

## Chapter 9 – Advanced configuration

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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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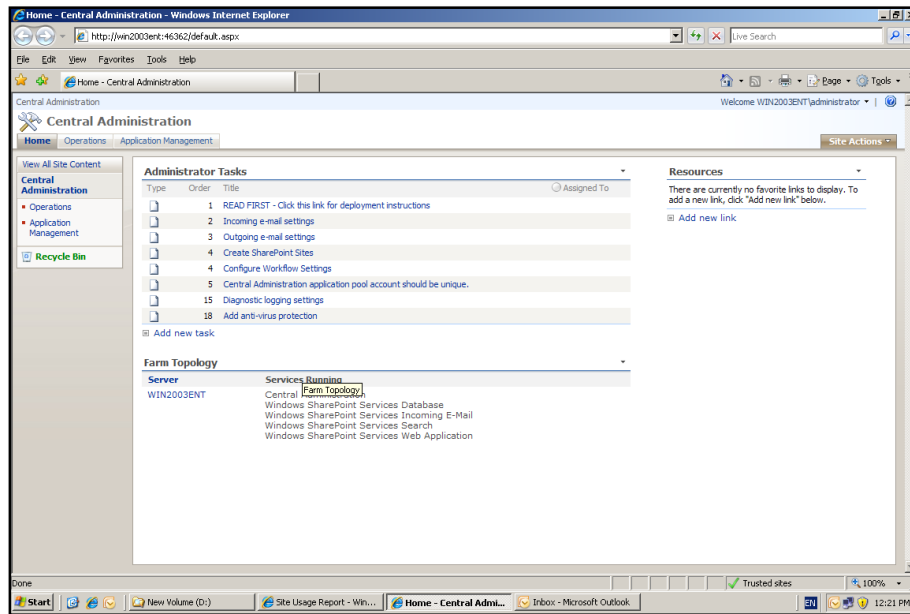
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### 9.1 Scope

There generally are not a lot of problems getting Windows SharePoint Services v3 (WSS v3) installed onto a Windows Server. However, in most cases this installation will only provide you with the most basic setup. This chapter will help you with the information required to configure additional options in WSS v3 to improve the usability and reliability of the installation.

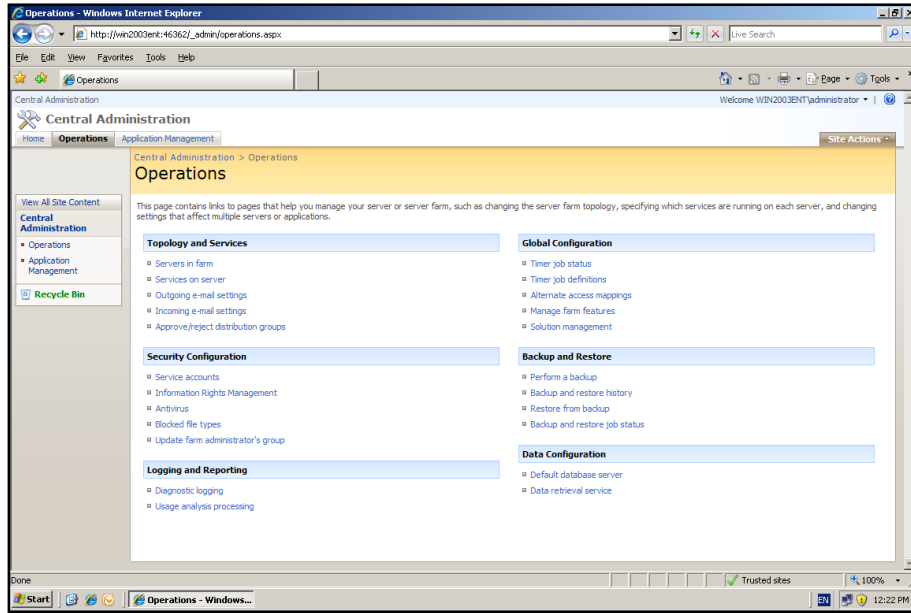
### 9.2 Configure usage analysis

WSS v3 can provide site usage statistics using reports that are built into the Site Administration. These usage reports are not configured by default. To do this you will need to open the *SharePoint 3.0 Central Administration* on the WSS v3 server via **Start | Administrative Tools | SharePoint 3.0 Central Administration** after logging in as an administrator.

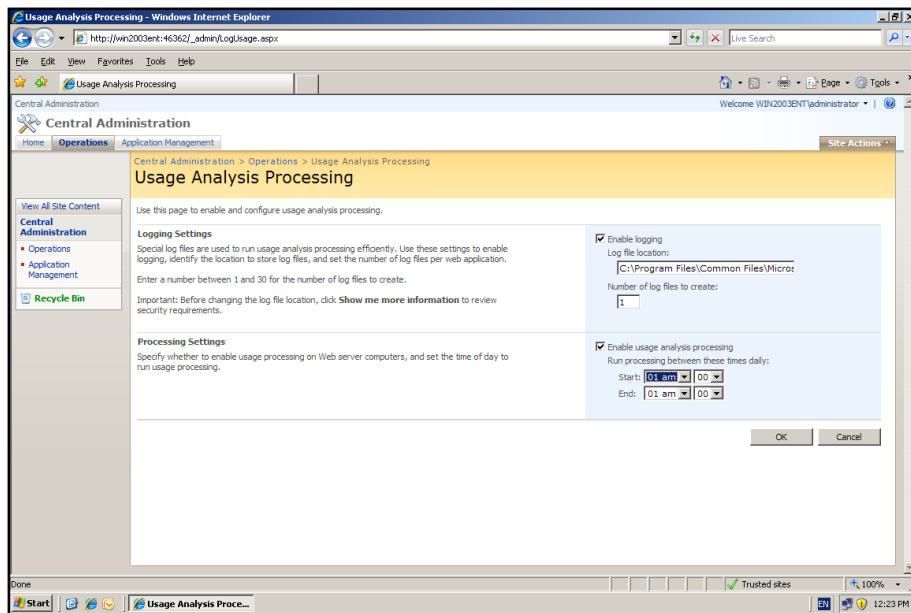


Now select the *Operations* tab.

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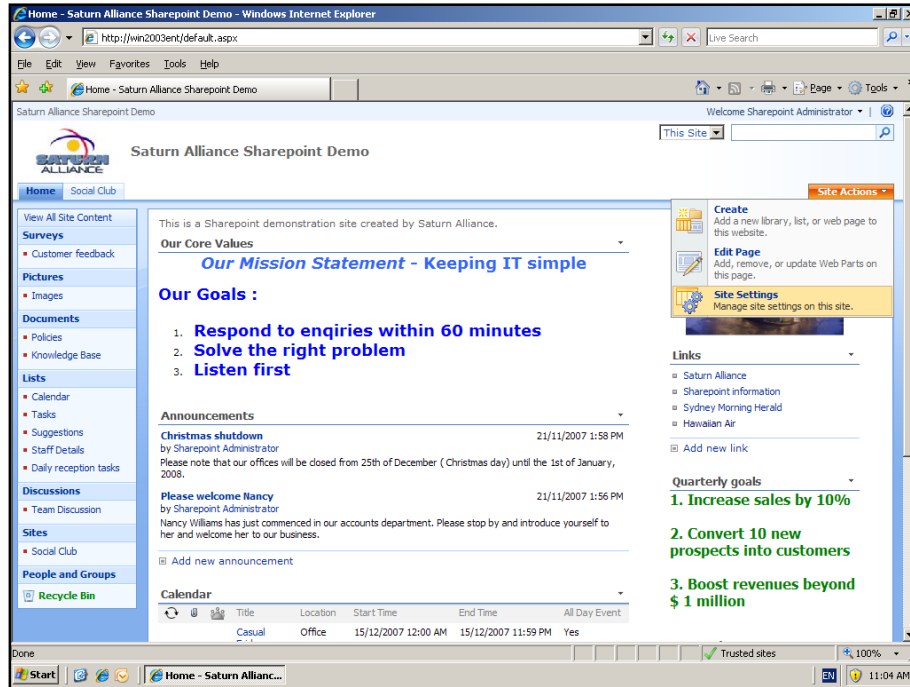
Under the *Logging and Reporting* section, select **Usage analysis processing**.



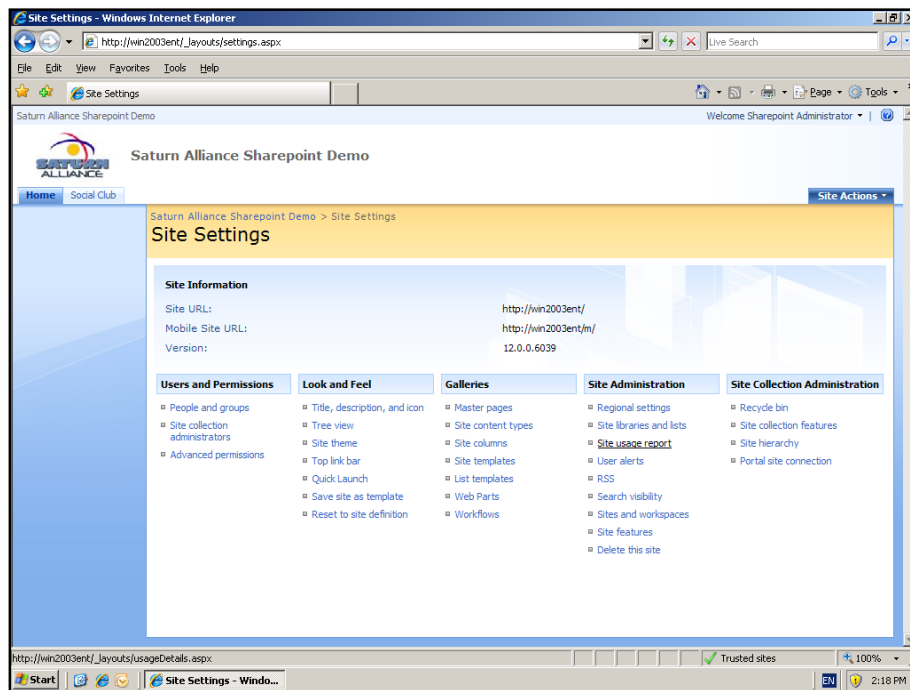
Check the *Enable logging* box and also set the location of the log files, by default these files will be stores in *C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\Logs*. Also *Enable usage analysis processing* by selecting the box and setting the desired processing time. Click **Ok** to continue.

To view the usage statistics connect to the WSS v3 site as an administrator.

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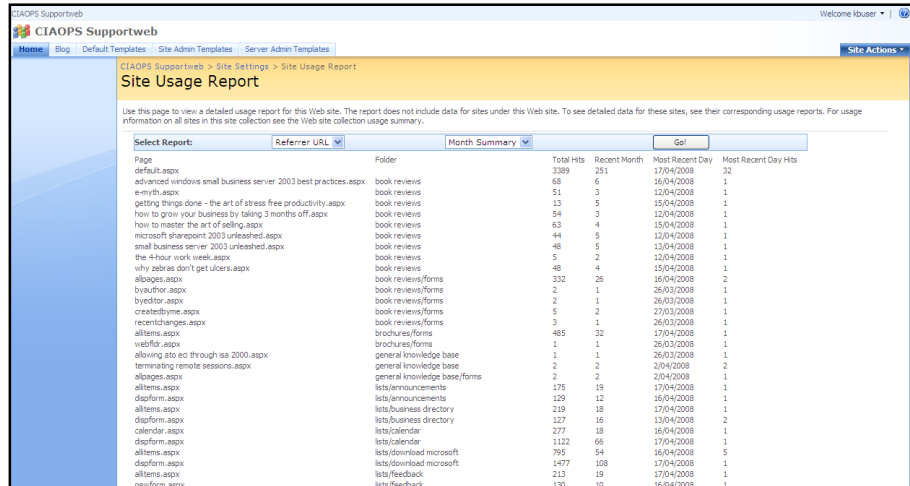


From the *Site Actions* option select **Site Settings**.



Under the *Site Administration* section select **Site Usage Report**.

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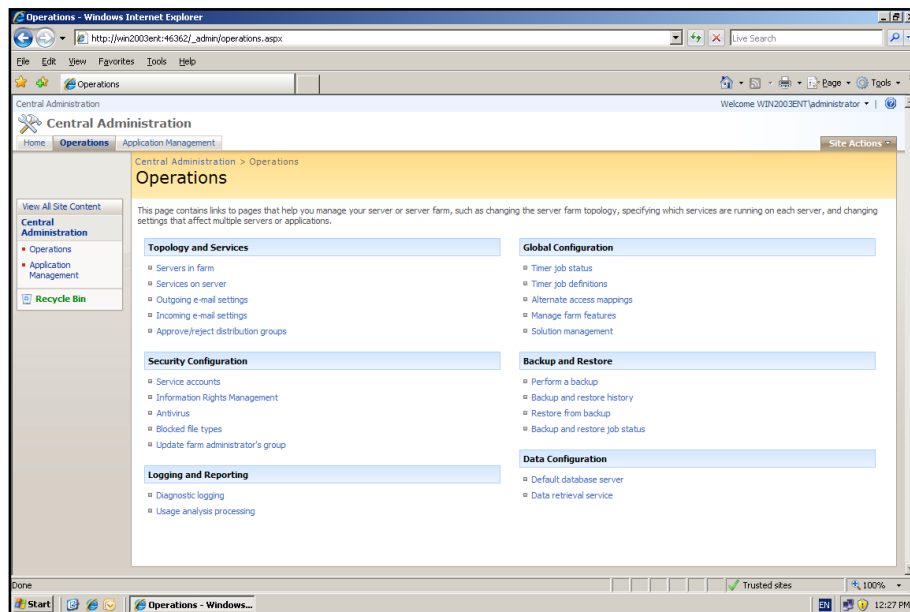


Page	Folder	Total Hits	Recent Month	Most Recent Day	Most Recent Day Hits
default.aspx		3389	251	17/04/2008	32
advanced windows small business server 2003 best practices.aspx	book-reviews	68	6	16/04/2008	1
e-myth.aspx	book-reviews	51	3	12/04/2008	1
getting things done - the art of stress free productivity.aspx	book-reviews	13	5	15/04/2008	1
how to grow your business by taking 3 months off.aspx	book-reviews	54	3	12/04/2008	1
how to master the art of selling.aspx	book-reviews	63	4	15/04/2008	1
microsoft sharepoint 2003 unleashed.aspx	book-reviews	44	5	12/04/2008	1
small business server 2003 unleashed.aspx	book-reviews	48	5	13/04/2008	1
the 4-hour work week.aspx	book-reviews	5	2	12/04/2008	1
why adobe don't get users.aspx	book-reviews	48	4	15/04/2008	1
allpages.aspx	book-reviews/forms	332	26	16/04/2008	2
byauthor.aspx	book-reviews/forms	2	1	26/03/2008	1
byeditor.aspx	book-reviews/forms	2	1	26/03/2008	1
createdbyme.aspx	book-reviews/forms	5	2	27/03/2008	1
recentchanges.aspx	book-reviews/forms	3	1	26/03/2008	1
allitems.aspx	brochures/forms	485	32	17/04/2008	1
webfor.aspx	brochures/forms	1	1	26/03/2008	1
allowing ato ec through isa 2000.aspx	general knowledge base	1	1	26/03/2008	1
terminating remote sessions.aspx	general knowledge base	2	2	2/04/2008	2
allpages.aspx	general knowledge base/forms	2	2	2/04/2008	1
allitems.aspx	lists/announcements	175	19	17/04/2008	1
disform.aspx	lists/announcements	129	12	16/04/2008	1
allitems.aspx	lists/business directory	219	18	17/04/2008	1
disform.aspx	lists/business directory	127	16	13/04/2008	2
calendar.aspx	lists/calendar	277	18	16/04/2008	1
disform.aspx	lists/calendar	1122	66	17/04/2008	1
allitems.aspx	lists/download microsoft	795	54	16/04/2008	5
disform.aspx	lists/download microsoft	1477	108	17/04/2008	1
allitems.aspx	lists/feedback	213	19	17/04/2008	1
newform.aspx	lists/feedback	130	10	16/04/2008	1

You can choose from a number of different reports (page, user, OS, browser and referrer URL) and daily or monthly reports. Note, that reports are generated once a day at the time you specified during the above set up (i.e. you will have to wait 24 hours for your first report to be available).

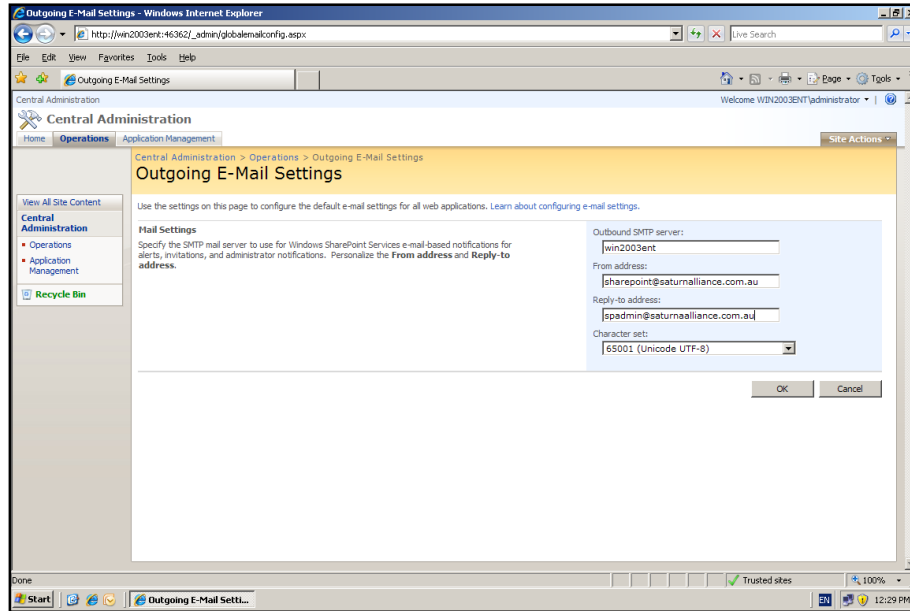
### 9.3 Configure default outgoing e-mail settings

To do this you will need to open the *SharePoint 3.0 Central Administration* on the WSS v3 server via **Start | Administrative Tools | SharePoint 3.0 Central Administration**. Select the *Operations* tab.



Under the *Topology and Services* section select **Outgoing e-mail settings**.

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In the *Outbound SMTP server* enter the name of your email server. If WSS v3 is installed on Windows Small Business Server 2003 then this will be the name of your server. In the *From address* field enter the email address you want alerts to be sent from (here [sharepoint@saturnalliance.com.au](mailto:sharepoint@saturnalliance.com.au)). In the *Reply-to address* enter the email address of the on-site administrator (here [spadmin@saturnalliance.com.au](mailto:spadmin@saturnalliance.com.au)). Finally, press **OK** to complete.

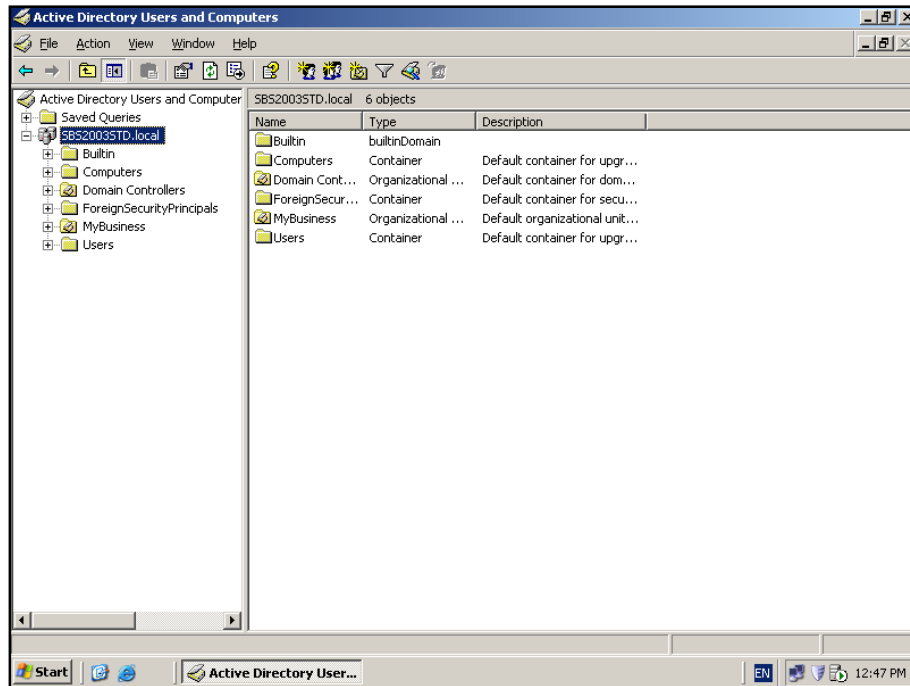
### 9.4 Configuring inbound emails

This option is only available on WSS v3 servers that are not installed on machines with Microsoft Exchange Server. This precludes this configuration on Windows Small Business Server 2003 if you have both WSS v3 and Exchange on the Windows Small Business Server 2003. However, if you have installed WSS v3 on a member server in your Small Business Server 2003 network then you can implement inbound email to WSS v3.

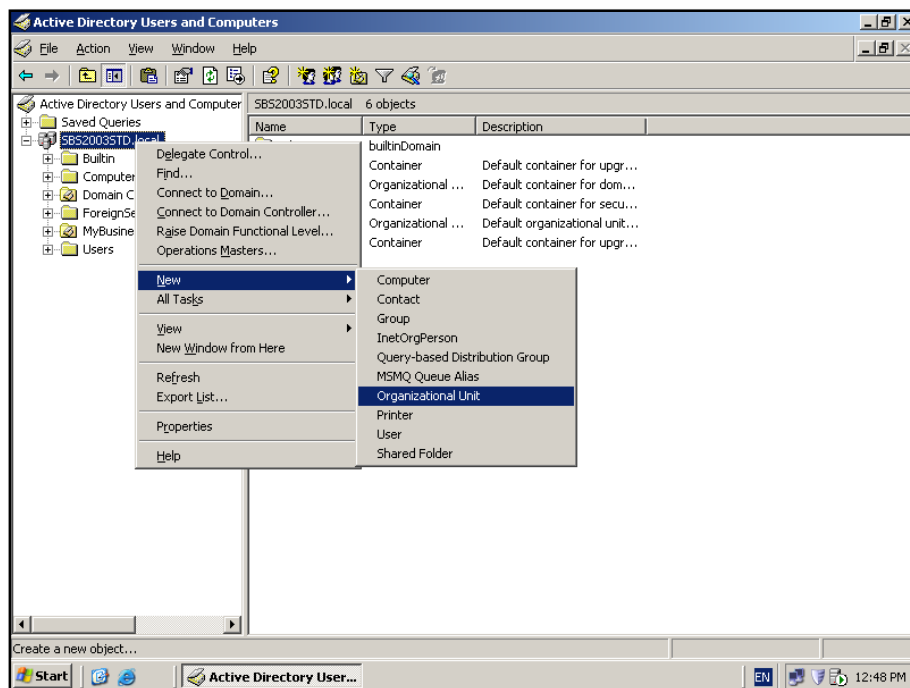
When you enable a WSS v3 library to receive emails it can automatically create a new contact in the Organizational Unit (OU) that you specify in Active directory (AD). It is best practice to create an OU that is dedicated to WSS v3 email addresses.

On the Domain Controller (DC) for your network, login as an administrator and select **Start | Administrative Tools | Active Directory Users and Computers**.

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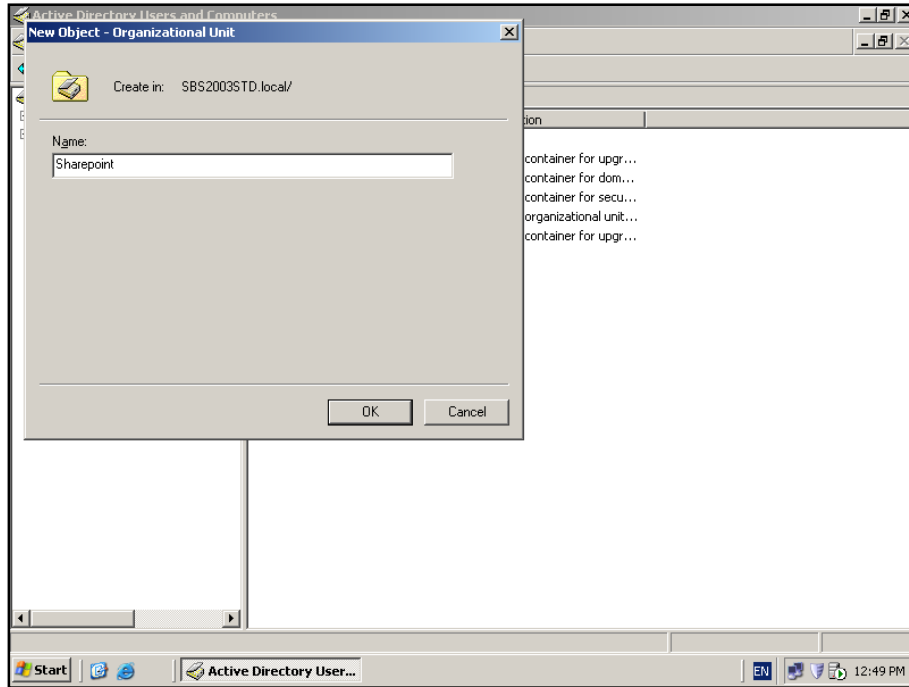


Create a new OU under your domain name by **right mouse clicking** on the domain name.

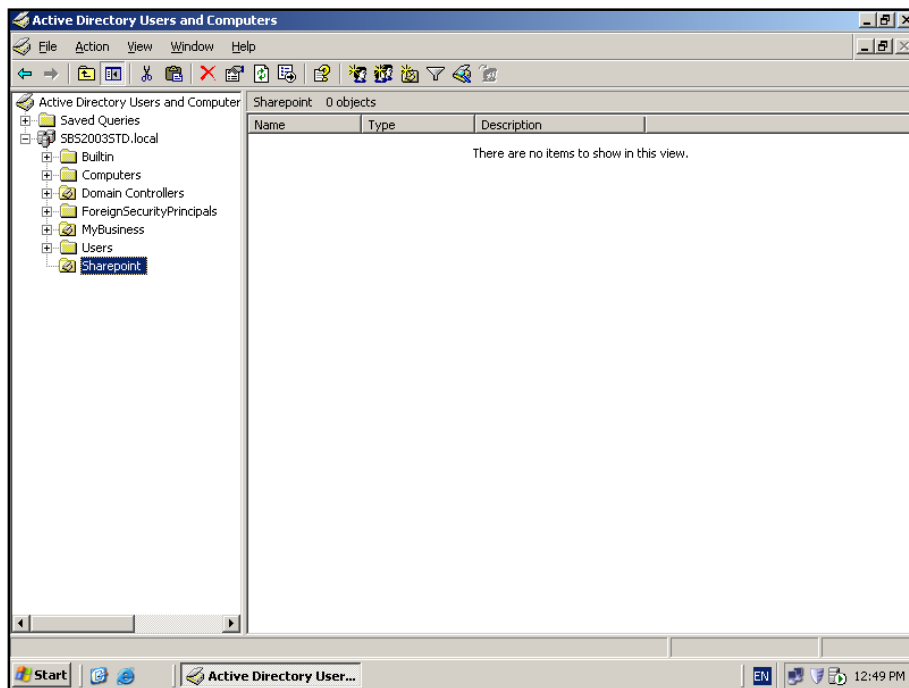


Then select **New | Organizational Unit**.

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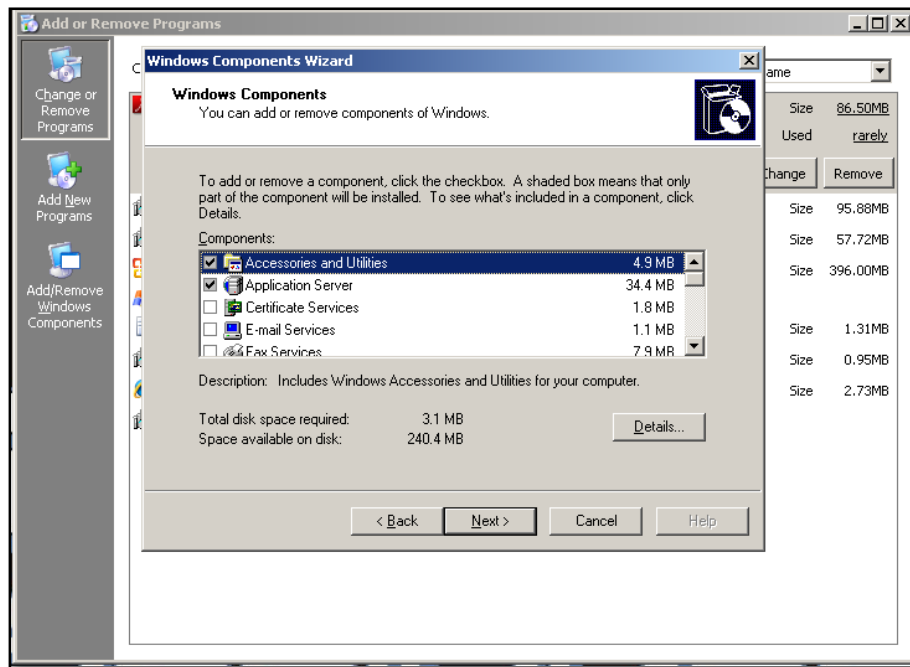
Give the new OU a descriptive name and press **OK**.



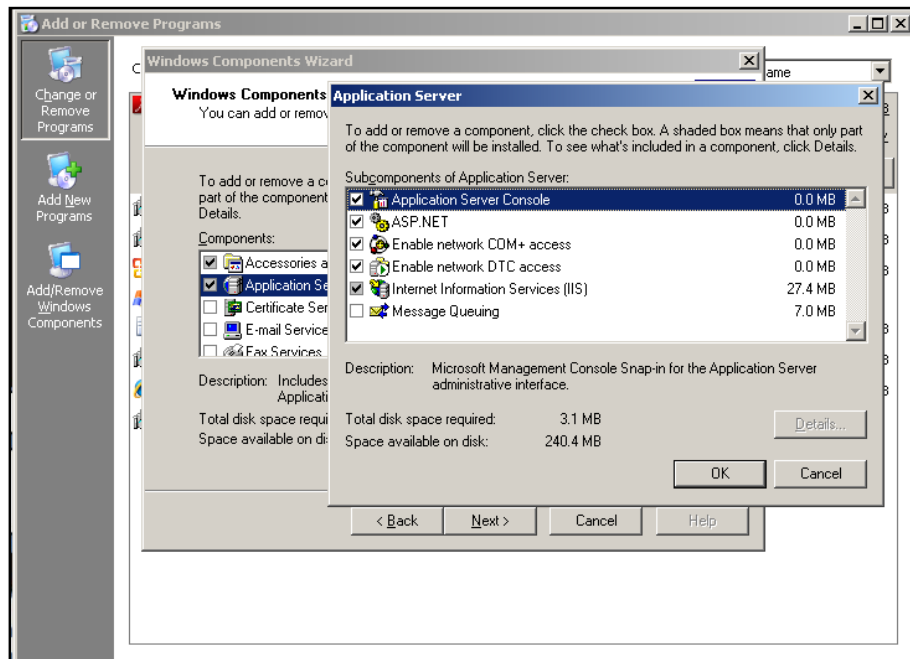
The OU should now appear under your domain.

You now need to ensure that the SMTP service is installed on the WSS v3 server. To do this follow the steps below.

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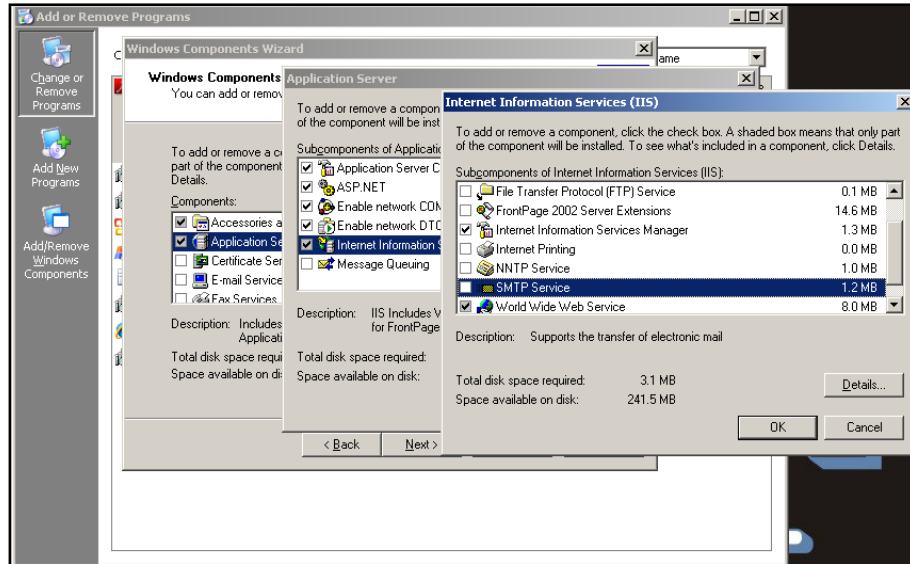


On the WSS v3 server, login as an administrator and select **Start | Control Panel | Add/Remove Programs | Add/Remove Windows Components**.

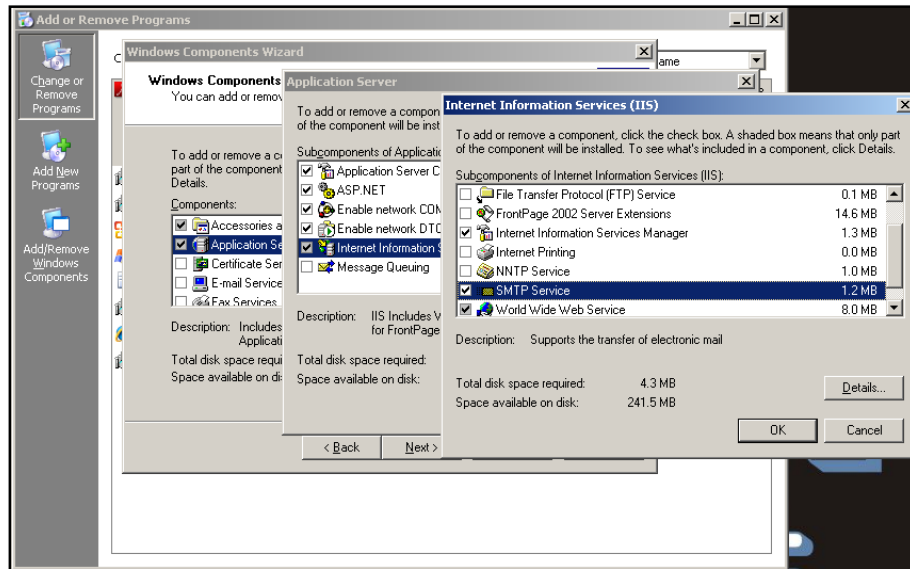


Select **Application Server** and press **Details**.

