. It does come configured with a home page that is a web part page but the only thing displayed on this page is a graphic.
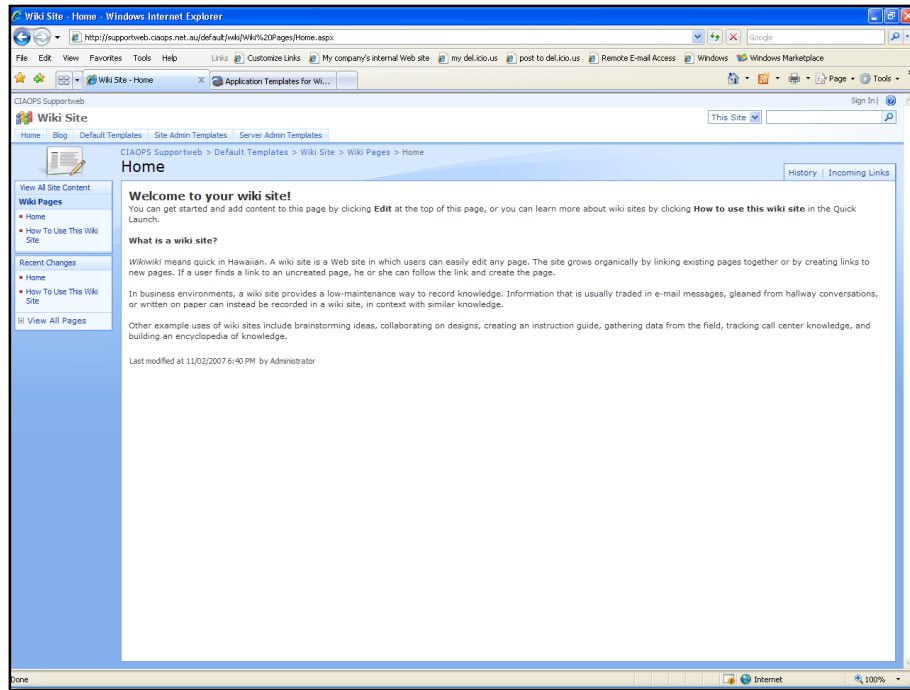
Document Workspace

The focus of this type of site is for team collaboration on a specific document. This type of site is usually created from Microsoft Office applications.
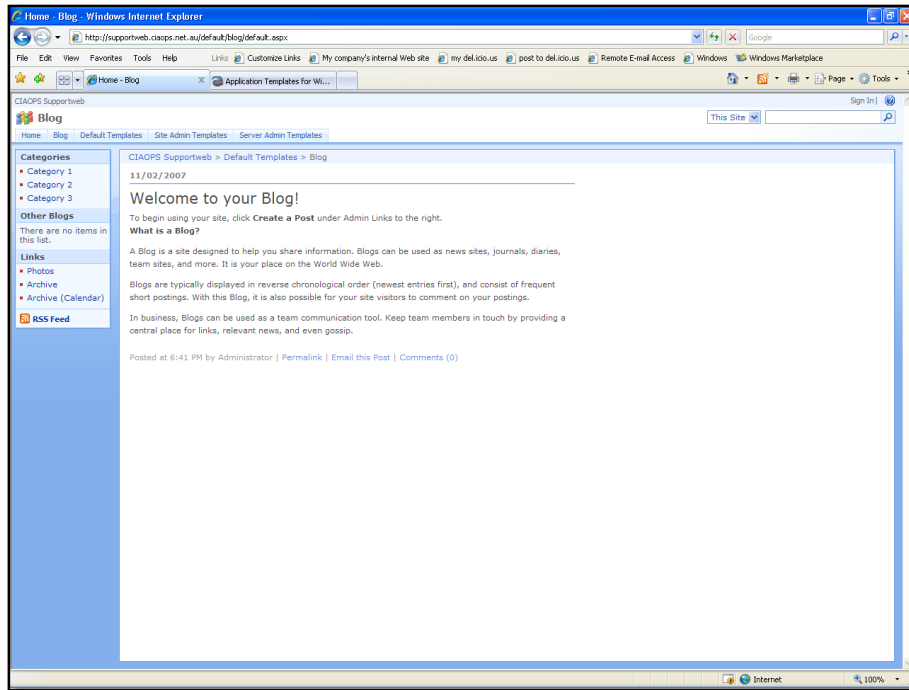
Wiki site

This template creates a library of documents that can be created and edited on line, without the need for additional programs on the client's machine. A wiki is typically used for creating things like knowledge bases and brainstorming. You can consider a wiki as a many to many communication method.
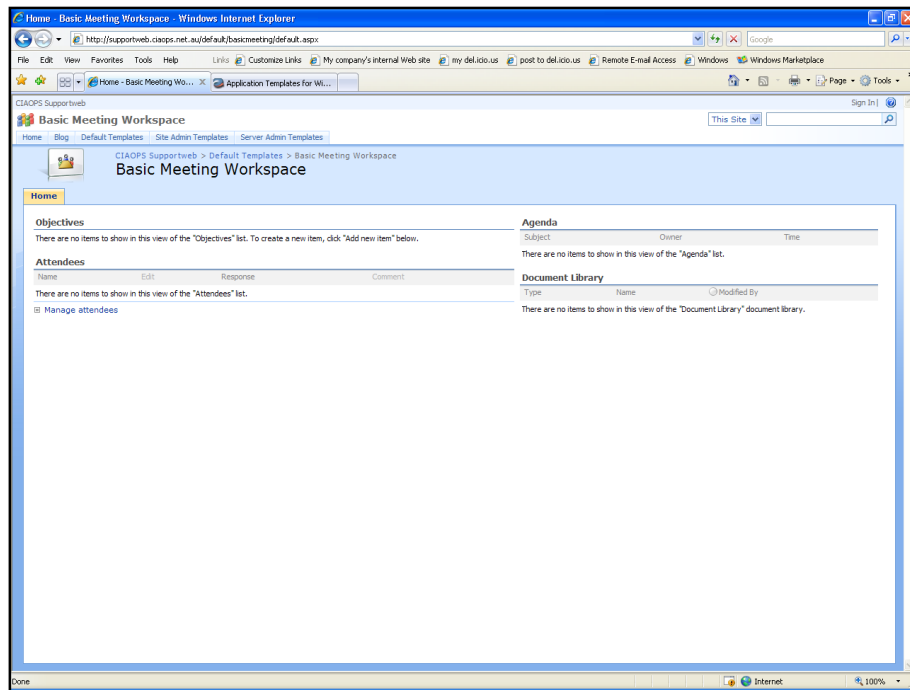
Blog

A blog or weblog is an online diary for sharing anything. Normally, a blog is maintained by a single person however it could be used by different team members as a way of communicating information. Each post is time and date stamped and arranged in order for later reference. You can also use an RSS reader to receive updates from blogs quickly and easily.
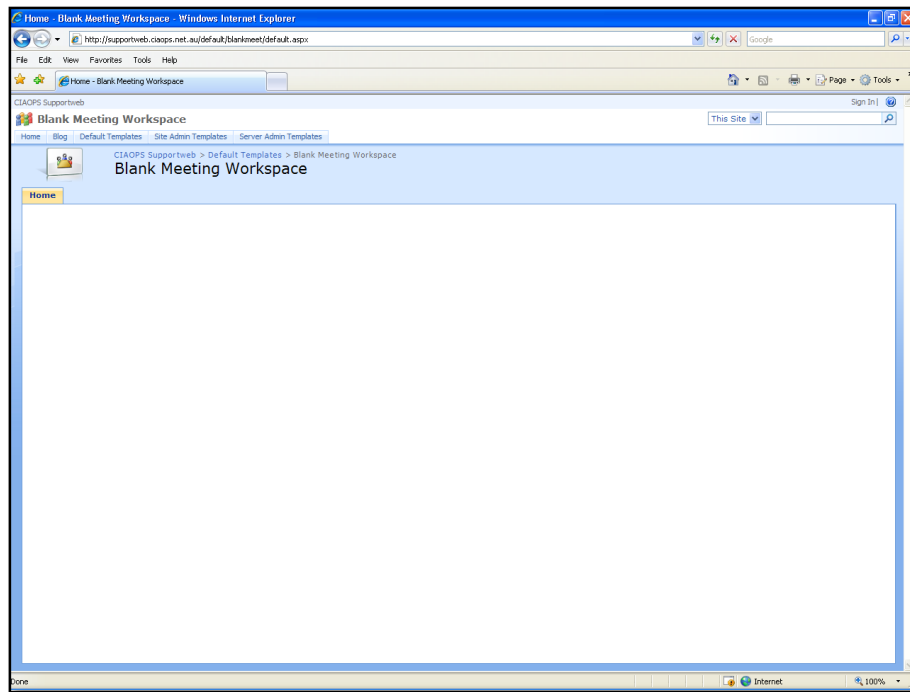
Basic Meeting Workspace

Contains four lists: agenda, attendees, objectives and document library and is normally used to capture information about meetings. This style of site is also created when a meeting is booked using Outlook 2003 or 2007.
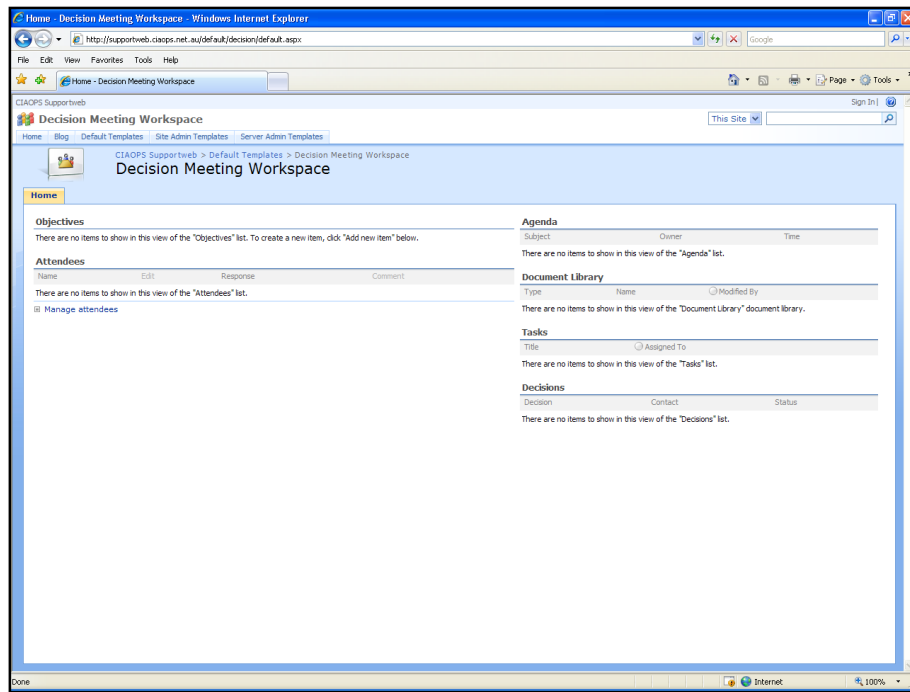
Blank Meeting Workspace

This is similar to the basic meeting workspace except it contains no libraries or web parts and only one list: *Attendees*. Any additional lists need to be created manually and the *Attendees* list will automatically be populated by users invited from Outlook.

Decision Meeting Workspace
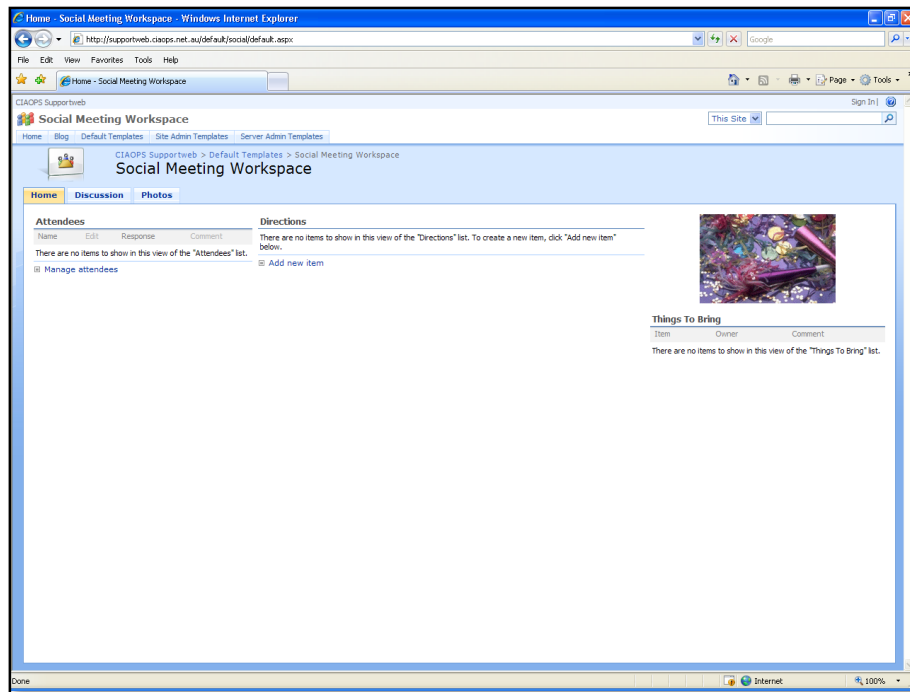

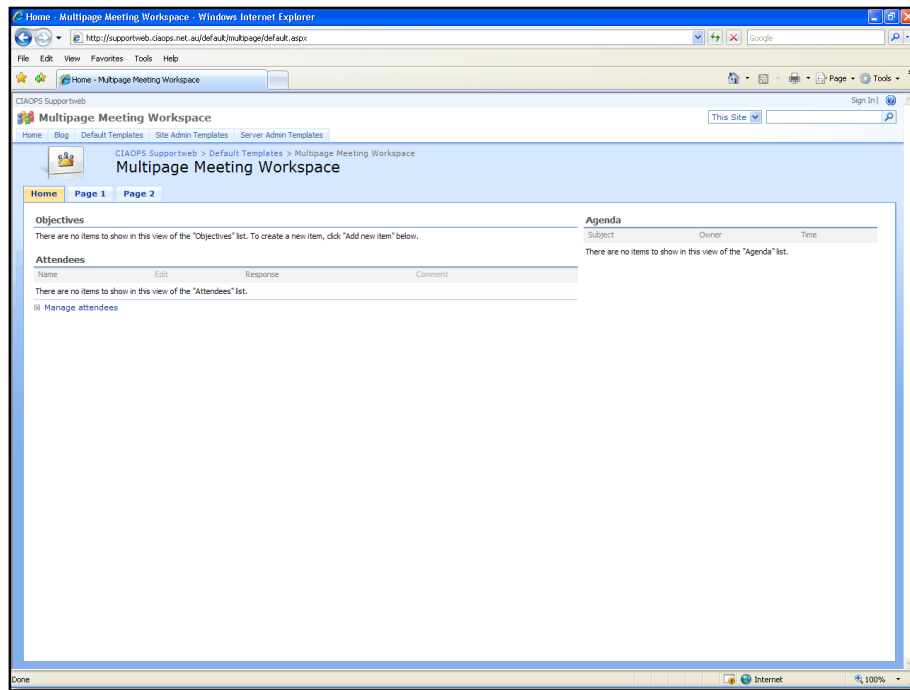Contains: agenda, objectives, attendees, document libraries, tasks and decisions.

