



## **Windows SharePoint Foundation 2010 Operations Guide**

By

Robert Crane

Computer Information Agency

<http://www.ciaops.com>



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## Terms

This Windows SharePoint Services Operations Guide (WSSOPS) from the Computer Information Agency is provided as is. Every effort has been made by the author to ensure that information provided is correct however this cannot be guaranteed.

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## 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 of topics. He can be contacted via [director@ciaops.com](mailto: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]**

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## 1.2 Reason

What is SharePoint and why would you need a guide on Windows SharePoint Foundation (WSF) 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 there doesn't seem to be a lot of information focused just on Windows SharePoint Foundation 2010 (WSF), most appears to be focused on the higher end SharePoint Server 2010 product.

I think WSF can not only provide significant productivity benefits to most businesses but it can achieve even greater results when implemented in small to medium businesses (SMB). Without a clear understanding of what the product is and how to implement it most SMB's will probably overlook WSF as a potential solution to help them manage their business information.

It is hoped that information provided in this guide will go some way to assisting businesses and IT providers in implementing Windows SharePoint Foundation 2010 (WSF).

## 1.3 Acknowledgements

I want to acknowledge all the people out there who provide information about SharePoint and WSF 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 Windows SharePoint Foundation Operations Guide (WSSOPS) is designed to provide comprehensive technical information about deploying and using WSF in any business. The Guide is squarely focused on WSF running in a small to medium business environment and especially where it runs on Windows Small Business Server (SBS) networks. Some of the information may also be relevant to SharePoint Server but the focus of the guide is squarely on WSF. It contains over 1,000 pages and counting, including extensive screen shots to assist the reader following exactly what is happening during each stage.

*Target Audience*

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

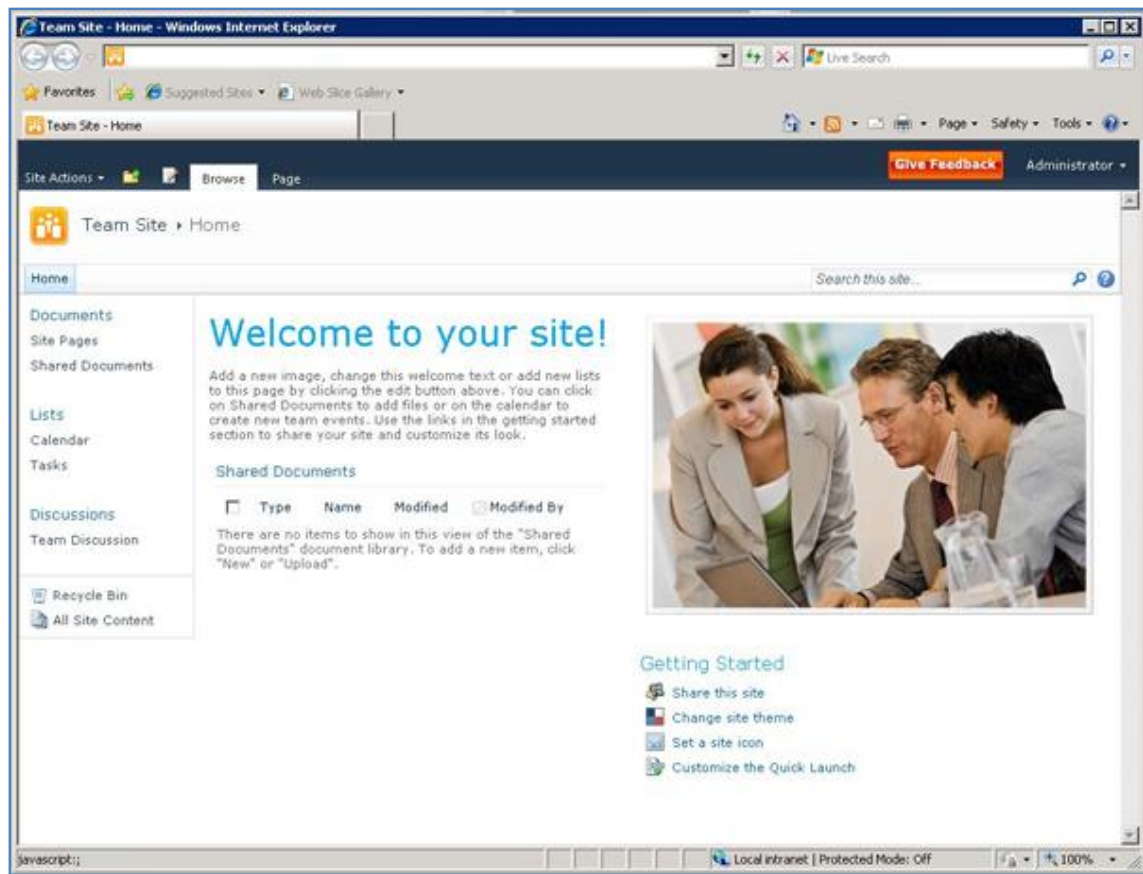
There are already publications available on Windows SharePoint Foundation but this Guide provides more value in a number of ways:

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, ensuring 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 Windows 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.
5. The guide provides a unique focus of WSF on Small Business Server. There are many unique features of WSF in a Small Business Server environment and this is the only publication that deals with these features.