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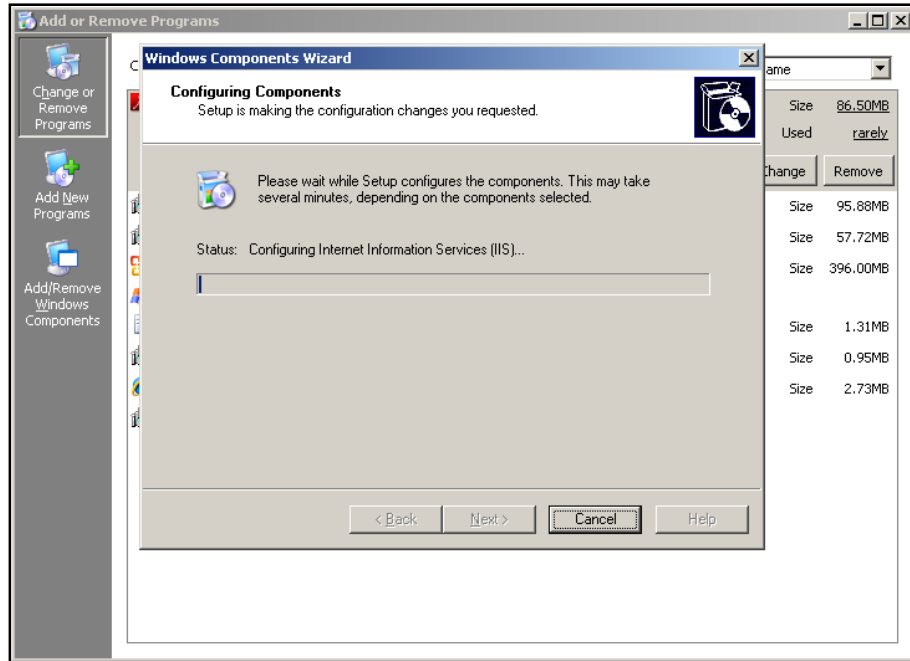


Select *Internet information Services* and then press the **Details** button.



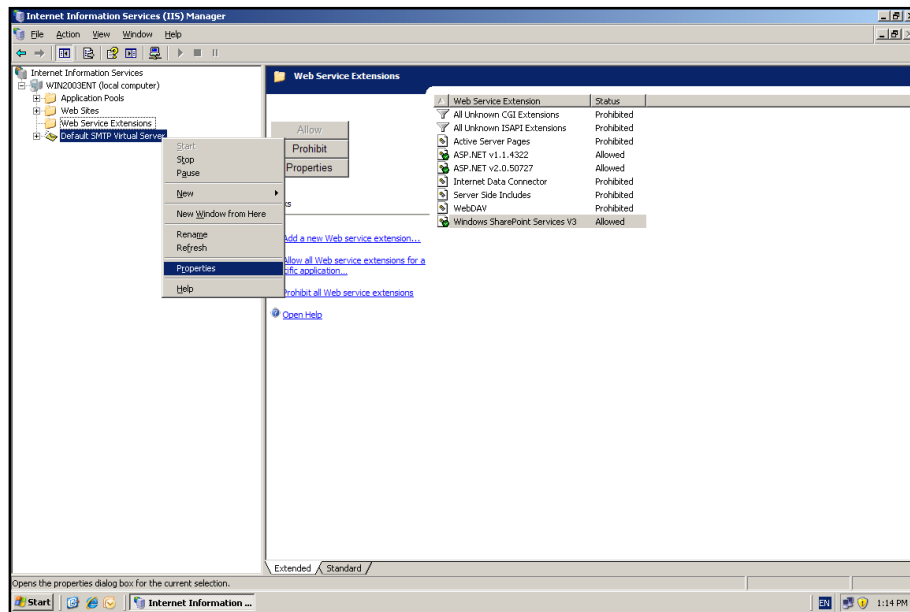
Place a tick in the box next to *SMTP Service* and press **OK** to close the *IIS window*. Click **OK** again to close the *Application Server window*. Finally, press the **Next** button at the Windows Components window to install the service.

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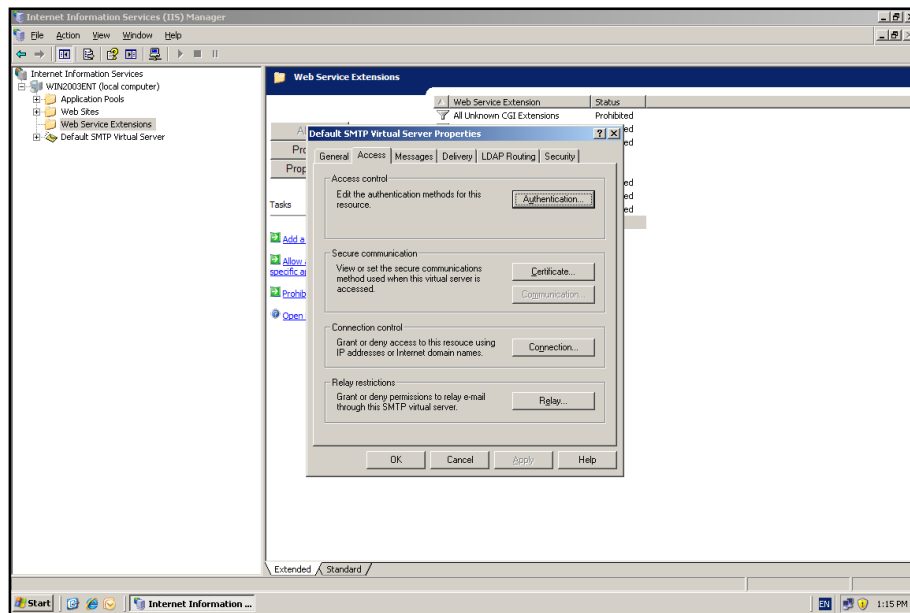
During this installation process you may be prompted to insert the original Windows Server operating system CD.

We now need to configure the SMTP server to accept relaying from the Exchange Server in the network. To configure this, select **Start | Administrative Tools | Internet Information Services**.

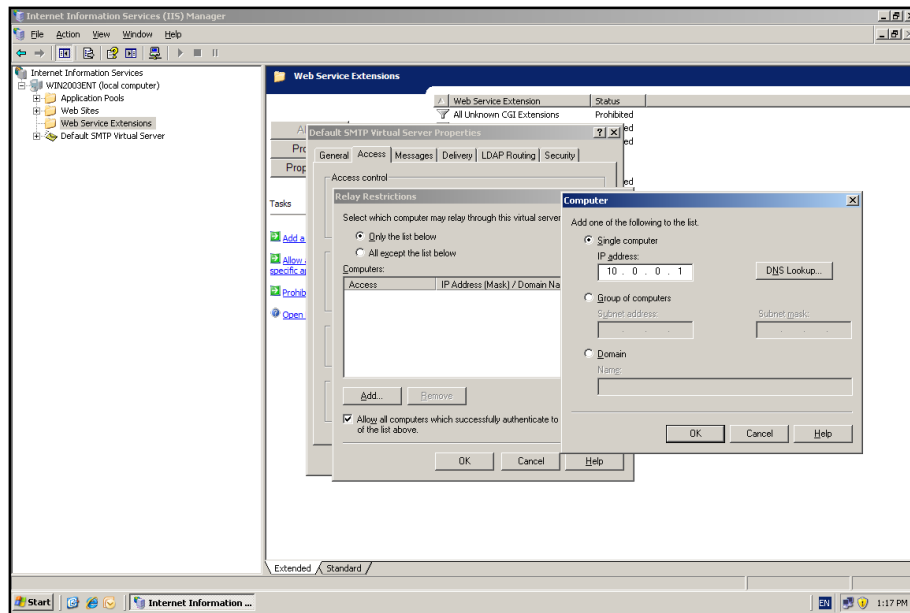


Locate the default SMTP Virtual Server, **right mouse click** and select **Properties**.

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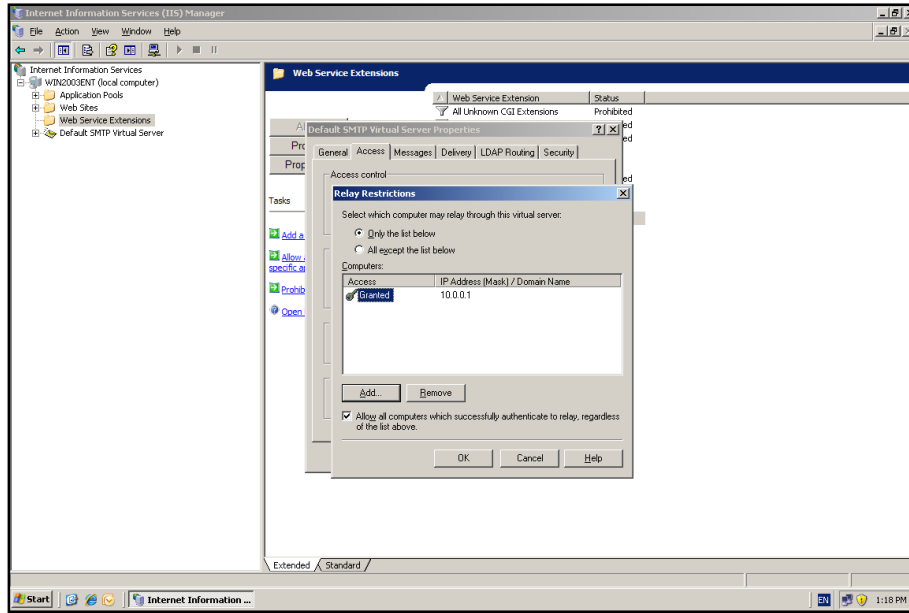


Select the **Access** tab, then select the **Relay** button.



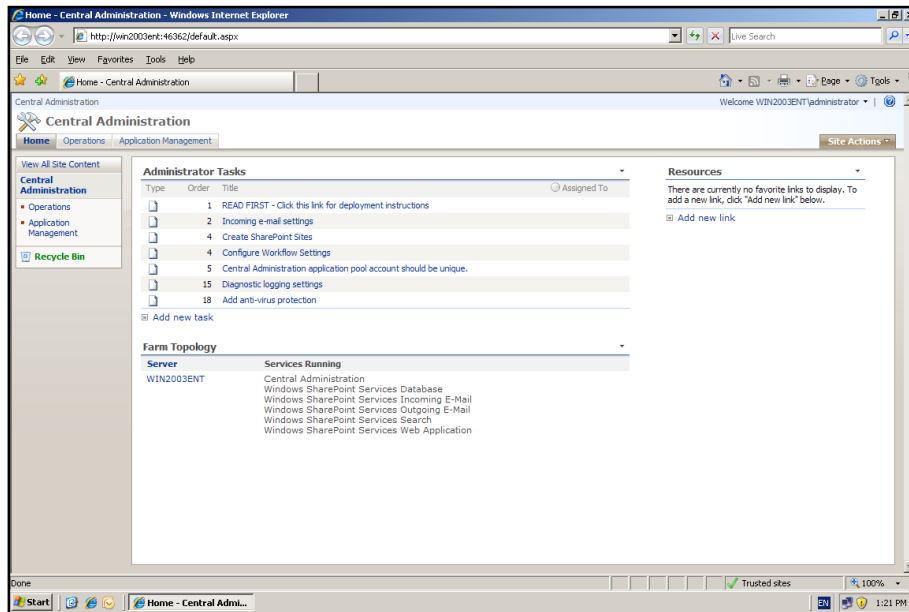
Click the **Add** button and enter the IP address of the Exchange server in the domain, in the case of a Small Business Server network this will be the IP address of the Windows Small Business Server 2003. Press **OK** to save.

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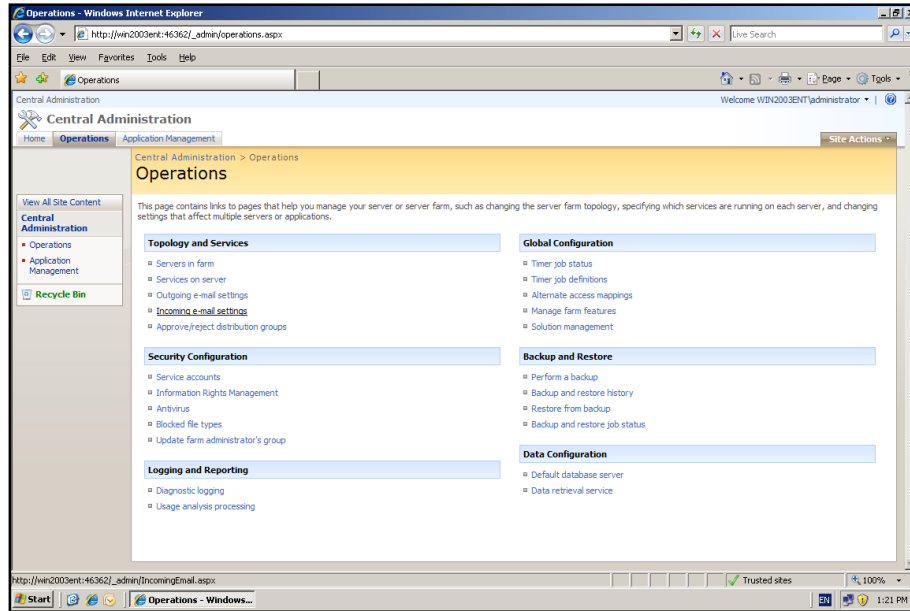
The allowed IP address should now appear in the list as shown above. Select **OK**, then **OK** again to close the Default SMTP properties windows. Now close the IIS Management console.

The next step is to configure the incoming e-mail settings in WSS v3. This is done through the SharePoint v3 Central Administration tool which is accessed via **Start | Administrative Tools | SharePoint 3.0 Central Administration** on the WSS v3 server.

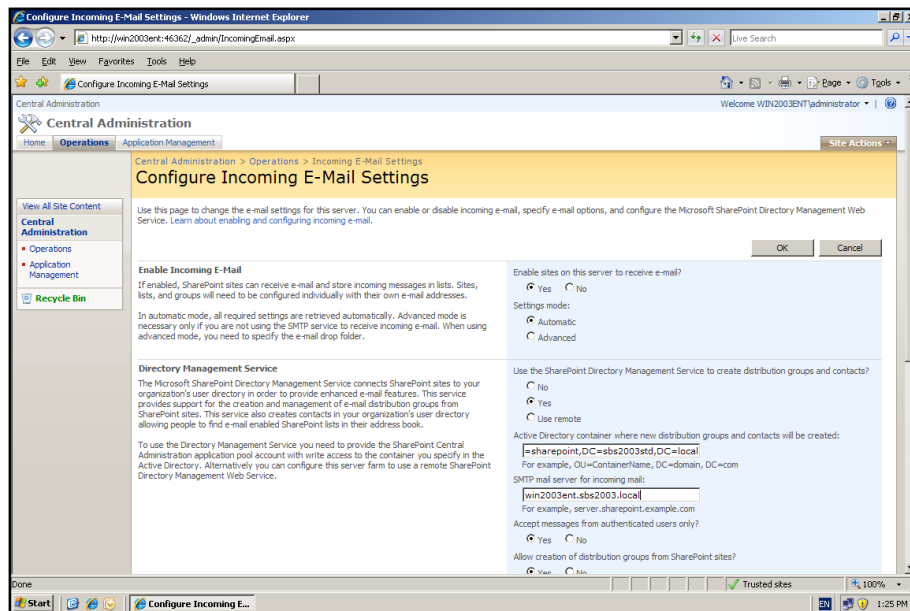


Select the *Operations* tab.

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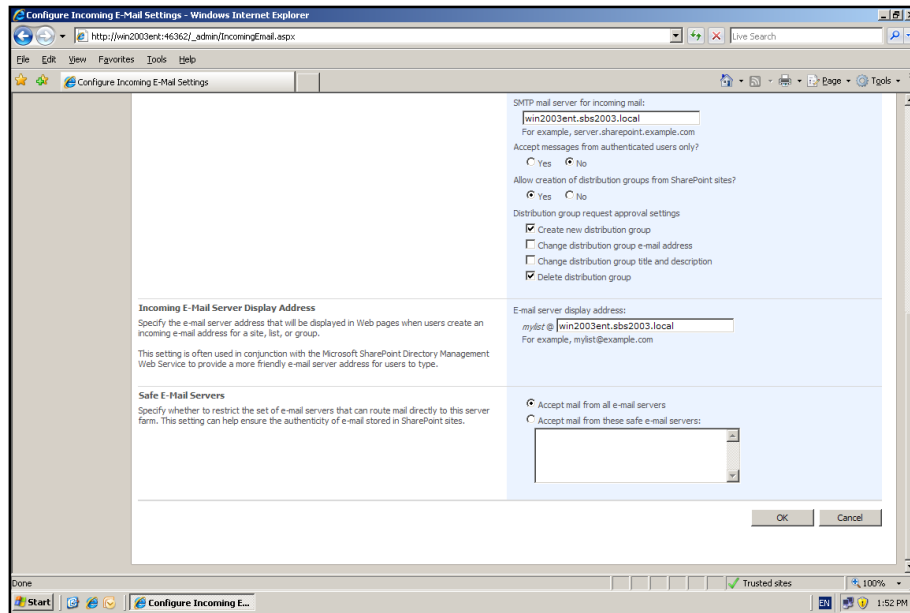
Under the *Topology and Services* heading select **Incoming e-mail settings**.



Select **Yes** to option *Enable sites on this server to receive e-mail*. Select the Settings mode as *Automatic*. If you select *Advanced* then you are given the option at the bottom of the page to specify which folder location will be used for the incoming mail drop folder. By default the drop folder will be the one used by the SMTP service which is located at `C:\inetpub\mailroot\drop`. Once mail is sent to this drop folder by SMTP the SharePoint timer service will pick up the mail and sent it to the correct location in WSS v3.

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In the *Directory Management Service* section select **Yes** to use the Directory Management Service. In the *Active directory container* field enter the name of the OU that was created earlier. In this case ou=sharepoint, DC=sbs2003std, DC=local. In the SMTP mail server field enter the name of the WSS v3 server (not the network Exchange server) in this case win2003ent.



Set the option *Accept messages from authenticated users only* to **No** if you want to allow *Site Administrators to create E-Mail enabled distribution groups* in AD then select **Yes** and set the approval settings below. This will allow the site administrator to create a mail address for the Site Group but until it is approved by a WSS v3 server administrator any new group will not be created in the AD. To approve these distribution groups a WSS v3 server administrator will select the **Approve/reject Distribution Groups** from **Sharepoint Central Administration | Operations | Topology and Services**.

For the incoming *E-Mail Server display address* enter the domain you wish all new List and Libraries to have. This could be @yourdomain.com.au if your email routing is correctly configured in your domain. If you are unsure set it to be the name of the WSS v3 server (in this case win2003ent.sbs2003.local)

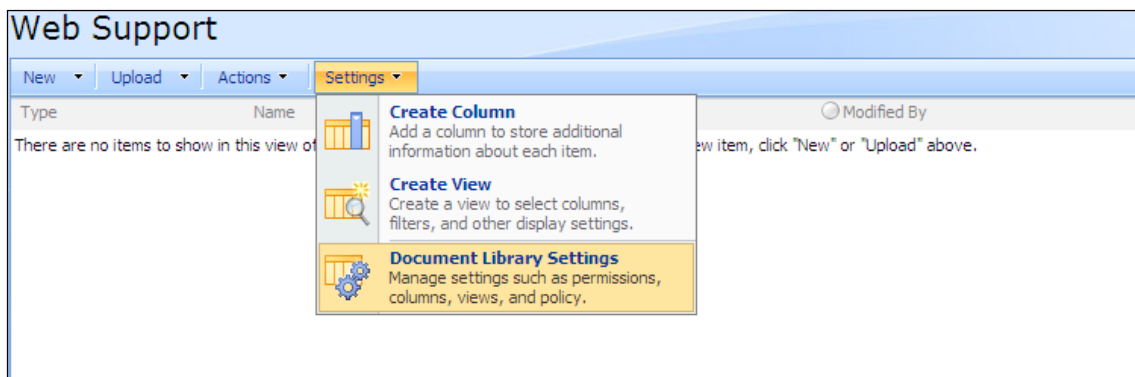
In the *Safe Email Servers* you could choose to specify only the IP address of your internal mail server if desired. If you are unsure then select *Accept mail from all e-mail servers*. Select the **OK** button to accept the selected options.

The next step in process is to configure a mail enabled document library in WSS v3. To create a new document library login to the WSS v3 as an administrator and select **Site Actions**, then **Create** from the top right. Next select *Document Library*.

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The screenshot shows a 'New' document library creation form. It is divided into two main columns. The left column contains sections for 'Name and Description', 'Navigation', 'Incoming E-Mail', 'Document Version History', and 'Document Template'. The right column contains input fields for 'Name' (set to 'Web Support'), 'Description', 'Display this document library on the Quick Launch?' (radio buttons for Yes and No, with 'Yes' selected), 'Allow this document library to receive e-mail?' (radio buttons for Yes and No, with 'Yes' selected), 'E-mail address' (set to 'web-support@...'), 'Create a version each time you edit a file in this document library?' (radio buttons for Yes and No, with 'No' selected), and 'Document Template' (set to 'Microsoft Office Word 97-2003 document'). At the bottom right are 'Create' and 'Cancel' buttons.

Give the document library a name and select the option to *Allow this document library to receive email*. Set the email alias to an email address that not currently being used. When complete select the **Create** button.



Under the new document library select **Document Library Settings** from the *Settings* menu.

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### Customize Web Support

<b>List Information</b>	
Name:	Web Support
Web Address:	http://[ ]/Web Support/Forms/AllItems.aspx
Description:	
E-Mail Address:	web-support@[ ]
<b>General Settings</b>	
<ul style="list-style-type: none"><li>Title, description and navigation</li><li>Versioning settings</li><li>Advanced settings</li></ul>	
<b>Permissions and Management</b>	
<ul style="list-style-type: none"><li>Delete this document library</li><li>Save document library as template</li><li>Permissions for this document library</li><li>Manage checked out files</li><li>Workflow settings</li></ul>	
<b>Communications</b>	
<ul style="list-style-type: none"><li>Incoming e-mail settings</li><li>RSS settings</li></ul>	

Select **Incoming e-mail settings** from under the *Communications* heading.

### Incoming E-Mail Settings: Web Support

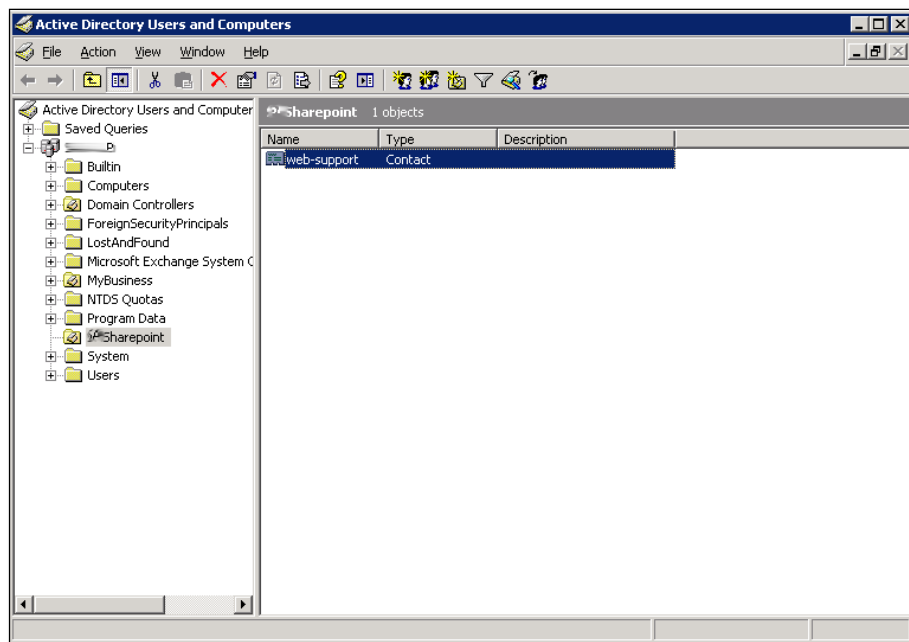
Use this page to change the e-mail settings of this document library. You can set the e-mail address for this document library, choose to save or discard e-mail attachments, and set e-mail security policy.

<b>Incoming E-Mail</b> Specify whether to allow items to be added to this document library through e-mail. Users can send e-mail messages directly to the document library by using the e-mail address you specify.	Allow this document library to receive e-mail? <input checked="" type="radio"/> Yes <input type="radio"/> No E-mail address: <input type="text" value="web-support"/> @[ ]
<b>E-Mail Attachments</b> Specify whether to group attachments in folders, and whether to overwrite existing files with the same name as incoming files.	Group attachments in folders? <input checked="" type="radio"/> Save all attachments in root folder <input type="radio"/> Save all attachments in folders grouped by e-mail subject <input type="radio"/> Save all attachments in folders grouped by e-mail sender Overwrite files with the same name? <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>E-Mail Message</b> Specify whether to save the original .eml file for an incoming e-mail message.	Save original e-mail? <input checked="" type="radio"/> Yes <input type="radio"/> No
<b>E-Mail Meeting Invitations</b> Specify whether to save e-mailed meeting invitations in this document library.	Save meeting invitations? <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>E-Mail Security</b> Use document library security for e-mail to ensure that only users who can write to the document library can send e-mail to the document library. <b>Caution:</b> If you allow e-mail from any sender, you are bypassing the security settings for the document library. This means that anyone could send an e-mail to the document library's address and their item would be added. With this option turned on, you are opening your document library to spam or other unwanted e-mail messages.	E-mail security policy: <input type="radio"/> Accept e-mail messages based on document library permissions <input checked="" type="radio"/> Accept e-mail messages from any sender

OK Cancel

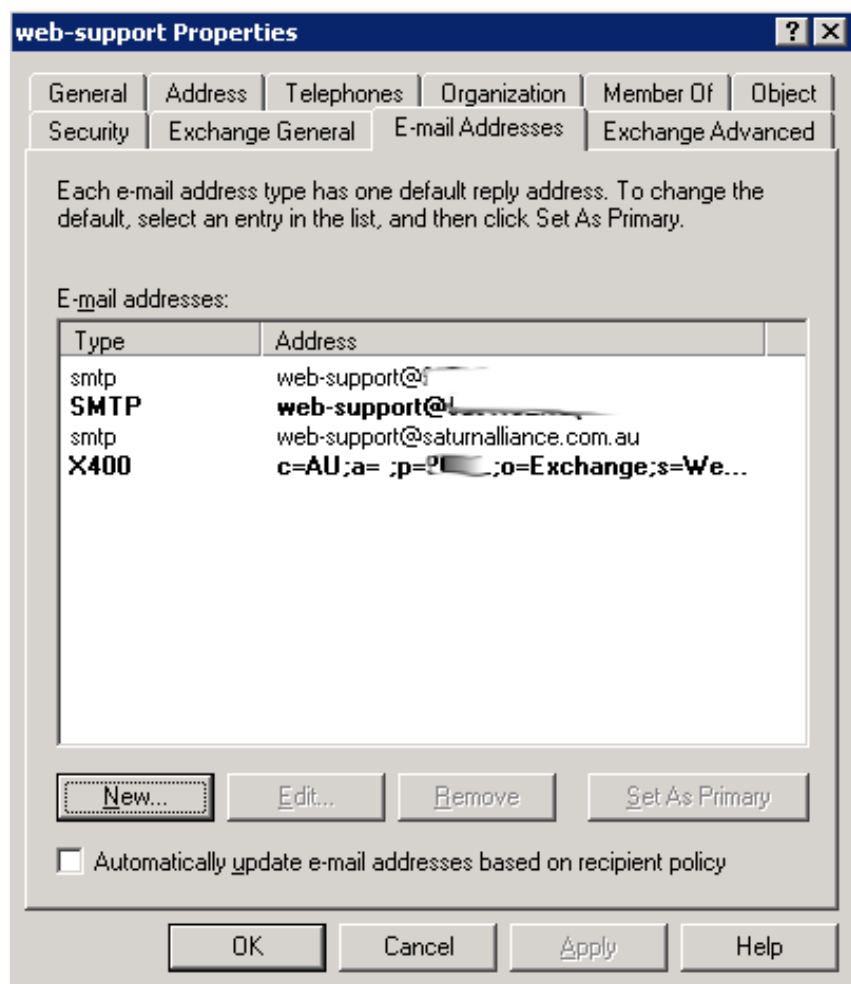
In the *E-Mail message* section select **Yes** to save original e-mail. In the *E-Mail Security* section select the option to **Accept** e-mail messages from any sender. Press **OK** to complete.

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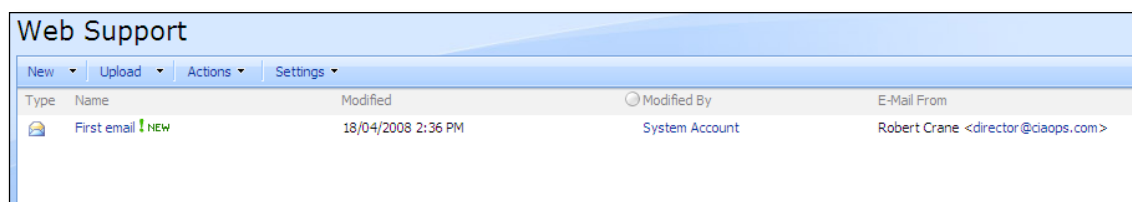


A short time after the document library has been created and mail enabled a new contact should appear automatically in the OU in the AD as shown above.

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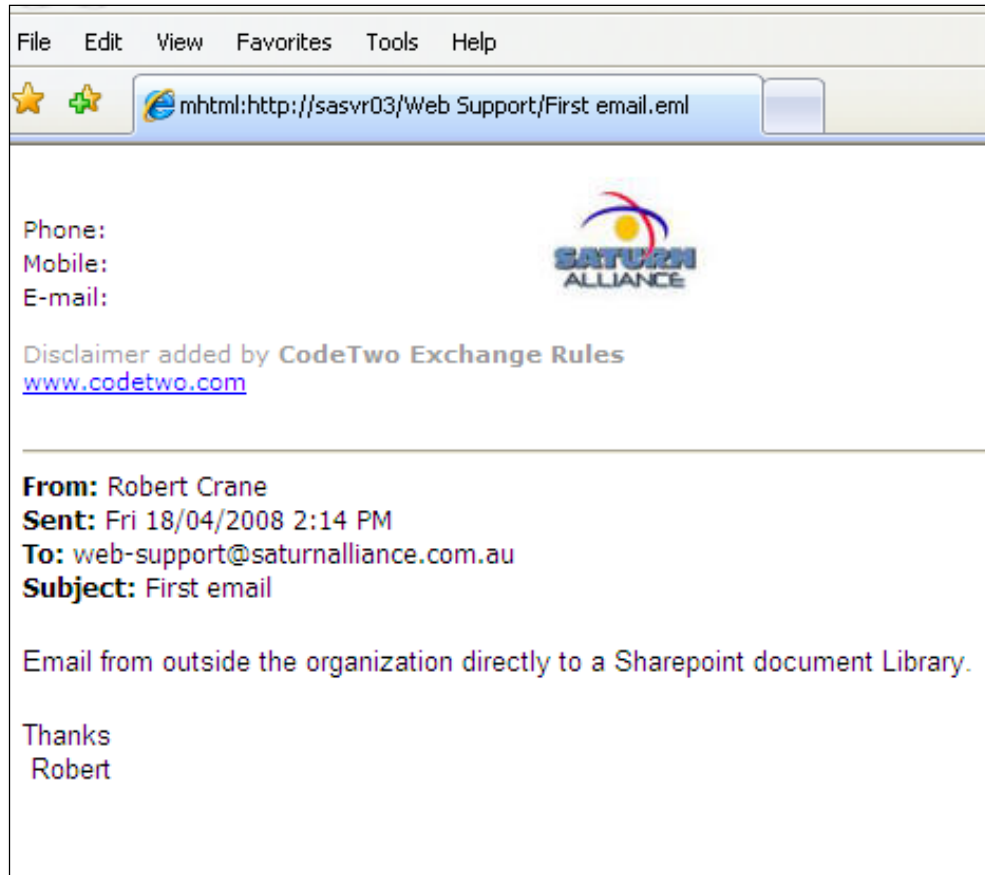


If you want to receive emails from outside your organization to the document library you just have just configured, **double click** on the new contact in the AD, then select the E-Mail Addresses tab. Enter a new email address for this contact that will receive emails from outside the organization (in this case [web-support@saturnalliance.com.au](mailto:web-support@saturnalliance.com.au) on the third line).



If you now send an email to the external email address you configured in AD (in this case [web-support@saturnalliance.com.au](mailto:web-support@saturnalliance.com.au)) you should see it appear in the document library as shown above. To open the email simply select the item as you would with any other normal document library item.

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The email will be displayed in a browser window.

Web Support				
New	Upload	Actions	Settings	View
Type	Name	Modified	Modified By	E-Mail From
	First email <span>NEW</span>	18/04/2008 2:36 PM	System Account	Robert Crane <director@ciaops.com>
	screen <span>NEW</span>	18/04/2008 2:42 PM	System Account	Robert Crane <director@ciaops.com>
	Second email with attachment <span>NEW</span>	18/04/2008 2:42 PM	System Account	Robert Crane <director@ciaops.com>

If another email is now sent with an attachment it will also be displayed in the document library in the manner in which you configured the document library to handle attachments. In this case the attachment is saved as a separate file in the same document library.

You can now use any of the standard WSS v3 features such as Alerts or Workflows to process this email.

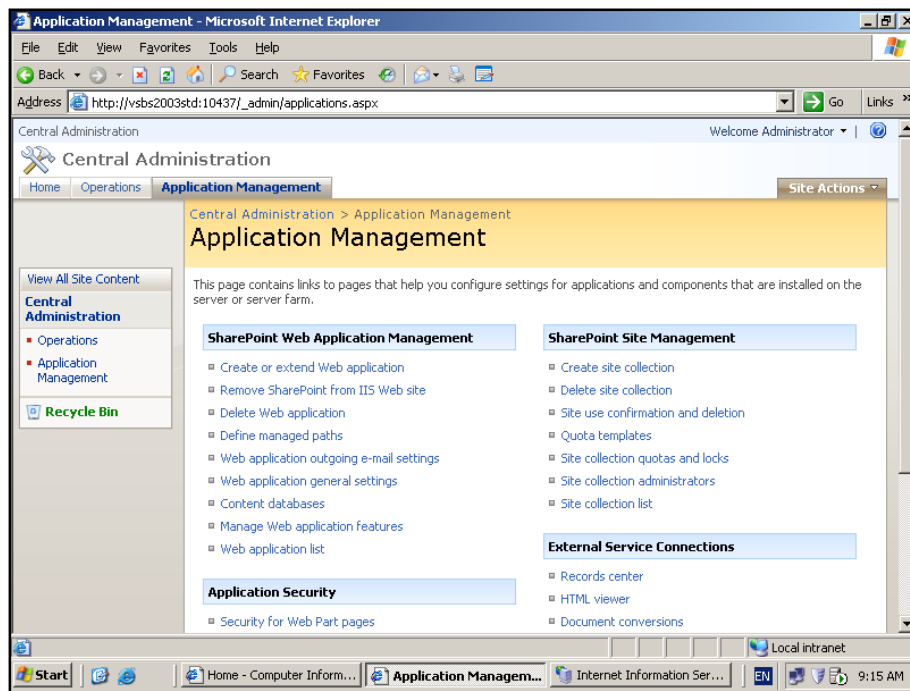
### 9.5 Configuring SSL

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There are a number of ways that WSS v3 can be utilized with SSL for secure communications. The following method will show you how to “extend” the existing WSS v3 site to SSL. This means that the original WSS v3 site (unencrypted) remains unchanged but the same content can also be accessed through an SSL connection.

