



Microsoft Office SharePoint Services Operations Guide

By

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<http://www.ciaops.com>



Chapter 1 – Introduction

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Index

- 1.1 About**
- 1.2 Reason**
- 1.3 Acknowledgments**
- 1.4 Aim**
- 1.5 Why MOSS 2007?**
- 1.6 What does WSS v3 offer?**
- 1.7 What is the difference between MOSS and Portal Server 2003?**
- 1.8 So what's in this Guide?**
- 1.9 Links**
- 1.10 Videos**
- 1.11 Conclusion**

Chapter 1 – Introduction

1.1 About

Author - Robert Crane BE MBA MCP

Robert has a degree in Electrical Engineering as well as Masters of Business Administration. He is also a Small Business Specialist and Microsoft Certified SharePoint Professional. Robert has over 15 years of IT experience in a variety of fields and positions, including working on Wall St in New York. He is the founder and principal of the Computer Information Agency. Apart from resolving client technical issues, Robert continues to present at seminars as well as write on a number for topics. He can be contacted via director@ciaops.com.

Product Testimonials

"We've been users of the SharePoint Operations Guide for around a year now, and quite simply it's become our SharePoint "Bible". Having the ability to call up relevant SharePoint information quickly and easily makes the investment in the product a no-brainer. The step-by-step guides contained within the product are great training material and it's helped us go from relative SharePoint beginners, into competent users I'd urge anyone considering the SharePoint Operations Guide to invest in it" - **Richard Tubb**

"The Computer Information Agency and their Windows SharePoint Operations Guide has made a considerable difference in the way we deploy and integrate SharePoint Services within our client sites. CIAOPS regular testing of new software releases and associated updates gives us the confidence to go to our clients with the best advice that meets their own unique environment. Testing and then documenting one client deployment strategy or migration for SharePoint within our company would greatly exceed the cost of the annual subscription for the Windows SharePoint Operations Guide where most of the hard work is already done and proven. This helps keep our own internal resource costs down allowing us to pass on considerable savings to our clients. As an added benefit, the ability to gain direct support and advice from CIAOPS on a particular situation has always been met in a satisfactory timeframe. We can even engage CIAOPS at a reasonable hourly rate to provide high level SharePoint expertise on our own behalf if required. We will be signing up again." - **Rod Arthur, LAN Creation**

"I've had a chance to review his guide and found it to be an excellent resource if you are new to or even familiar with Windows SharePoint Services. It gives great overview in how to perform many of the tasks that you will need to do in a SharePoint installation, along with real world experience where it varies from the official Microsoft line. I'd suggest you check it out if you are doing work with SharePoint as it will save you time and money." - **Wayne Small, [SBS-MVP]**

Chapter 1 – Introduction

1.2 Reason

What is SharePoint and why would you need a guide on Microsoft Office SharePoint Server 2007 (MOSS) you may well ask. To answer the first question, much like Excel, SharePoint is a productivity tool from Microsoft. The answer to the second part is because most information about MOSS is focused on the larger multi server installation, whereas this guide is aimed the small to medium installation and implementations of MOSS.

MOSS can clearly provide businesses with not only productivity improvements but also improvements in the way that documents are managed are archived as well as integration into many business intelligence applications. Although MOSS can represent a significant investment for any business, if implemented and used correctly it can provide significant benefit to the organization.

It is hoped that information provided in this guide will go some way to assisting businesses and IT providers in implementing Microsoft Office SharePoint Server 2007 (MOSS).

1.3 Acknowledgements

I want to acknowledge all the people out there who provide information about SharePoint and MOSS for free, via blogs, discussion groups and what not. I have also tried to do the same but felt that there needed to be a comprehensive collection of all this information. It has taken many hours of writing, testing and reading to cover all the material in this guide and that is why I charge a fee for it. However, I tip my hat to those who continue to provide information like this for free in many different forms. If you ever come across something that is useful don't forget to at least thank the author for their efforts.