## **1.5 Why WSF?**

Simple, it is a tool. Put aside all the marketing talk about collaboration and sharing information with team members. WSF 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. WSF is the same. Once installed, you need to put information into it to get value out of it. Again, much like Excel, WSF 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.

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The above screen shot shows the 'look' of WSF. 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 WSF can be customized to suit and you don't need to be a developer to do this.

## *Why choose WSF?*

Before I come to the differences between WSF and its bigger sibling, SharePoint Server, why choose WSF over SharePoint Server? Since the focus of this Guide is for SMB businesses one of the most critical factors is upfront cost. Well, you'll be please to know that WSF is currently a FREE download from Microsoft! Yes, I did say FREE and I did say from Microsoft. All you basically need is any Windows Server 2008 or better to run it on and you can start getting the benefits of WSF.

So why does Microsoft offer WSF free? My guess would be that WSF really works best with other Microsoft software so it is a great way to encourage people to purchase additional Microsoft software to leverage more of the benefits, however if you already have Microsoft Office (Word, Excel, etc) you have enough to get started. It also has to be said that if you want to get the best integration between WSF and Microsoft Office

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then you should have at least Office 2010 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 WSS v3 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.
- 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 SharePoint Server offer that WSF doesn't offer?**

SharePoint Server actually leverages a lot of the functionality that WSF provides but adds features that are beneficial to enterprise businesses. It offers enterprise scale



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document and record management, portals, enterprise wide alerts, news, personalized sites and enterprise integration.

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

## 1.7 What does WSF offer that SharePoint v3 doesn't?

WSF has all the existing features of the previous SharePoint v3 as well as new features such as Business Connectivity Services, Central Administration (Redesigned), Claims-Based Authentication, Health Monitoring, Sandboxed Solutions, Windows PowerShell support as well as a new look and feel including the Office ribbon interface.

WSF is also required to install Office Web Applications. These allow the use of things such as Word, Excel, PowerPoint and OneNote via a web browser.

## 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 a comprehensive DVD that contains this Guide, training and deployment notes, videos as well all the software required to get WSF operational in your business. As new material becomes available it will be added to the DVD and sent to all subscribers automatically.

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 2 - Product features*

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

### *Chapter 3 - Installing Windows Foundation Server 2010 on Windows 2008 Server*

This chapter will detail the steps required to install WSF 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 WSF to take advantage of these different storage locations.

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

### *Chapter 4 - Installing Windows Foundation Server 2010 on Small Business Server 2008*

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This chapter details the steps required to install WSF onto a Windows Small Business Server 2008 (SBS). In order to preserve many of the existing features of SBS special attention needs to be paid to the installation method. As with the previous chapter, this chapter will also examine the different data storage options that are available and how to install WSF on SBS to take advantage of these.

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

## *Chapter 5 - SharePoint Central Administration*

The Share Central Administration site allows you to perform tasks affecting WSF 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 WSF 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 WSF 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 WSF installation to suite your business needs.

## *Chapter 7 - SharePoint Migration & Upgrades*

If you have already been using the previous version of SharePoint v3 this chapter will provide you with the options and details about migrating that information into WSF.

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 8 - Database Operations*

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

The chapter will help you understand the differences and limitations of database products like Microsoft SQL 2008 Express, SQL 2008 Server Express R2, SQL 2008 Server

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Workgroup, SQL 2008 Server Standard. It will also provide guidance on how to work with each of these databases to get the most from WSF.

## *Chapter 9 - Advanced Configuration*

Taking WSF 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 WSF installation.

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

## *Chapter 10 – Templates*

Templates are a way to fast track the development and customization of your WSF sites. Not only does Microsoft make WSF freely available it also makes a number of business templates for WSF 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 WSF is its inbuilt search. This chapter will show the basics of WSF search but also show you how to integrate Acrobat PDF and other documents into WSF search.

The chapter will also includes information about the implementation of Microsoft Search Server 2010 Express as a powerful method of indexing all the document information on your network rather than just what is held in WSF.

## *Chapter 12 – Add-ons*

Another great feature of WSF is its ability to incorporate additions from third parties. This chapter will examine some of the best third party add-ons for WSF 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 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 WSF environment using Microsoft Virtual PC.

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## *Chapter 14 - Installing SharePoint server prerequisites*

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

## *Chapter 15 – Securing Windows Foundation Server 2010*

Securing the data that resides in WSF is critical since it most likely contains not only business but also customer information. WSF 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 WSS v3 including linked lists and workflows. You'll also learn how to link a WSF site to products like Microsoft Outlook 2007.

### **1.9 Links**

- Microsoft Windows SharePoint Foundation 2010  
<http://sharepoint.microsoft.com/en-us/product/Related-Technologies/Pages/SharePoint-Foundation.aspx>
- Microsoft SharePoint Server 2010  
<http://sharepoint.microsoft.com/en-us/Pages/default.aspx>
- Microsoft Office SharePoint Online  
<http://www.microsoft.com/online/sharepoint-online.mspix>

### **1.10 Videos**

#### **CIAOPS Video tutorials**

- 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)

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- 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**

- SharePoint in Plain English  
<http://www.youtube.com/watch?v=s12Jb5Z2xaE>

### **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 web site contains 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](mailto:director@ciaops.com) and I thank for reading the Window SharePoint Services Operations Guide (WSSOPS).