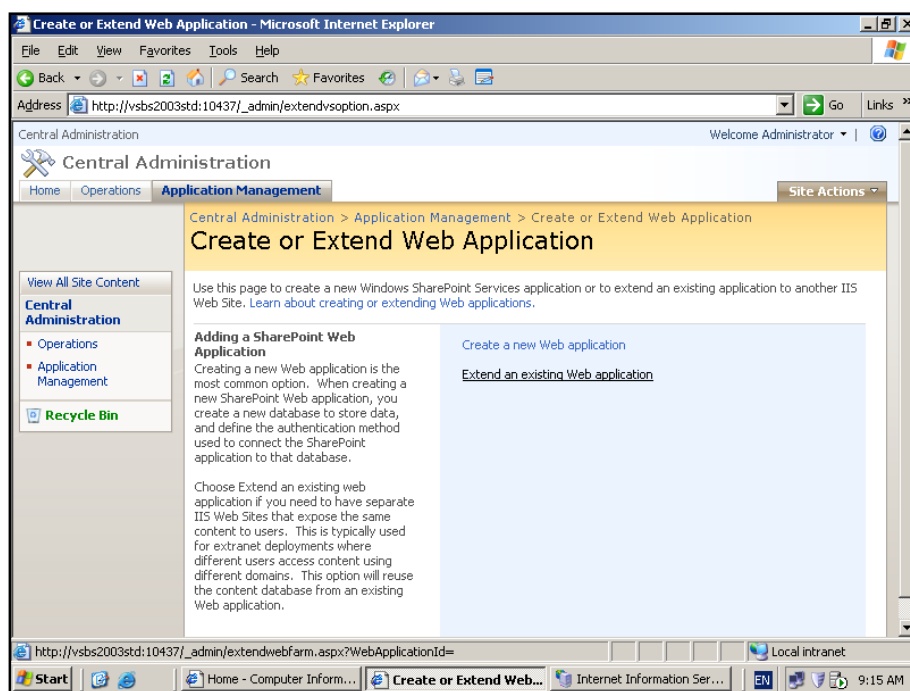
Your WSS v3 server will require an SSL certificate to already be in place if you plan to use SSL. Windows Small Business Server 2003 already has a certificate created if you have completed the Connect to Internet Wizard during the configuration process. It is also possible to create a self signed certificate if you have installed WSS v3 on a stand-alone server. For more information about creating a self signed certificate see – **Chapter 14 – Installing SharePoint server prerequisites.**

It is important to keep in mind that using SSL with WSS v3 will slow the site down simply due to the SSL encryption and the graphical nature of WSS v3. This will be more evident if you have large documents and images because these too must be encrypted by SSL before they are transmitted. Also be aware that some custom web parts from third parties may not function over SSL. In this event you will be given the option to close the offending web part to display the page.

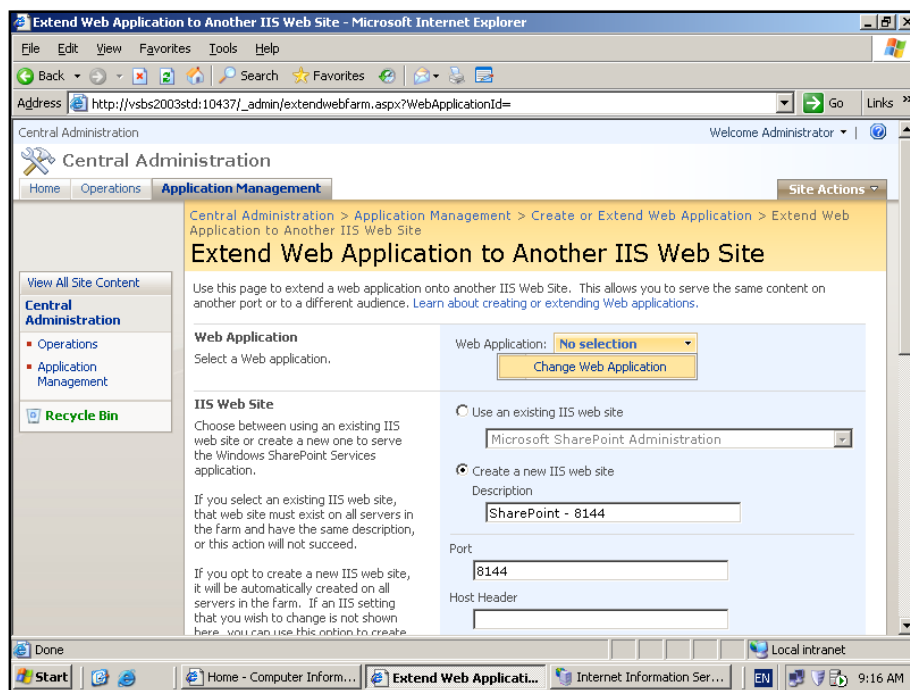


Run the *SharePoint Central Administration* by logging into the WSS v3 server as an administrator and running **Start | Administrative Tools | SharePoint Central Administration V3**. Once this is opened select the **Application Management** tab. Under *SharePoint Web Application Management* select **Create or extend web application**.

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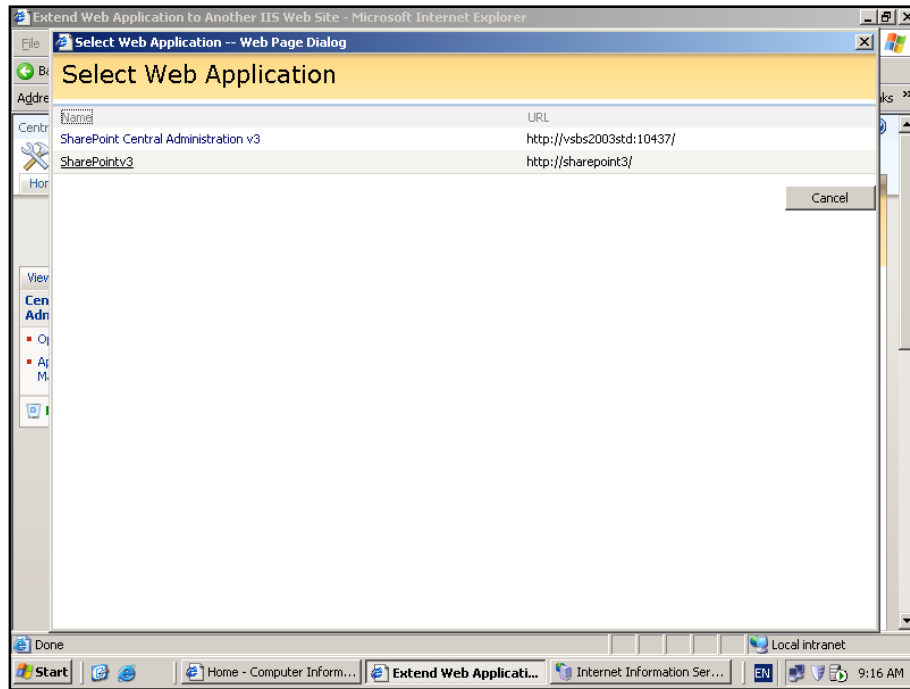


Now select the link to **Extend an existing Web application**.

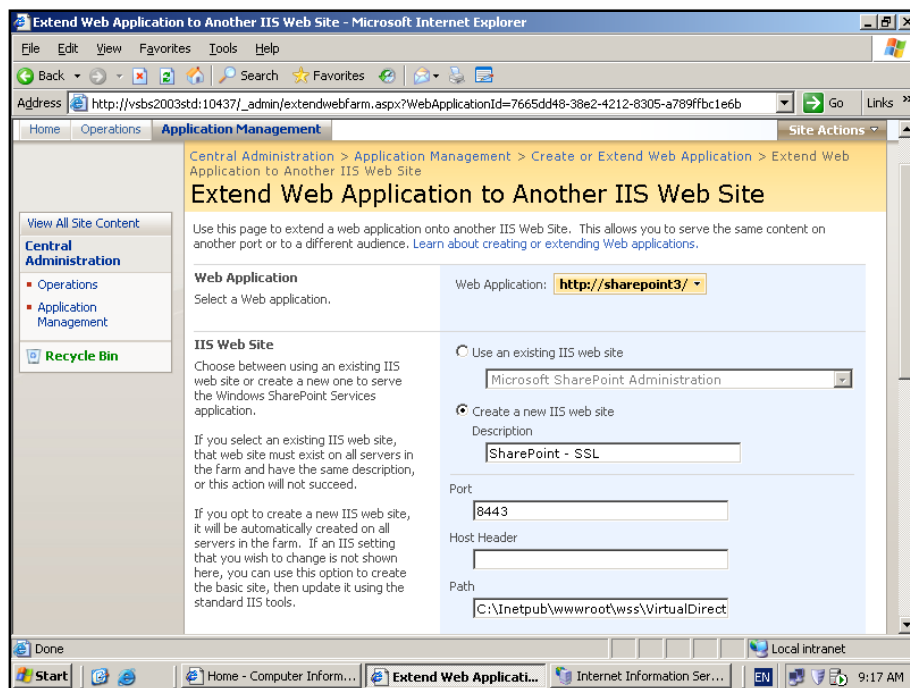


In the *Web Application* option click the down arrow to the right and select the displayed option **Change Web Application**.

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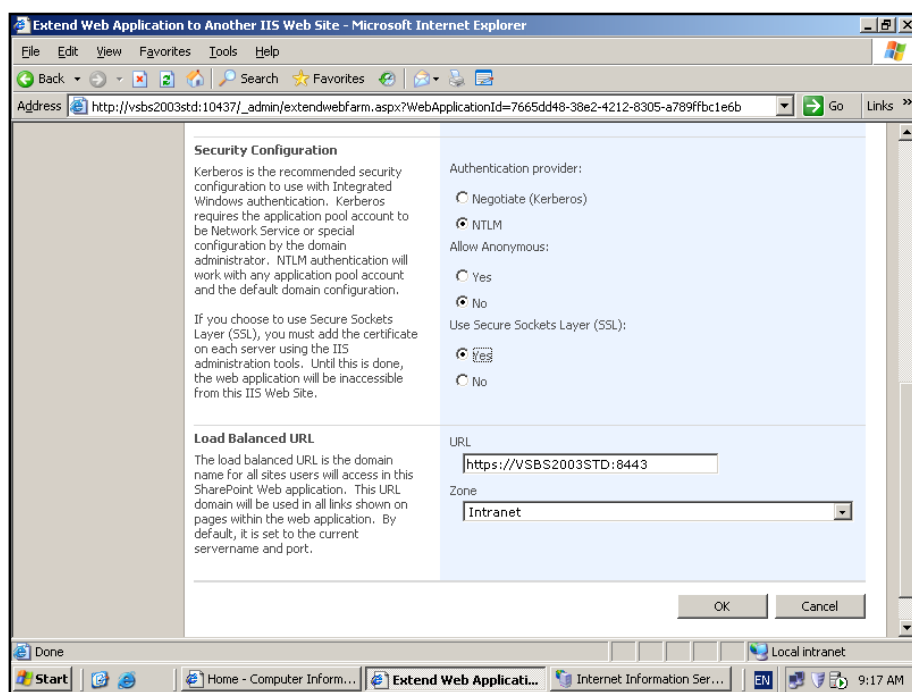
From the list of existing WSS v3 sites select the site you wish to enable via SSL. In this case the site Sharepointv3. Simply click once with the **left mouse button** to select.



You should now see this WSS v3 site displayed in the *Web Application* area.

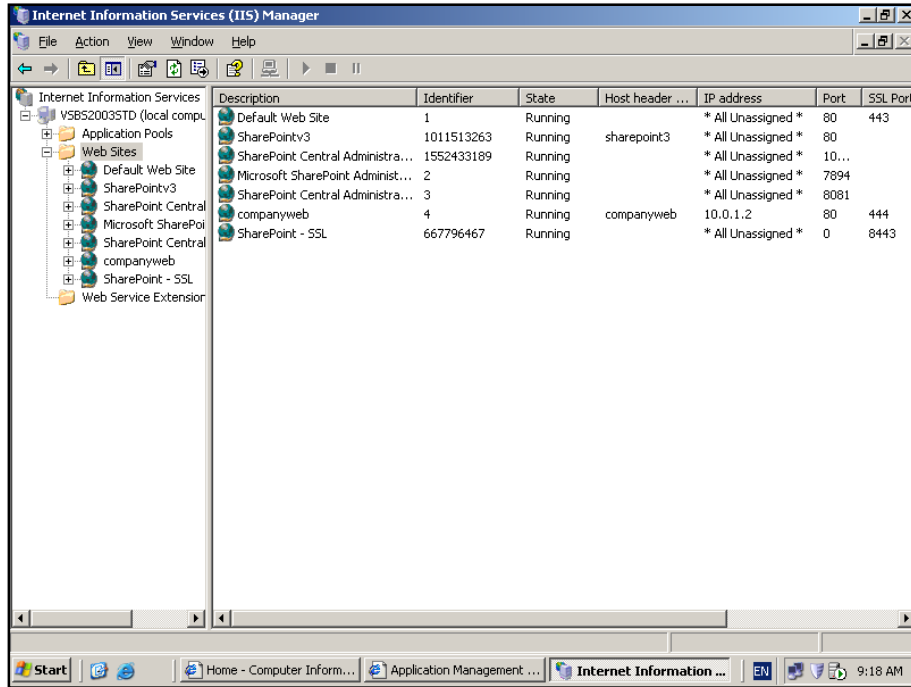
## Chapter 9 – Advanced configuration

Select the option to *Create a new IIS web site* and give the site a meaningful name (in this case SharePoint – SSL). Next, select the port over which you wish to run SSL. The SSL port by default is 443 however in many cases you may want to select another port. This is especially true with Windows Small Business Server 2003 which uses port 443 for Outlook Web Access and Remote Web Workplace.

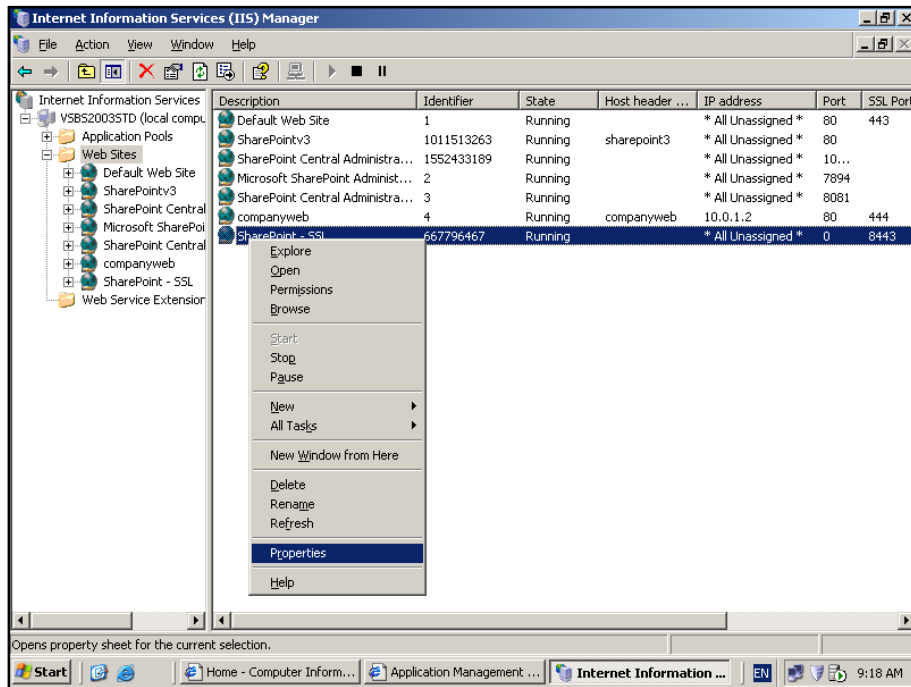


Set the other options as required but ensure that the option *Use Secure Sockets Layer (SSL)* is set to **Yes**. Select **OK** when complete.

## Chapter 9 – Advanced configuration

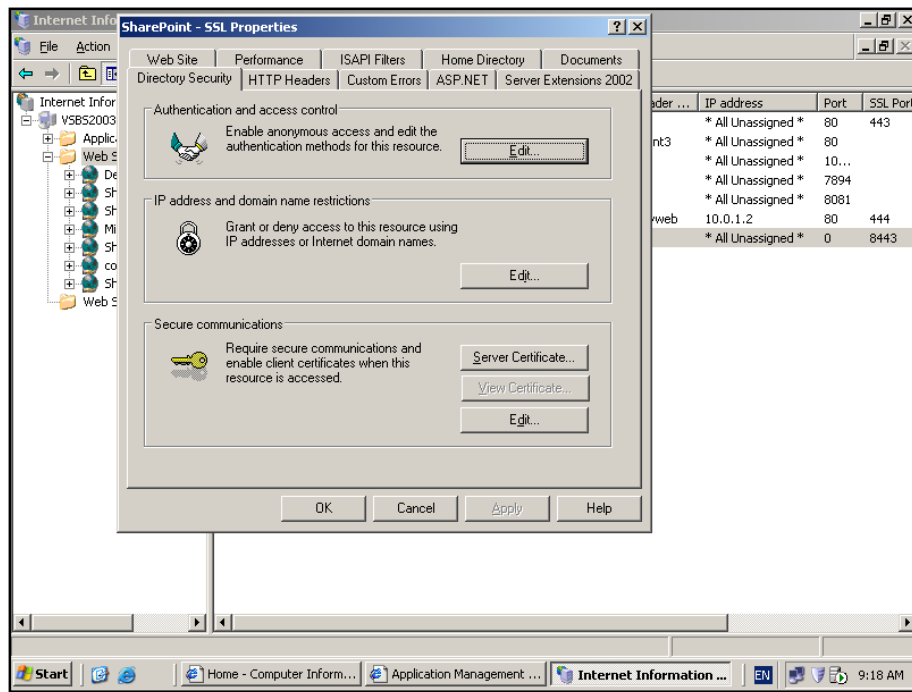


If you now open the *Internet Information Services (IIS) Manager* via **Start | Administrative Tools** you should see that there is now an additional web site with the name you just created in the *SharePoint Central Administration* (in this case *SharePoint – SSL*). You should also note that its Port is 0 but the SSL port is the value that you selected previously (in this case 8443).

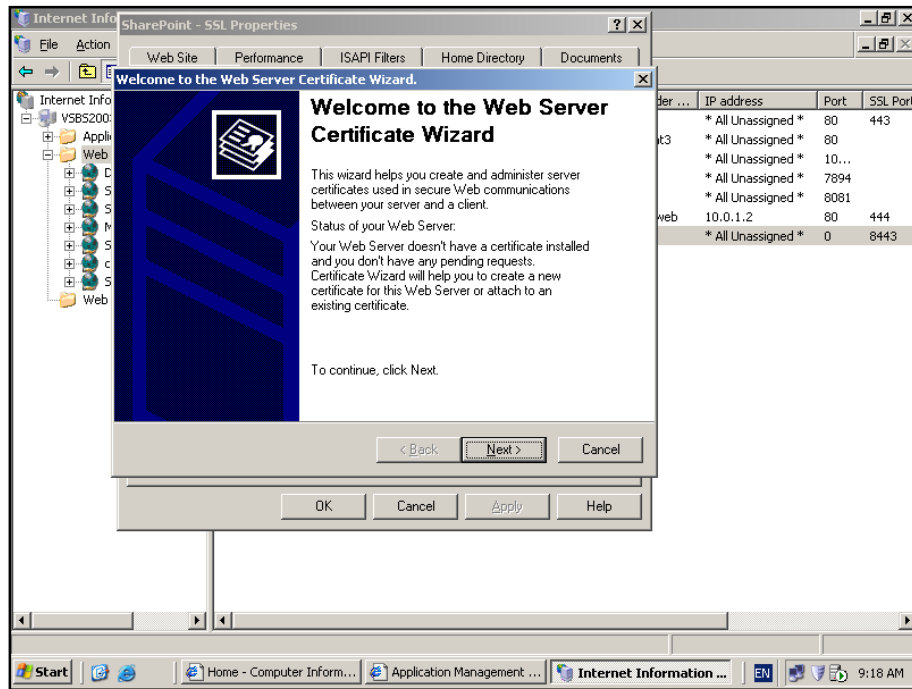


## Chapter 9 – Advanced configuration

**Right mouse click** on this new web site and select **Properties** from the menu that appears.

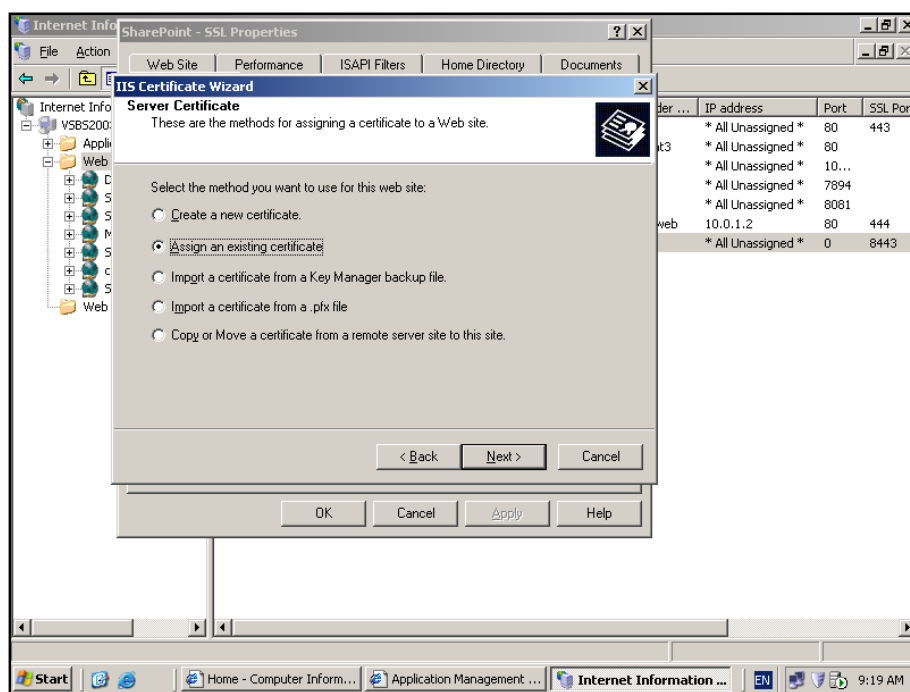


From the web site properties window select the **Directory Security** tab. Under *Server communications* select the **Server certificate** button.

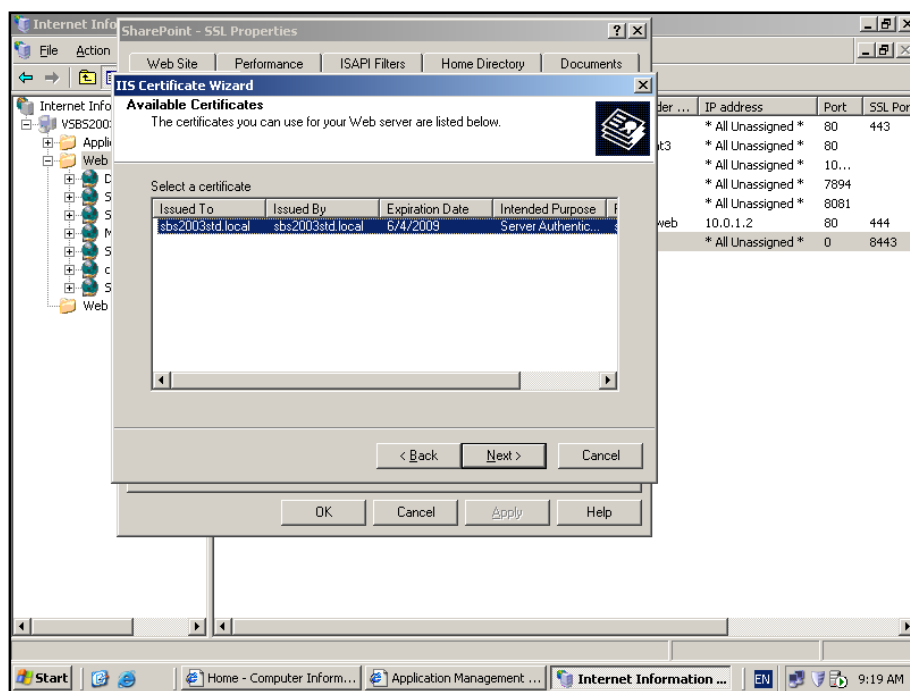


## Chapter 9 – Advanced configuration

This will launch the Web Server Certificate wizard. Select **Next** to continue.

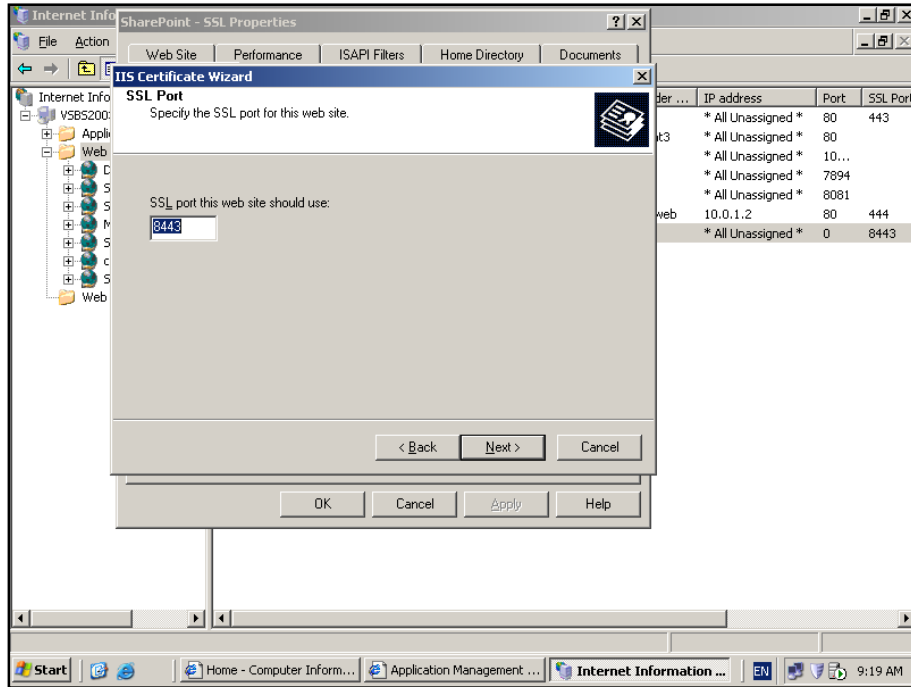


Now select the option to *Assign an existing certificate* and press **Next** to continue.

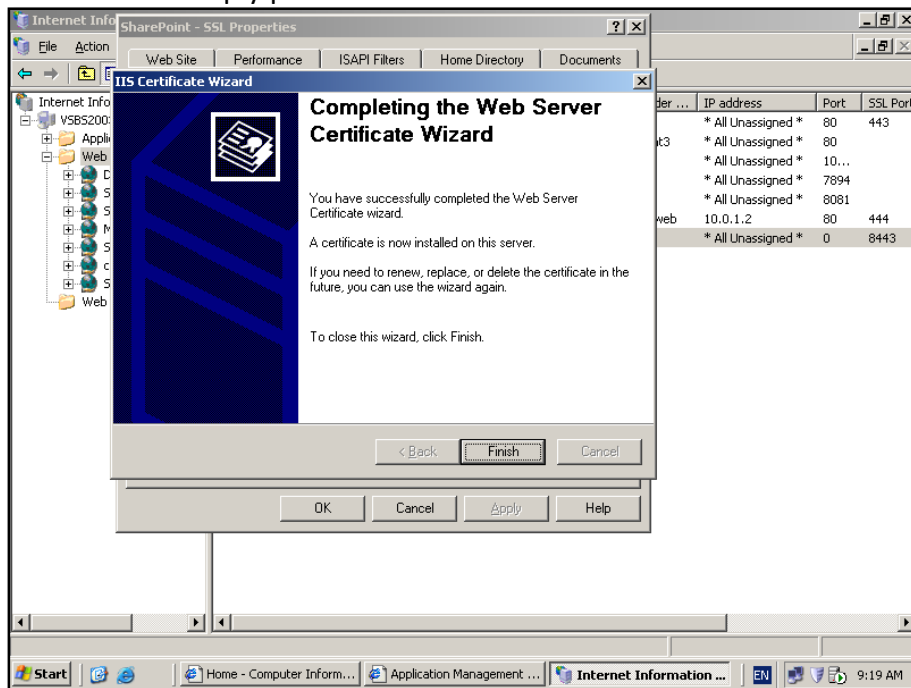


Select the available certificate and press **Next** to continue. If no certificate is available then you have not configured one for this server.

## Chapter 9 – Advanced configuration

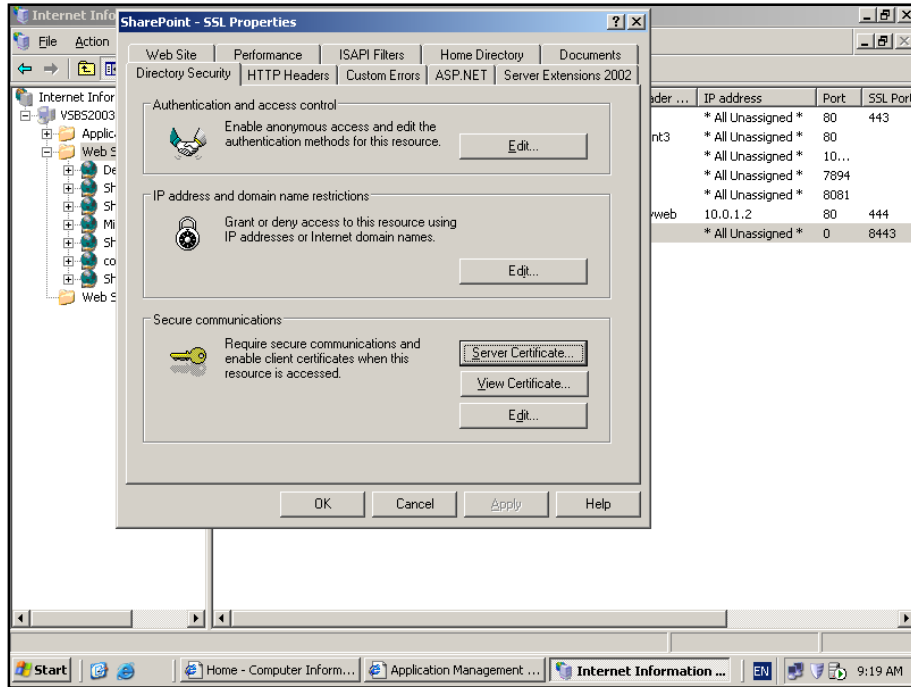


Select the port on which you wish SSL to operate. The value displayed by default is the value you elected to use when you extended the WSS v3 site previously. You should not change this value but simply press **Next** to continue.

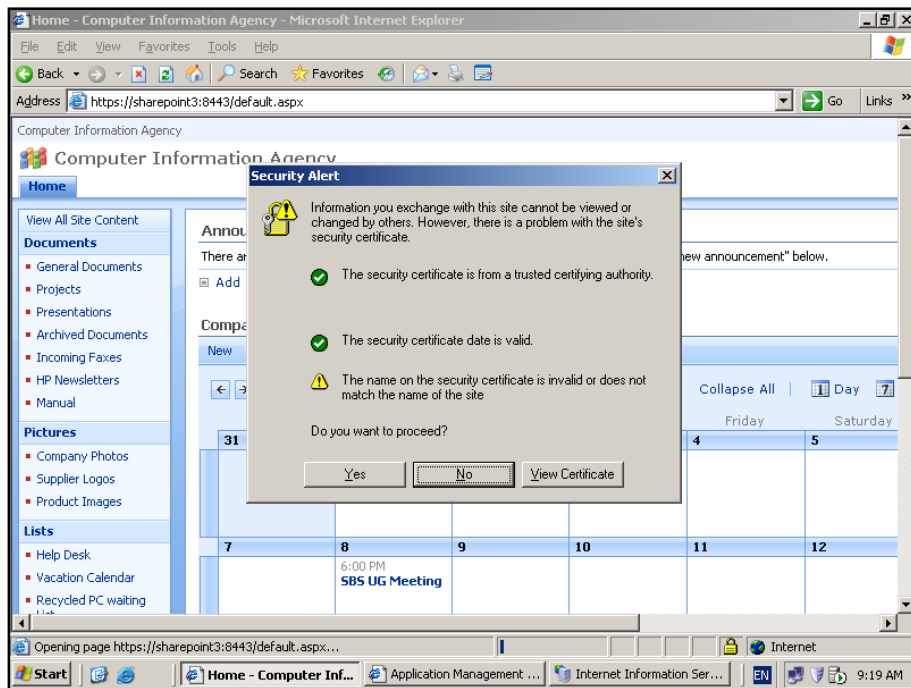


Press the **Finish** button to complete the wizard.

## Chapter 9 – Advanced configuration



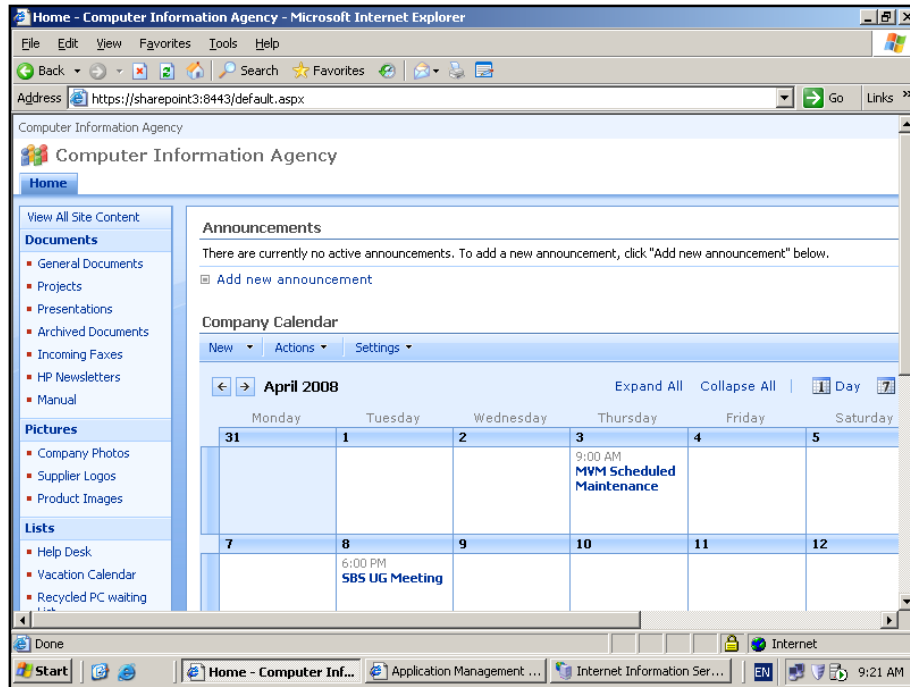
You will now be returned to the web site properties window. Press **OK** to close this window, then close the IIS Manager.



Open a web browser and type the address of your new SSL WSS v3 site into the browser. Remember you will have to use `https://` as the prefix and the `:<SSL_port>` as the suffix (in this case <https://sharepointv3:8443>).