Social Meeting Workspace

Contains three tabs, *Home*, *Discussions* and *Photos*. These pages contain: Attendees, Directions, Things to Bring, Discussions, and Picture Library. You have the ability to add new pages as required.

Multipage Meeting Workspace

Contains three pages; Home, Page1 and Page2. The Home tab contains: Objectives, Attendees and Agenda. The other pages are empty so you can add additional information. You are also able to create additional pages.

10.4   Adding Templates to SharePoint

Microsoft offers a number of free templates for download that can be added to WSS v3. They currently offer two different styles of templates:

Site admin templates are custom templates (*.stp files) that are easy for any SharePoint site administrator to install into the template gallery without requiring server administration access. *Available in English only*.

Server admin templates are site definitions (*.wsp files), enabling tighter integration and enhanced functionality within the Windows SharePoint Services platform. They require a server administrator to install.
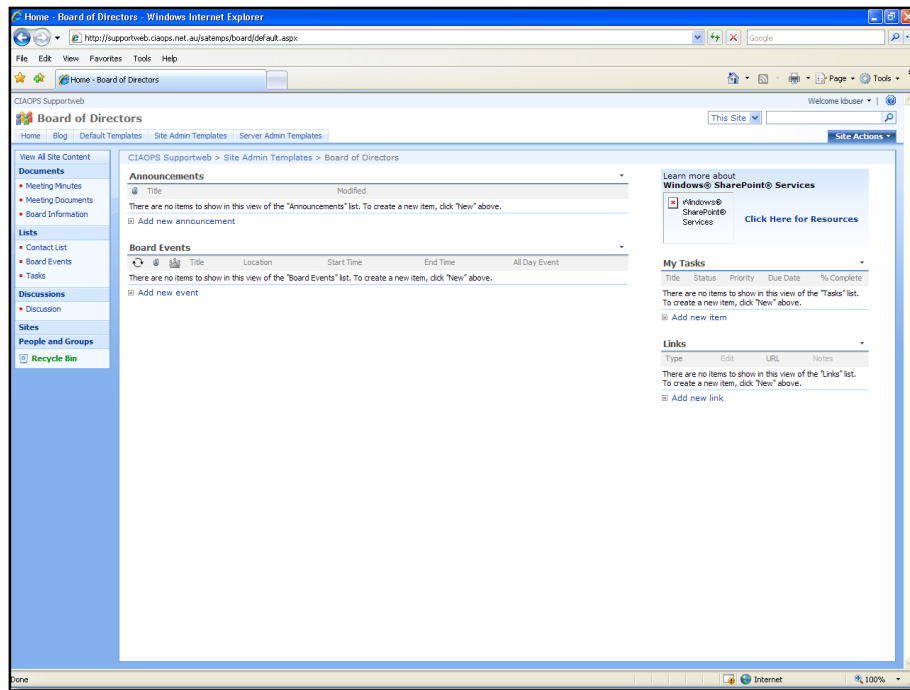
The 20 Site Admin templates are available for public download via

http://www.microsoft.com/downloads/details.aspx?FamilyID=e815f516-f9a4-45cd-9cc2-f6e35962324a&displaylang=en
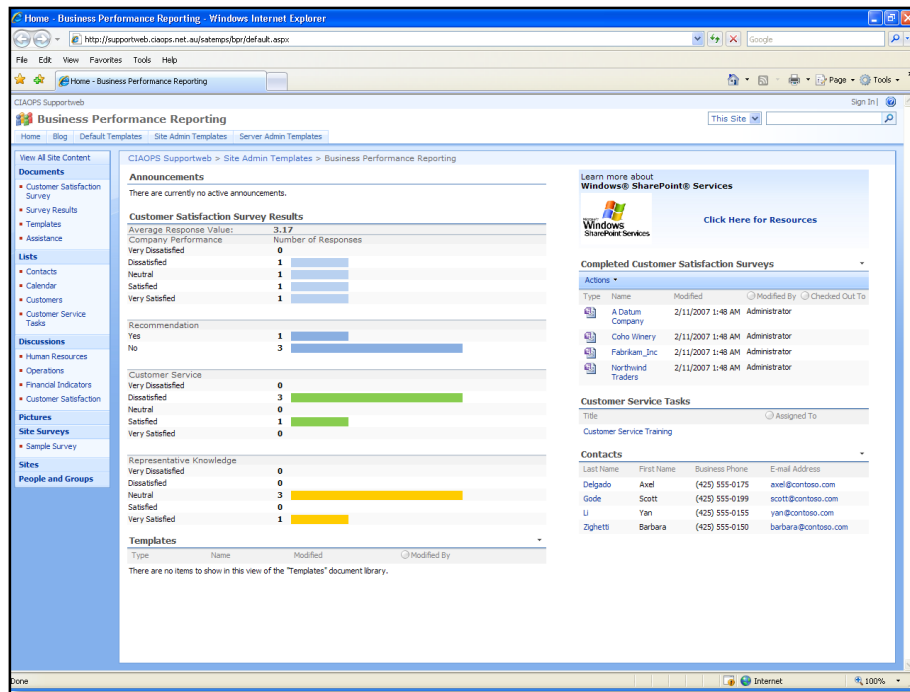
they include:

Board of Directors

The Board of Directors application template provides a single location for an external group of members to store and locate common documents such as quarterly reviews, shareholder meeting notes and annual strategy documents.
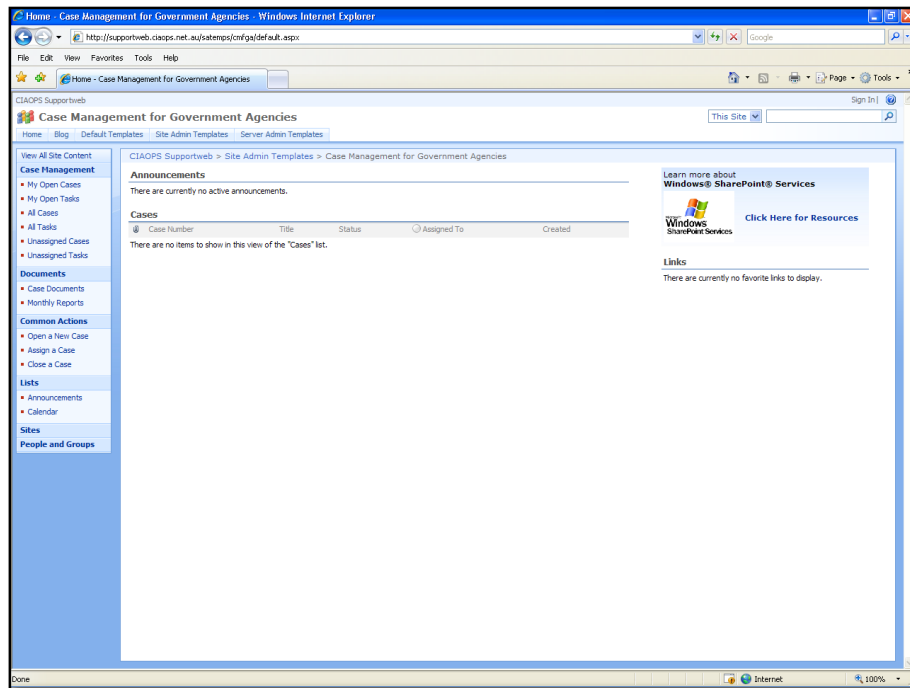
Business Performance Reporting

The Business Performance Reporting application template helps organization managers track the satisfaction of customers through a combination of surveys and discussions.
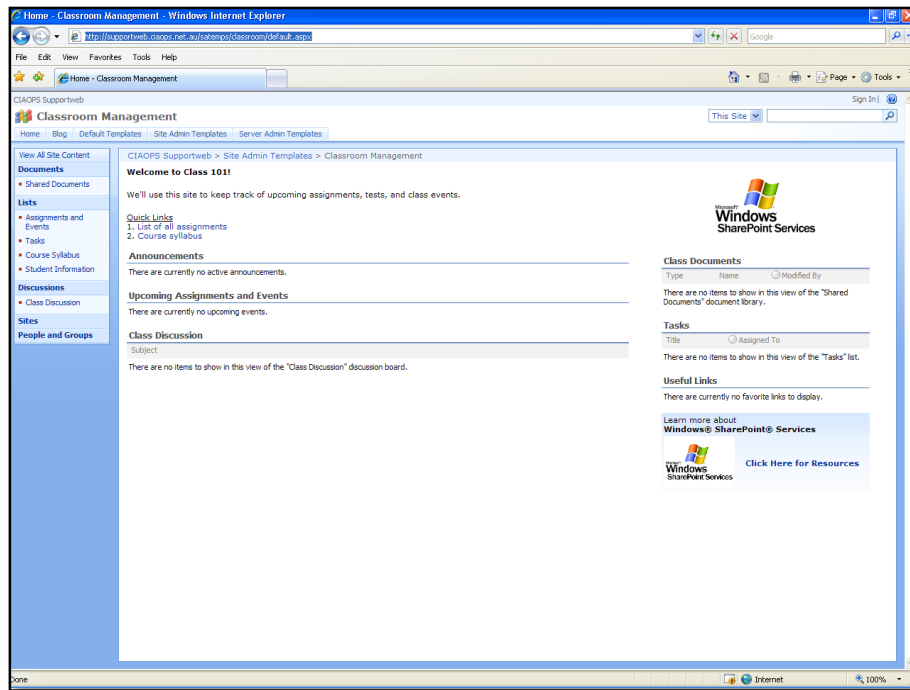
Case management for Government Agencies

The Case Management for Government Agencies application template helps case managers track the status and tasks required to complete their work.
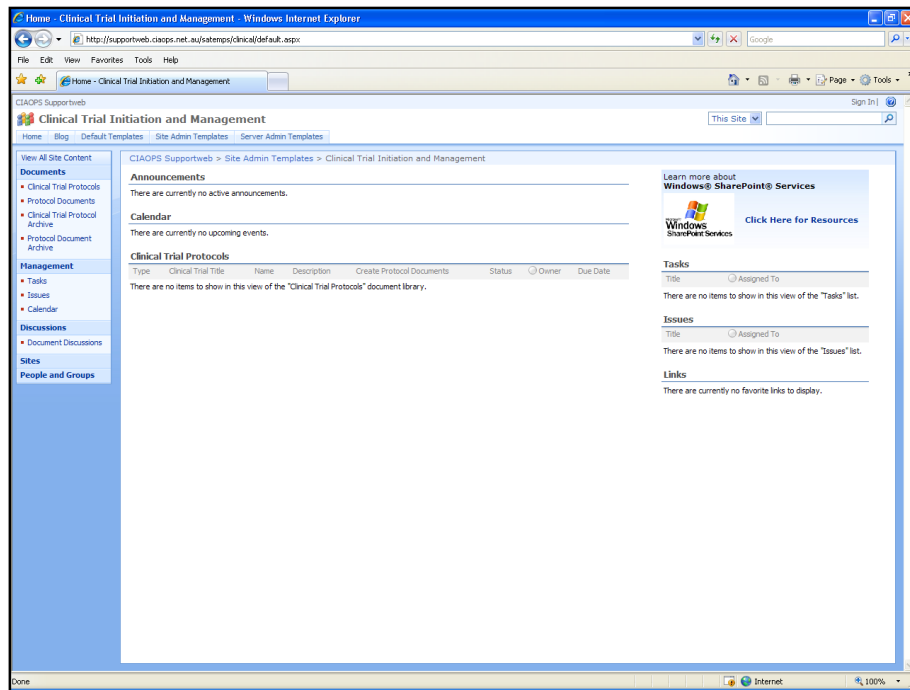
Classroom Management

The Classroom Management application template helps instructors and students organize and store information related to a particular class.
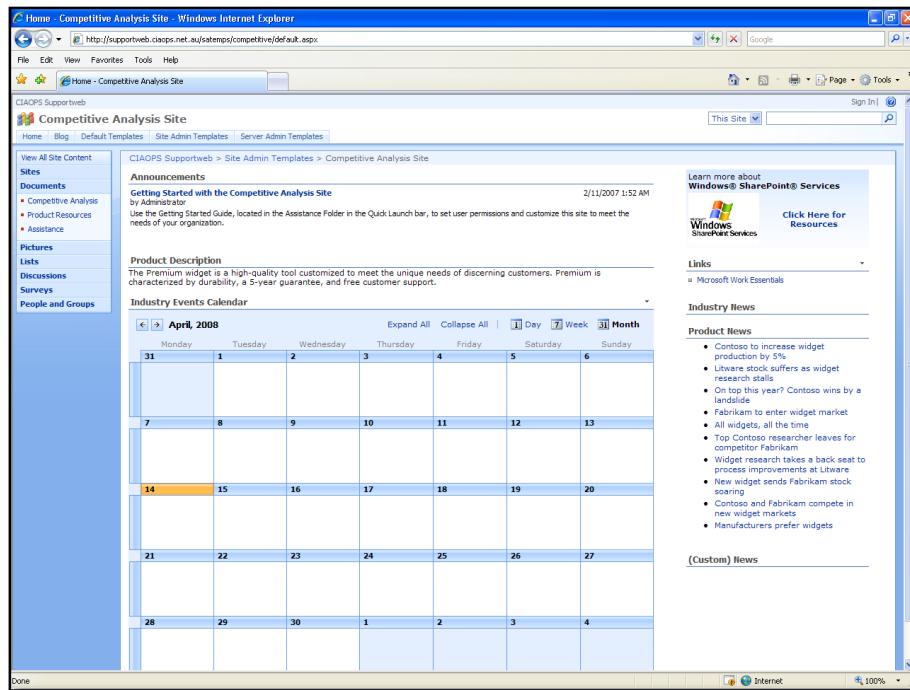
Clinical Trial Initiation and Management