1.4 Aim

This Microsoft Office SharePoint Server Operations Guide is designed to provide comprehensive technical information about deploying and using MOSS in any business. The Guide is squarely focused on MOSS running in a small to medium business environment. Some of the information may also be relevant to Windows SharePoint Services (WSS v3) but the focus of the guide is squarely on MOSS. It contains over 2,000 pages and counting, including extensive screen shots to assist the reader following exactly what is happening during each stage.

Target Audience

The target audience for this Guide is the IT professional who desires having more knowledge about MOSS, how to install it, how to migrate data and how to get the best

Chapter 1 – Introduction

from the product for their business or for their customers. It is not mean as a 'how to' guide for first time users. The Guides' expectation is that the reader is an IT professional who is comfortable working with Windows Servers, installing and configuring software.

Benefits

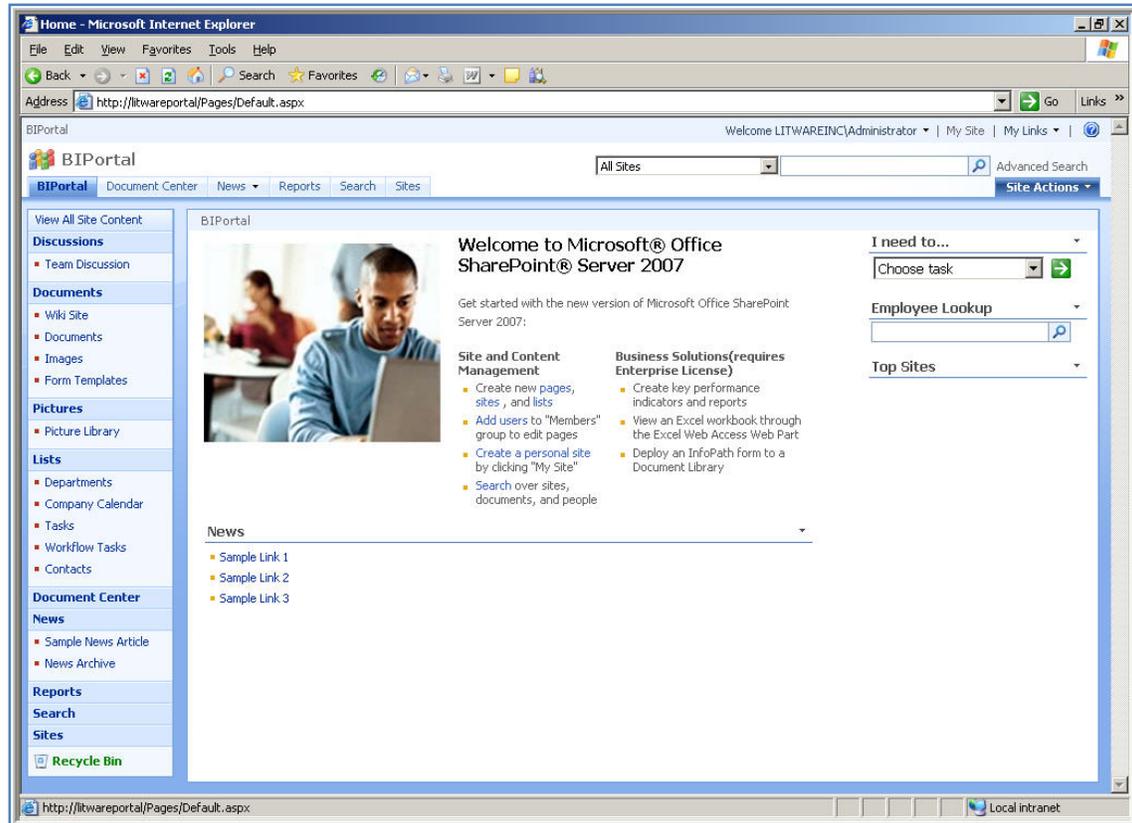
There are already publications available on Microsoft Office SharePoint Services but this Guide provides more value in a number of ways:

1. The full guide is updated on a monthly basis. This means as new material and resources become available they will be included. Subscribers will receive these updates every month, for the duration of their subscription, ensuing that the information in the Guide is always comprehensive and up to date.
2. The Guide includes information about the best add-ons and enhances to SharePoint that other publications generally don't mention. The Guide not only tells you about these enhancements but also show you how to go about installing them on your SharePoint site.
3. All subscribers receive access to a hosted SharePoint 2010 site that not only includes documentation but also videos, whitepapers and application downloads that means you can get up and running with SharePoint faster, rather than having to download everything.
4. All subscribers receive a free hosted SharePoint account which they can use for their own testing and demonstration purposes. There are some limits on this but generally it means that subscribers can get stuck right into SharePoint.

1.5 Why MOSS?

Simple, it is a tool. Put aside all the marketing talk about collaboration and sharing information with team members. MOSS is first and foremost a tool a lot like Excel or Word. For example, when you open Excel you get a blank spreadsheet into which you put your knowledge. MOSS is the same. Once installed, you need to put information into it to get value out of it. Again, much like Excel, MOSS provides an unprecedented amount of flexibility and integration to achieve significant productivity gains. In simple terms think of it as a place to capture all that business information that usually resides in employees heads and generally leaves the business when they do.

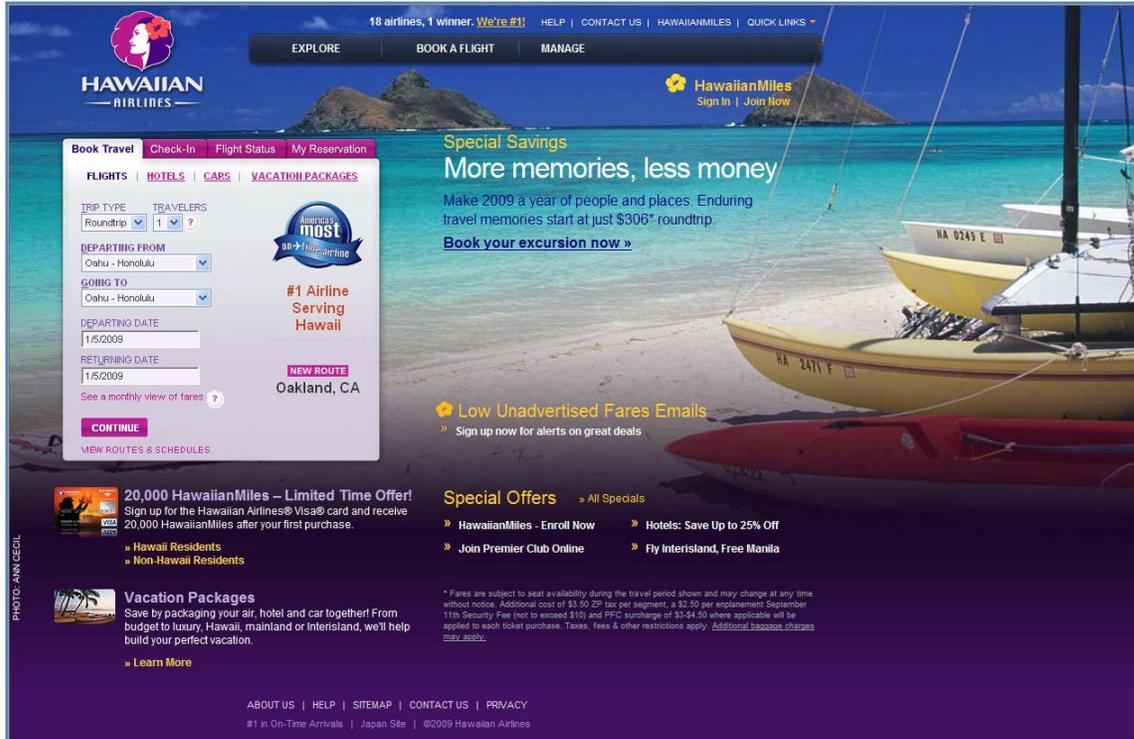
Chapter 1 – Introduction



The above screen shot shows the ‘look’ of MOSS. It is normally accessed through a browser but can also be accessed directly by Microsoft Office applications. It is important to remember that the appearance of MOSS can be customized to suit and you don’t need to be a developer to do this.