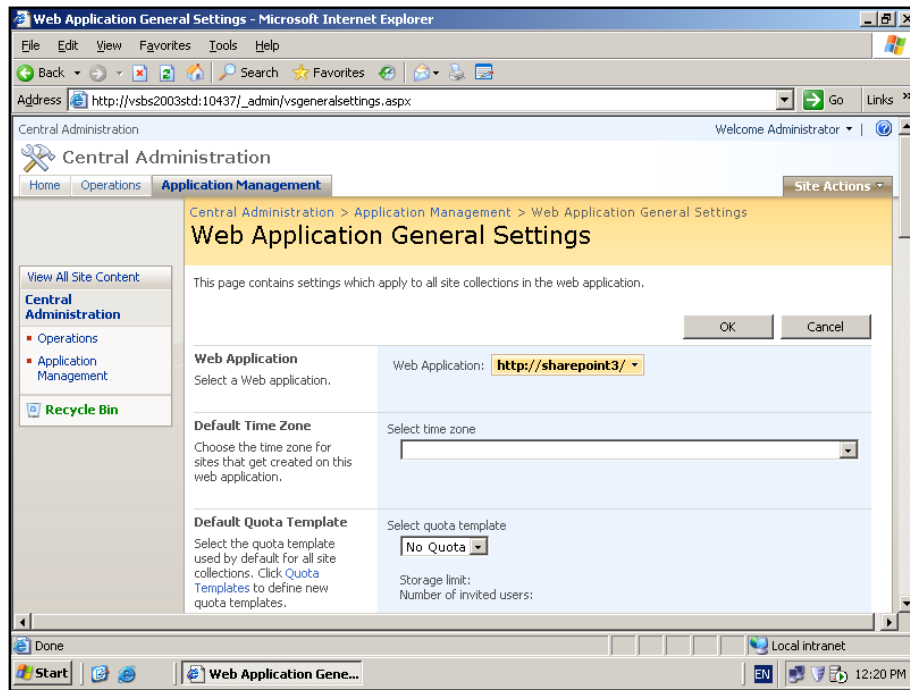
## Chapter 9 – Advanced configuration

Prior to the site displaying you may see a certificate warning like that shown above. This occurs because this configuration has used a self signed Small Business Server 2003 certificate. If you use a commercial SSL certificate this should not occur.



You should now see your existing site displayed as it was before but now all traffic will be sent via SSL.

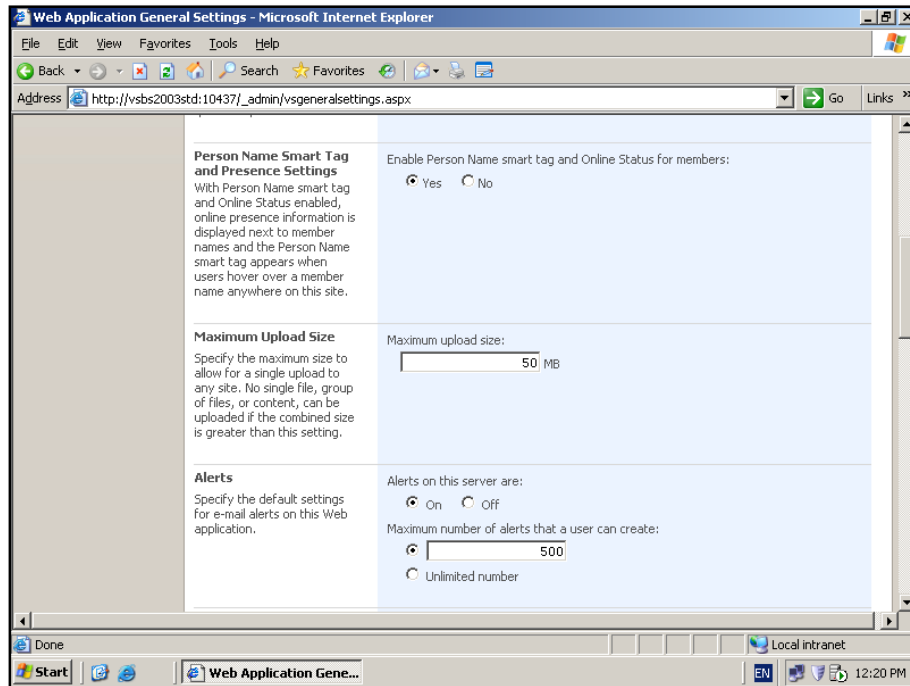
### 9.6 Web application general settings



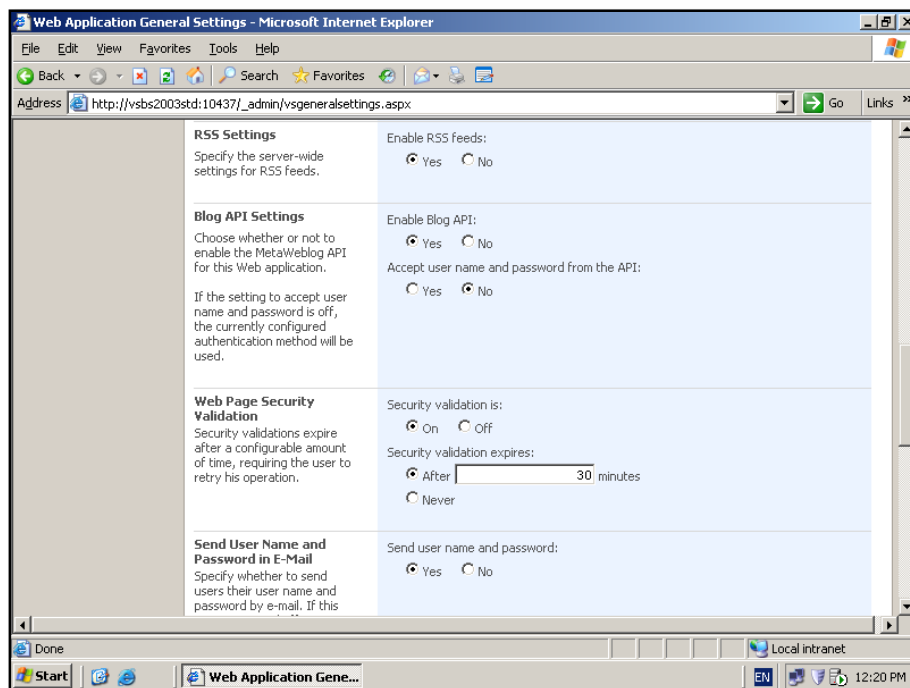
There are some WSS v3 settings for each site you create that are not set during the initial setup phase. To set these go to **Start | Administrative Tools | SharePoint Central Administration V3**. Once this is opened select the **Application Management** tab. Under *SharePoint Web Application Management* select **Web Application General settings**.

Here you can set the time zone and whether a quote template applies. Scroll down for further settings.

## Chapter 9 – Advanced configuration

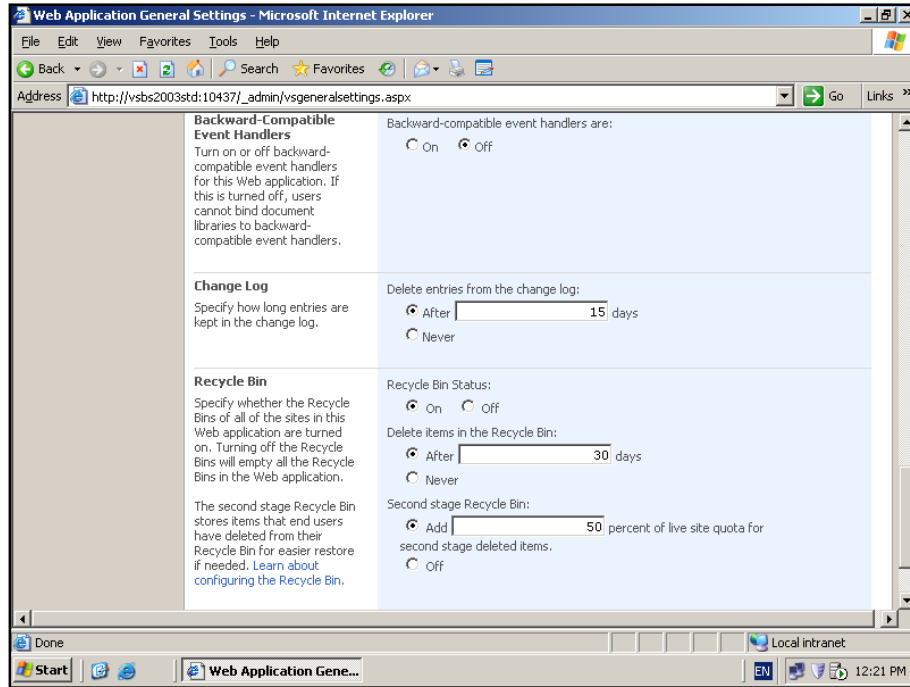


You can select to Enable *Person Name smart tag and Online status*, the *Maximum uploaded file size* and Alert configuration. Scroll down again for further settings.



You can select to enable RSS feeds, Blog API, Security validation and whether to send the user name and password during a user creation process. Scroll down for further options.

## Chapter 9 – Advanced configuration



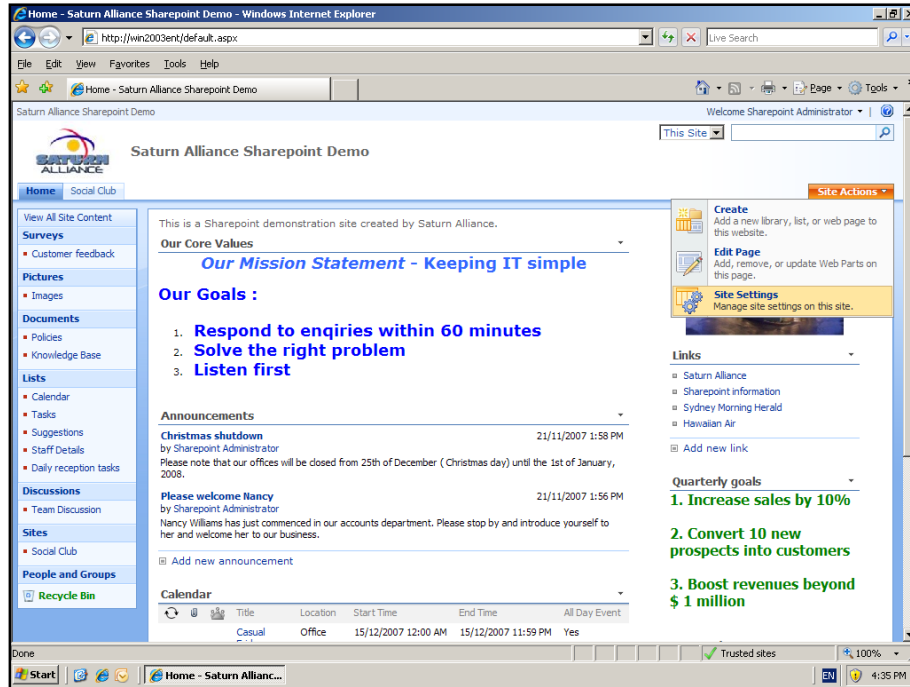
You can set the log limit and recycle bin status. When complete press the **OK** button at the bottom of the screen to apply the settings you have selected.

### 9.7 RSS Feeds

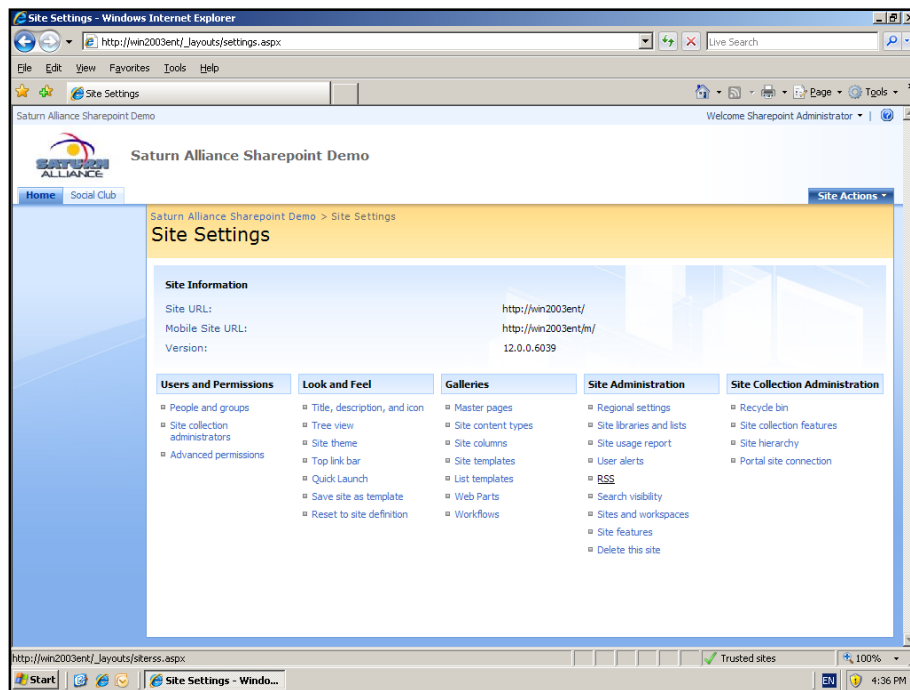
To allow RSS feeds in WSS v3 you firstly need to ensure that it has been enabled in the Web Application General Settings in *SharePoint Central Administration* shown above. Normally, this will be enabled as it controls RSS across the WSS v3 site.

Next, you need to configure RSS Settings for a WSS v3 site. Log on to the WSS v3 site as an administrator.

## Chapter 9 – Advanced configuration

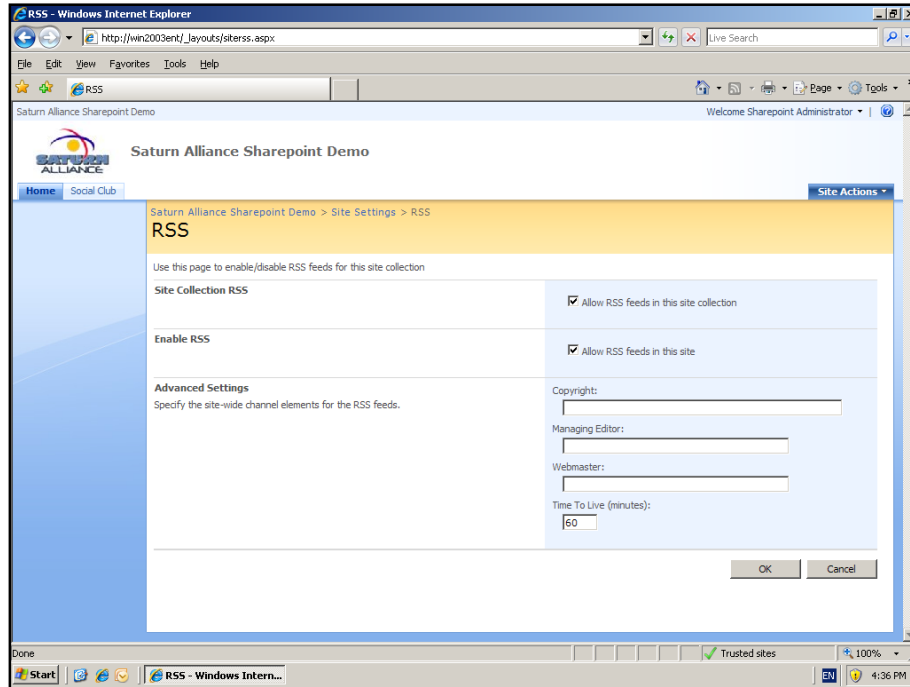


Select **Site Actions** | **Site Settings**.



Then Select **RSS** from under the *Site Administration* section.

## Chapter 9 – Advanced configuration

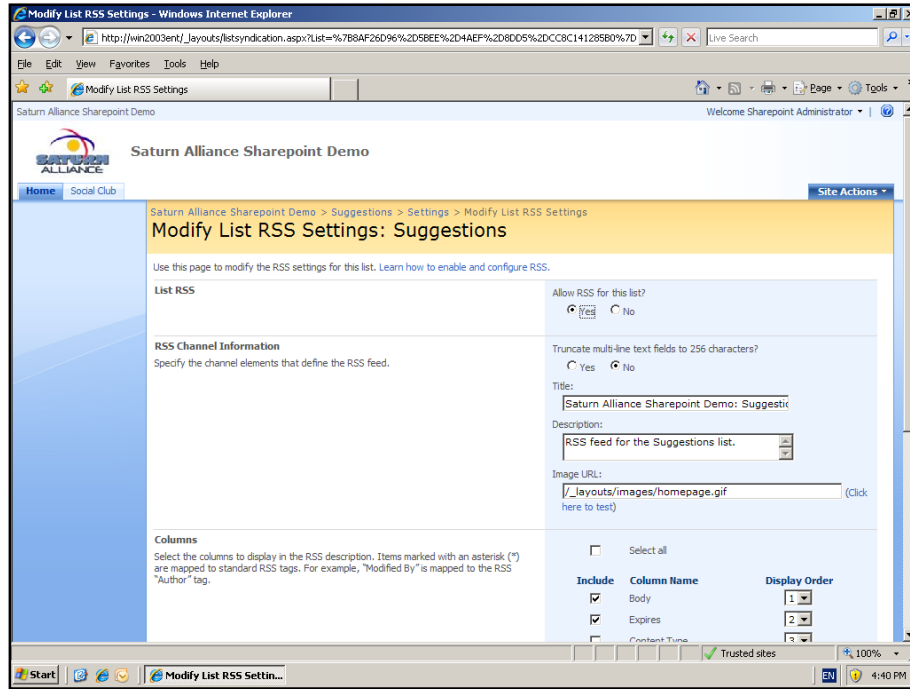


Configure the settings as required. The *Time To Live* setting is the preferred synchronization time in minutes for a RSS feed reader that uses any of the lists in the current site as a RSS source.

Click **OK** to save and close the configuration page.

Each list has its own RSS settings which are located via the WSS v3 list then **Settings | Document Library Settings | RSS Settings**.

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### 9.8 Site Tracking

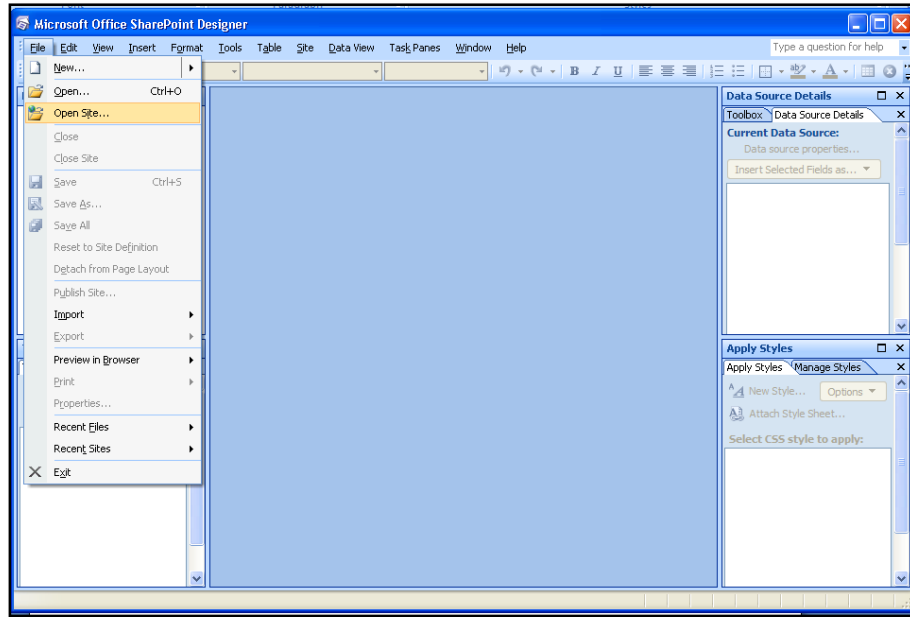
It is possible to use a third party product like Google Analytics to track visitors to a WSS v3 site located on the Internet. In most of these cases you need to create an account with the third party (in this case Google Analytics) prior to making any changes to WSS v3. You then configure the WSS v3 web site address you wish to track on that site. Then, at the conclusion of this configuration you will be given a small piece of HTML code that needs to be inserted into each WSS v3 page so that visits can be tracked and reported back to the monitoring site.

This means that to get the best indication of which parts of your WSS v3 site people visit you need to insert the tracking HTML code into every page. On a normal web site this would be a very time consuming process, however because SharePoint utilizes something known as Master Pages the process is in fact very simple.

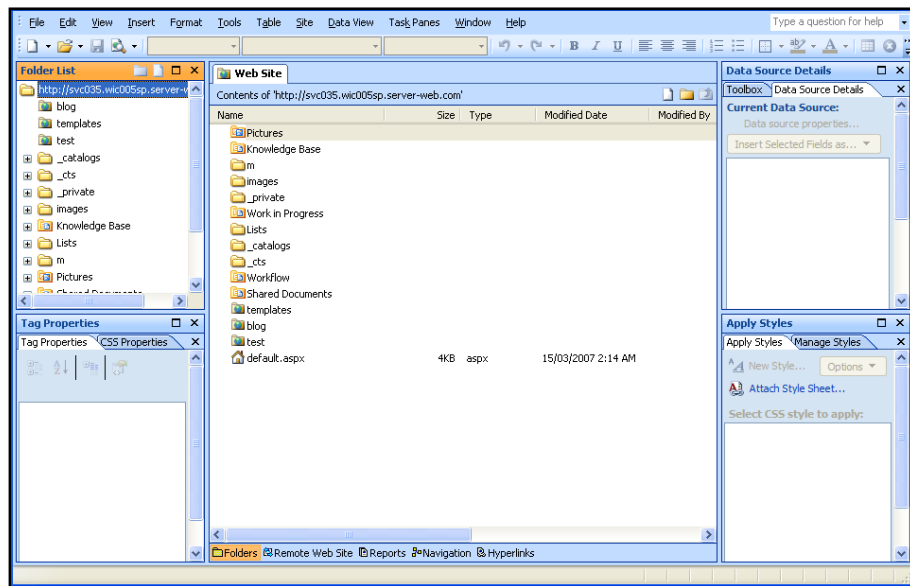
To edit your WSS v3 site's Master Page you will need to use Microsoft Office SharePoint Designer which is an additional add-on program to the standard Microsoft Office package. It normally needs to be purchased independently of standard Microsoft Office software. Microsoft SharePoint Designer is the replacement to Microsoft FrontPage.

Start by loading *Microsoft SharePoint Designer* usually via **Start | All Programs | Microsoft Office | Microsoft SharePoint Designer 2007**.

## Chapter 9 – Advanced configuration

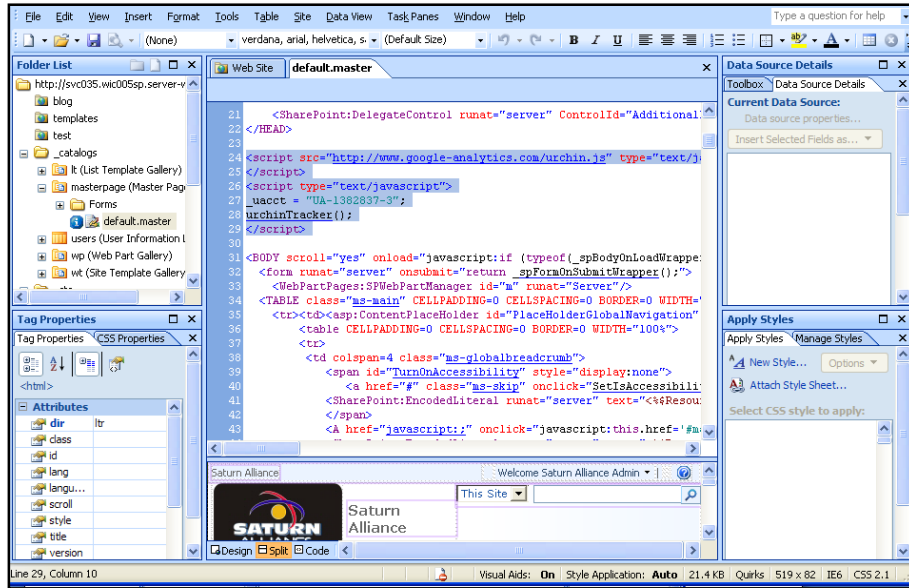


Now select **File | Open Site** to enter the address of your WSS v3 site (i.e. <http://www.mysharepoint.com>). You may be prompted to enter a WSS v3 administrator login to allow access, enter a valid login and continue.

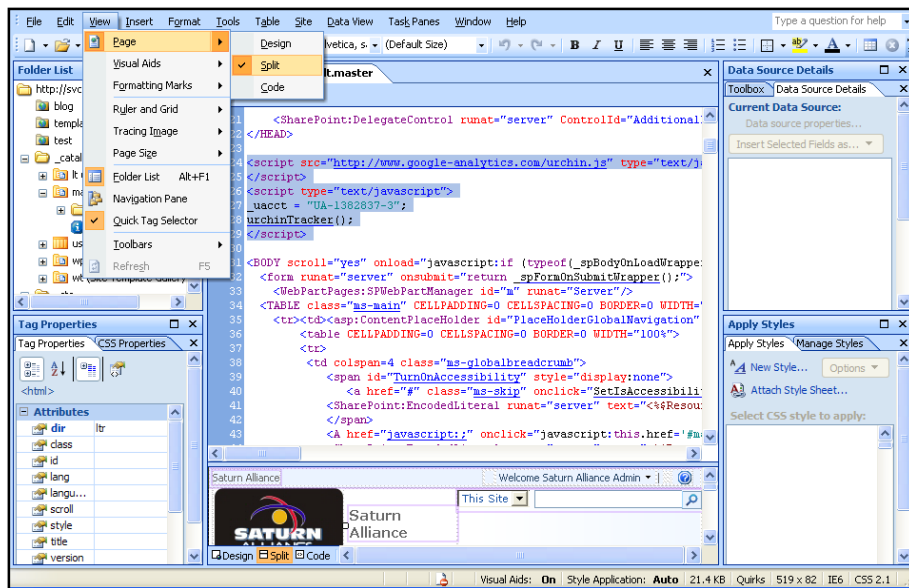


You should now see the WSS v3 site displayed in the folder list in the top left of the screen.

## Chapter 9 – Advanced configuration

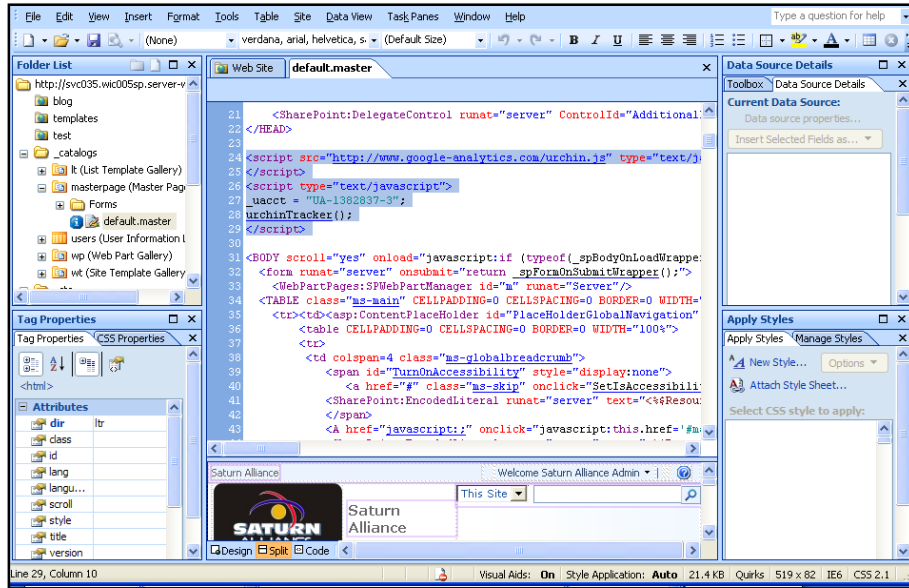


Navigate through the folder list under **\_catalogs | masterpage** until you locate the file *default.master*. **Double click** on this file to open it for editing in the middle window as shown above.



If you can't see the HTML code simply select **View | Page | Split** from the menu to display both the HTML and final page.

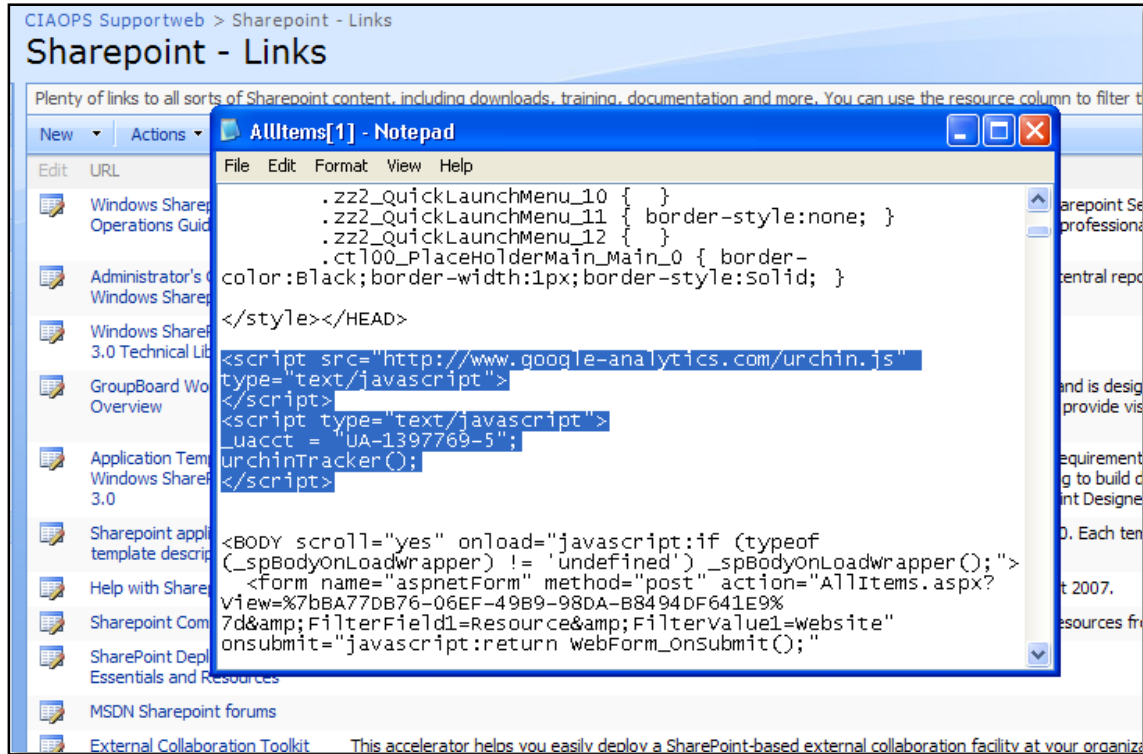
## Chapter 9 – Advanced configuration



You can now paste the tracking HTML code you received from the third party into the *default.master* page. In this case it has been located between the `</HEAD>` and `<BODY>` tag at the top of the page.

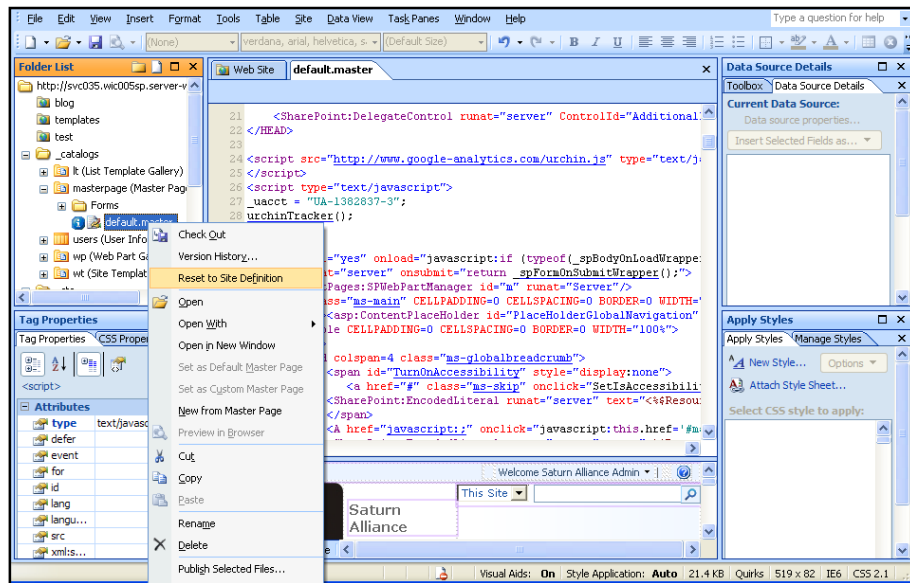
If you now save the *default.master* with the new code additions that will now appear in every page on your WSS v3 site because all pages in the WSS v3 site are based on this *default.master* page, even though it may not appear so. To check that the code does appear simply browse to any page on your WSS v3 site, **right mouse click** on the page and select **View Source** from the menu that appears.

## Chapter 9 – Advanced configuration



If you scroll through the HTML you should be able to locate the tracking HTML code that you entered into the *default.master* page.

You need to be aware that once you save the *default.master* it automatically updates your WSS v3 site. If you ever have any issues after saving the *default.master* you can always revert back to the original copy.



## Chapter 9 – Advanced configuration

To do this simply **right mouse click** on the *default.master* file in the *Folders List* window in the top right of the screen and select the option **Reset to Site Definition** from the menu that appears.

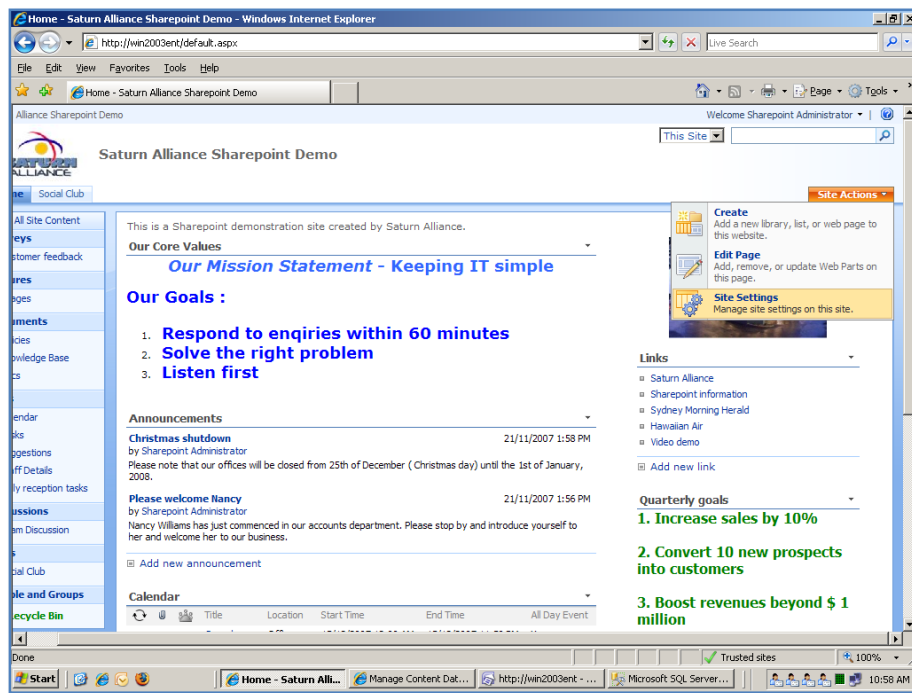
Making a change to the *default.master* page in WSS v3 will apply that change to all pages in your site because they all constructed using this page as their base.