The Clinical Trial Initiation and Management application template helps teams manage the process of tracking clinical trial protocols, objective setting, subject selection and budget activities.
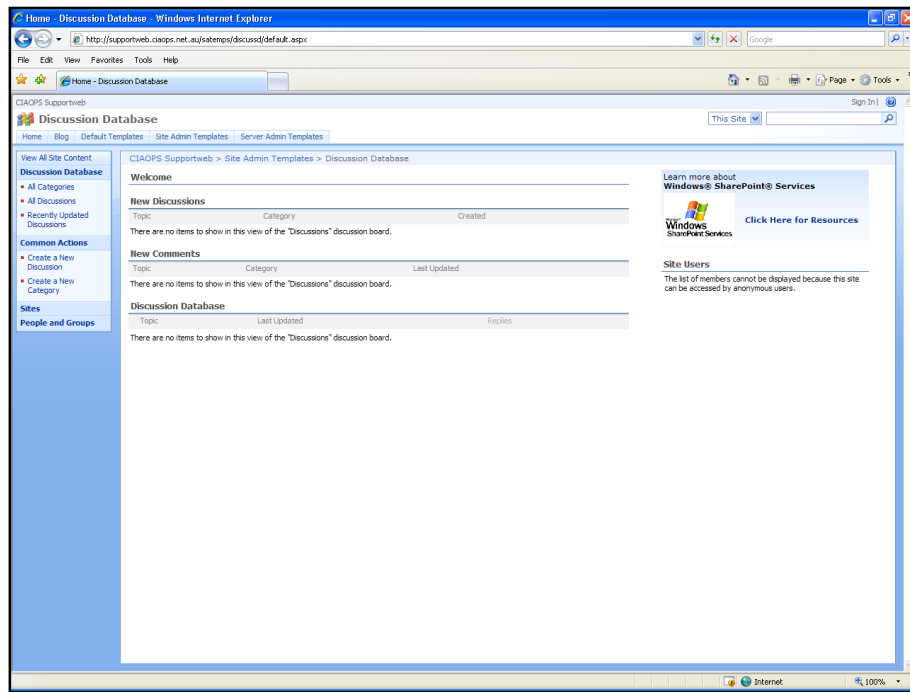
Competitive Analysis Site

The Competitive Analysis Site application template helps teams organize information about competitors and their products.
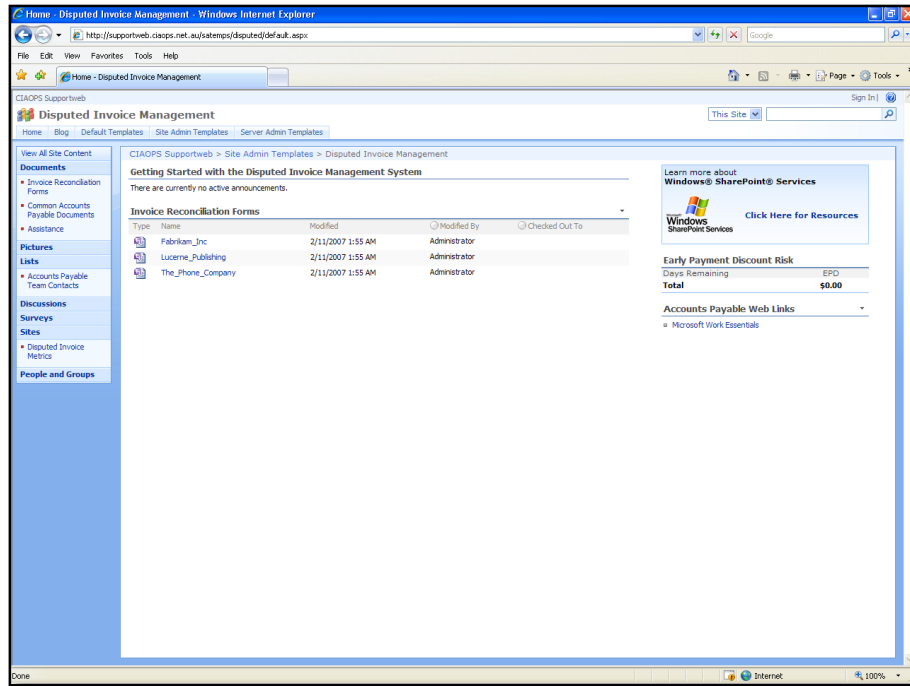
Discussion Database

The Discussion Database application template provides a location where team members can create and reply to discussion topics.
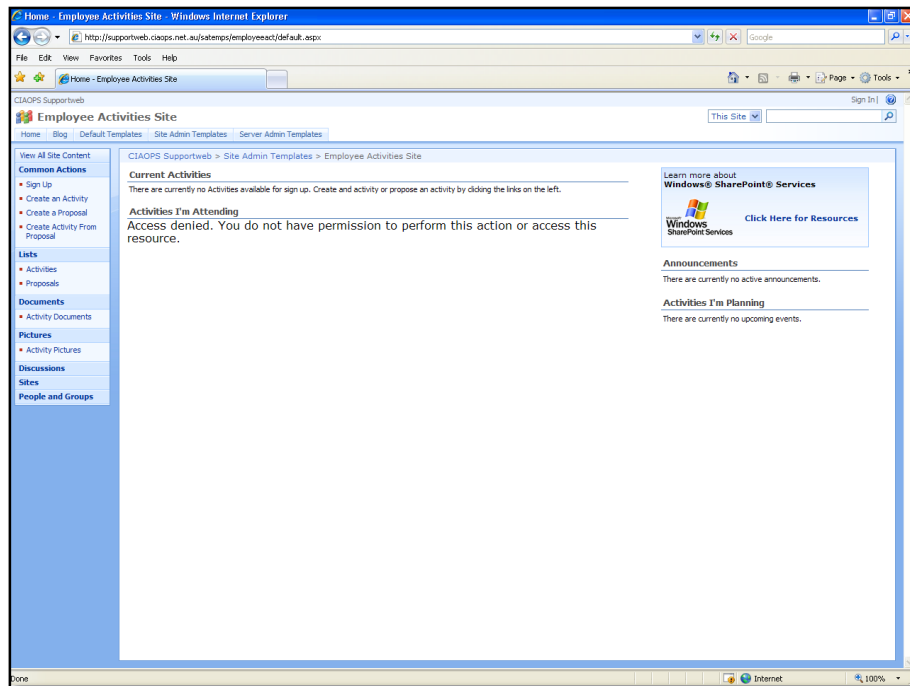
Disputed Invoice Management

The Disputed Invoice Management application template helps accounts payable departments track open invoices including the potential savings associated with paying the invoice early.
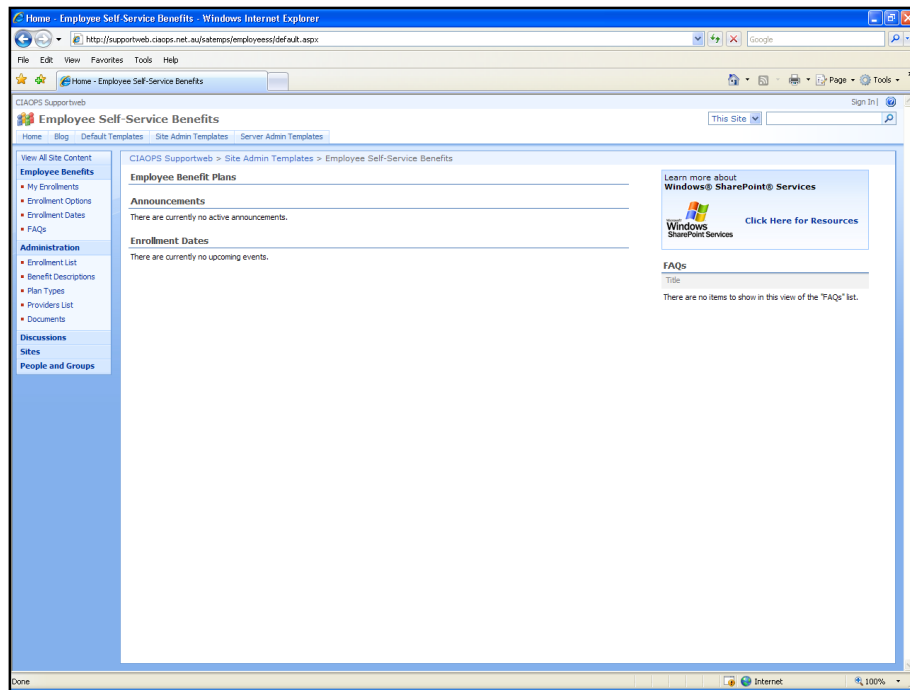
Employee Activities Site

The Employee Activities Site application template helps manage the creation and attendance of events for employees.

Employee Self-Service Benefits
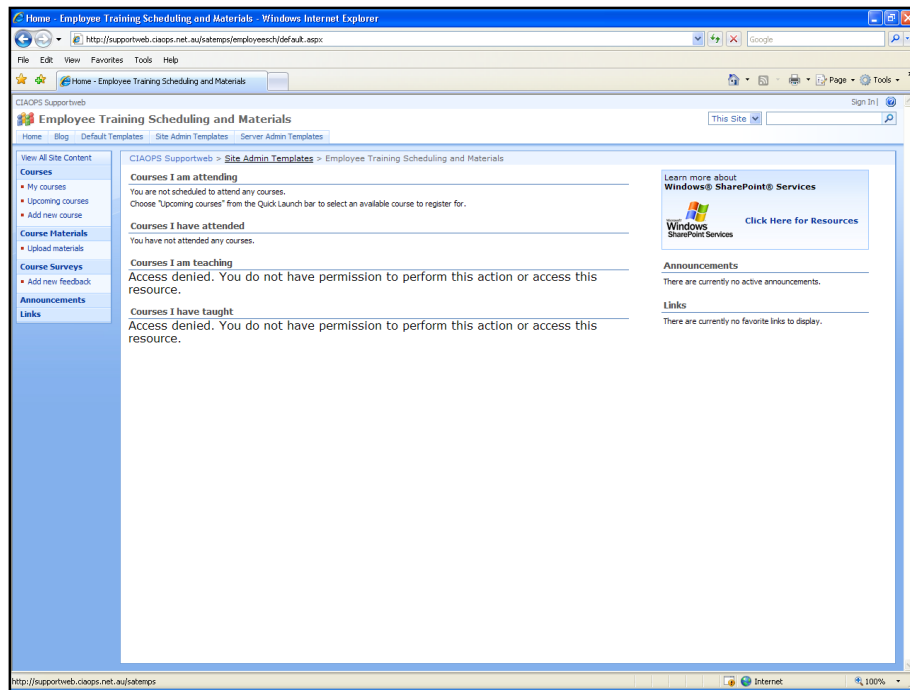

The Employee Self-Service Benefits application template provides tools for an organization to inform employees about available benefits as well as enabling them to enroll for each benefit.
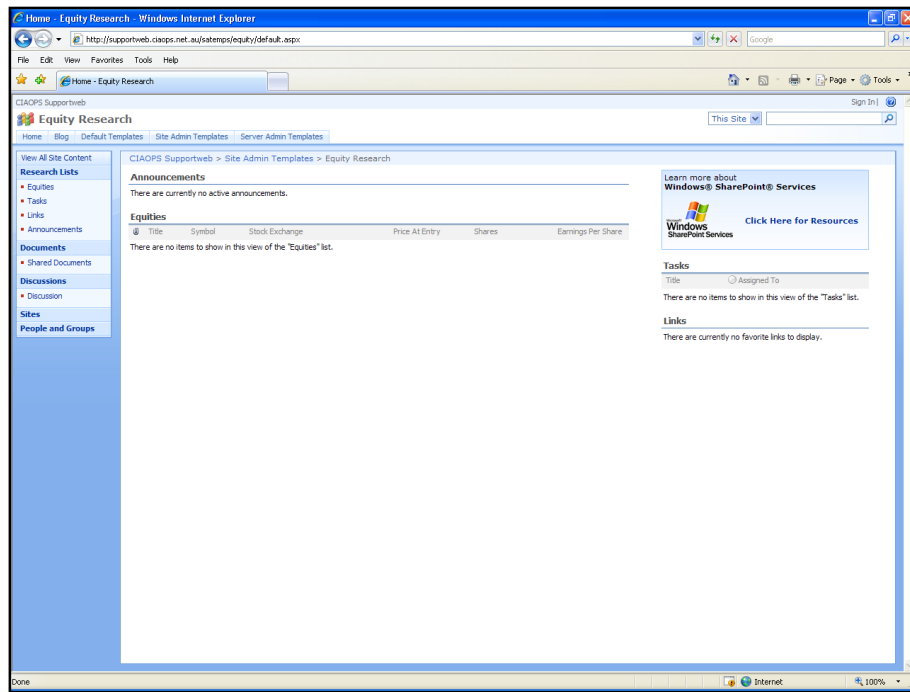
Employee Training Scheduling and Materials