You can build on top of the standard MOSS offerings solutions that allow users to create, deploy and manage web sites without the need for dedicated IT support. Using the standard tools such as document libraries, lists and wikis any business can transform SharePoint into something that help make business processes more efficient.

Chapter 1 – Introduction



It is however possible via development tools to take SharePoint to a level where it appears as any other web site. The above screen shot is an example of a MOSS site that is active on the Internet.

Why choose MOSS?

Before I come to the differences between MOSS and its sibling, WSS v3, why choose MOSS over WSS v3? MOSS is Microsoft's enterprise level SharePoint solution. It builds on the functionality provided by WSS v3 by actually including all the features of WSS v3. It extends these features. MOSS standard includes all WSS v3 features and adds:

- Additional workflows
- Additional web parts, such as social networking and document roll up.
- Web content management (web publishing features)
- Records management, including retention and auditing policies.
- Additional search capabilities such as people search, across files shares, web sites, Lotus Notes databases and other third party content.
- My Sites (each user has their own personal site with public and private areas)
- Enterprise features such as Excel Services and Business Data Catalogue (BDC)
- Support for information rights management (IRM).

MOSS Enterprise includes all the features of both WSS v3 and MOSS standard but also includes:

Chapter 1 – Introduction

- Excel Services, that is Excel functionality through a web browser
- Business intelligence features
- Business process and business forms support
- Business data search

Excel Services in MOSS Enterprise makes it easy to manage Excel spreadsheets by publishing them directly to MOSS Enterprise. Once published, they can be viewed and interacted with via a web part.

Unlike WSS v3, MOSS is not a free product and it comes in two versions, standard and enterprise. MOSS requires not only a server license but also a client access licence (CAL) for each user who is accessing MOSS.

It is also important to remember that upgrading from WSS v3 to MOSS standard or MOSS standard to MOSS enterprise is relatively straight forward. However, performing downgrades from MOSS enterprise to MOSS Standard or WSS v3 usually involves a complete re-installation.

It also has to be said that if you want to get the best integration between MOSS and Microsoft Office then you should have at least Office 2007 Professional. You may however want to consider Office 2010 Professional Plus since it includes InfoPath 2010. InfoPath is an excellent tool that can be easily integrated into MOSS to allow the creation and completion of business forms. For more information about the Microsoft Office 2010 versions see:

<http://office.microsoft.com/en-au/suites/HA101757031033.aspx>

Some may ask about the difference between SharePoint and normal network file shares but consider the following advantages of a SharePoint implementation:

- Document versioning can be configured that keeps complete copies of previous versions of documents for reference or recovery.
- Alerts can be configured to allow users to receive email notification when something is changed, added or removed.
- Documents can be checked out so that others users can't modify the document while it is under going changes. They can of course open it read only.
- Each document library allows you to associate multiple document templates that can be used to create new documents directly.
- Additional document description information, known as metadata, can be added to documents in a library to allow better sorting and searching.

Chapter 1 – Introduction

- Different views of the same document library can be created to allow users to only view information about documents that meet certain criteria. This allows users to find the documents they need faster.
- The ability to search not only for the document name but also for text within the body of the document.
- Many standard configurations can be templated and reused in other areas of the SharePoint site.

These are just some of the many features of SharePoint that make it a superior solution to the traditional network file shares.

1.6 What does WSS offer that MOSS doesn't offer?

In short, nothing, for MOSS actually installs WSS v3 as part of its installation process because it utilizes WSS v3 as the building block on which it operates.

For more information about the differences between these products see **Chapter 2 - Product features**.