### 9.9 Site Columns

There are many instances where you utilize the same information in a WSS v3 site. One way to reduce the amount of effort this replication requires and enhance the reliability of data is to create site columns.

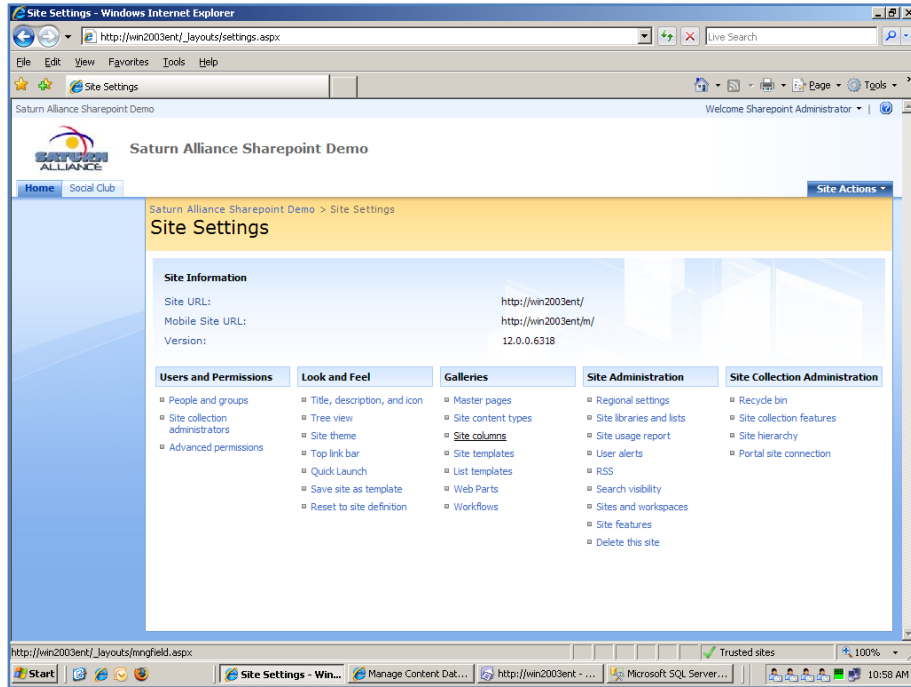
Site columns are exactly the same as normal columns in any WSS v3 list but they are available to any list within the site. This means you can create a common list or gallery of column definitions once and then reuse it anywhere within your site.

As an example we will consider creating a site column for the list of Australian states.

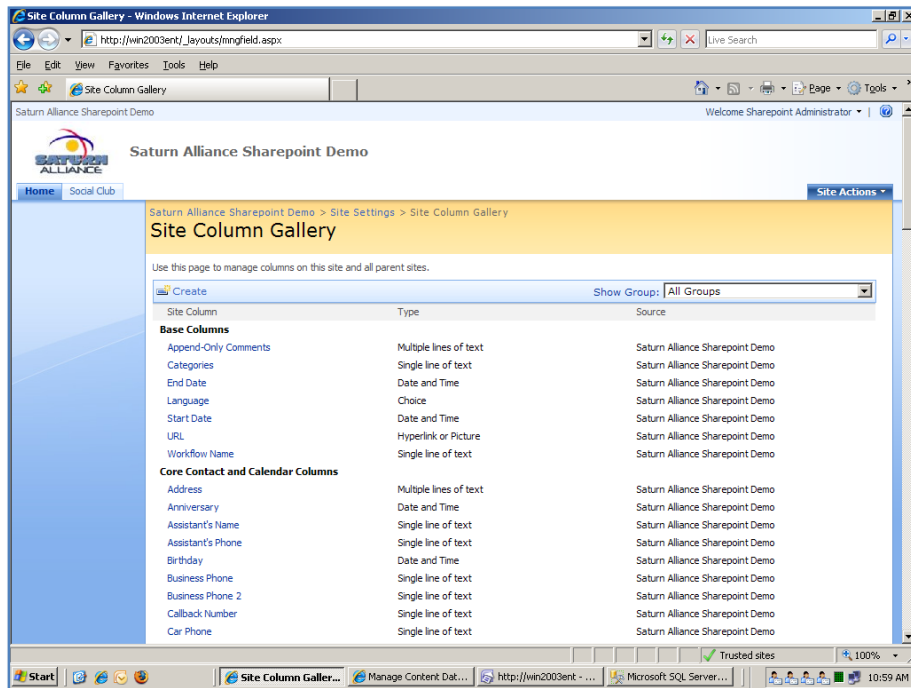


The first step in the process is to create a site column. From the Home page of your WSS v3 site select **Site Actions | Site Settings** in to the top right hand side of the screen.

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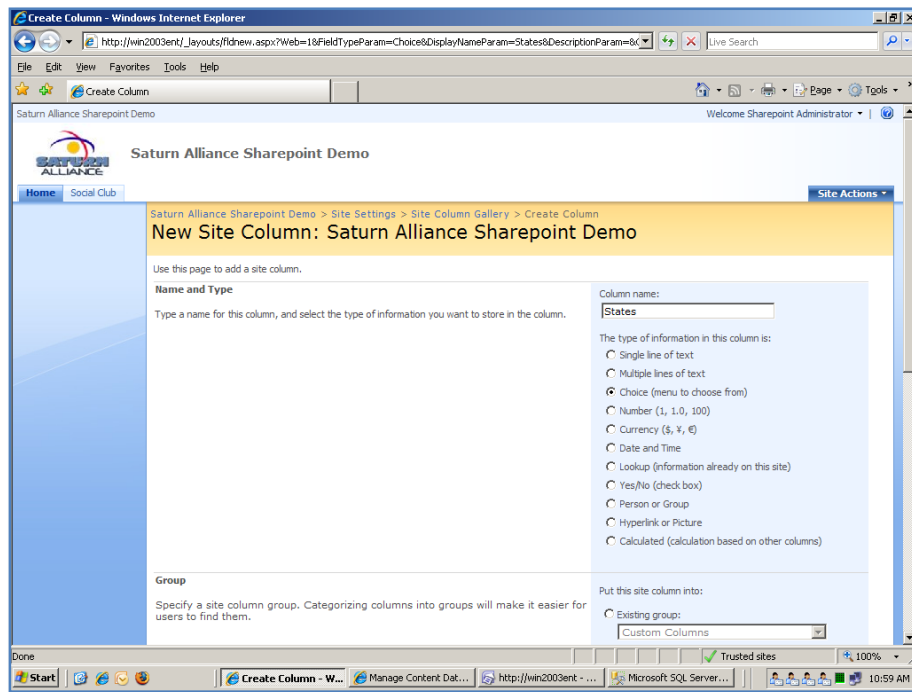
In the *Site Settings* area select **Site Columns** from under the *Galleries* section.



You will now see a list of the existing site columns. Many of these are default with WSS v3.

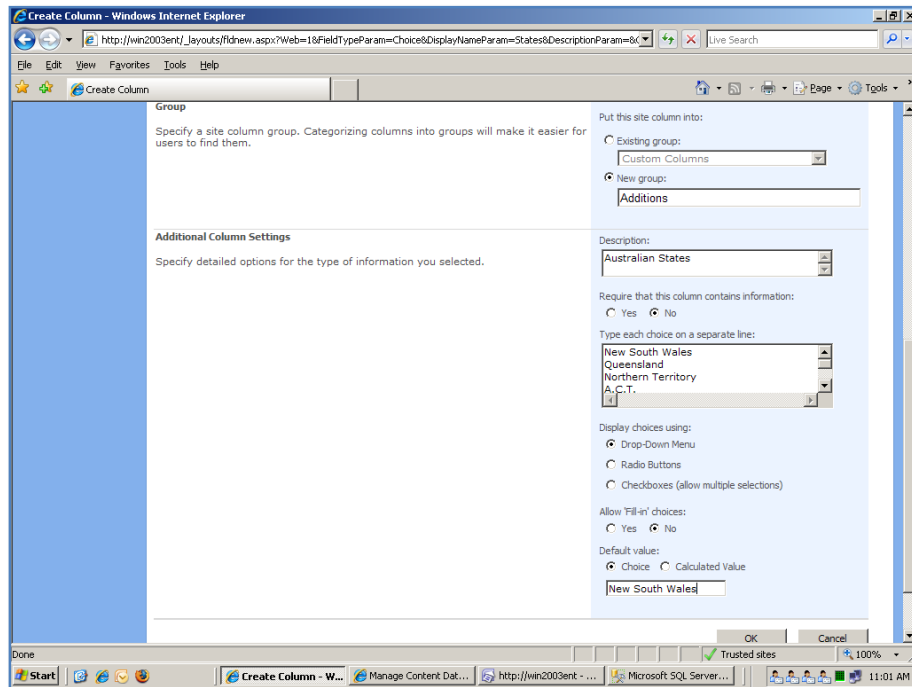
To create a new site column select the **Create** button from the menu bar at the top.

## Chapter 9 – Advanced configuration



You are now able to enter the details for the new site column. Give the column a unique name (in this case *States*) and select what type of field it will be (in this case *Choice*).

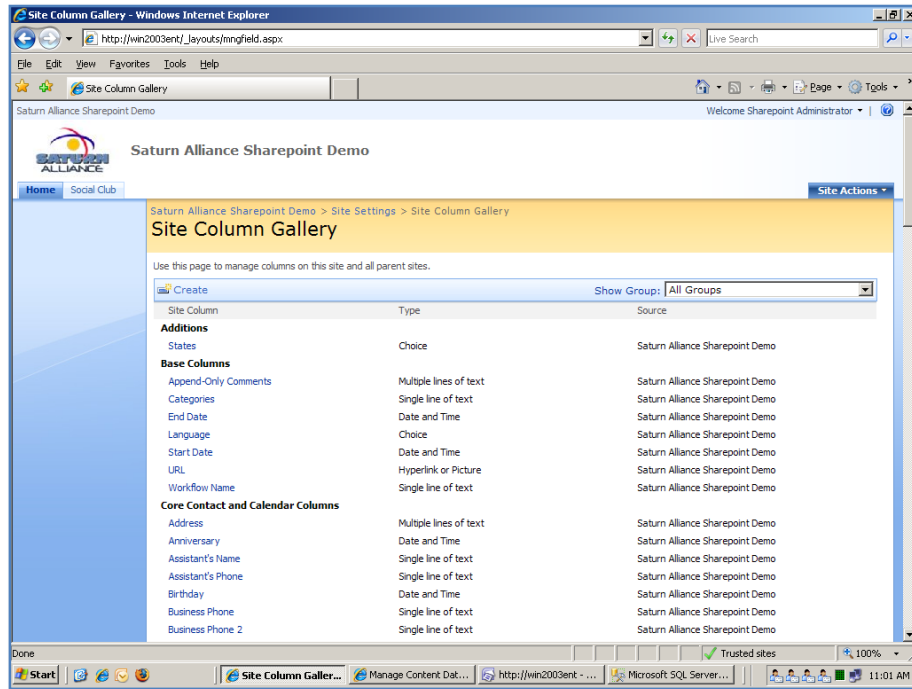
Scroll down the screen for more choices.



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It is recommended that you create any additional custom site columns under a new group heading as this makes them easier to locate and apply and will be shown later. In this case a new group called *Additions* has been created.

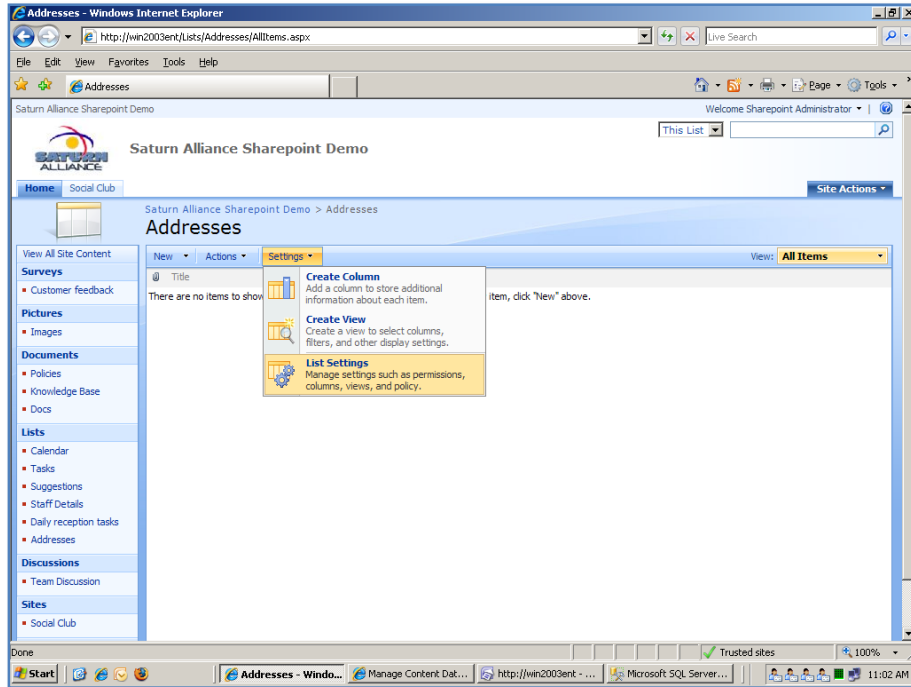
Continue filling in the required details for your column and when complete press the **OK** button.



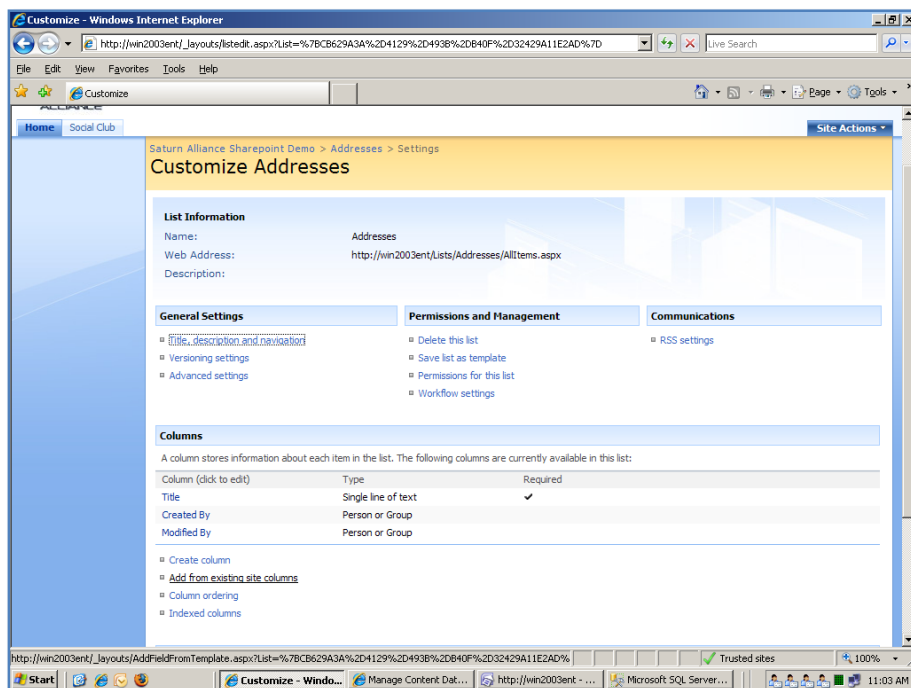
You are now returned to the *Site Column Gallery* page. You should now be able to see your new column in the group you created it under. In this case it appears under the heading *Additions* at the top of the list.

You may need to scroll through the whole gallery to locate you new column. This is one reason why it is recommended that you create a new group for all new site columns and you place it in a group that will alphabetically appear at the top of the list.

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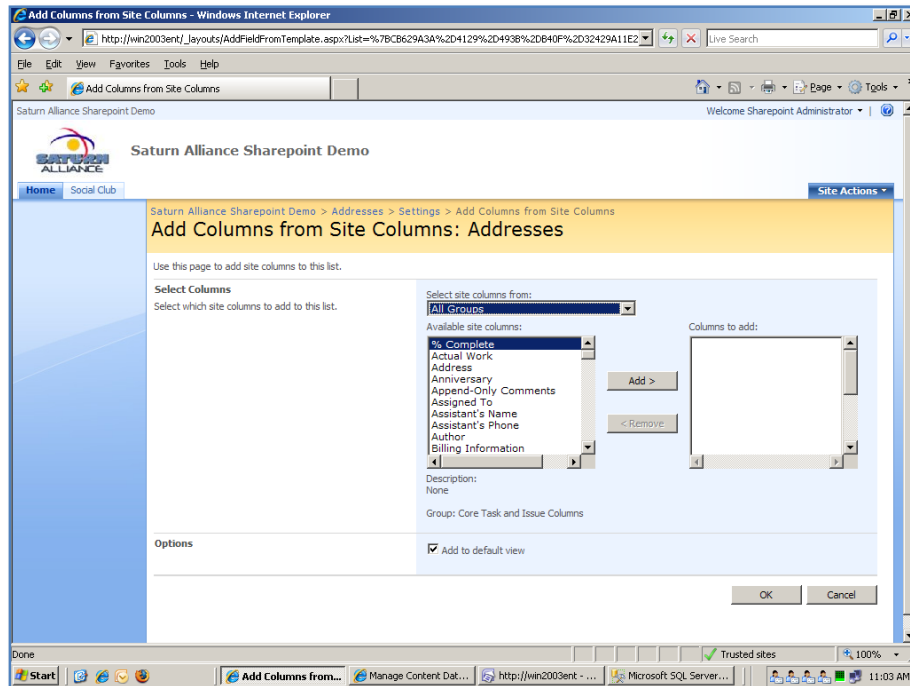


To use the new site column you have just created, locate any list in WSS v3 and select **Settings | List Settings** from the menu bar.

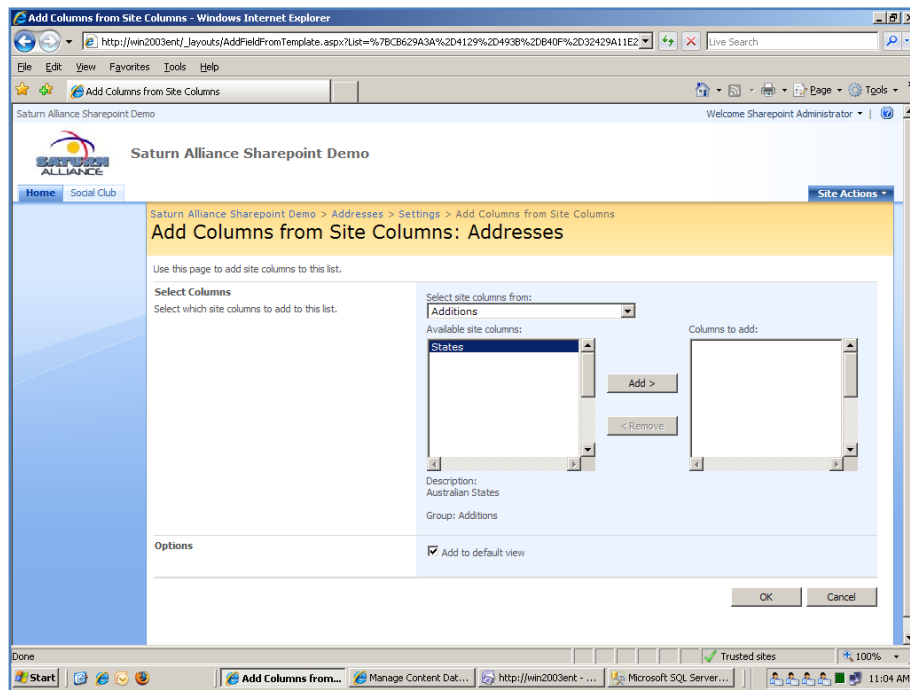


In the middle of the customize page you will find a *Columns* section. At the bottom of this section you will find a link **Add from existing site columns**. Select this.

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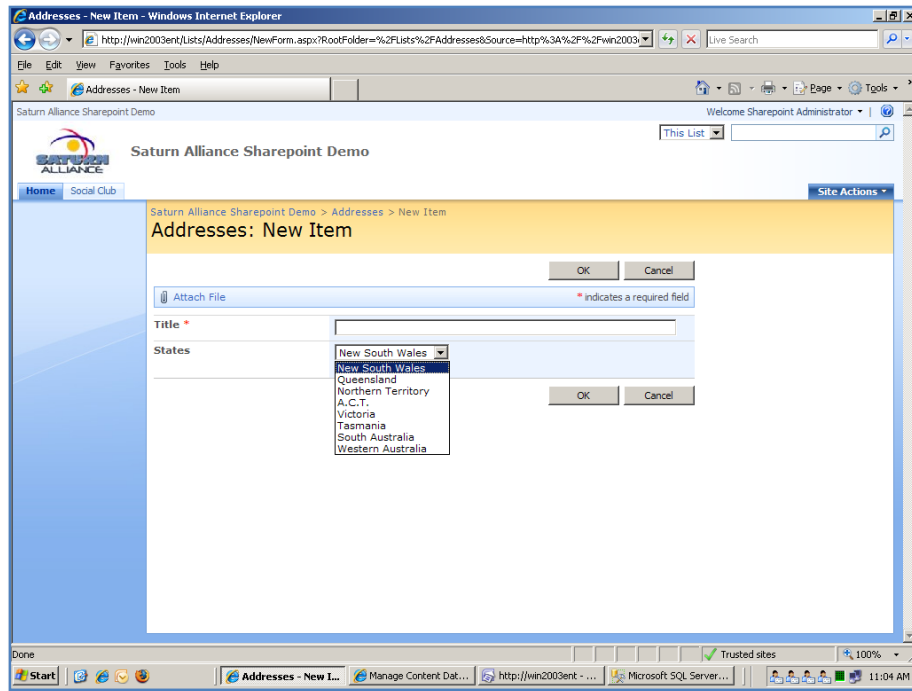
You will now see a complete list of all the site columns that are available. To add a column simply select it on the right under *Available site columns* and press the **Add** button.



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You can filter the columns that are displayed by using the *Select site columns from* option to only display columns from a certain group. By creating a new group you can quickly locate any new site column you have created.

When you have selected the site columns you require press the **OK** button to continue.



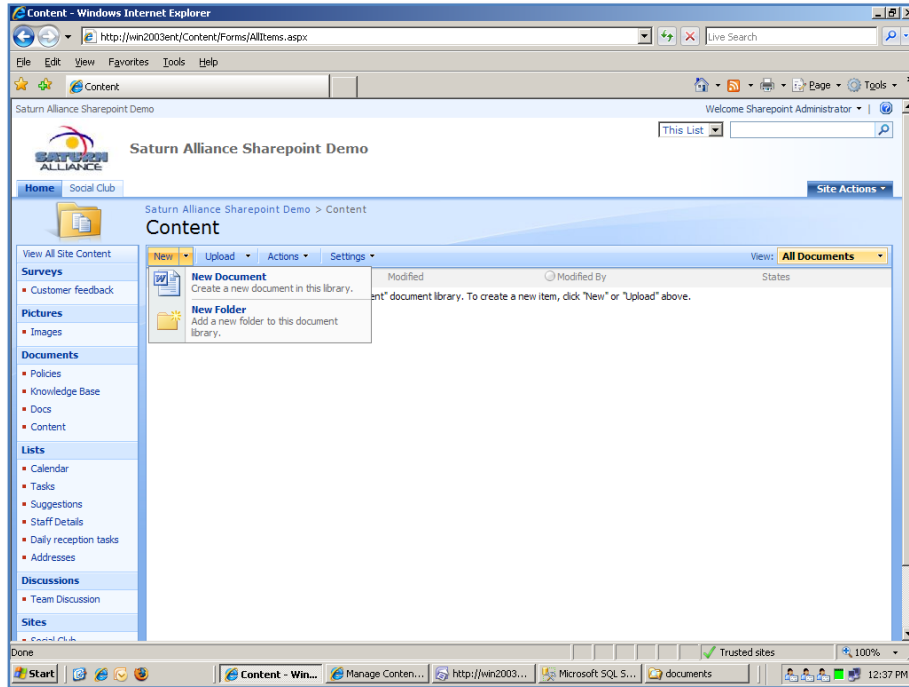
If you now return to your list and create or edit an entry you should see the site columns appear (in this case *States*). You can then use that column as you would any other column.

Site columns allow you to create standard columns that can be reused anywhere in your site. This means that there is only a single point to maintain any changes. Note that if you do change a site column it will change for every list that it appears in. Depending on how you change the column will depend on how any existing data is changed. It is not recommended to make major changes to site columns once you have them in production.

### 9.10 Additional library templates

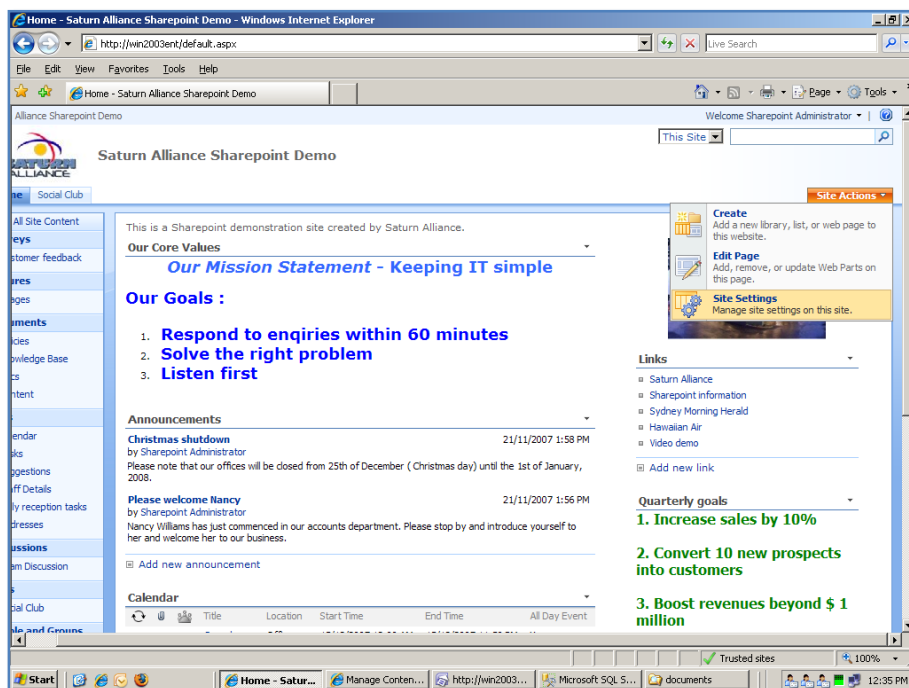
When you create a document library you initially select what sort of document template you wish to use with the library. From that moment you will see that default template option appear when you select **New** from the document library menu as shown here.

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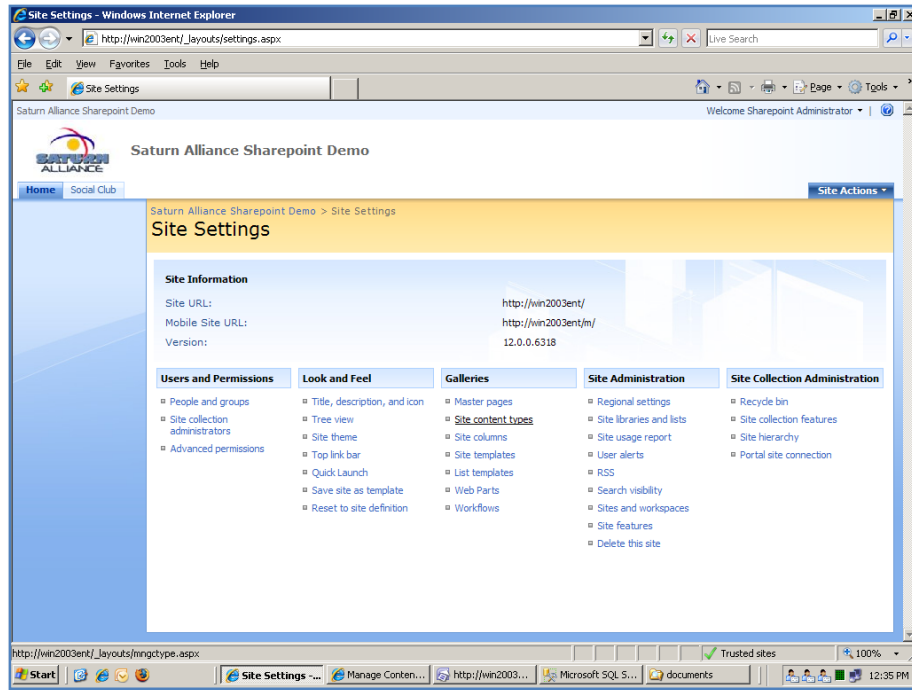
Here you can see the standard default options under *New* in a document library. One to create a *New Document* based on a Word document (selected initially when the document library was created) and secondly a *New Folder*.

WSS v3 allows you to have a number of document templates associated with a document library. This is done via *Content Types*.

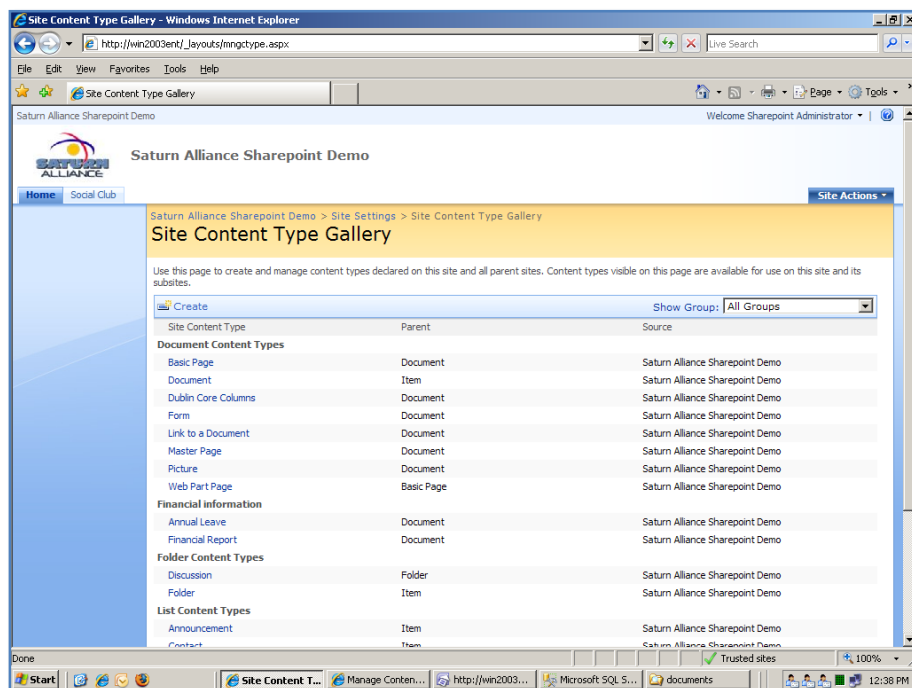


## Chapter 9 – Advanced configuration

The first step in the process is to create a new content type. To do this return to the Home page of your WSS v3 site and select **Site Actions | Site Settings** from the upper right.



From the *Site Settings* page select **Site content** type from under the *Galleries* section.



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You will now see a list of all the content types in your WSS v3 site. Note that they are arranged under headings and are also based on a *Parent* type.

Select **Create** from the menu in the upper left.

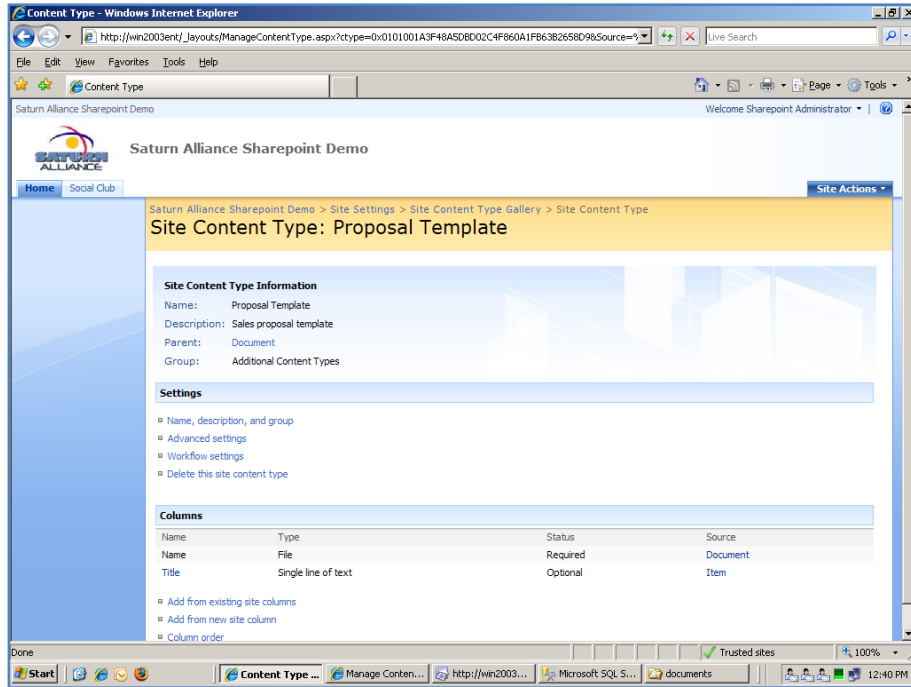
The screenshot shows the 'New Site Content Type' page in a Windows Internet Explorer browser. The page title is 'New Site Content Type' and the URL is 'http://win2003ent/\_layouts/ctypenew.aspx'. The page contains a form for creating a new content type. The form has three main sections: 'Name and Description', 'Parent Content Type', and 'Group'. In the 'Name and Description' section, the 'Name' field is 'Proposal Template' and the 'Description' field is 'Sales proposal template'. In the 'Parent Content Type' section, the 'Select parent content type from:' dropdown is set to 'Document Content Types', and the 'Parent Content Type:' dropdown is set to 'Document'. In the 'Group' section, the 'Put this site content type into:' radio button is selected for 'New group:', and the 'Additional Content Types' field is 'Additional Content Types'. The 'OK' and 'Cancel' buttons are at the bottom right of the form.

Give the new content type a descriptive name. In the *Select parent content type from* select *Document Content Types*. In the *Parent Content Type* select *Document*.