The Employee Training Scheduling and Materials application template helps instructors and employees manage courses and related materials.
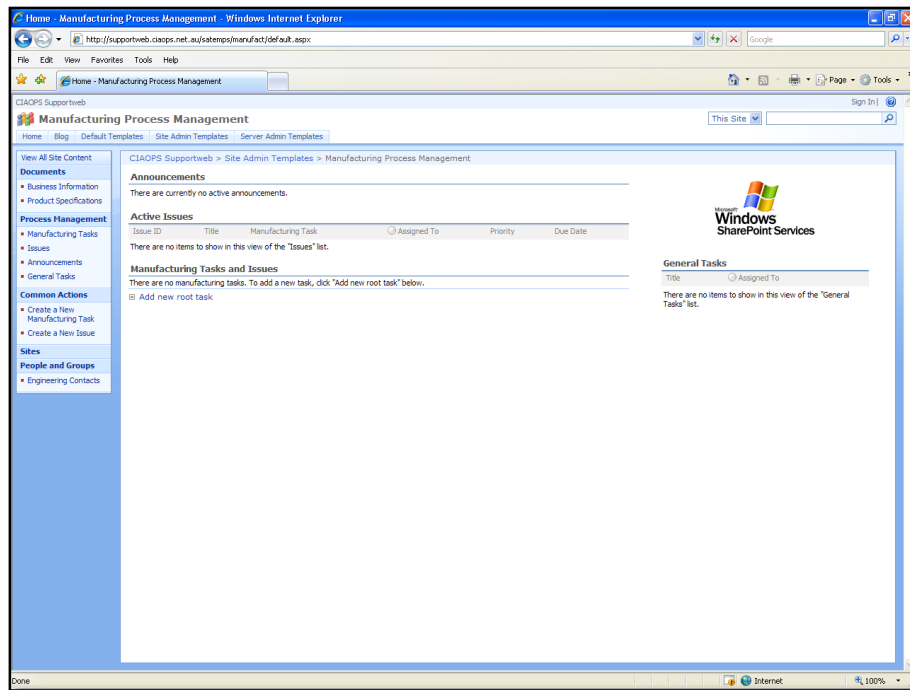
Equity Research

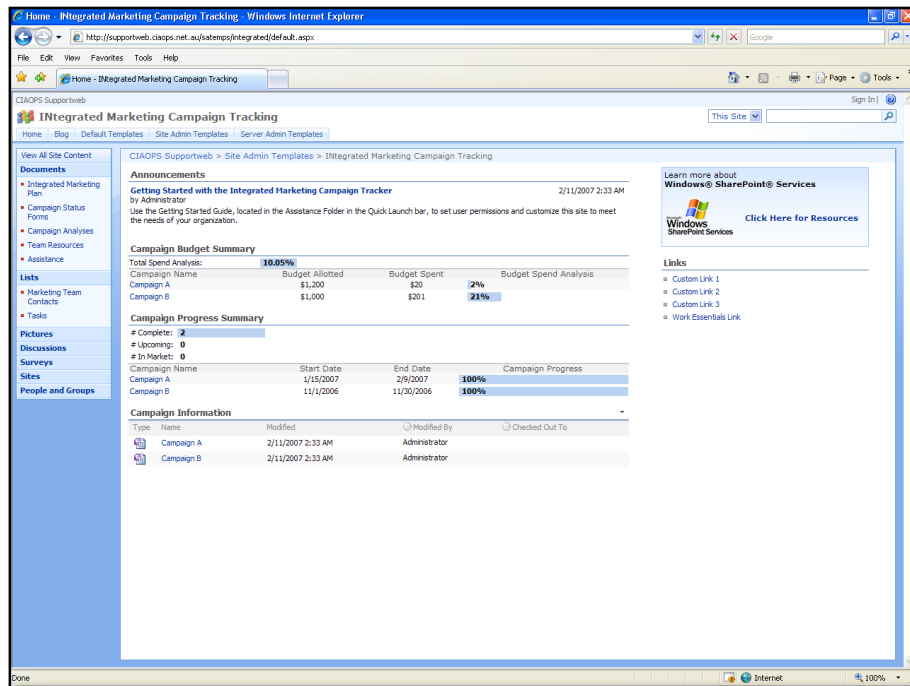The Equity Research application template helps teams collaborate on researching stocks and other equities.

Manufacturing Process Management

The Equity Research application template helps teams collaborate on researching stocks and other equities.
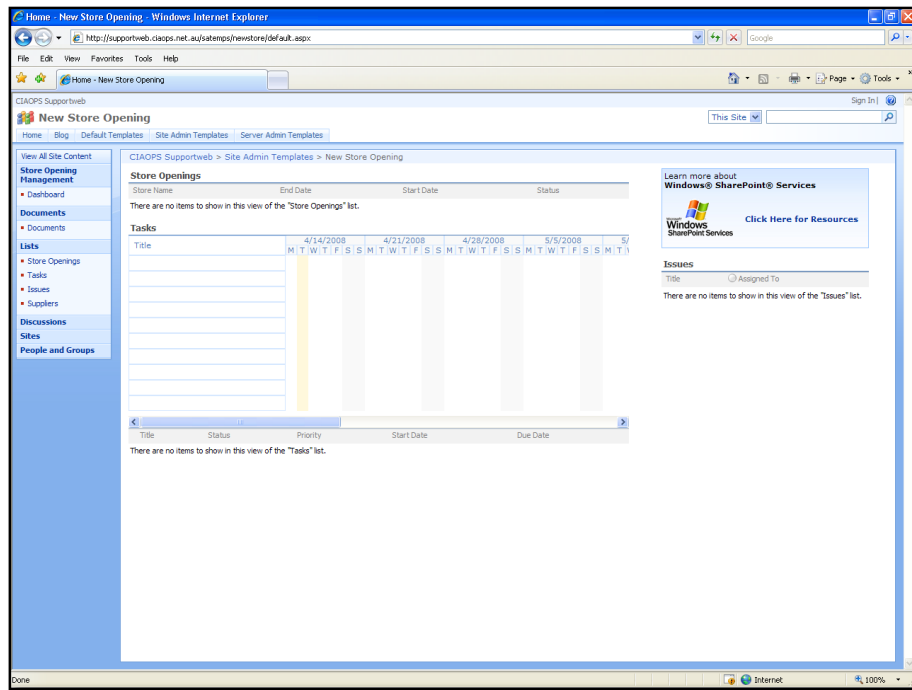
Integrated Marketing Campaign Tracking

The Integrated Marketing Campaign Tracking application template helps marketing managers track the implementation and success of outbound marketing activities.
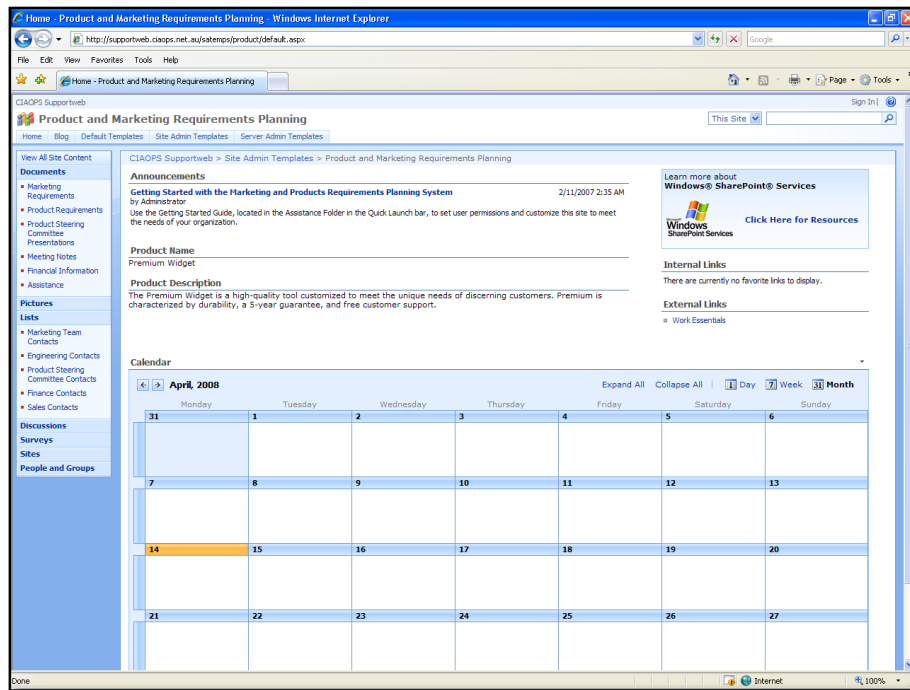
New Store Opening

The New Store Opening application template helps a team manage the opening of new store locations or re-modeling of existing store location.
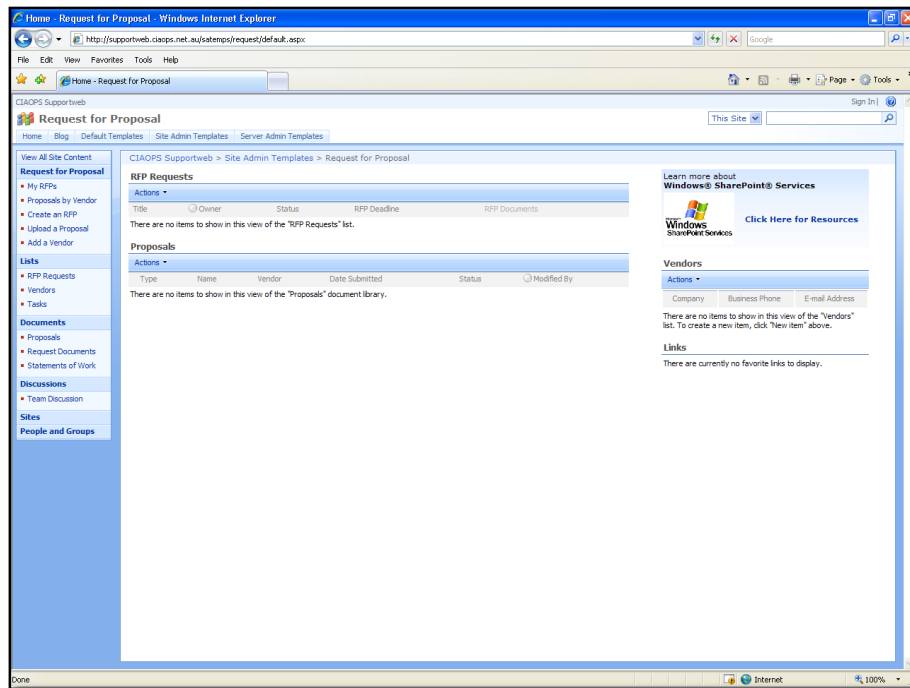
Product and Marketing Requirements Planning

The Product and Marketing Requirements Planning application template enables teams to manage the process of collecting and documenting requirements for new products.
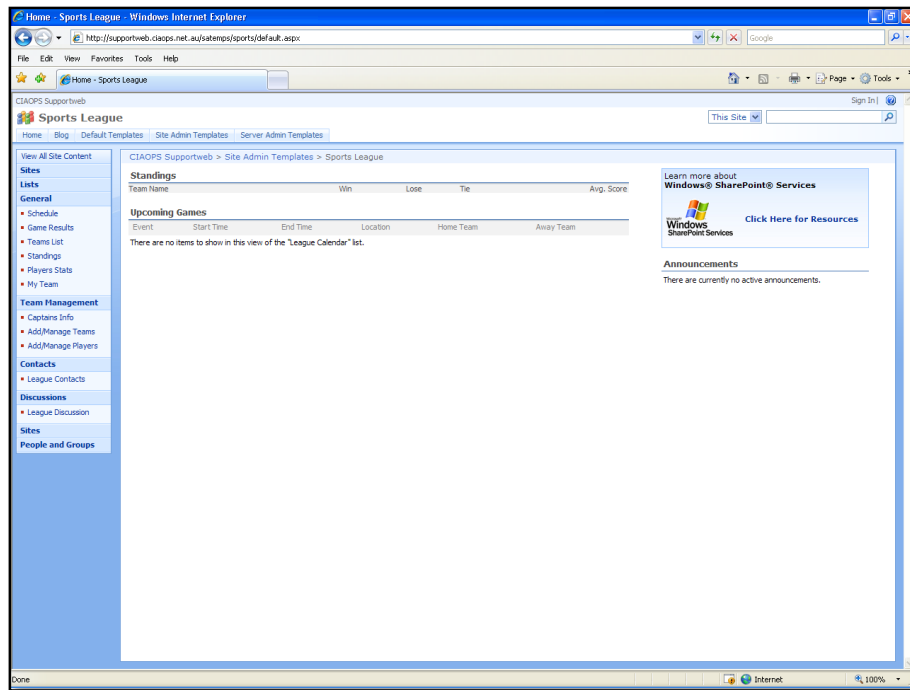
Request for Proposal

The Request for Proposal (RFP) application template helps manage the process of creating and releasing an initial RFP. The site also helps simplify the process of notifying individuals about the status of the RFP and submitted proposals.
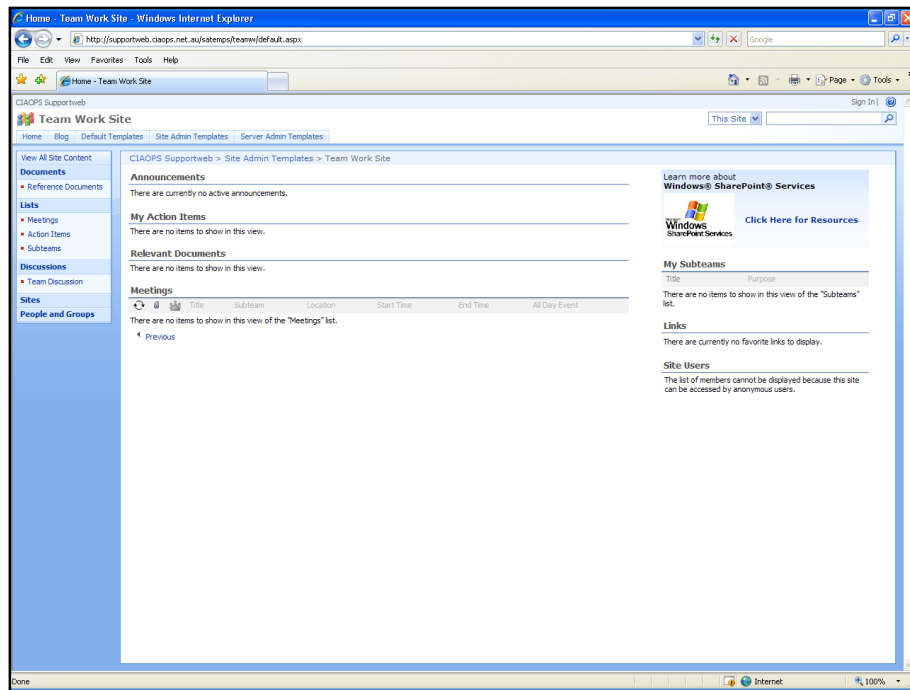
Sports League