1.7 What is the difference between MOSS and SharePoint Portal Server 2003?

MOSS offers features that automate business processes and content aggregation that had to be manually performed in Portal Server 2003. Also with MOSS what is available in the top level sites is the same as what is available for the team sites. In SharePoint Portal Server 2003 there was big difference between work carried out in a team site and work carried out in the portal. This leads to confusion in relation to what could and couldn't be done at each level.

MOSS also now supports more ways to authenticate users than what was available in Portal Server. MOSS also incorporates automated workflow that was also not available in Portal Server 2003.

1.8 So what's in this Guide?

For an annual subscription you'll receive regular updates to the guide. You'll also receive any new material that is published and finally you'll receive access to the hosted SharePoint site that contains this Guide, training and deployment notes, videos as well all the software required to get WSS v3 operational in your business.

To get a better idea of what the Guide actually contains here are the current chapter headings and a brief summary of the contents of each chapter.

Chapter 1 – Introduction

Chapter 2 - Product features

Exactly what do you get when you install MOSS and exactly how can it be used in a business? The chapter will examine the main MOSS features with special attention devoted to the new enhancements of MOSS.

Chapter 3 - Installing Microsoft Office SharePoint Server on Windows 2003 Server

This chapter will detail the steps required to install MOSS on a Windows Server. Typically this will be a member server in a pre-existing domain. The chapter will examine the different data storage options that are available and how to install MOSS to take advantage of these different storage locations.

The chapter provides a step by step, including all screenshots, installation guide for MOSS in both default and advanced installation modes.

Chapter 4 -

Chapter 5 - SharePoint Central Administration

The Share Central Administration site allows you to perform tasks affecting MOSS farm resources. Some of these tasks include configuring farm wide services like search, incoming and outgoing emails, service accounts and so on. The Central Administration site will also allow you to work with a MOSS web site (known as a site collection) and perform tasks such as creating, extending and deleting as well as setting quotas and who can administer the site.

Chapter 6 - Site settings

The administration of an individual MOSS site is accomplished via Site Settings. This chapter will take through in detail what all these options are what their role is. Site Settings are the first steps you need to start customizing your MOSS installation to suite your business needs.

Chapter 7 - SharePoint Migration & Upgrades

If you have already been using the previous version of SharePoint v2 this chapter will provide you with the options and details about migrating that information into MOSS.

The chapter will provide a step by step, including all screenshots, migration guide in the three different recommended migration methods. The chapter will also show you when and where you can use each migration option.

Chapter 1 – Introduction

Chapter 8 - Database Operations

At the heart of MOSS is data storage. How the data is stored can have a significant impact on the growth and performance of MOSS. This chapter examines in detail the many different data storage options that are available for MOSS.

The chapter will help you understand the differences and limitations of database products like Microsoft SQL 2005 Server Express Embedded Edition, SQL 2005 Server Express, SQL 2005 Server Workgroup, SQL 2005 Server Standard. It will also provide guidance on how to work with each of these databases to get the most from MOSS.

Chapter 9 - Advanced Configuration

Taking MOSS beyond its default setup and installation is the way to ensure that you get the most from the product. This chapter will show the steps that are available to really get the most from your MOSS installation.

You will also learn how to backup and restore your MOSS installation and data. This chapter also includes topics like how to extend MOSS to allow secure (via SSL) communications.

Chapter 10 – Templates

Templates are a way to fast track the development and customization of your MOSS sites. Not only does Microsoft make MOSS freely available it also makes a number of business templates for MOSS available also for free. This chapter will show you how to install and implement these templates as well as be able to create your own templates.

Chapter 11 - Search

One of the most powerful features of MOSS is its inbuilt search. This chapter will show the basics of MOSS search but also show you how to integrate Acrobat PDF and other documents into MOSS search.

The chapter will also includes information about the implementation of Microsoft Search Server 2008 as a powerful method of indexing all the document information on your network rather than just what is held in MOSS.

Chapter 12 – Add-ons

Another great feature of MOSS is its ability to incorporate additions from third parties. This chapter will examine some of the best third party add-ons for MOSS and give you a step by step process of installing them in your business. Some of these add-ons include: colour calendars, reminder services for SharePoint.