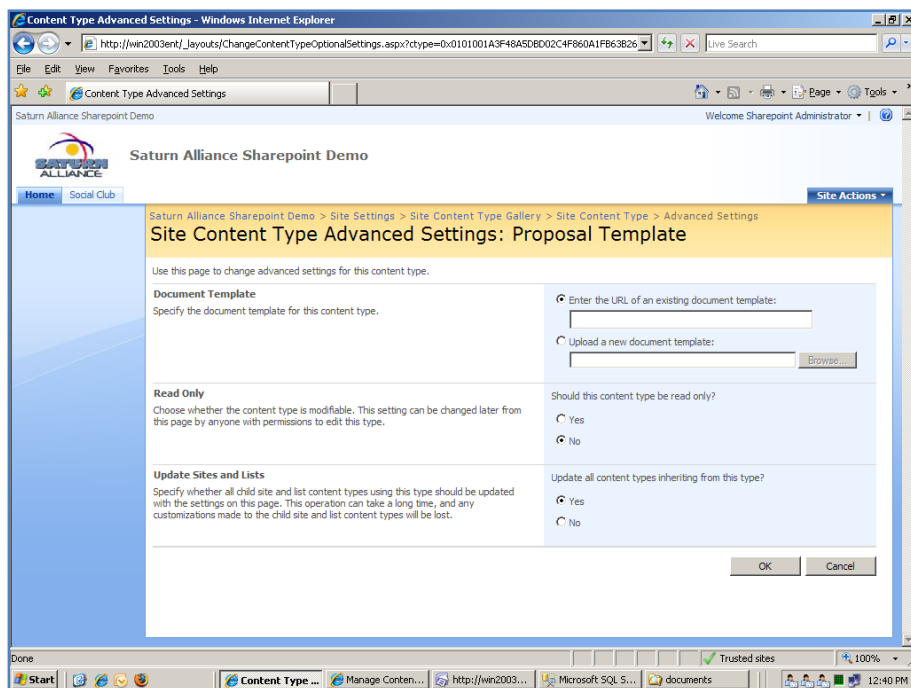
It is also recommended that you create a new group for all new content types to make them easier to locate. In this case a new group will also be created called *Additional Content Types*.

When complete press the **OK** button to continue.

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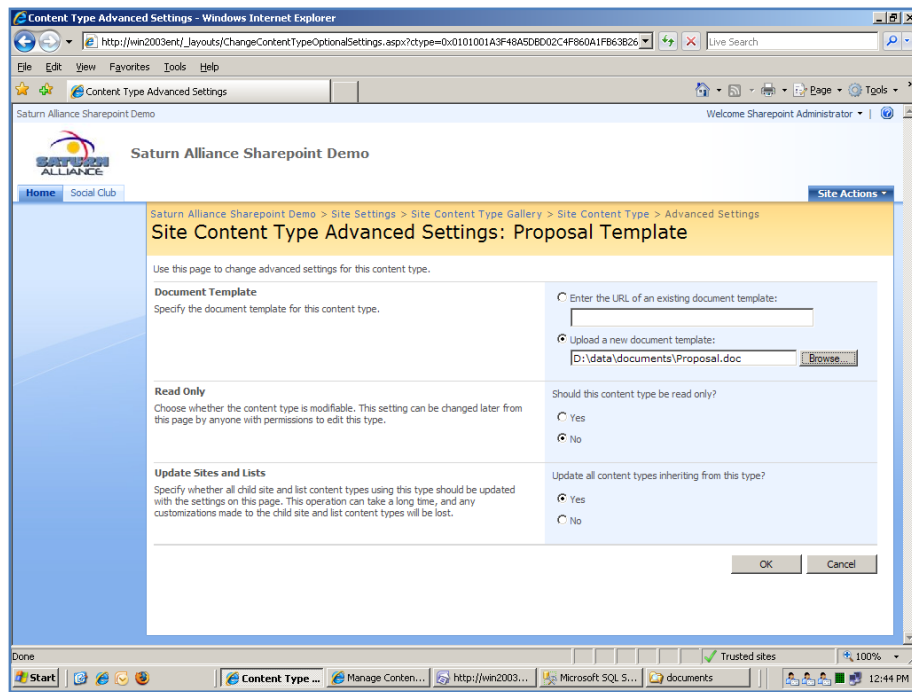
In the *Site Content Type* screen for the new item you just created select **Advanced Settings** under the *Settings* heading.



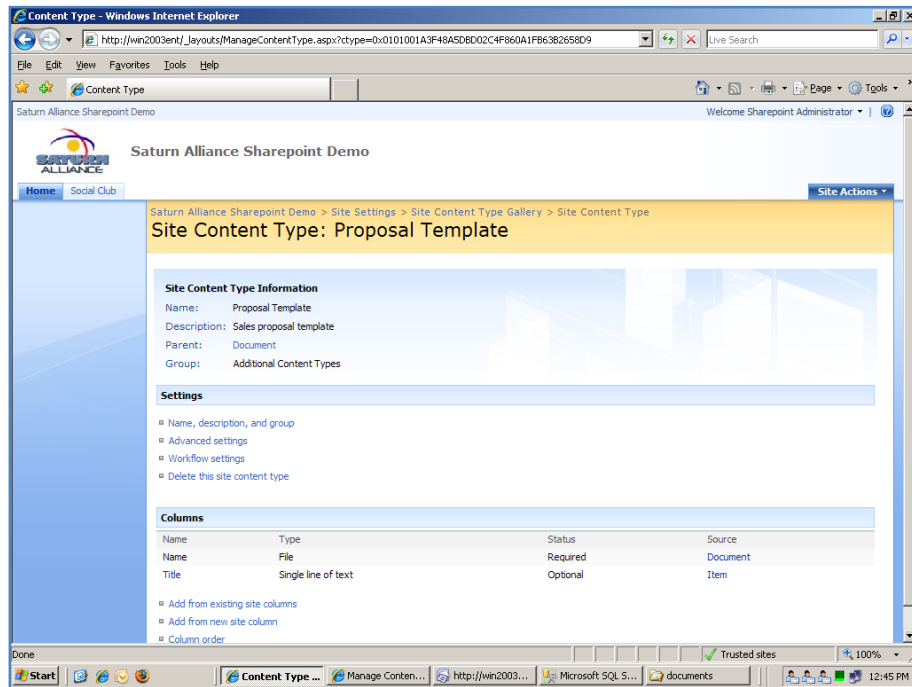
In the *Document Template* area you can either enter the *URL of an existing document* or *Upload a new document template*.

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Note, that if you link to a document template your WSS v3 users will also need access to this if you want them to be able to use it.

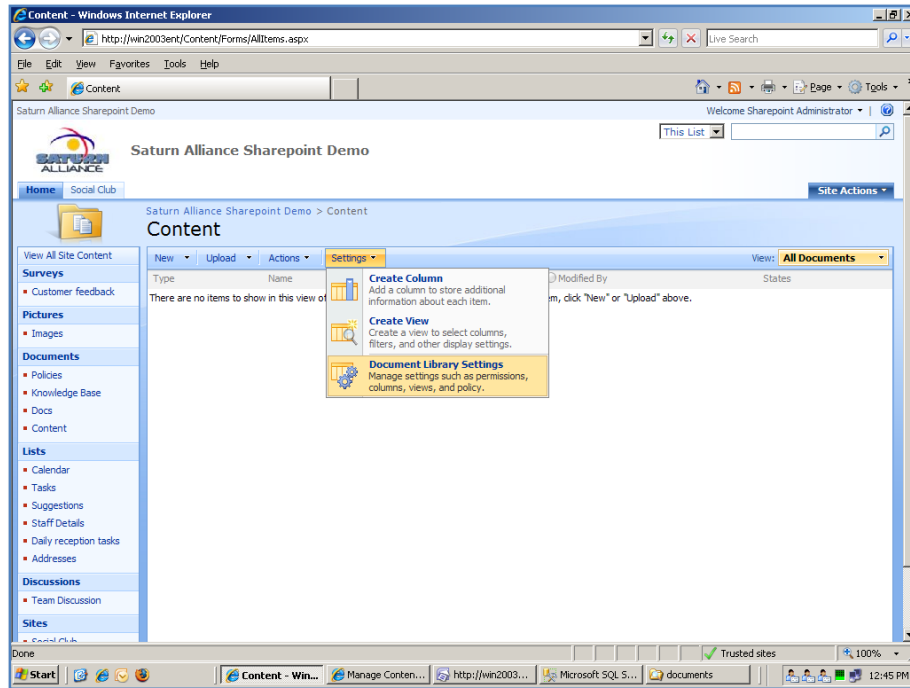


In this case the choice will be made to upload an existing document template. Enter the desired path and press the **OK** button to continue.

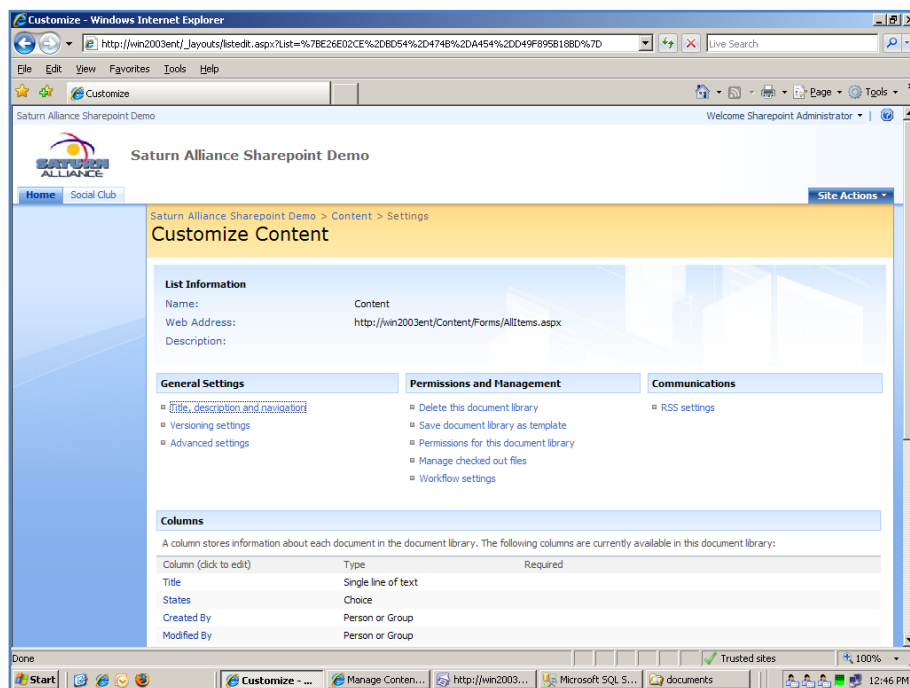


## Chapter 9 – Advanced configuration

You will be returned to your *Site Content Type* page. You are able to make additional changes, including adding columns, for this content type but in this case this new content type will be applied to a document library as is.

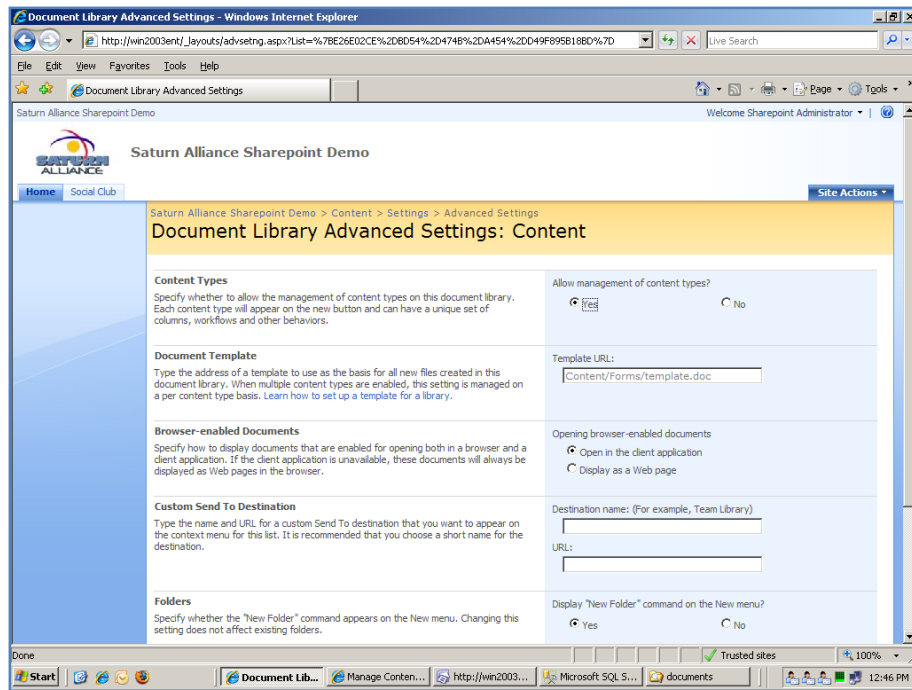


Navigate to the document library where you wish the new content type to be applied. **Select Settings | Document Library Settings** from the menu.



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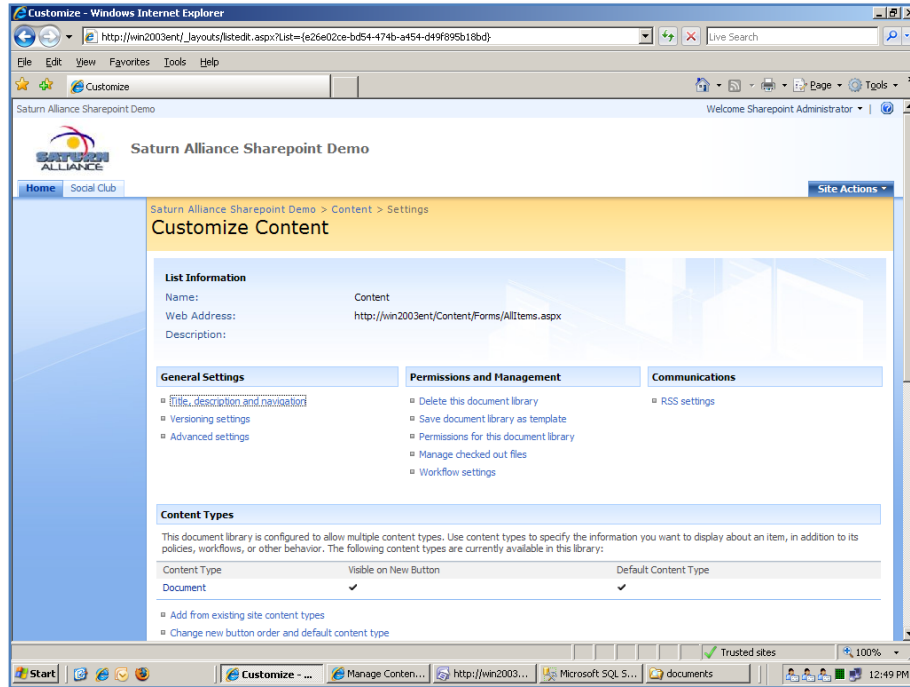
From the document library settings page select **Advanced settings** which is under the *General Settings* area.



Under the *Content Types* area at the top of the page select the **Yes** option to *Allow management of content types*.

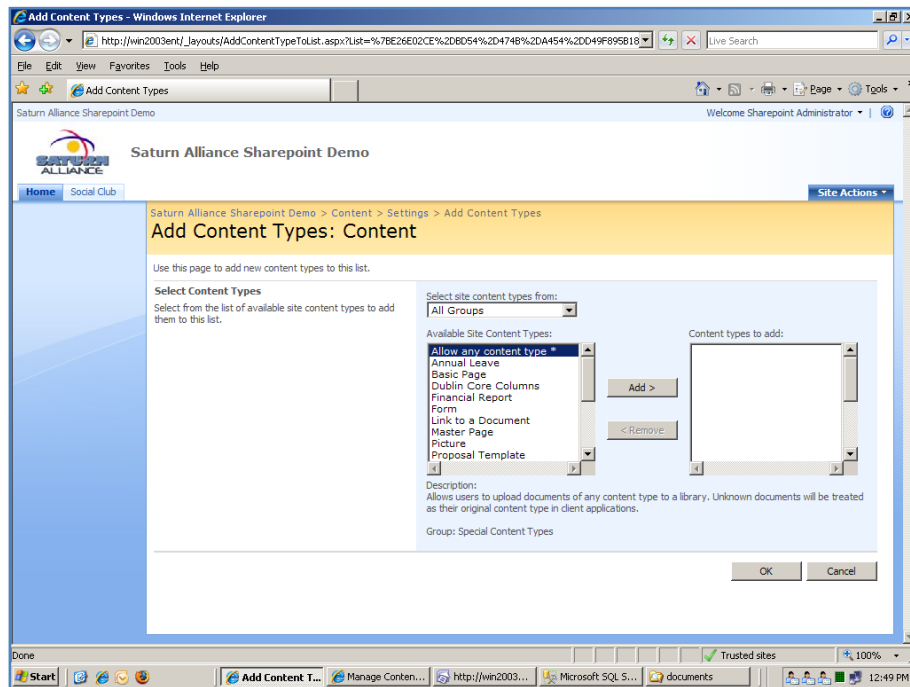
Scroll down to the bottom of the page and press **OK** to continue.

## Chapter 9 – Advanced configuration



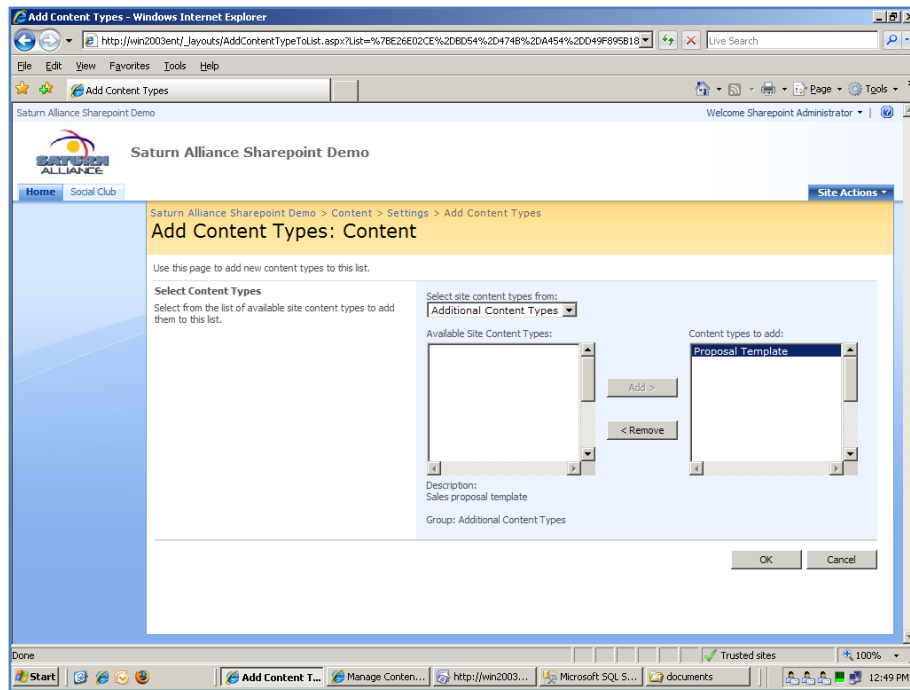
You will now be returned to the **Settings** page of your document library. You should now see a section called *Content Types* appear in the middle of the page.

Select **Add from existing site content types** to continue.



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You will now be presented with a complete list of all content sites available on the site. You can add any to the library simply by selecting it on the left hand side and pressing the **Add** button.

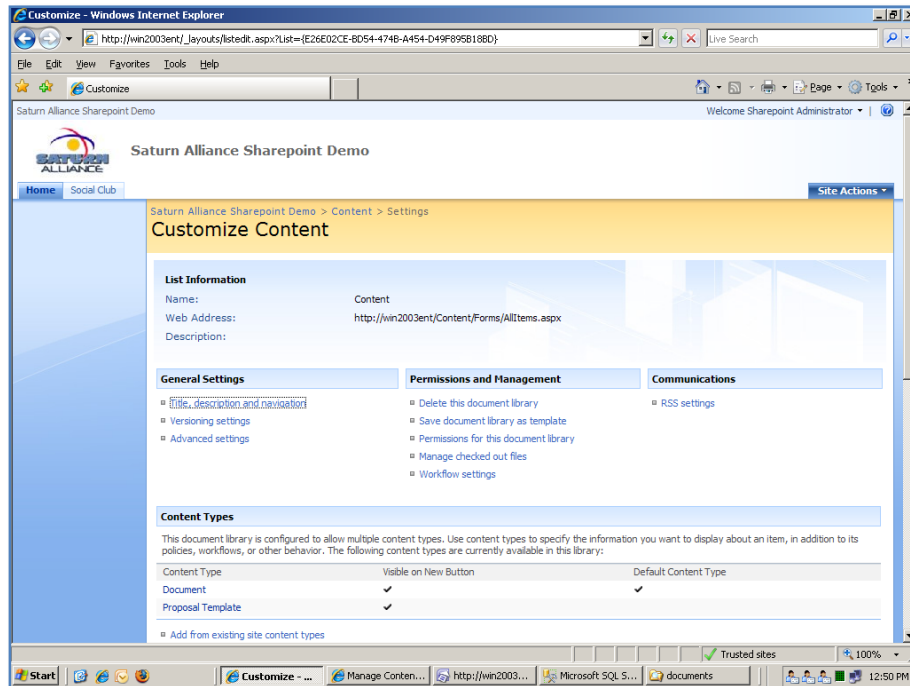


As mentioned before, to make location of new content types easier it is recommended that you create a new group. We can then select this group in the *Select site content types from* option and only see the content types we have created.

In this case we have added the content type *Proposal template*.

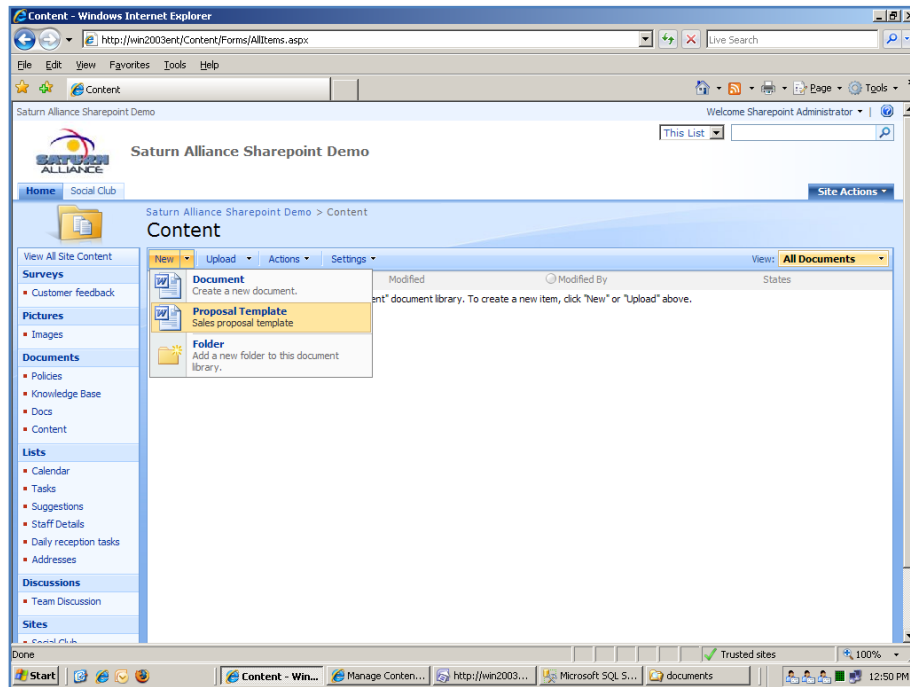
When selection is complete press the **OK** button to continue.

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You should now see two listing under *Contents Types*, the default (in this case *Document*) and the one just added (in this case *Proposal Template*).

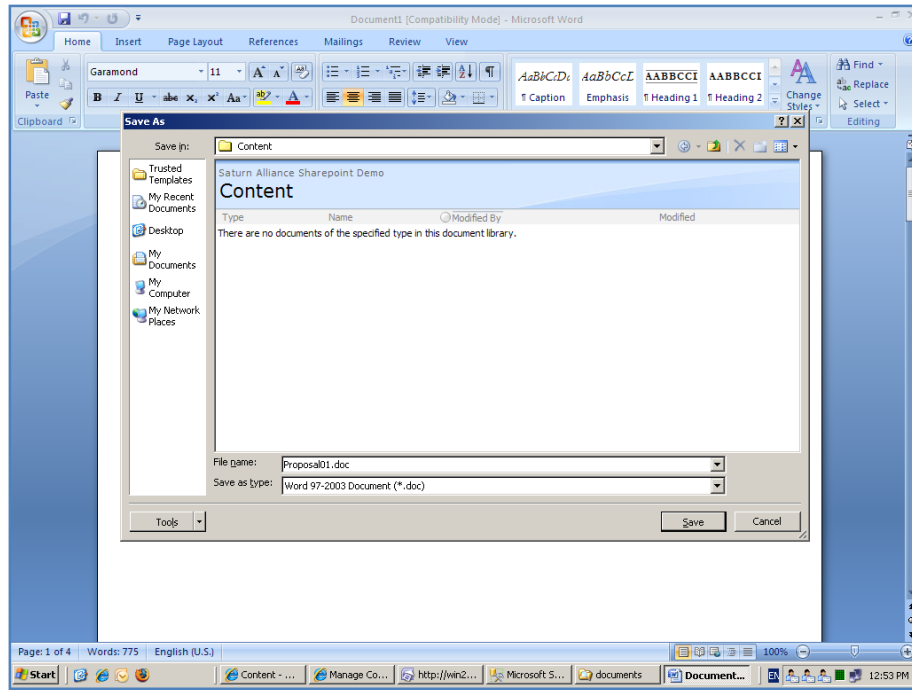
In this case a content type simply acts as a mask, adding its functionality to the document library.



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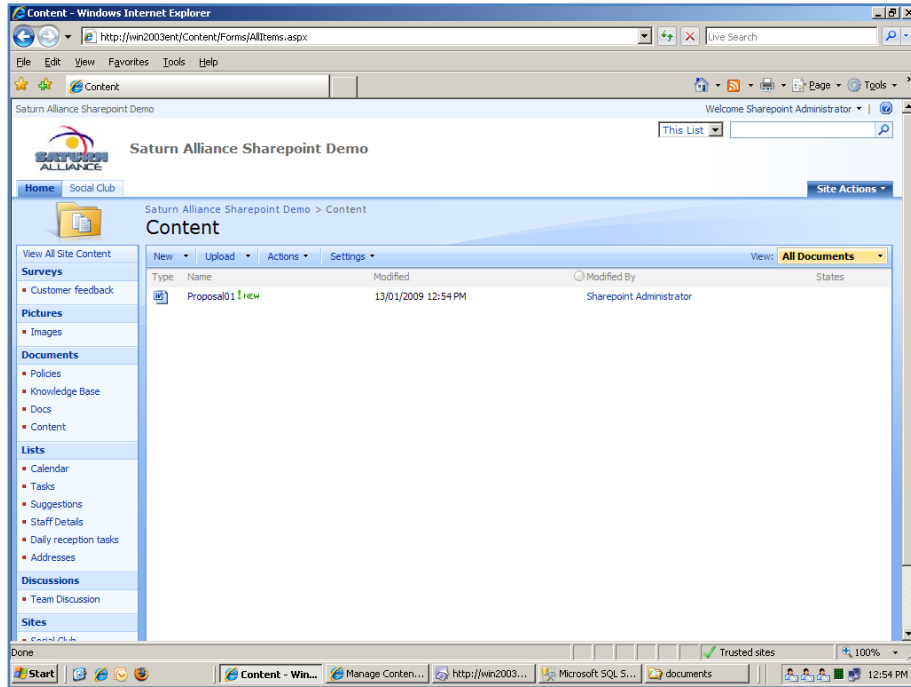
If you now return to the document library and select **New** you should see that the document that forms part of the content type you added to document library appear.

If you now select that template, Word will open.

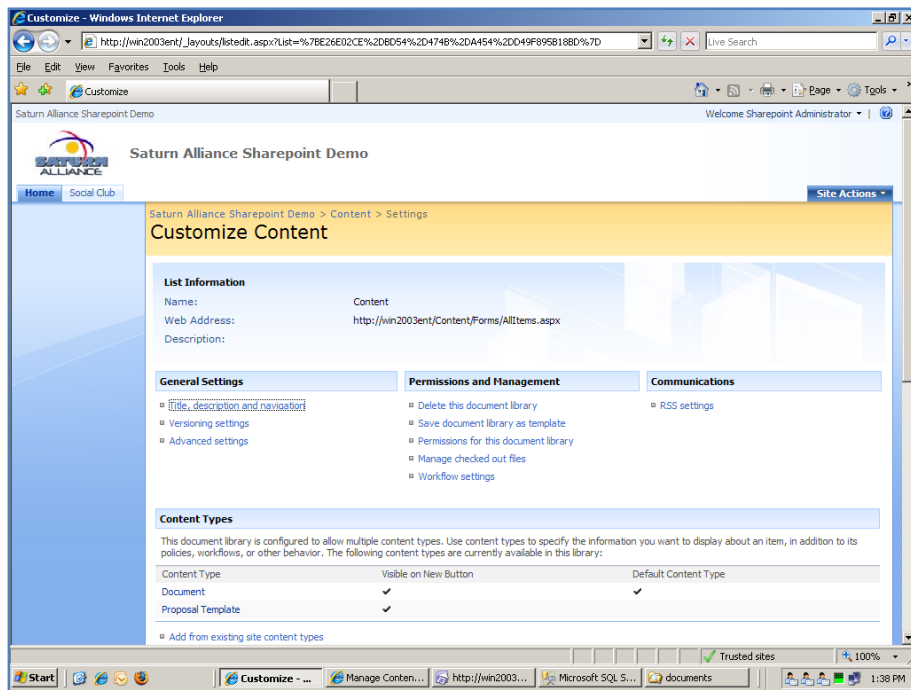


You can create a new document based on this template and save it back to your document library.

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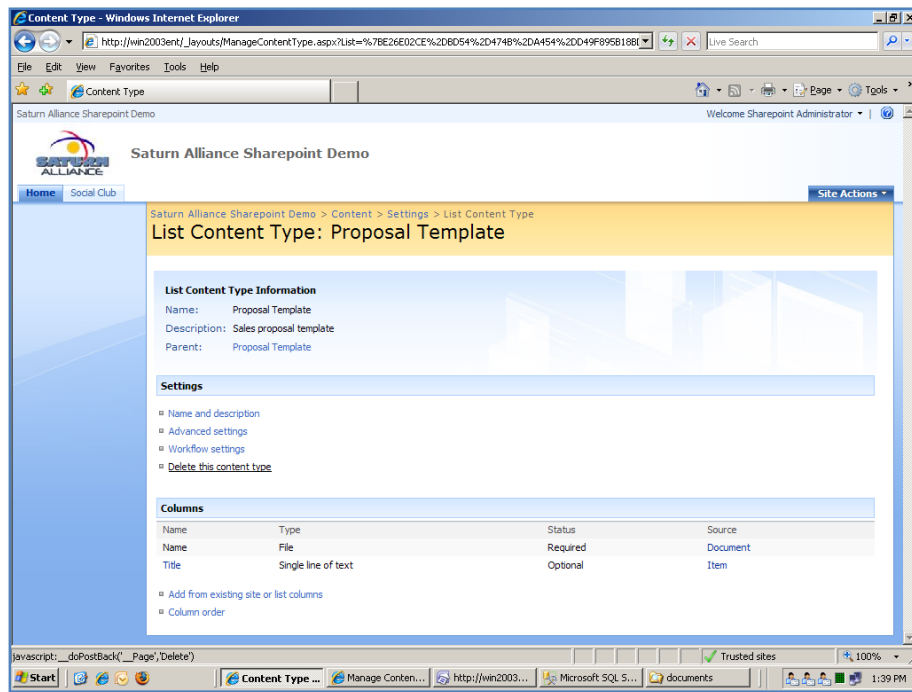


It is possible to remove a content type from a library but it is not normally recommended because there are a number of dependencies. However the process would be as follows.

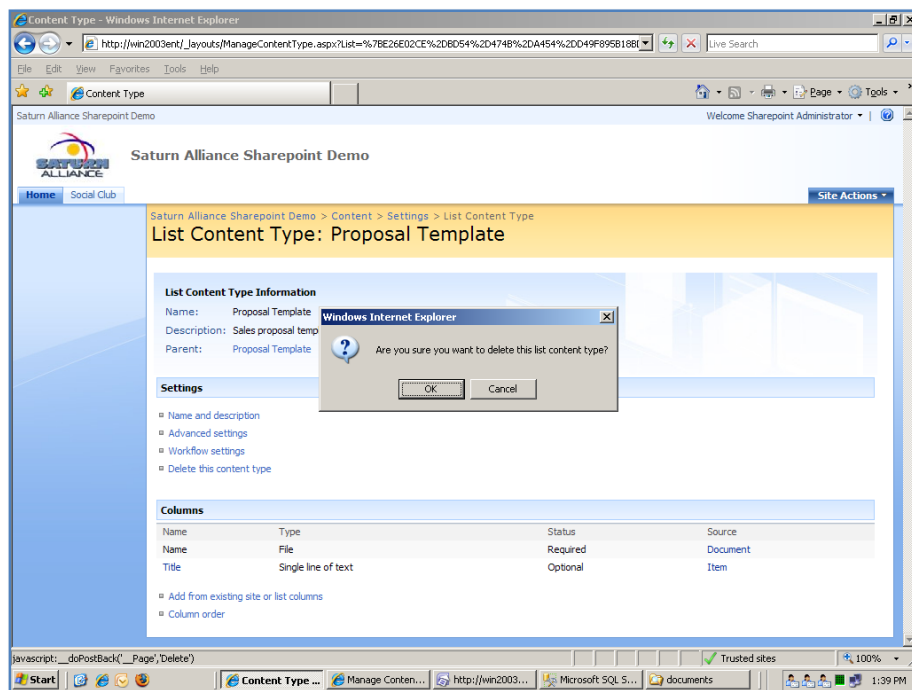


Return to the *Settings* of the document library and select the *Content Type* name by clicking on it.

## Chapter 9 – Advanced configuration

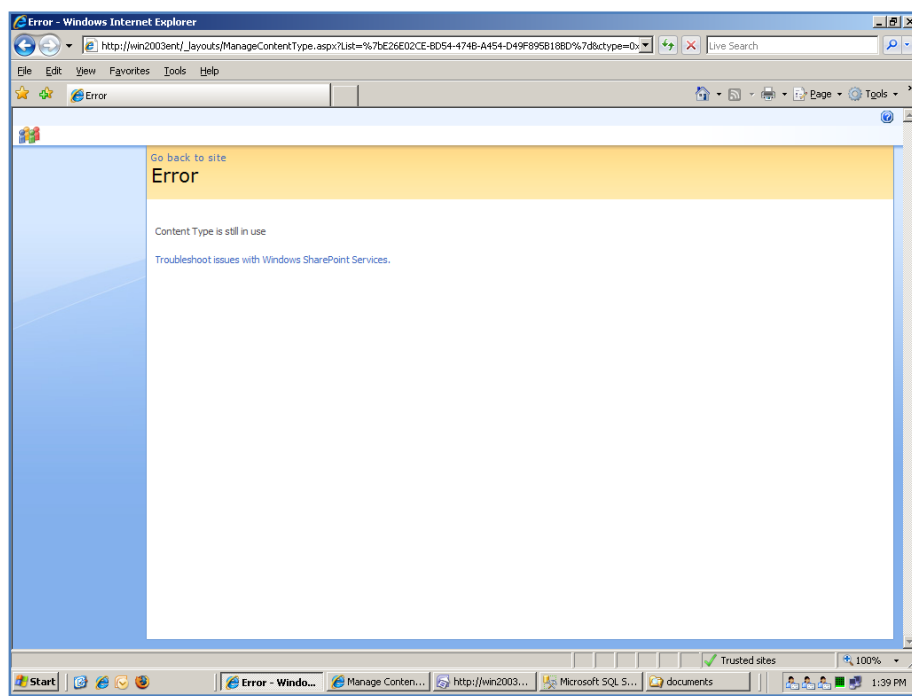


Select the option **Delete this content type**.



You will be prompted to confirm your selection.

Press the **OK** button to continue.



If there still are dependencies in the document library to the content type you will receive an error like shown above.