The Sports League Site application template helps an intra-company league administrator manage a something like a baseball league.
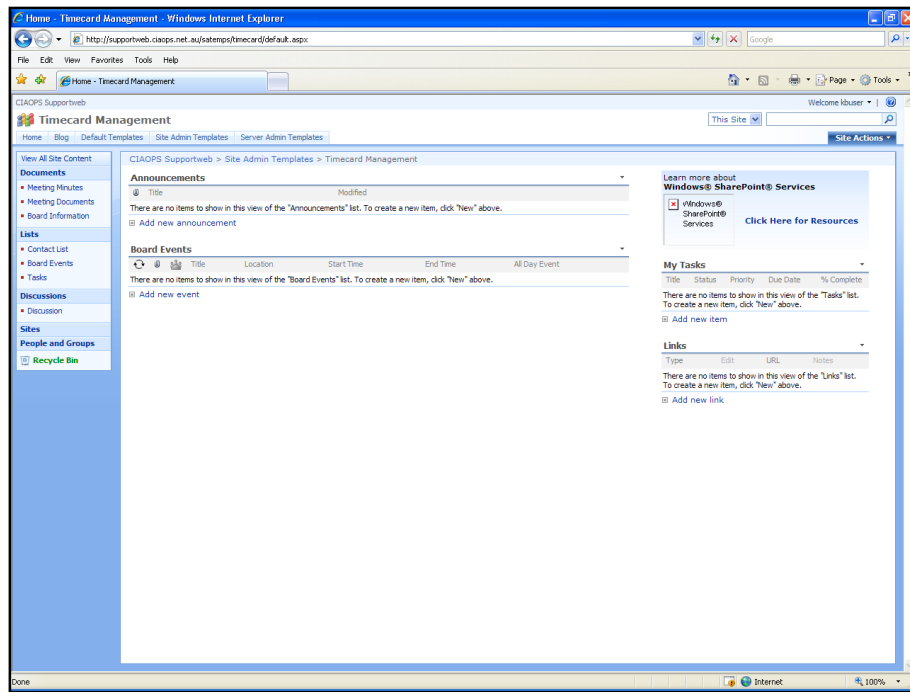
Team Work site

The Team Work Site application template provides a place where project teams can upload background documents, track scheduled calendar events and submit action items that result from team meetings.

Timecard Management

The Timecard Management application template helps teams track hours spent working on various projects. Team members 'punch in' and 'punch out' of work on project tasks. Managers can view the total hours spent by project and by person.
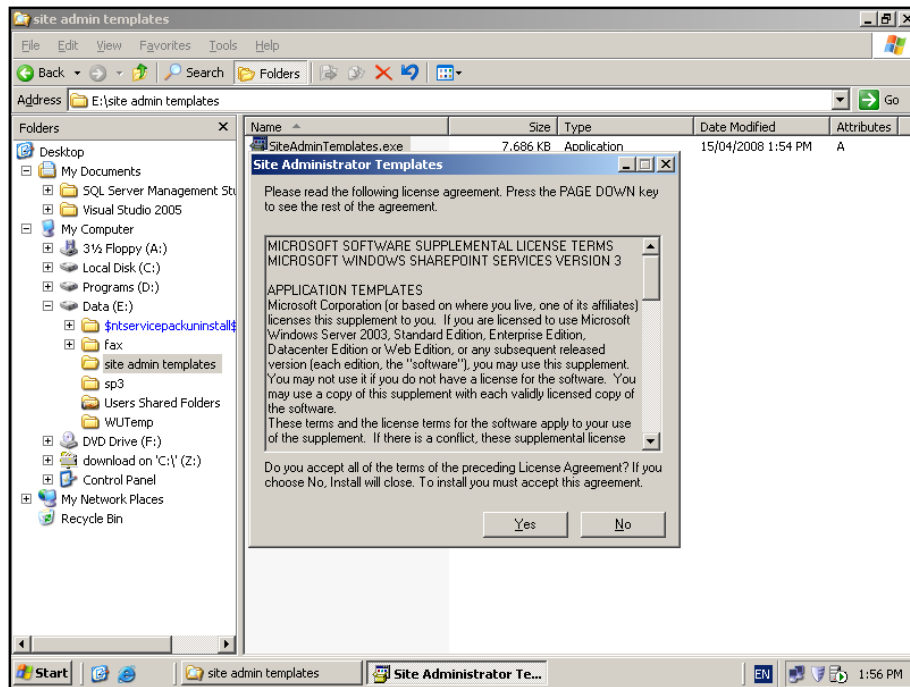
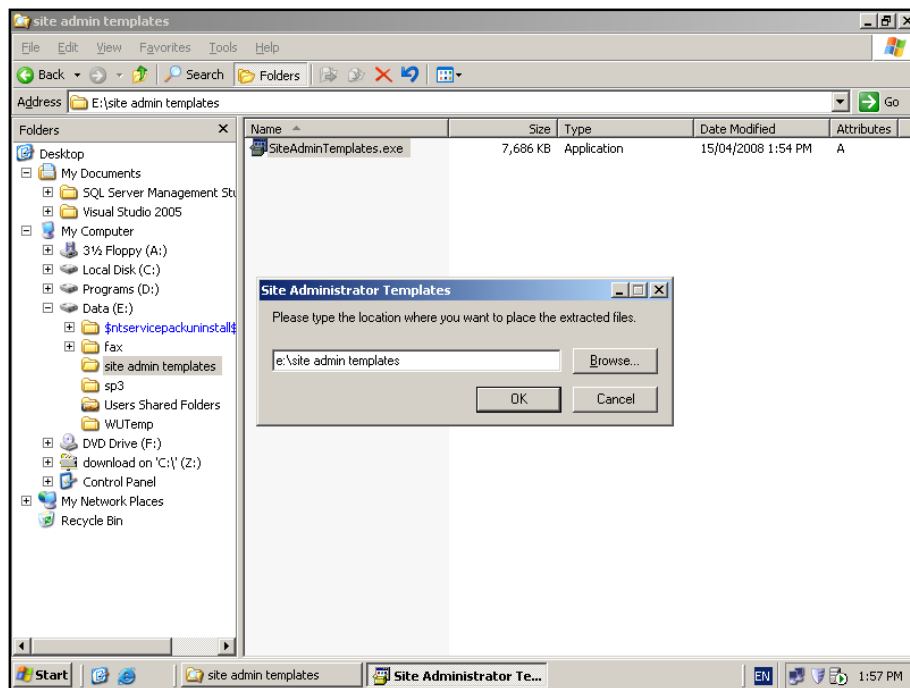## 10.5   Installing Site Admin templates

To download the templates go to:

http://www.microsoft.com/downloads/details.aspx?FamilyID=e815f516-f9a4-45cd-9cc2-f6e35962324a&displaylang=en

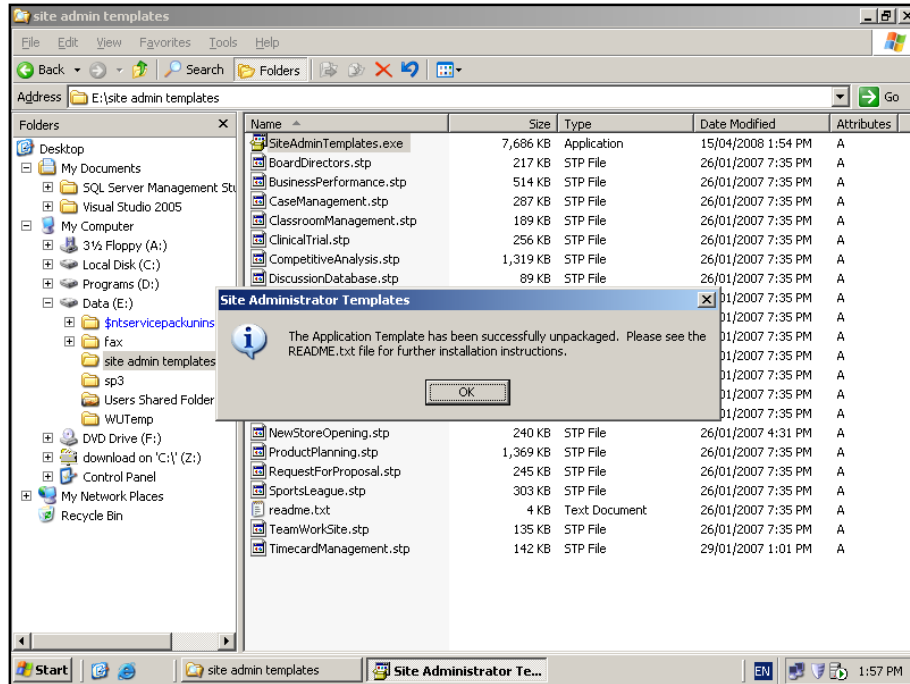Once the templates have been downloaded from Microsoft, simply double click on the file to run.

Accept the license agreement by pressing **Yes**.

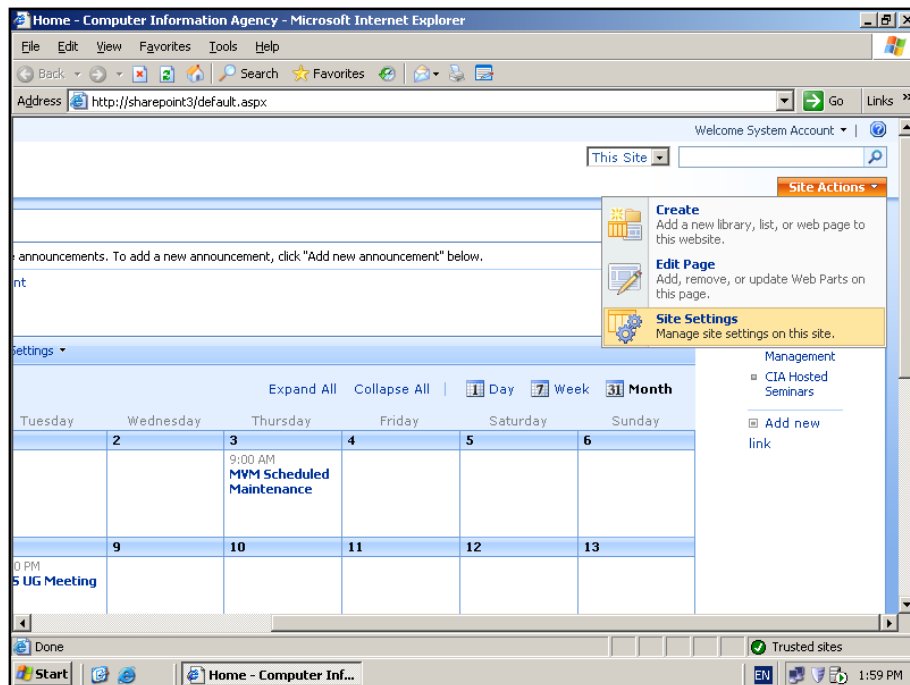

Next, define a location where you wish the template files to be placed on your system.
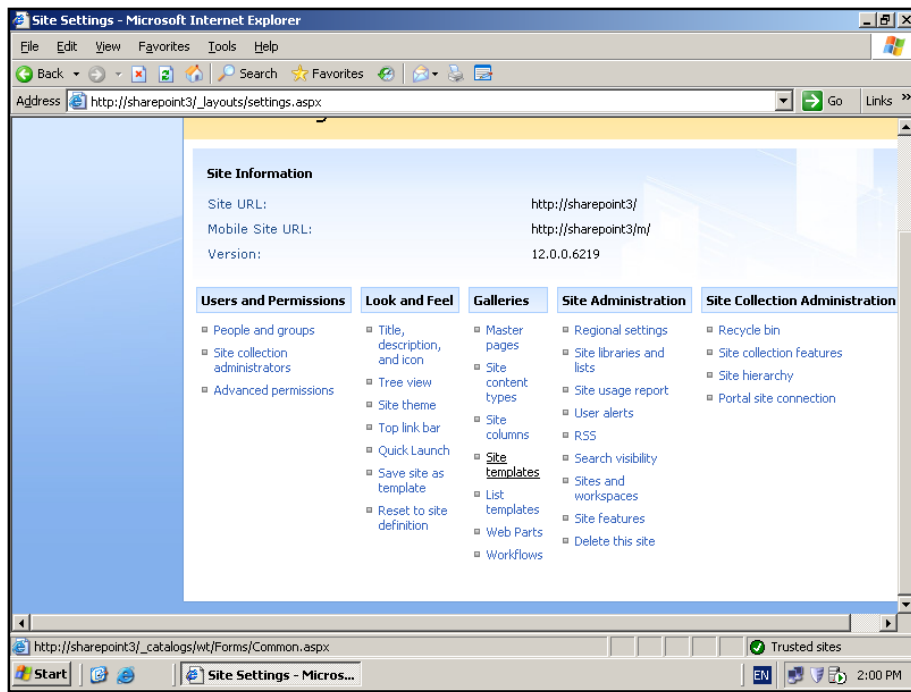
When the process is complete simply press the **OK** button. You should now see a list of with the extension .STP is the directory you selected previously.
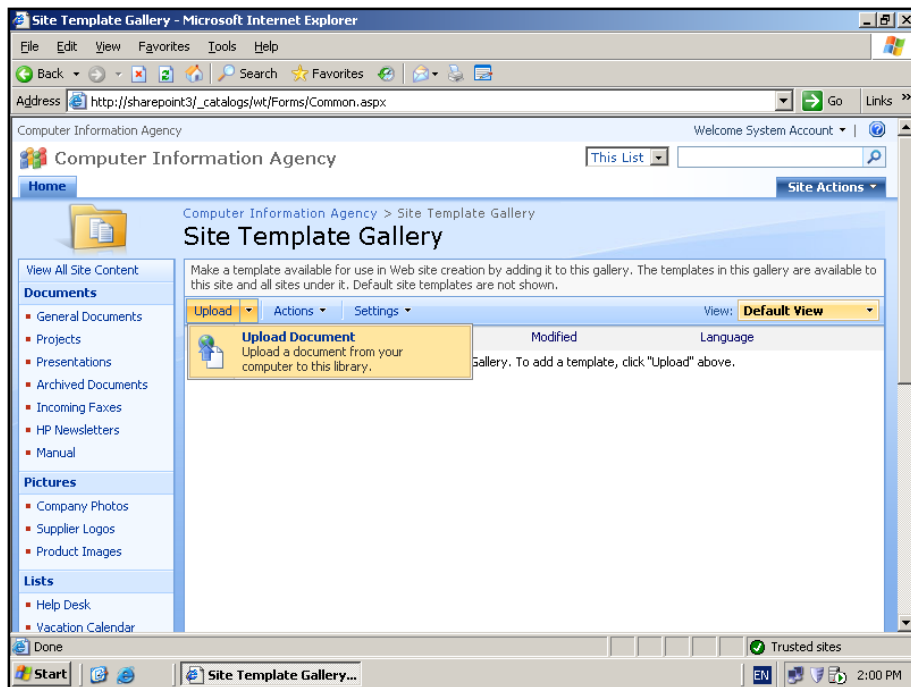

Log into your SharePoint site as the site Administrator.