Chapter 1 – Introduction

Chapter 13 - Troubleshooting

Like any software product issues can arise. This chapter will examine not only the most common issues but give you step by step instructions on how to resolve them. The chapter will also include the installation and setup of a test MOSS environment using Microsoft Virtual PC.

Chapter 14 - Installing SharePoint server prerequisites

Getting everything right before installing MOSS onto a server can greatly reduce the chance of problems later on. This chapter will show you how to install and configure all the WSS v3 prerequisites to ensure a trouble free installation.

Chapter 15 – Securing Microsoft Office SharePoint Server

Securing the data that resides in MOSS is critical since it most likely contains not only business but also customer information. MOSS has many security enhancements that make protecting your data simpler.

Chapter 16 – Tutorials

Here you will shown step by step how to work some of the more advanced features of MOSS including linked lists and workflows. You'll also learn how to link a MOSS site to products like Microsoft Outlook 2007.

1.9 Links

- Microsoft Windows SharePoint Services
<http://office.microsoft.com/en-gb/sharepointtechnology/default.aspx>
- Microsoft Office SharePoint Server (MOSS)
<http://www.microsoft.com/sharepoint/default.mspx>
- Top ten benefits of SharePoint v3.0
<http://technet.microsoft.com/en-us/windowsserver/sharepoint/bb684456.aspx>
- Microsoft Office SharePoint Online
<http://www.microsoft.com/online/sharepoint-online.mspx>

1.10 Videos

CIAOPS Video tutorials

Chapter 1 – Introduction

- 091112 – Introduction to SharePoint (30 mins)
- 091126 – Basics of using SharePoint (30 mins)
- 091210 – Basic SharePoint Administration (60 mins)
- 100107 – SharePoint questions and answers (60 mins)
- 100204 – SharePoint and Office (60 mins)
- 100225 – Document libraries in depth (60 mins)
- 100311 – Learning to use lists (60 mins)
- 100706 – Installing SharePoint Foundation on SBS 2008 (60 mins)
- 100803 – Configuring SharePoint Foundation for PDF search and icons (26 mins)
- 100811 – Migrating to SharePoint Foundation 2010 (42 mins)

Additional videos

- Demo: Tour a Windows SharePoint Services 3.0 site
<http://office.microsoft.com/en-us/sharepointtechnology/HA102055631033.aspx>
- A quick tour around a SharePoint site
http://www.cbtclips.com/sharepoint3/Assets/swf/wssv3_site_tour/wssv3_site_tour.html
- How to post announcements to the SharePoint home page
http://www.cbtclips.com/sharepoint3/Assets/swf/wssv3_announcement/wssv3_announcement.html
- Add and customize an Issue Tracking list to the site
http://www.cbtclips.com/sharepoint3/Assets/swf/wssv3_issues/wssv3_issues.html
- Overview of the document management features built into SharePoint
http://www.cbtclips.com/sharepoint3/Assets/swf/wssv3_understanding_libraries/wssv3_understanding_libraries.html
- SharePoint in Plain English
<http://www.youtube.com/watch?v=s12Jb5Z2xaE>

Chapter 1 – Introduction

- Microsoft Office System Webcast: Tips and Tricks to Get You Started Using Microsoft SharePoint Products and Technologies (Level 100)
<http://msevents.microsoft.com/CUI/WebCastEventDetails.aspx?culture=en-US&EventID=1032345262&CountryCode=US>
- Linking SharePoint 2007 with Outlook 2007
<http://www.youtube.com/watch?v=p9CnBNVnBjk>

1.11 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 there is continued feedback and support.

For people who have subscribed to the Guide you will also receive access to the hosted SharePoint 2010 site with the complete Guide and other resources such as file downloads and videos, that will allow you to successfully implement Windows SharePoint Services quickly in your environment.

Please send your comments, feedback and proposed additions to director@ciaops.com and I thank for reading the Microsoft Office SharePoint Server Operations Guide.