You will need to remove these dependencies before the content type can be deleted from the library. This may mean removing all document created using the document template that was provided by the content type.

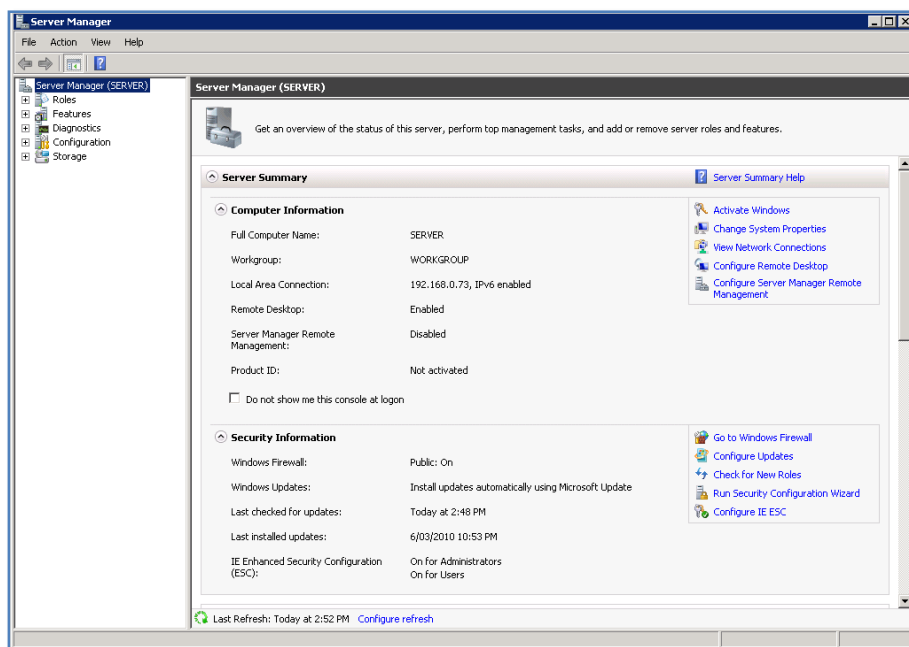
So in general it is not a good idea to remove a content type after it has been used by a library.

### 9.11 TIFF iFilter in Windows Server 2008 R2

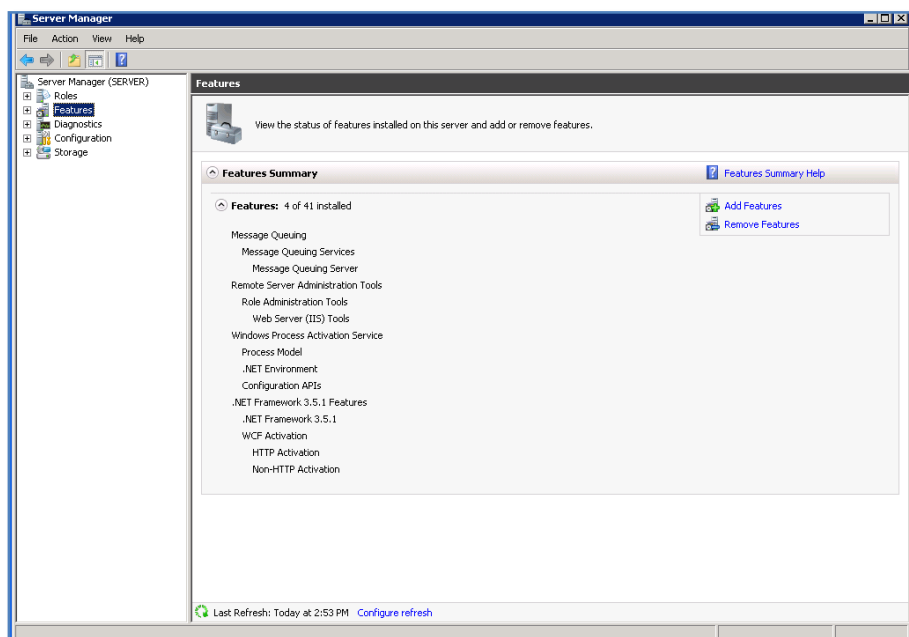
An iFilter allows WSS v3 to make the information contained in that file type available for indexing. Windows Server 2008 R2 includes an iFilter for TIFF documents which needs to be enabled on the server if it is to be utilized by any TIFF documents stored in WSS v3. At this point in time no other version of Windows Server supports the TIFF iFilter.

To enable that option follow these steps.

## Chapter 9 – Advanced configuration



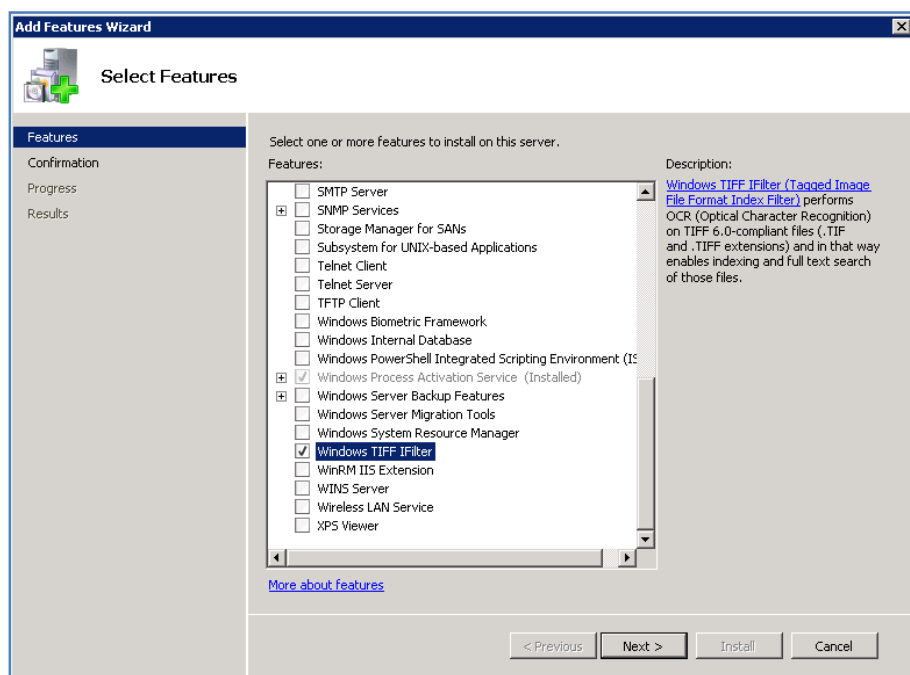
Login to the WSS v3 server as an administrator and run the *Server Manager* from the *Start Menu*. When run it should appear like shown above.



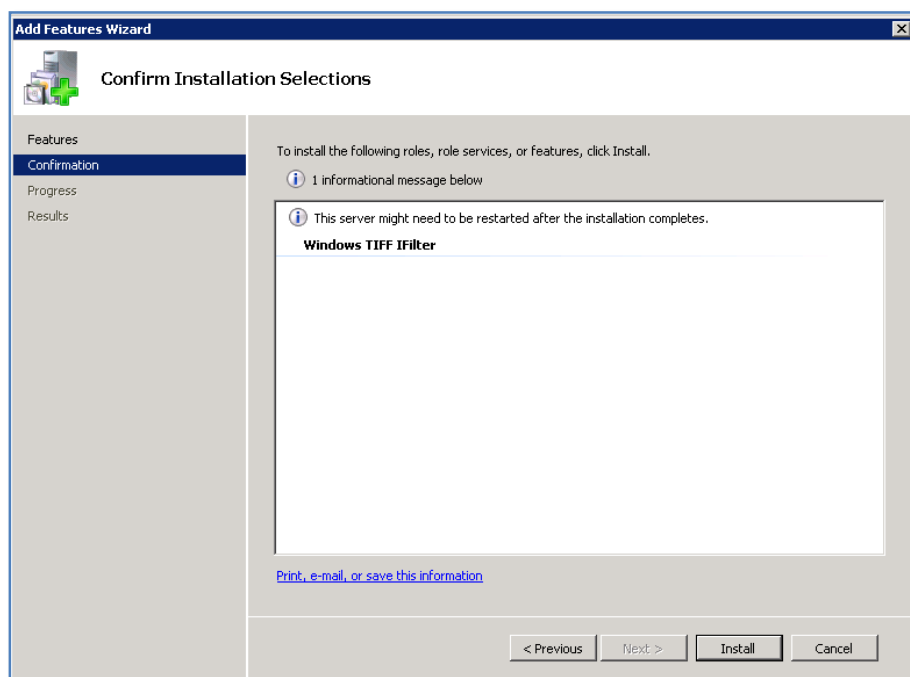
On the left hand side window select **Features**. When selected you should now see all the features that have been installed on this Windows Server 2008 R2 machine.

To add the TIFF iFilter click on the **Add Feature** hyperlink on the right hand side of this window.

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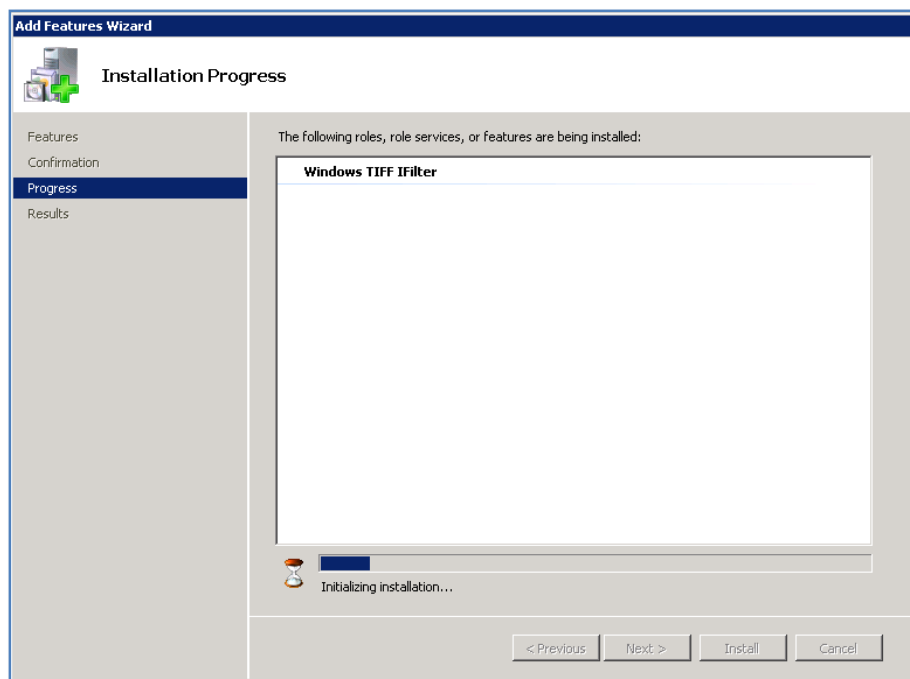
If you scroll the list of features you will find the one *Windows TIFF IFilter* towards the bottom as shown above. To enable this, simply place a check mark in the box and press the **Next** button to continue.



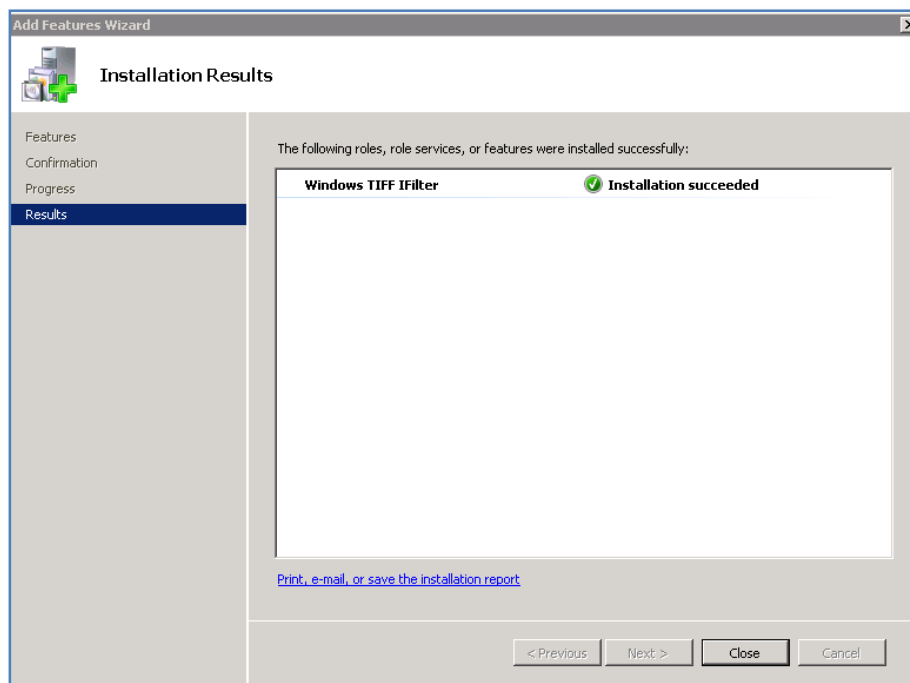
You should now see a summary of the new features you are about to install on this server displayed.

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Press the **Install** button to continue.



The installation process will commence and you will see a progress bar move across the bottom of the screen.



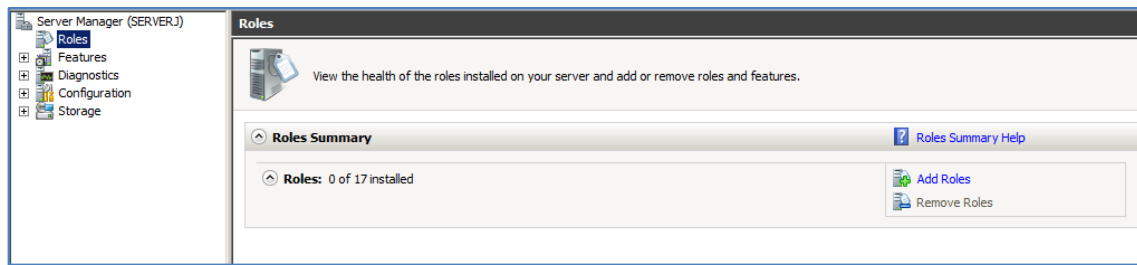
Once the process has completed you will see a summary like shown above.

Press the **Close** button to continue. Now any new TIFF documents you add to the WSS v3 site will be indexed. Any existing TIFF documents already in your WSS v3 site will be indexed when the next full index crawl is performed. To manually force a complete full index crawl see section – **11.7 Manual Full Crawl**.

### 9.12 Configuring Windows Server 2008 R2 for WSS v3

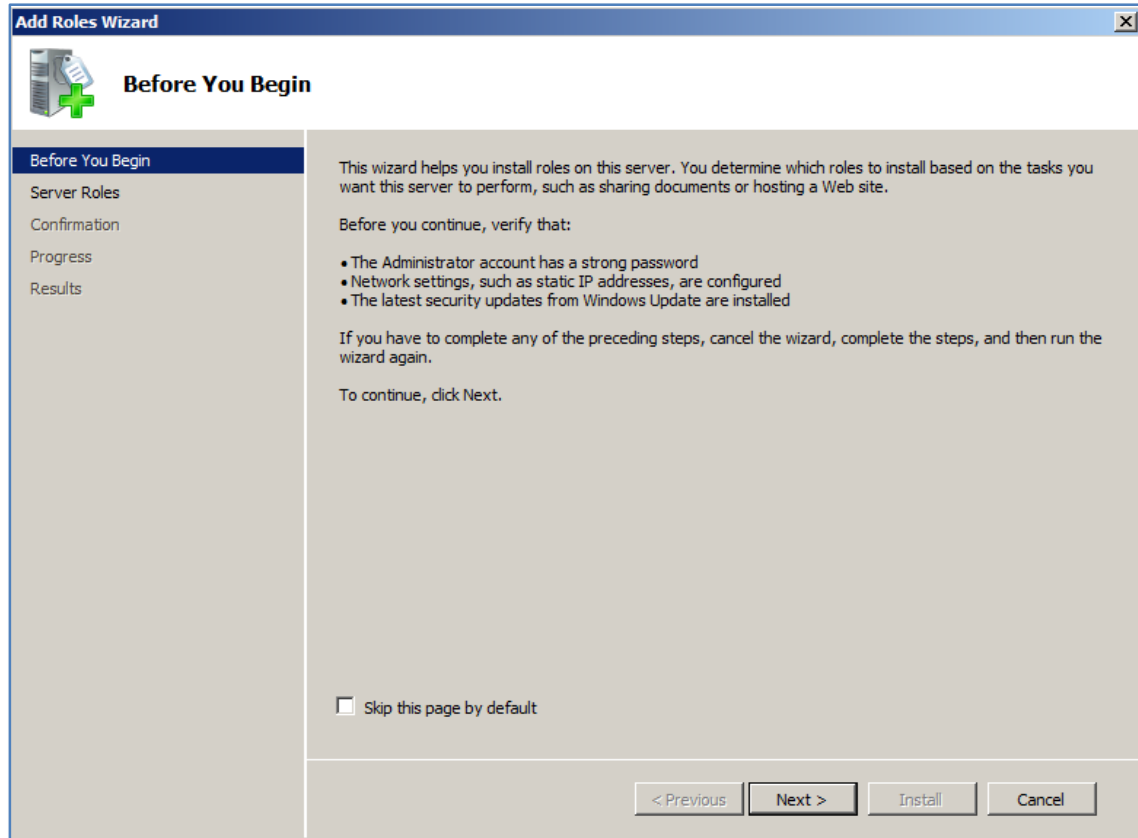
SharePoint 2010 comes with a pre-requisite installer that not only downloads and installs the required software but also correctly configures the Windows Server 2008 onto which SharePoint 2010 will be installed. Unfortunately, Windows SharePoint Services v3 (WSS v3) doesn't come with such a tool. Therefore the server will need to be set up manually. The following procedure will show you how to achieve this.

Login to the Windows Server 2008 R2 as an administrator and run the *Server Manager* utility.



Select the **Roles** node as shown above. You may already see some configured roles for the server but will assume here that it is a new server and none have been configured as yet. To add a new role for the server click the **Add Roles** hyperlink on the right hand side of the screen.

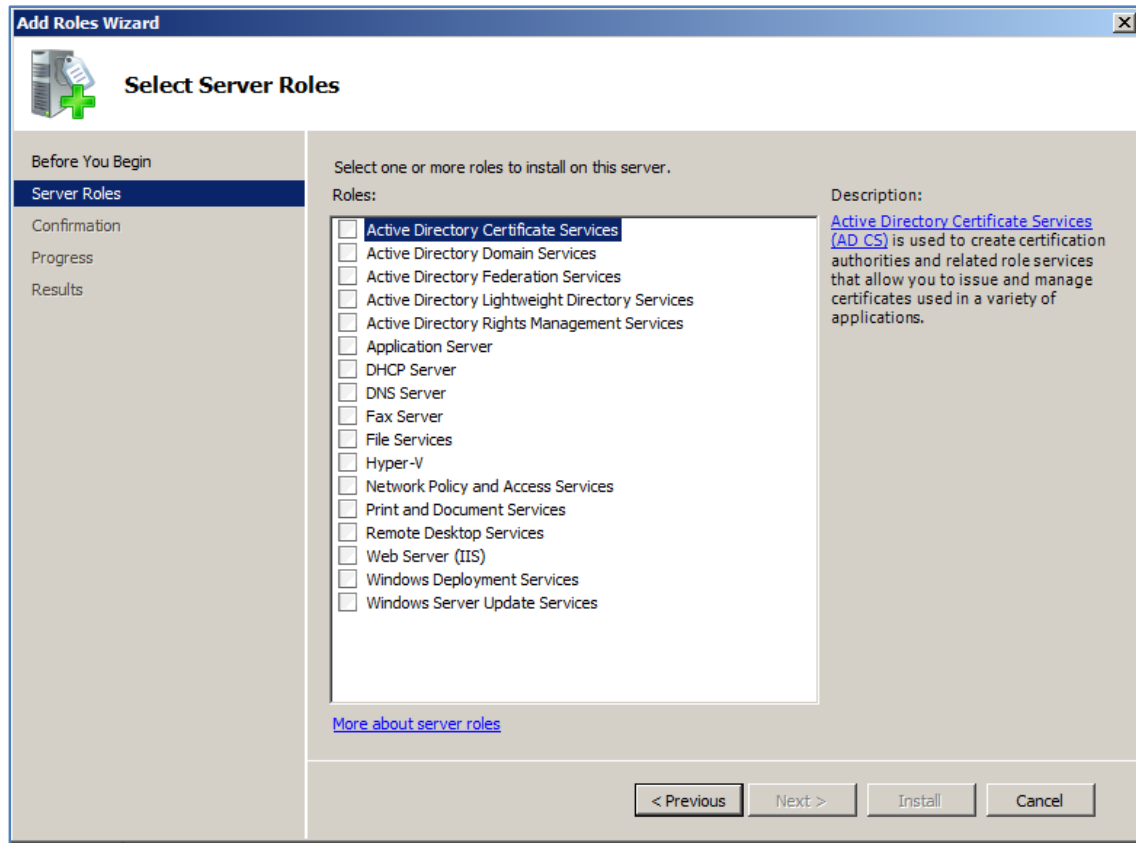
## Chapter 9 – Advanced configuration



This will launch the *Add Roles Wizard* as shown above. You can select the **check box** at the bottom of the page to prevent this initial page from being displayed in future.

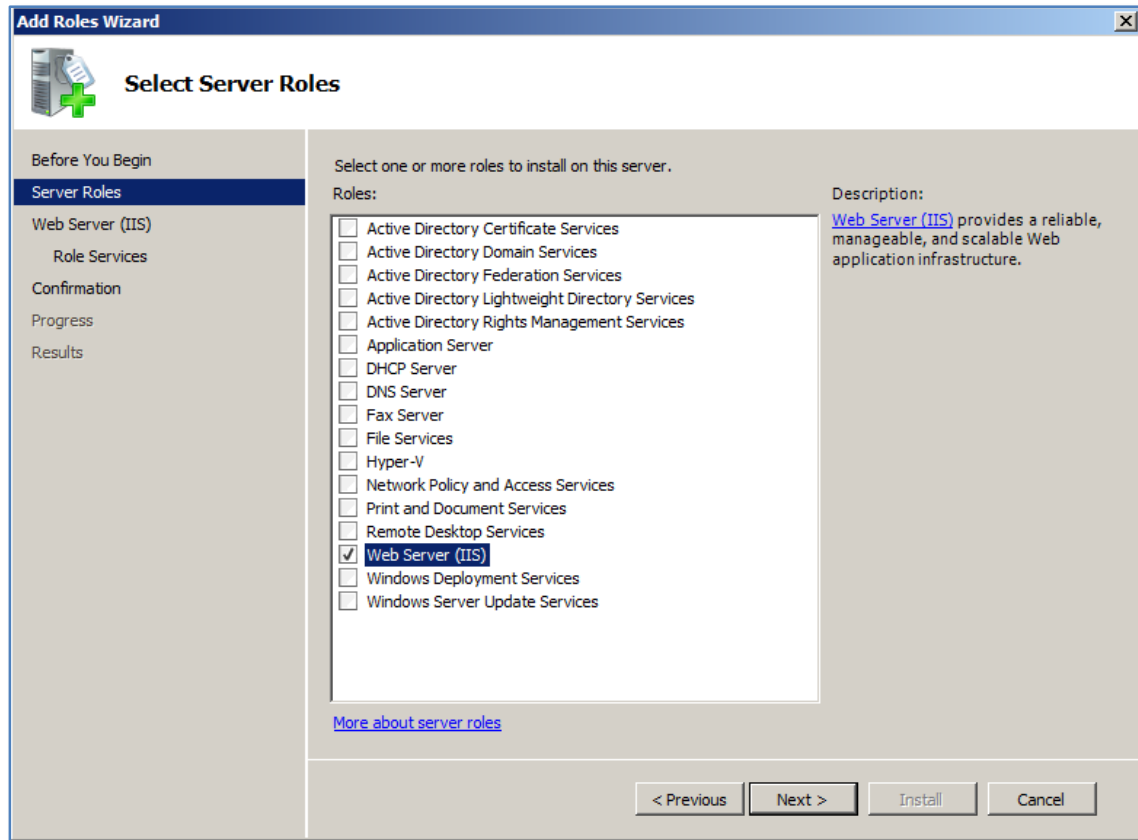
Press **Next** to continue.

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You should now see a list of roles displayed as shown above. Some of these may already be checked depending on how your server is configured.

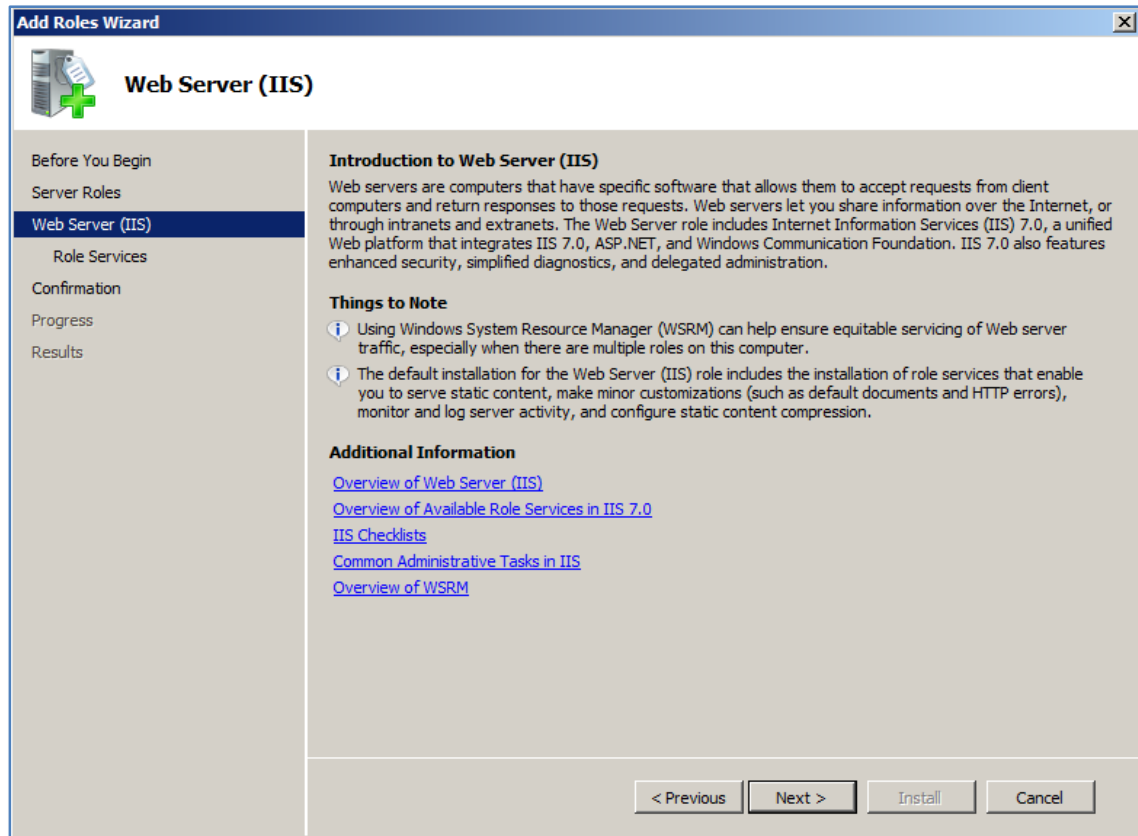
## Chapter 9 – Advanced configuration



From the list of Roles to the right select **Web Server (IIS)** by placing a check in the box.

Press **Next** to continue.

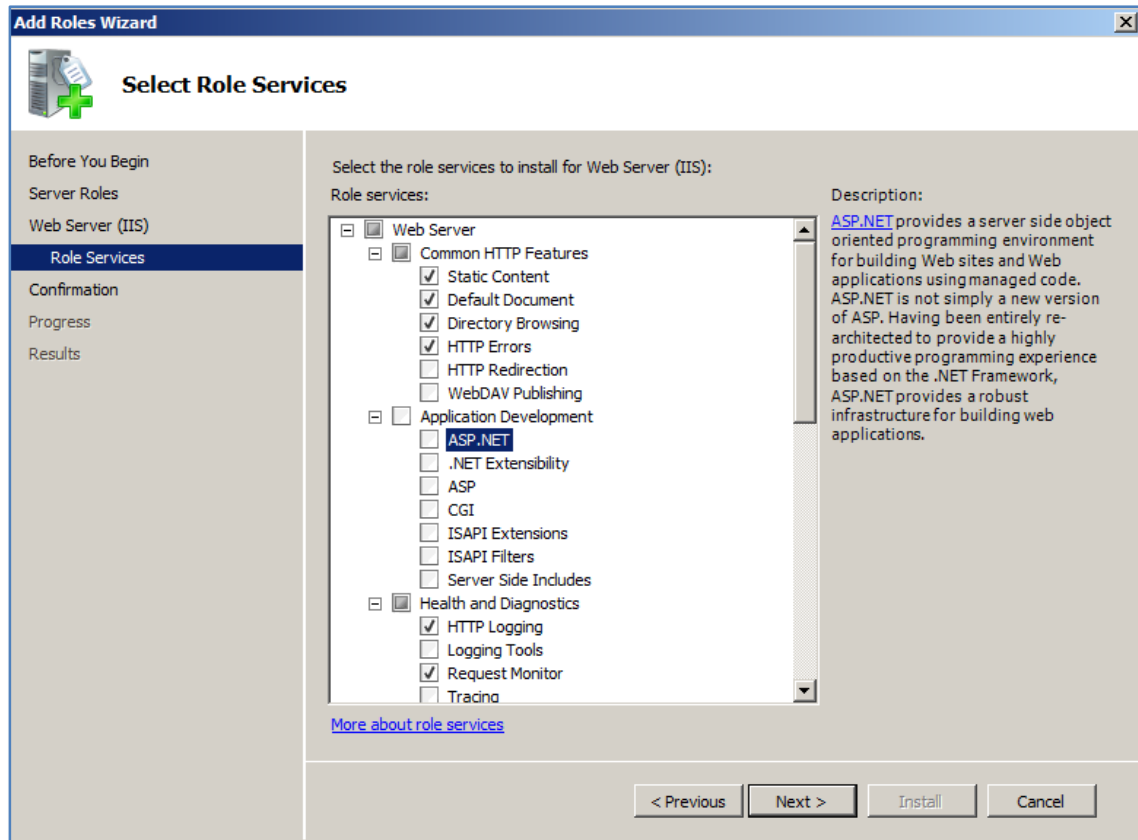
## Chapter 9 – Advanced configuration



You should now see the screen shown above giving you information about configure the Web Server (IIS).

Press the **Next** to continue.