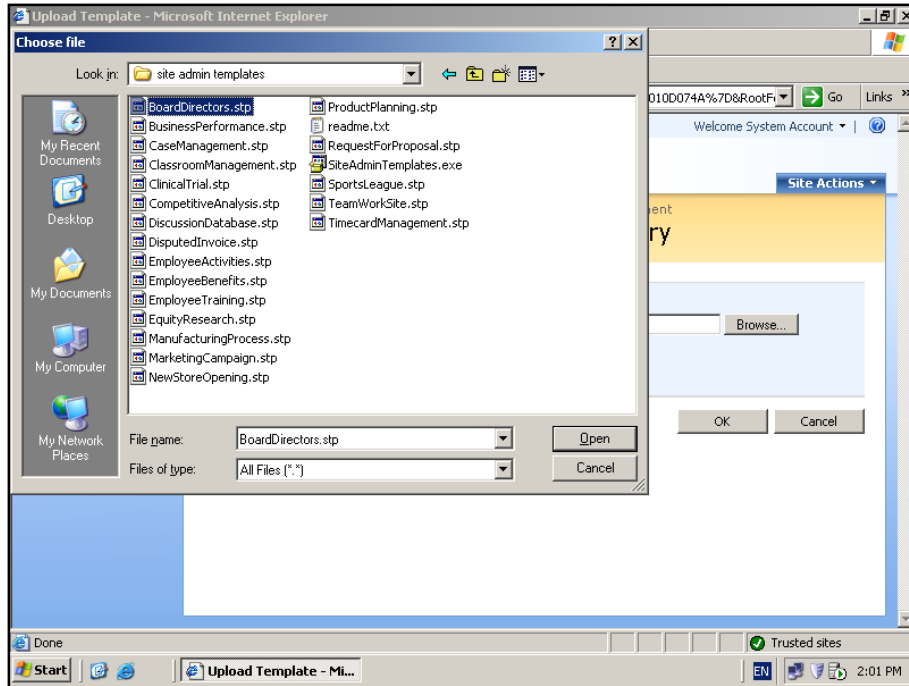From the *Site Actions* drop-down menu in the top right, select **Site Settings**.
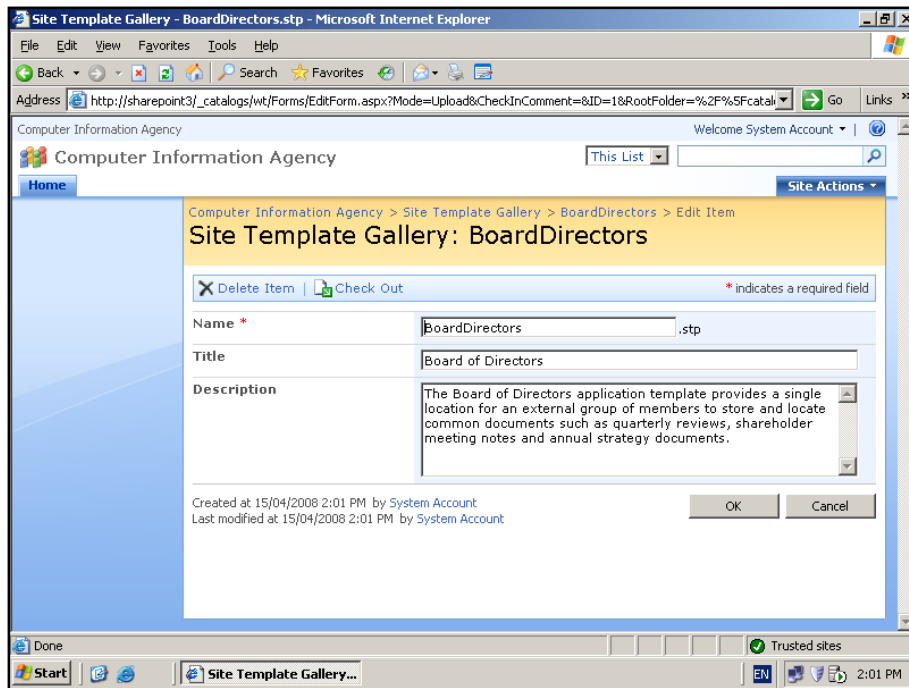
Under the *Galleries* section, select **Site templates**.

Select **Upload** to load an application template into this SharePoint site.

Browse to the *<template_name>.stp* file from the directory and select **Open**.
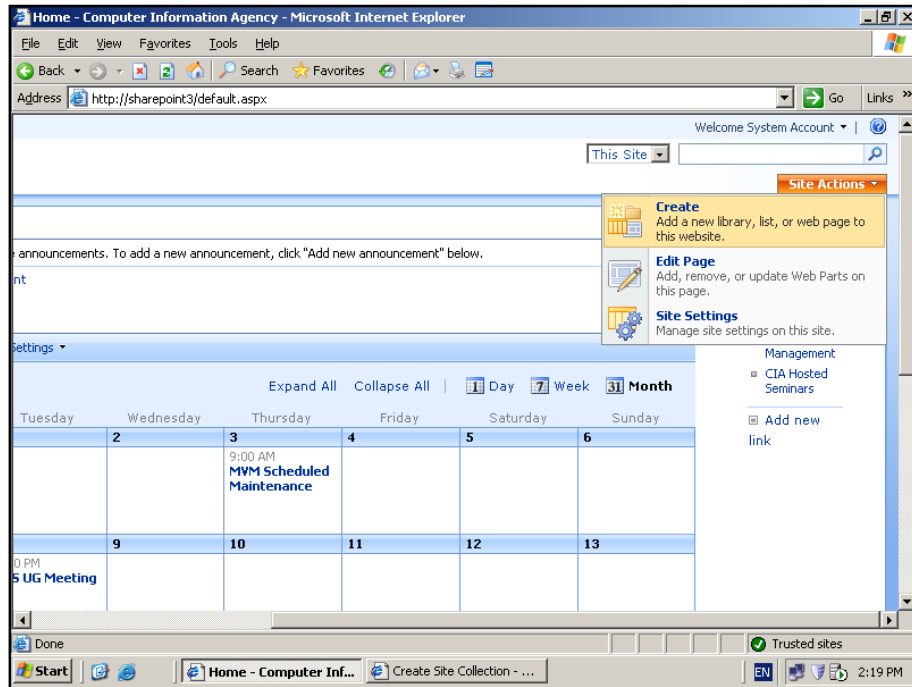

Click **Ok** to complete the upload of the application template to your WSS v3 site.

You will need to complete this process for every template you wish to have available in WSS v3.
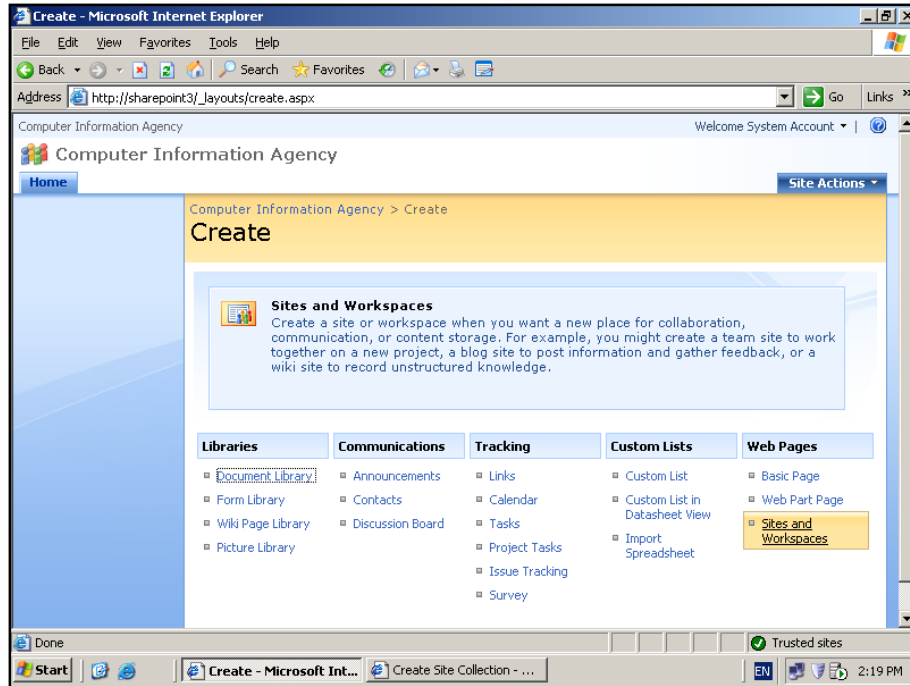
Now, when you create a sub-site these Site Admin templates will be available under the custom tab.
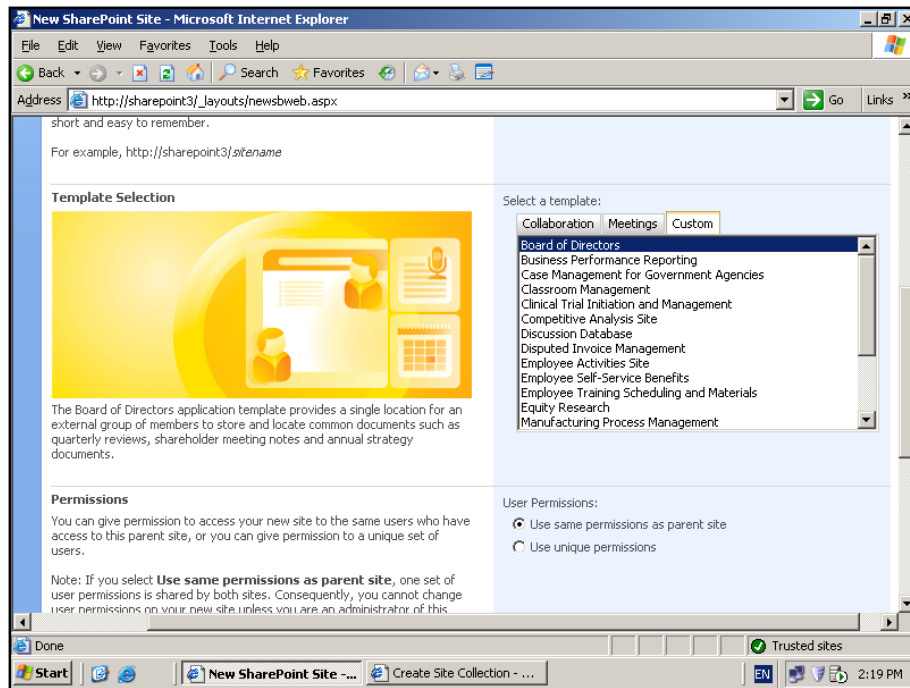

To create a new sub site with one of the templates you have just loaded login to your WSS v3 site as an administrator and select **Site Actions** the **Create** from the upper right of the window.
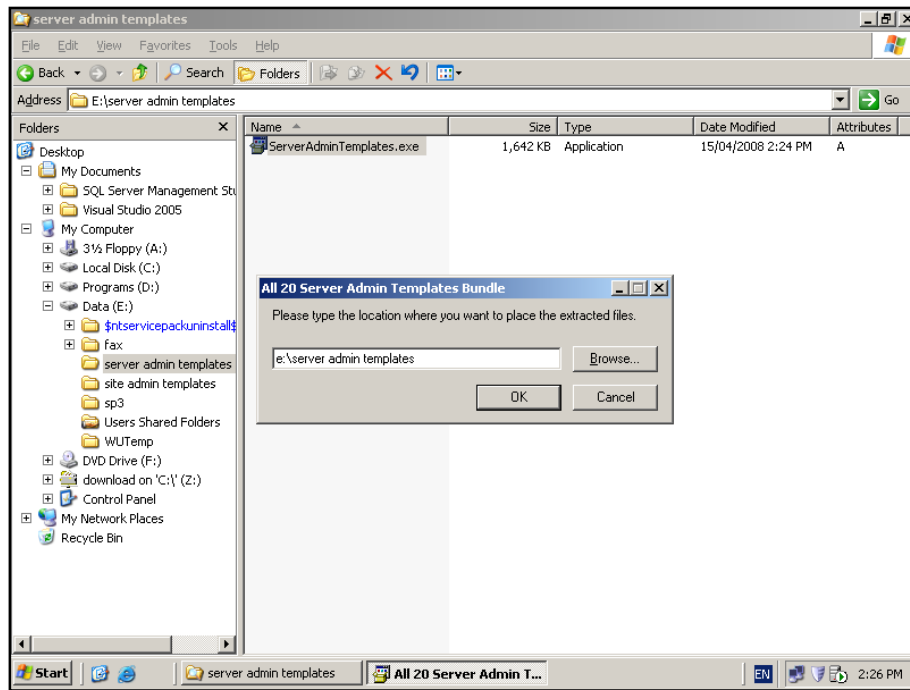
Now select **Sites and Workspaces** from under the *Web Pages* heading.

If you scroll down to the Template Selection and look at the Custom tab you should see a list of all the templates you just added. You can use any of these now when you create a WSS v3 sub-site.
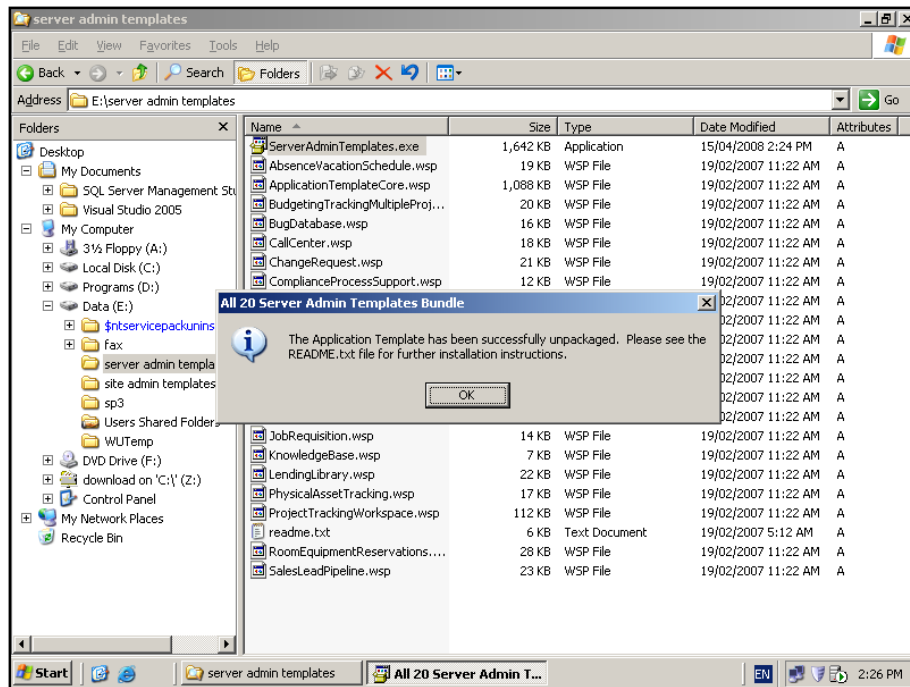
10.6   Server Admin Templates
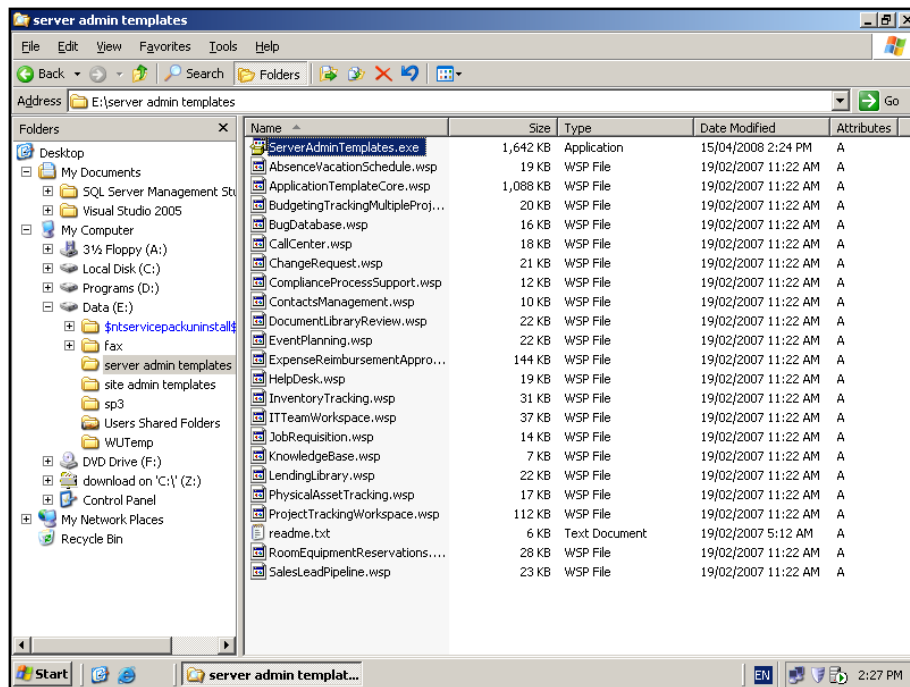

Download the Server templates file from

http://www.microsoft.com/downloads/details.aspx?FamilyID=aae4cb5a-91d2-4f1b-9a45-3bb894e218f8&DisplayLang=en

Double click on the downloaded file to run. Select a location where you wish to store the templates and hit **OK**.

Once this process is complete press **OK** to continue. You should now see a list of files with extension .WSP in the directory you selected above.

To add these templates to WSS v3 you will need access to the WSS v3 server and be logged on as an administrator.

Once logged on open a DOS window via **Start** | **Run** | **cmd**. Once the DOS window is open change to the WSS v3 directory *at c:\program files\common files\Microsoft shared\web server extensions\12\bin.*

Run the command

stsadm –o addsolution –filename   <path>\ApplicationTemplateCore.wsp

Next, run

stsadm –o deploysolution –name ApplicationTemplateCore.wsp -allowgacdeployment

Then run

stsadm –o execadmsvcjobs

Now run

 stsadm -o copyappbincontent

The Application Template Core solution has now been added to the WSS v3 solution store, and deployed on the server.

You must complete the above steps prior to installing the Server admin templates.

You now need to add each template individually to WSS v3 via the following steps. While still at the DOS prompt run:

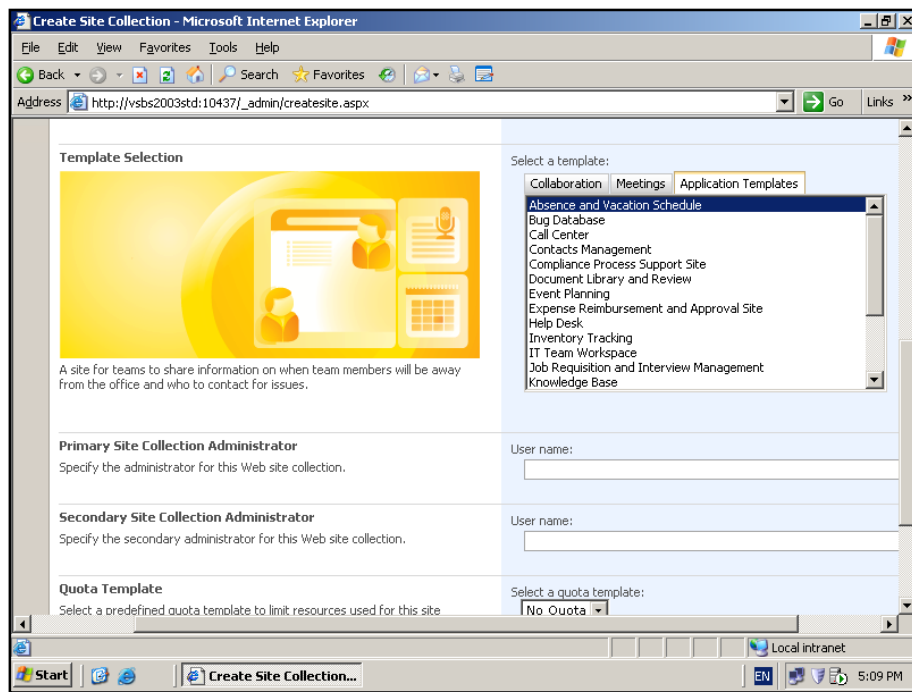**stsadm –o addsolution –filename <template_name>.wsp**

Then run

stsadm –o deploysolution –name <template_name>.wsp –allowgacdeployment –immediate

followed by

stsadm –o execadmsvcjobs

for each template you wish to have installed. For Guide subscribers you will find a batch file called *deploy.bat* on the update DVD that will execute the above steps for the Template Core and all Server Admin templates automatically.
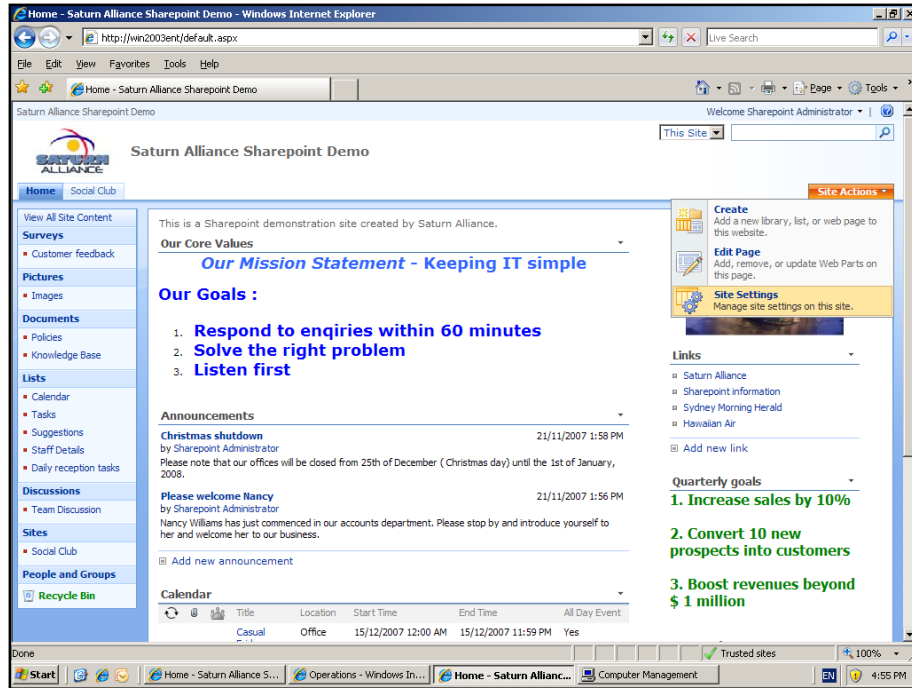
Once the templates have been added, if you return to the *Create Site Collection* in *SharePoint Central Administration* you should see the list of Server Admin templates now displayed which you can choose from under the *Application Templates* tab.
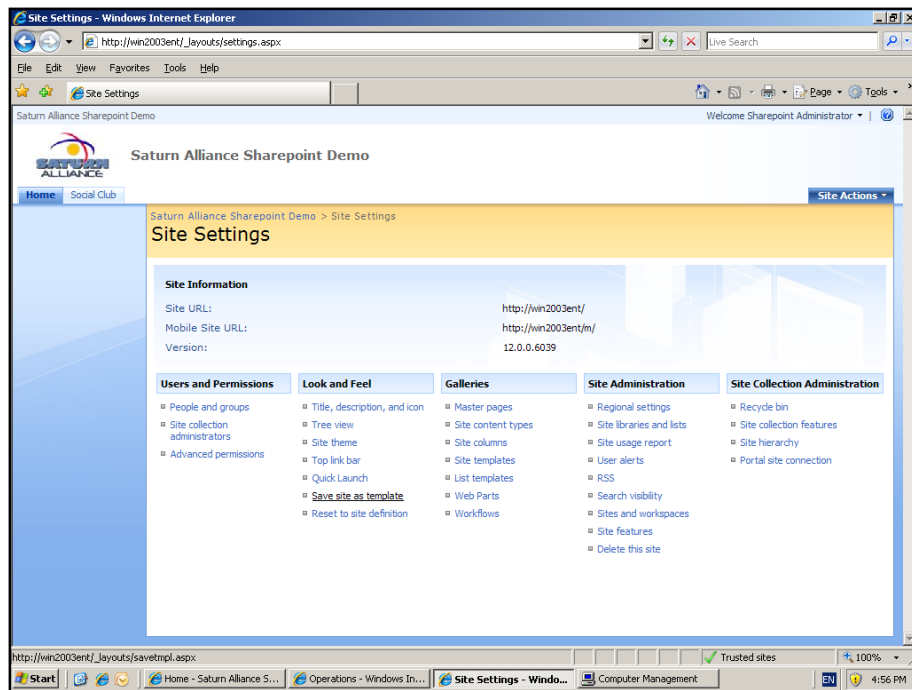
10.7   Saving entire site as a template

It is possible to save the entire contents of a WSS v3 site, as well as the data within it (up to 500MB max) to a site template.
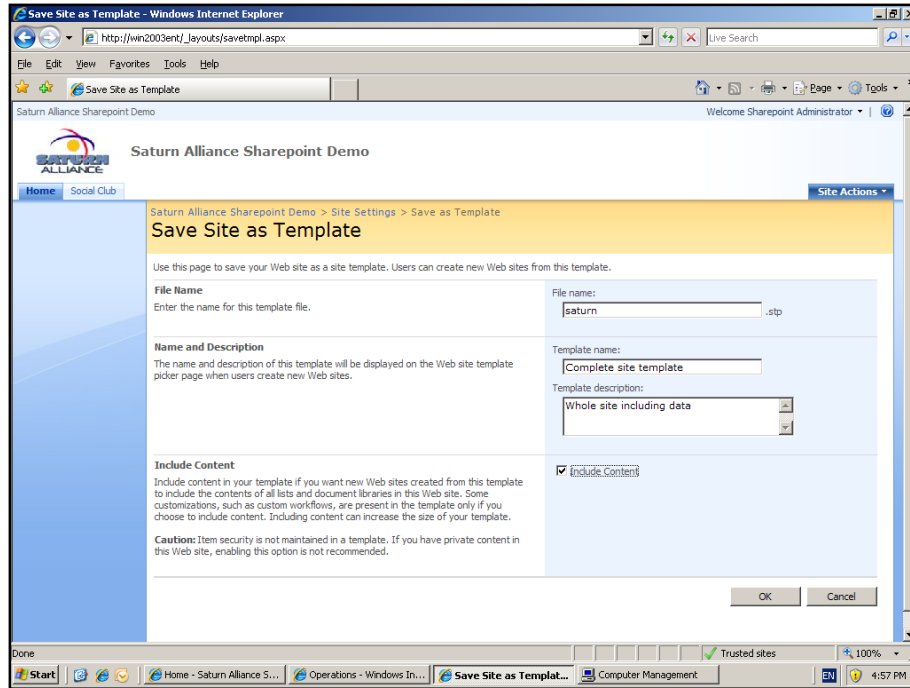
Login to the WSS v3 site as an administrator and select **Site Actions** | **Site Settings** from the top right.
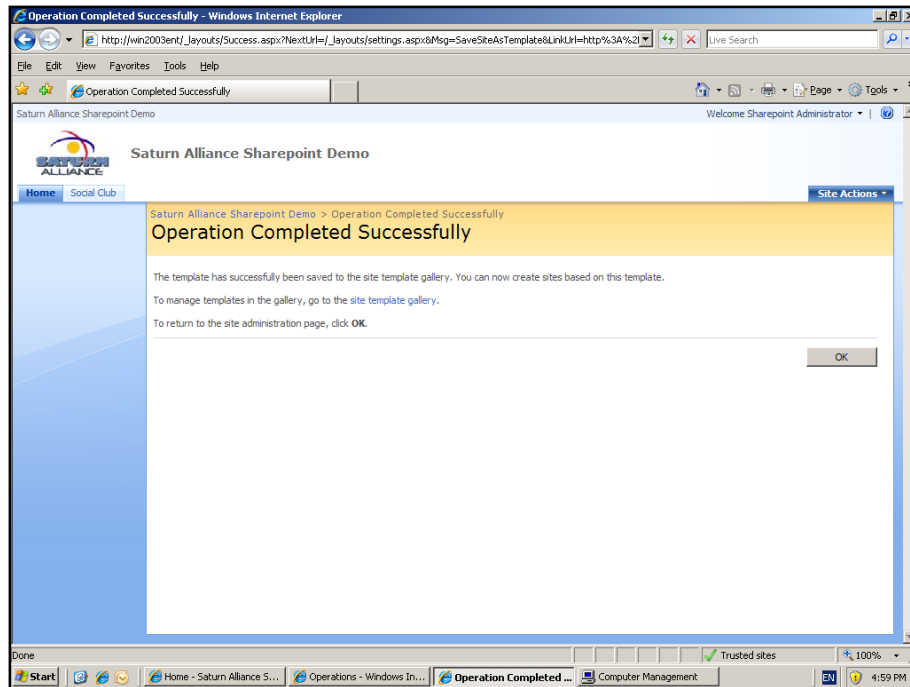

From the *Look and Feel* section, select the option **Save site as template**.
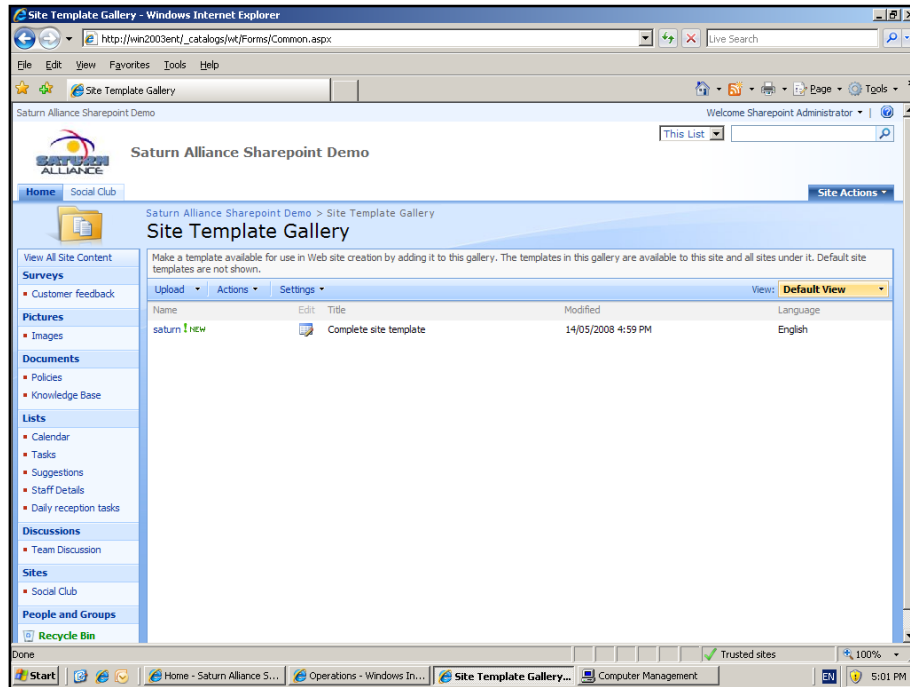
Give the template a *Filename* and then a *Template name* and *Description*. You are also able to select the option below to include all the site content (remember this will only work provided there is less than 500GB of data). Press the **OK** button to continue.
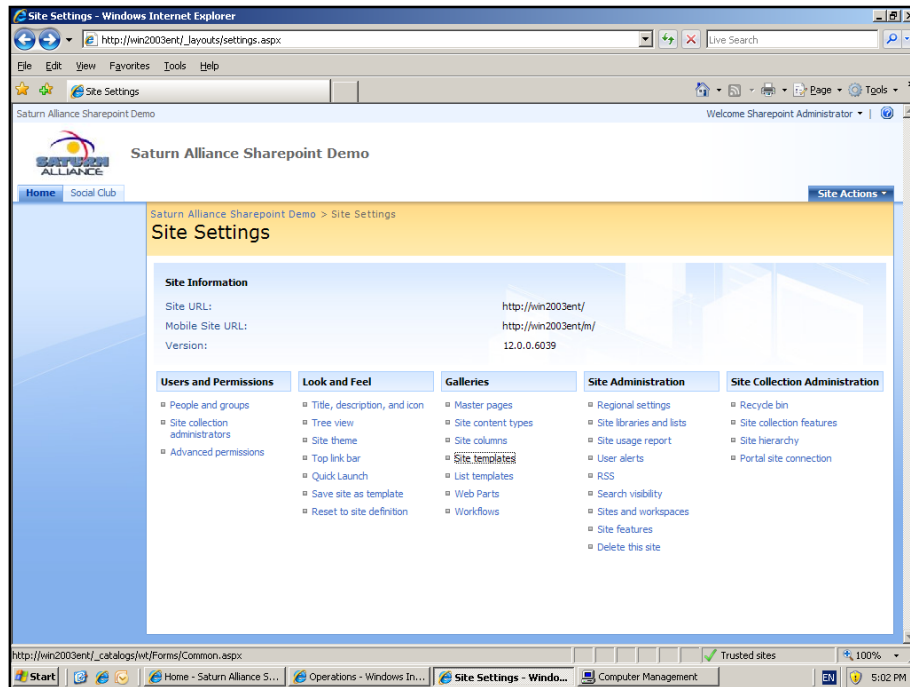
Upon successful completion you should see a screen like that shown above. Click the *site template gallery* link to view the template gallery for the entire site (which is where the template is saved), or press the **OK** button to return to the site.
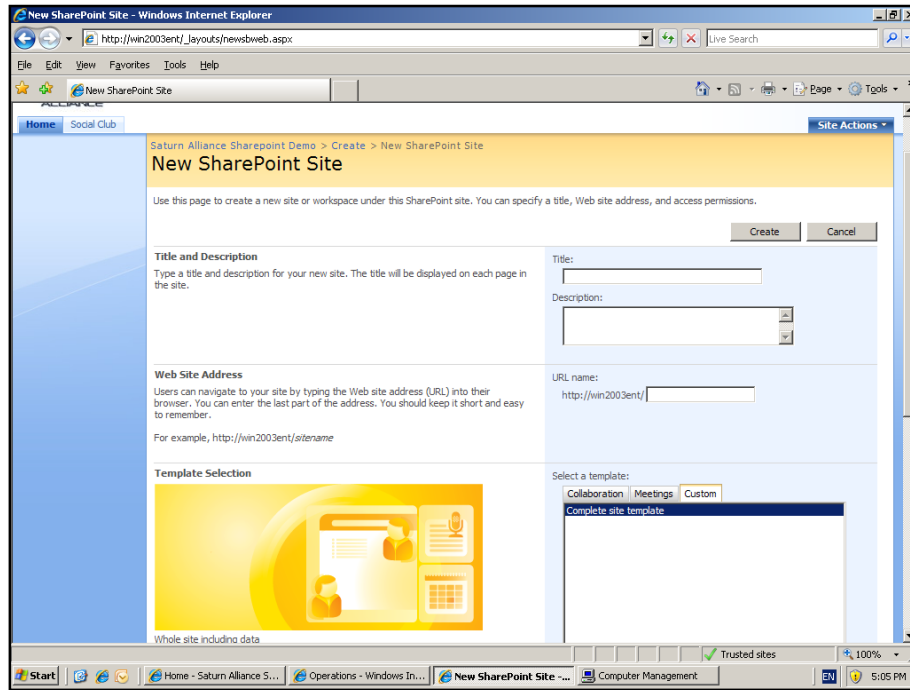

The template you just created now appears in the WSS v3 Site Template Gallery.
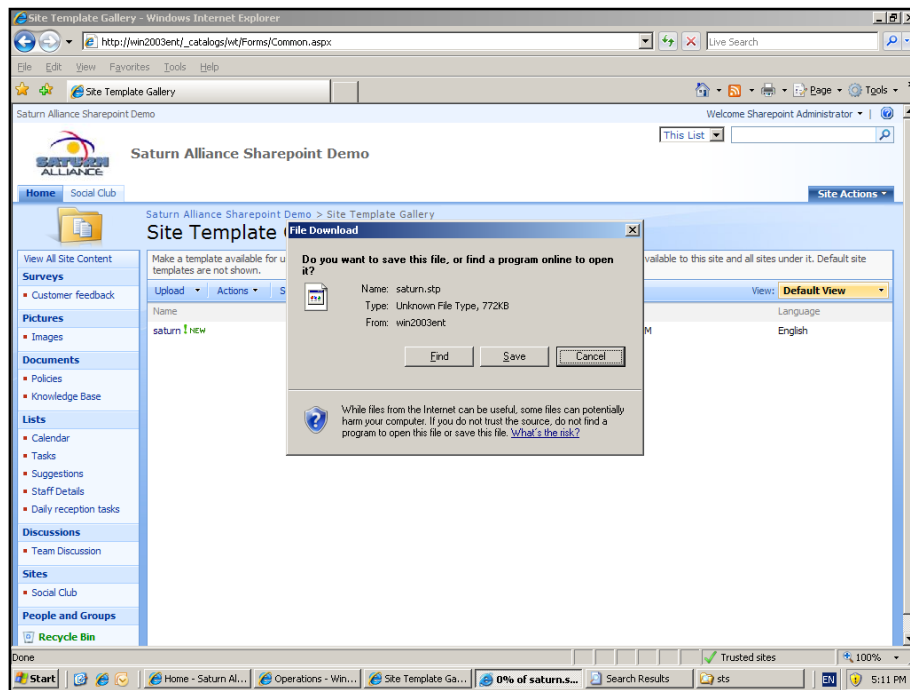
You can return to this gallery in future by selecting **Site Actions | Site Settings** from the main screen (provided you are logged on as an administrator) and then selecting Site templates under the *Galleries* section.
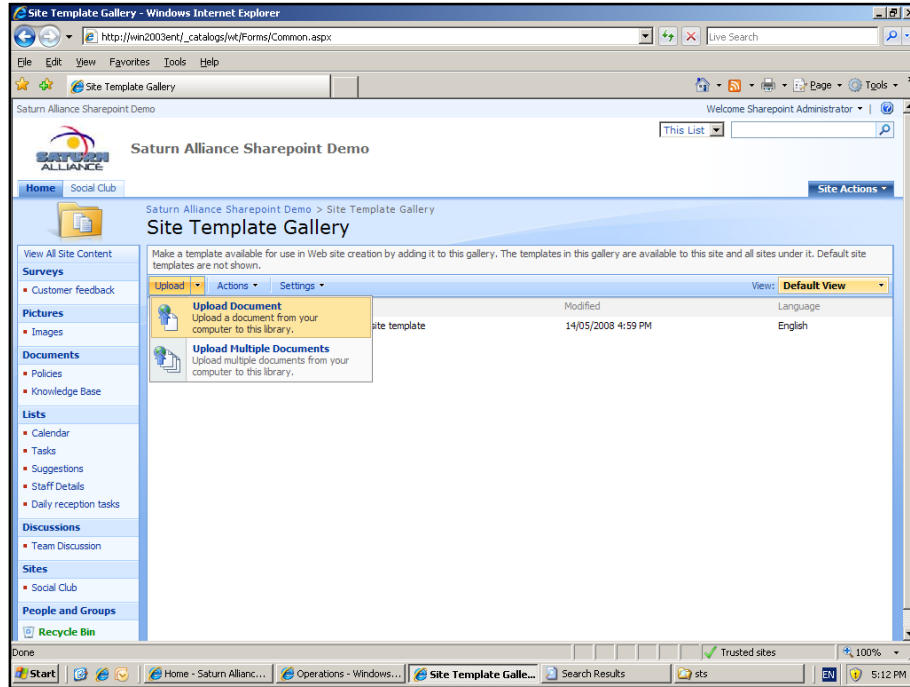

You will also find this template located under the *Custom* tab when you go to create a sub-site.

To save the template to a file that can be copied and then imported into another WSS v3 installation simply click on the template name and save the file to the desired location.

To upload a site template simply go to the Site template Gallery as before and select Upload from the menu bar and browse to the template file location.

10.8   Conclusion

This guide continues to be a work in progress and I encourage comments and feedback of any type. The only way that the Guide will improve if these is continued feedback.

Please send your comments and feedback to director@ciaops.com.