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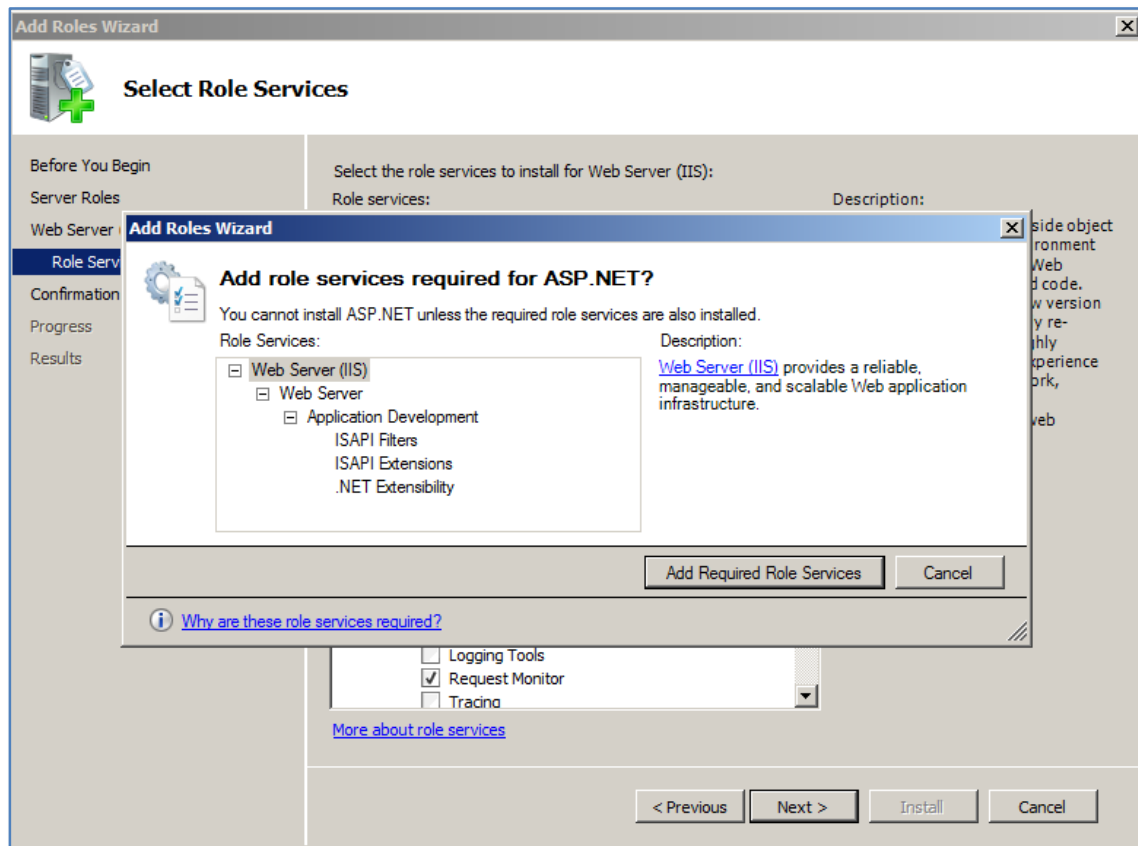


You will now see the Role Services. You need to ensure the following items are checked:

- Web Server
  - Common HTTP Features
    - Static Content
    - Default document
    - Directory browsing
    - HTTP errors
  - Application Development
    - ASP .NET
    - .NET Extensibility
    - ISAPI Extensions
    - ISAPI Filters
  - Health and Diagnostics
    - HTTP Logging
    - Logging Tools
    - Request Monitor
    - Tracing
  - Security
    - Basic Authentication
    - Windows Authentication

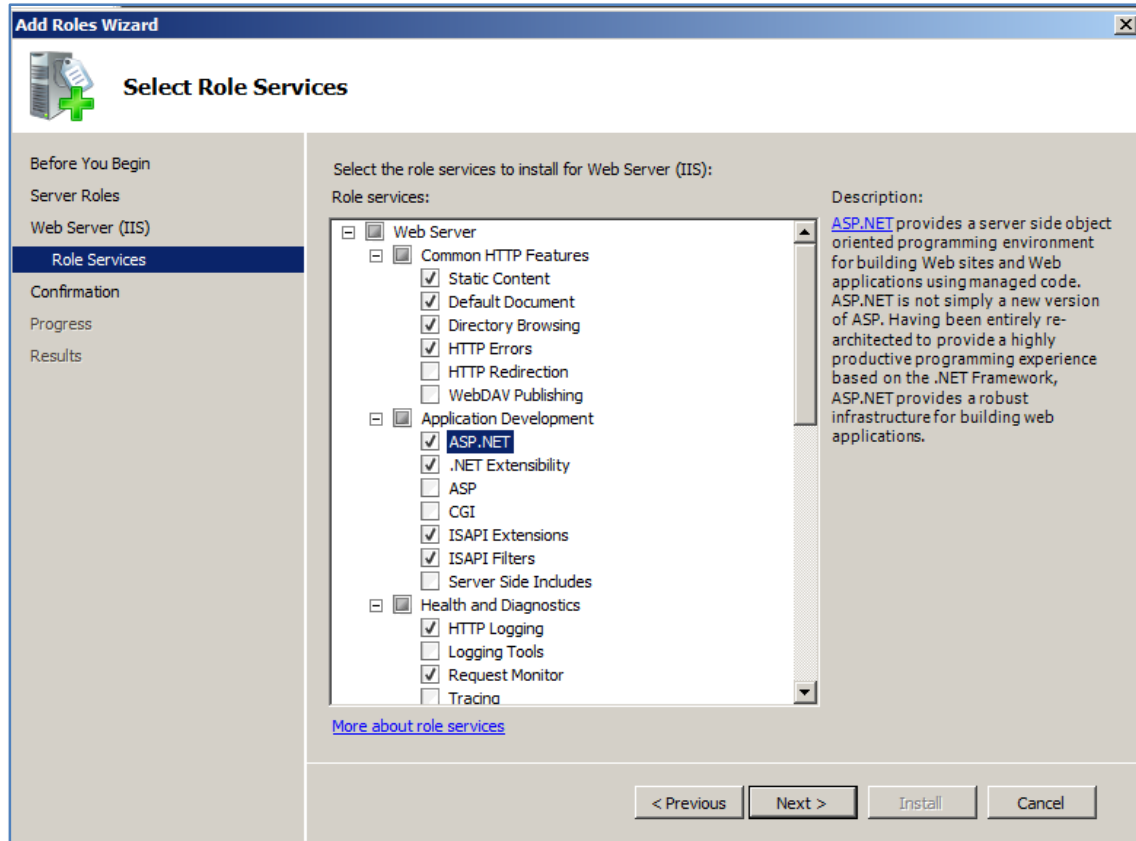
## Chapter 9 – Advanced configuration

- Digest Authentication
- Request Filtering
- Performance
  - Static content compression
  - Dynamic content compression
- Management Tools
  - IIS Management console
- IIS6 Management compatibility
  - IIS6 Metabase compatibility
  - IIS6 Management console

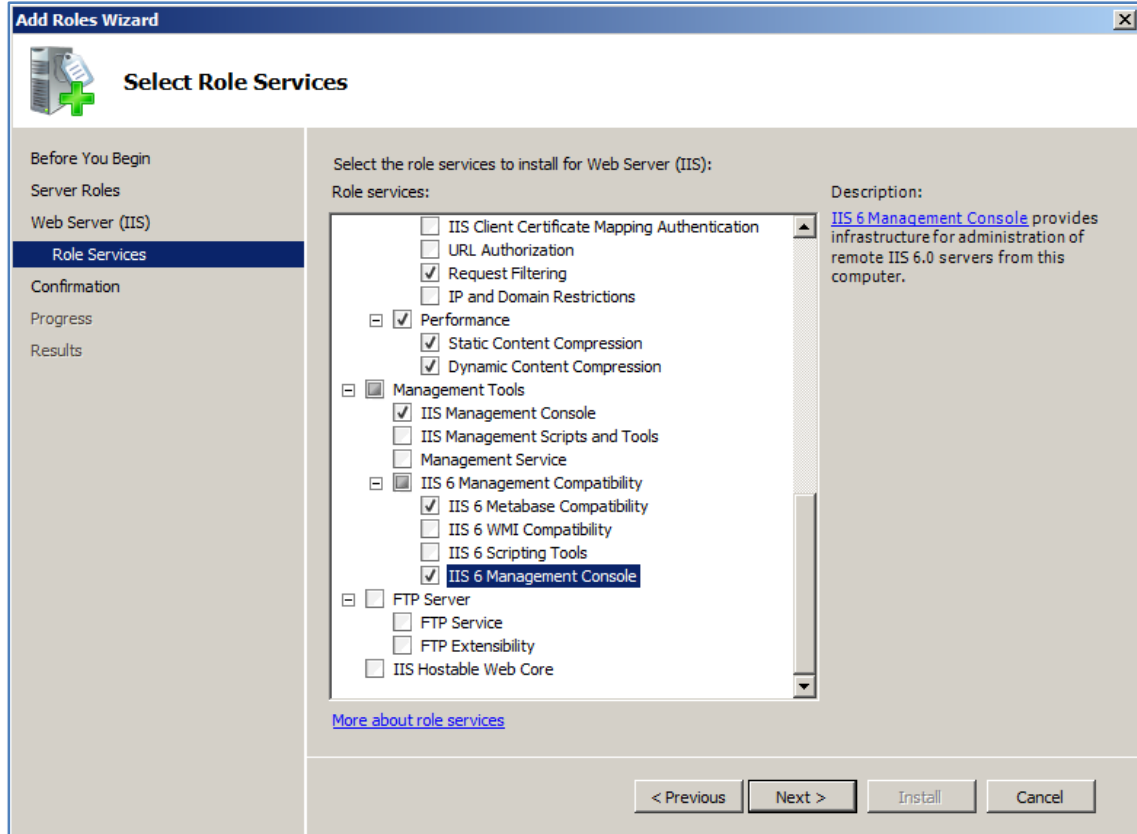
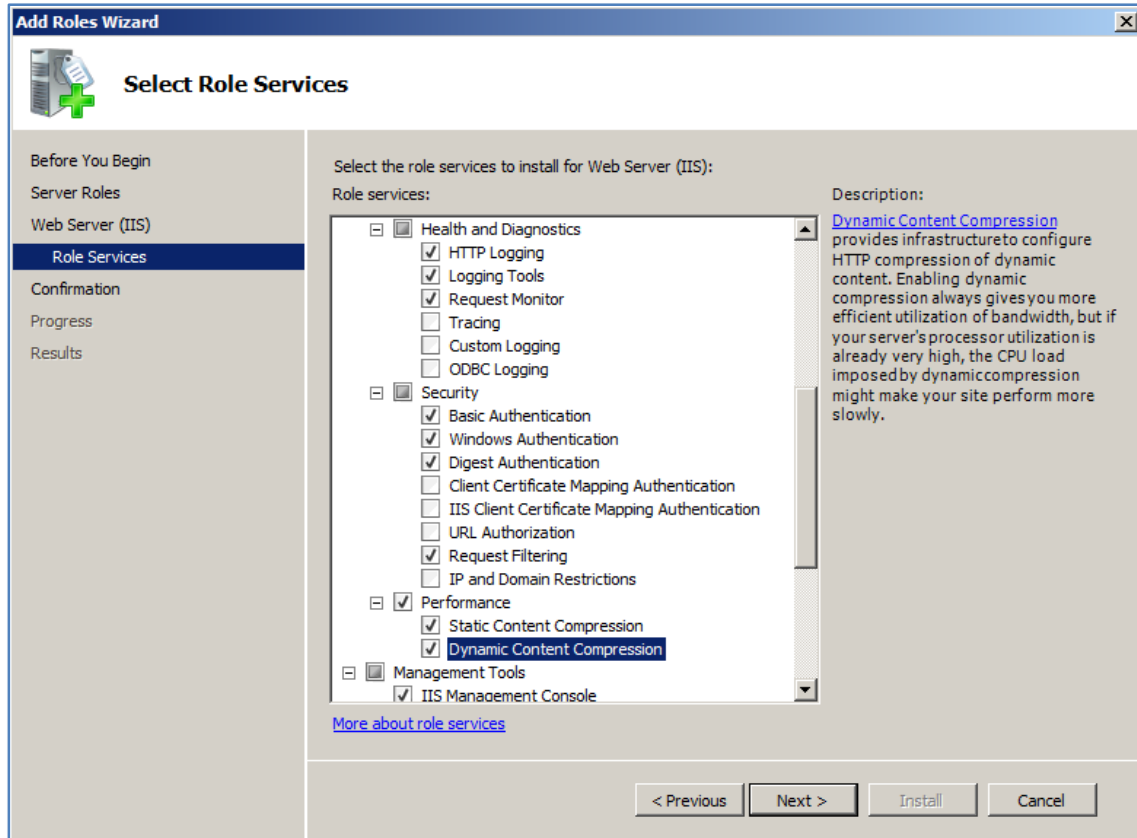


You also be prompted to add additional roles like shown above with ASP.NET. Simply click the **Add Requested Role Services** button to add and dependencies.

## Chapter 9 – Advanced configuration

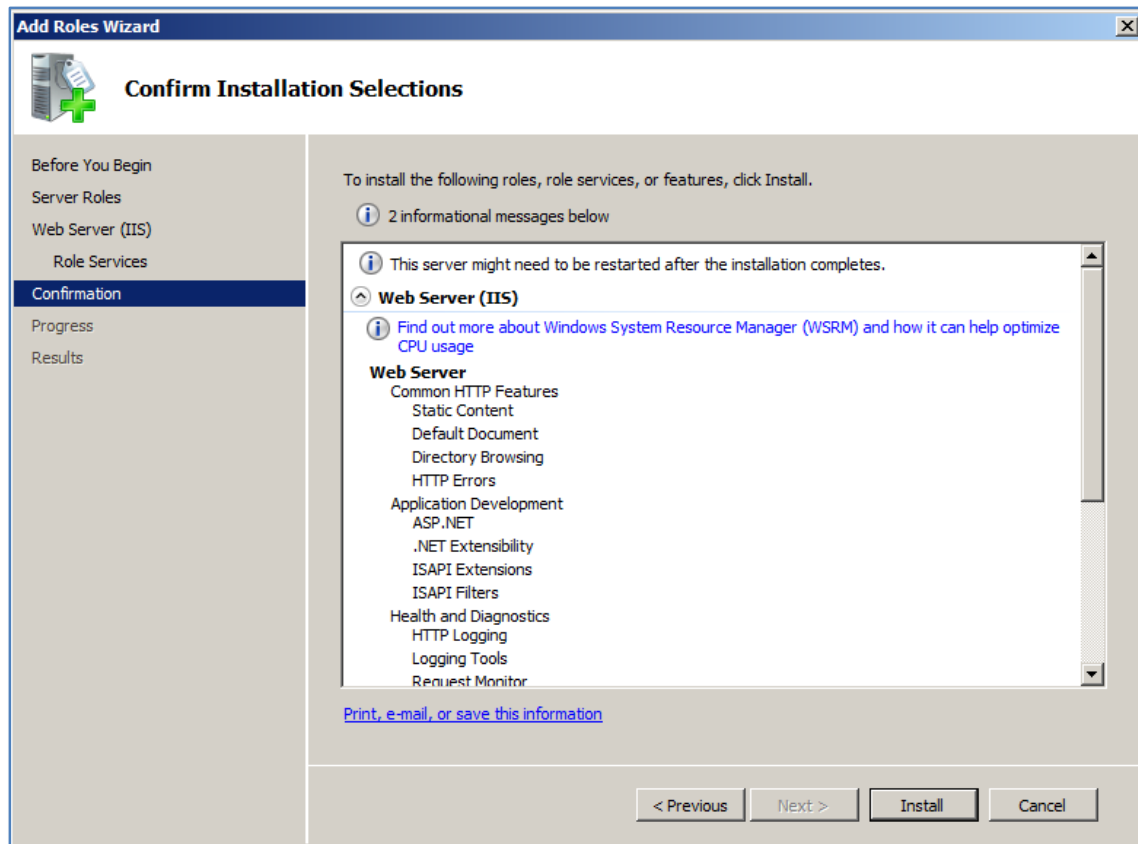


## Chapter 9 – Advanced configuration



## Chapter 9 – Advanced configuration

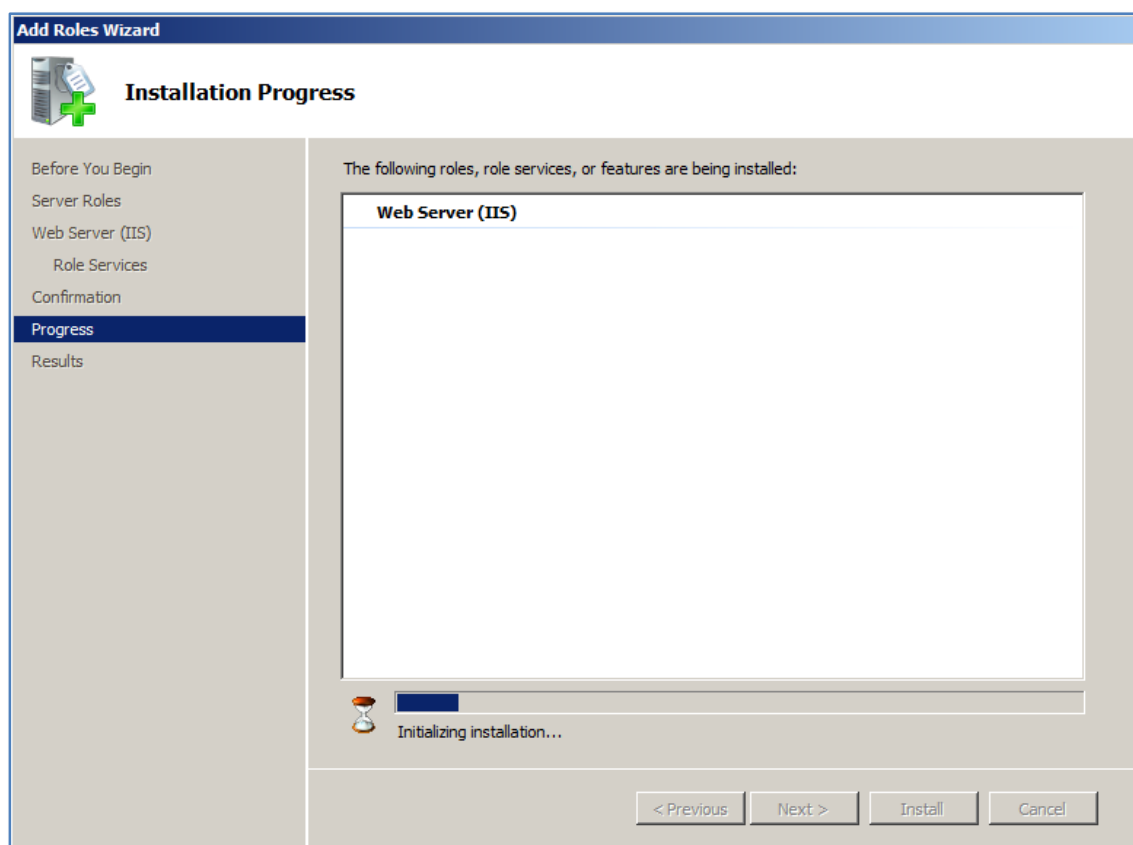
Once all the options have been selected, as shown above press the **Next** button to continue.



You will then be shown a summary screen to confirm the options you have selected.

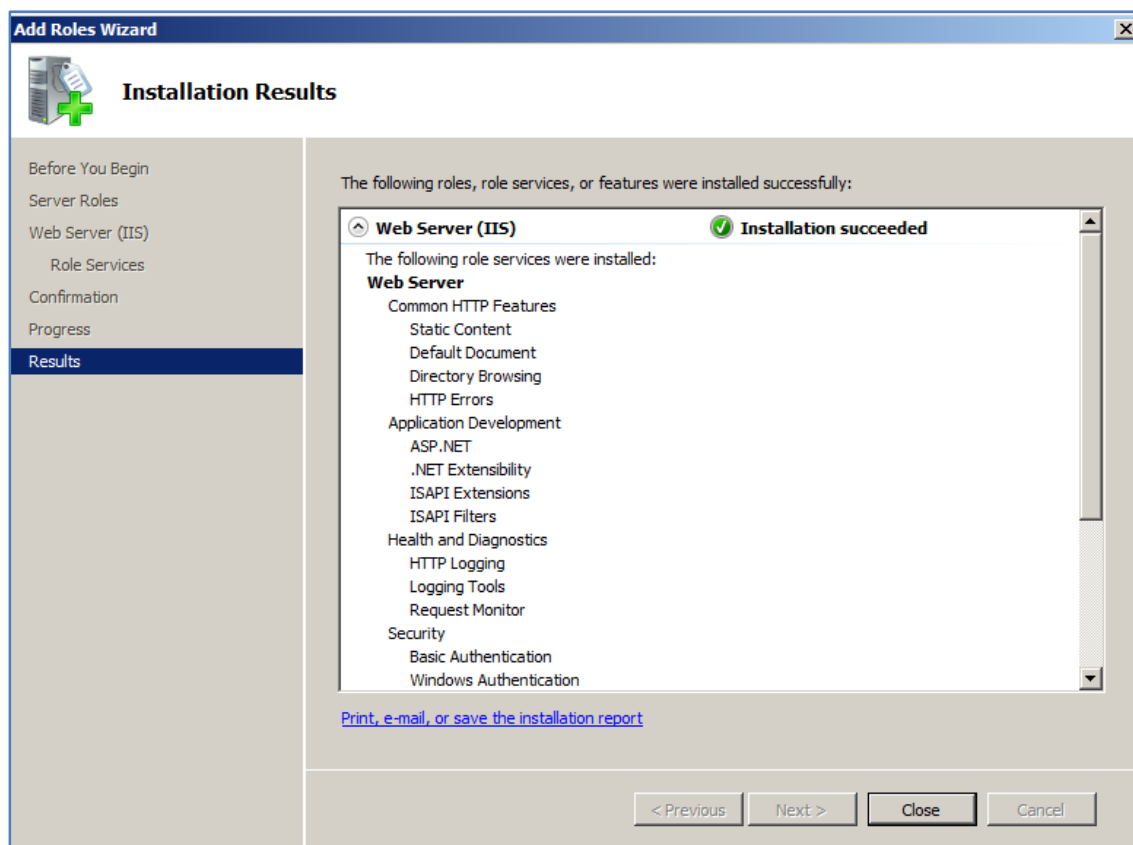
Press the **Install** button to commence the installation.

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You will now see the progress bar move across the screen as the components are installed and configured.

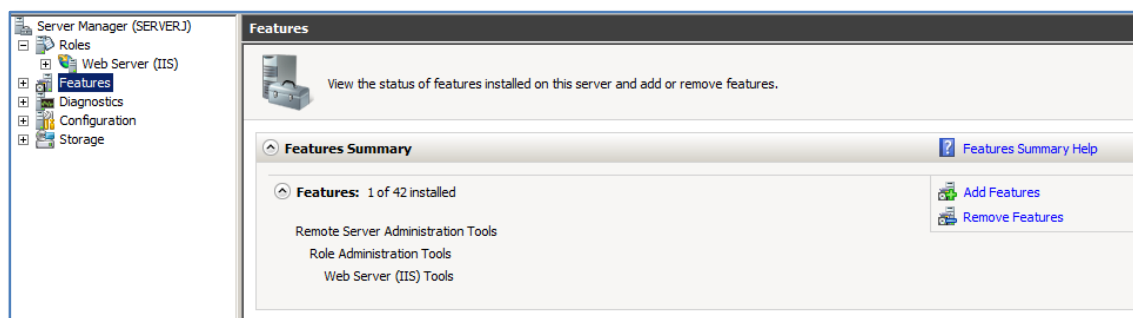
## Chapter 9 – Advanced configuration



When the process is complete you will a summary screen like shown above.

Press the **Close** button to complete the process.

You should now be returned to the *Server Manager* console where you should see the Web Server (IIS) role has been added.

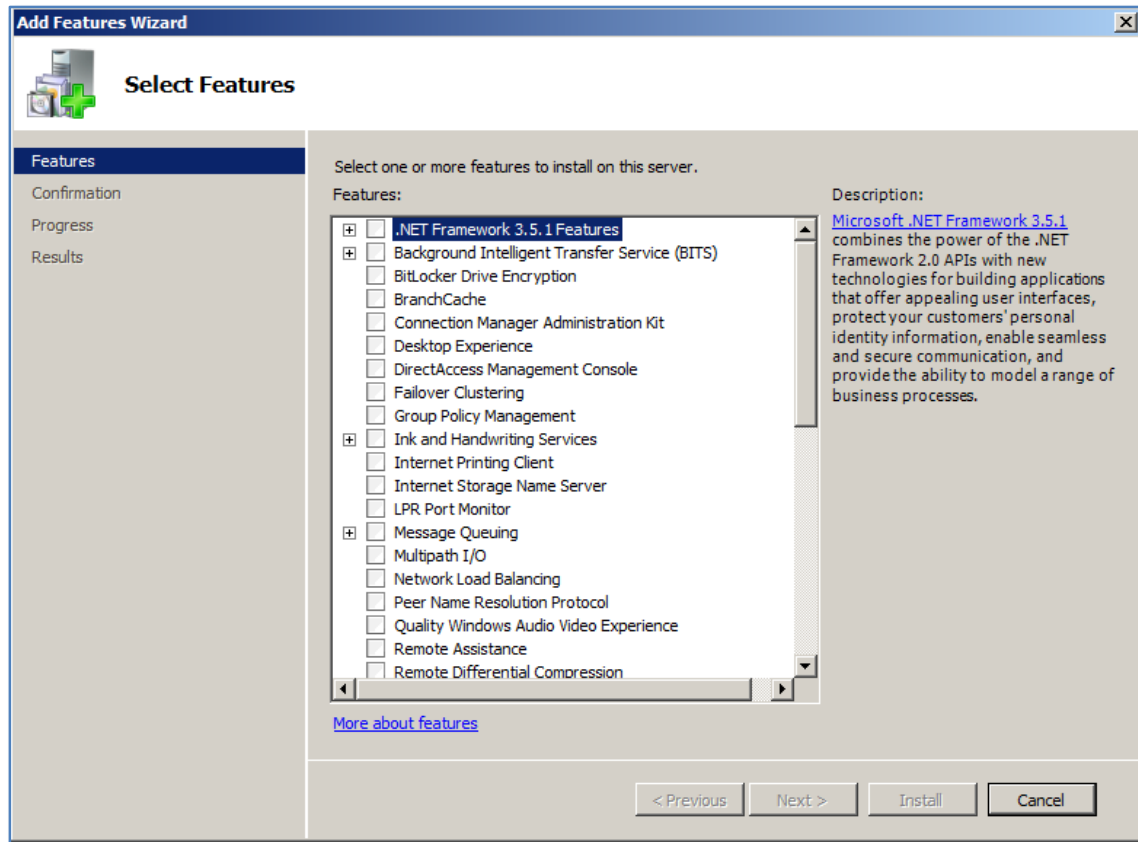


From the options on the left hand side select **Features**.

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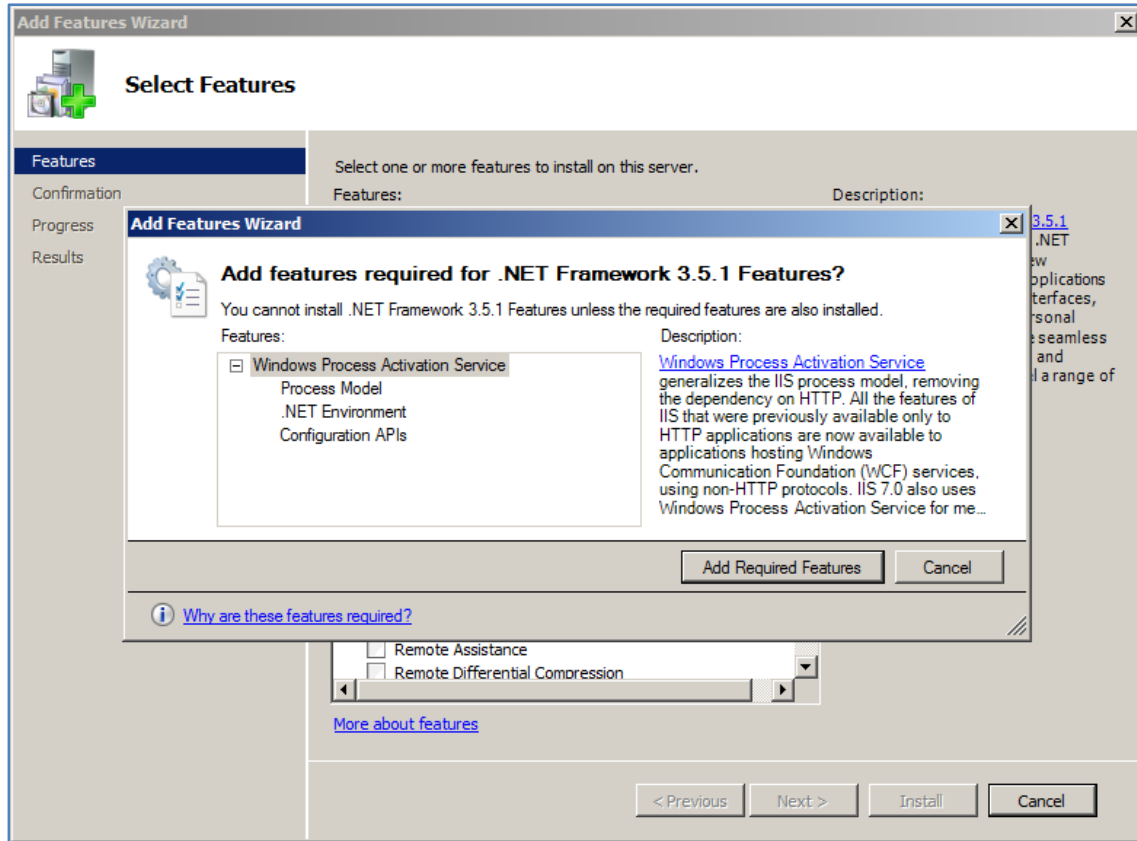
You will be taken to the list of *Features* that are installed on the server. There may be a number of pre-existing *Features* already configured. If this is a new server the only *Features* that should have been configured are those for the Web Server (IIS).

Click on the hyperlink **Add Features** to the right of the window.



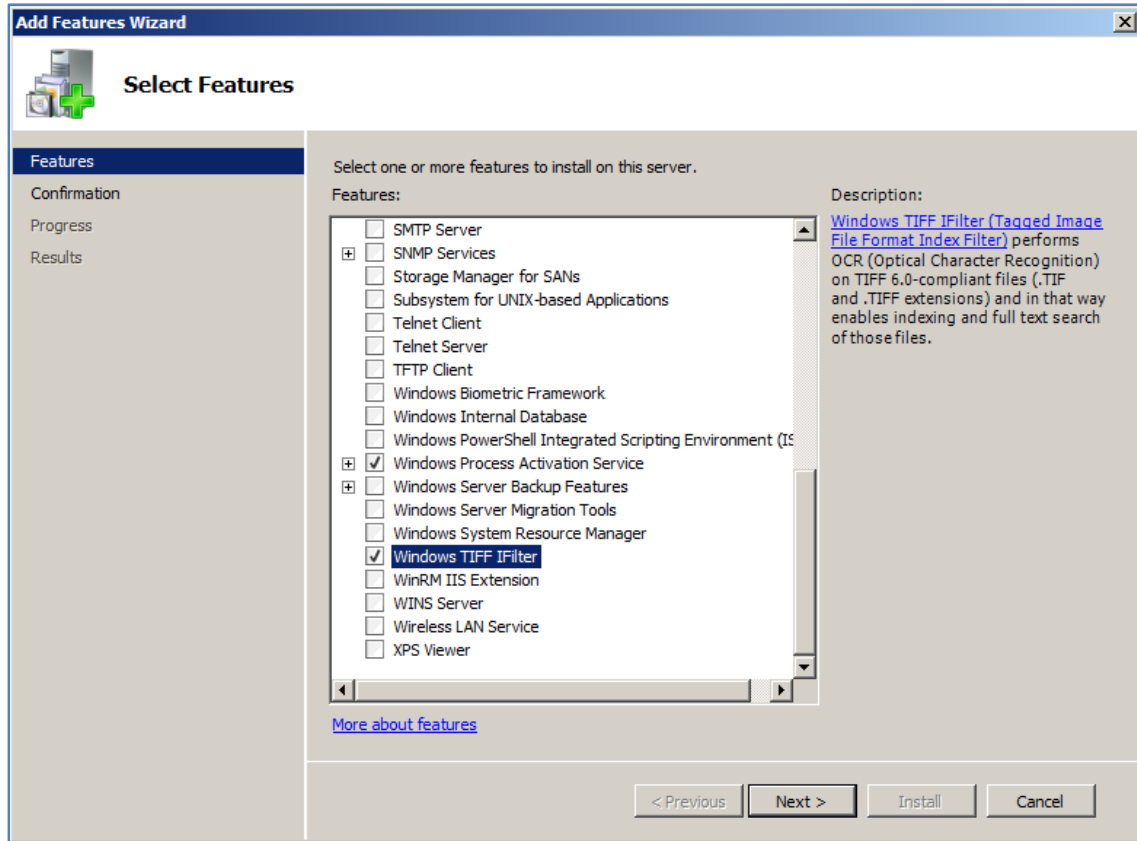
You will then be taken to a list of *Features*. Select the option for **.NET Framework 3.5.1** features by placing a tick in the checkbox to the left.

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When you do so you will most likely be prompted to add additional features like shown above. Simply click the **Add Required Features** button.

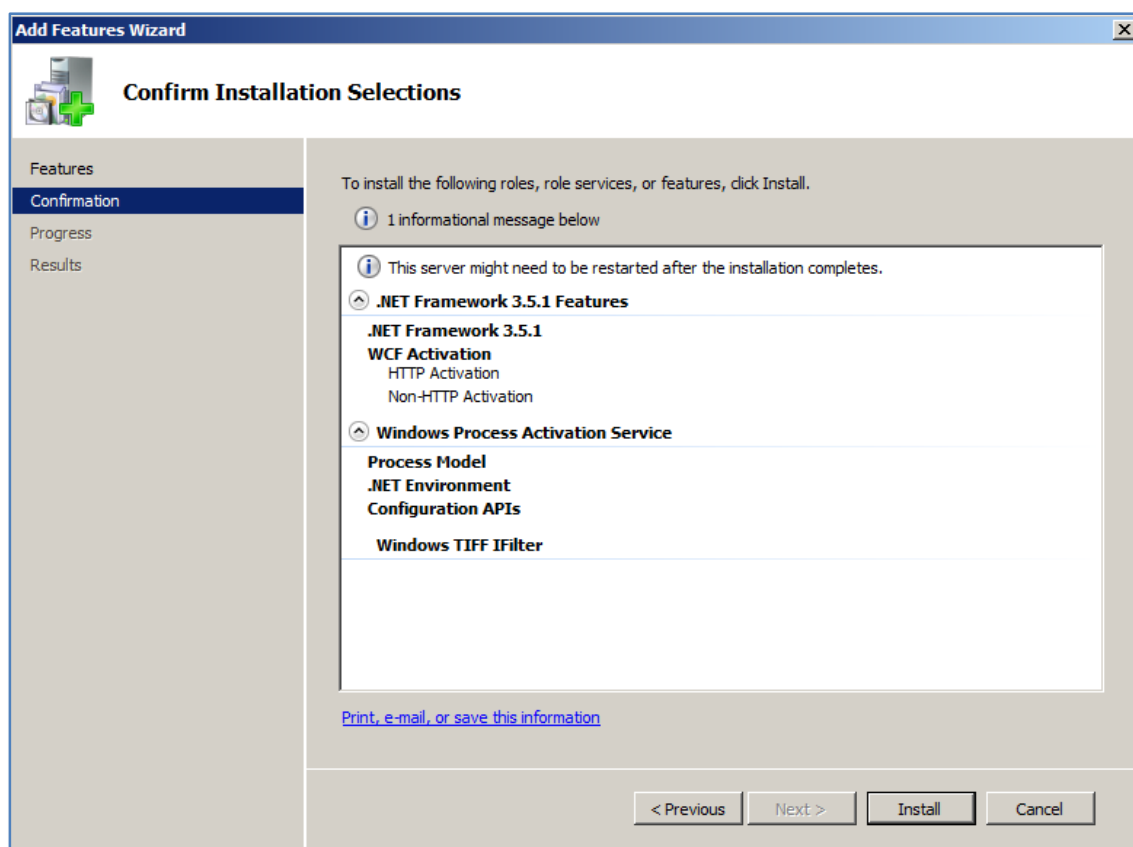
## Chapter 9 – Advanced configuration



It is also recommended that you scroll down the list and select the *TIFF iFilter* option. This allows suitably saved TIFF files to be indexed by SharePoint.

Press **Next** when complete.

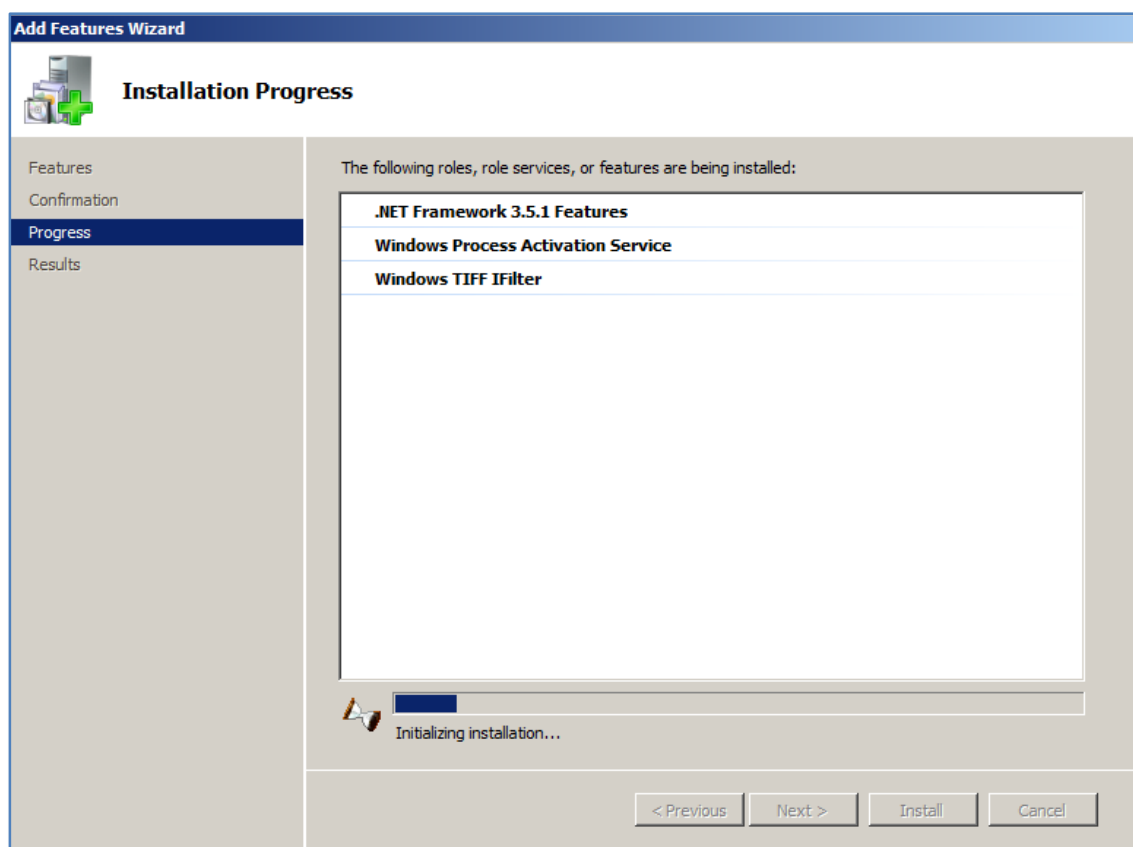
## Chapter 9 – Advanced configuration



You will then be shown a summary of the choices you have made.

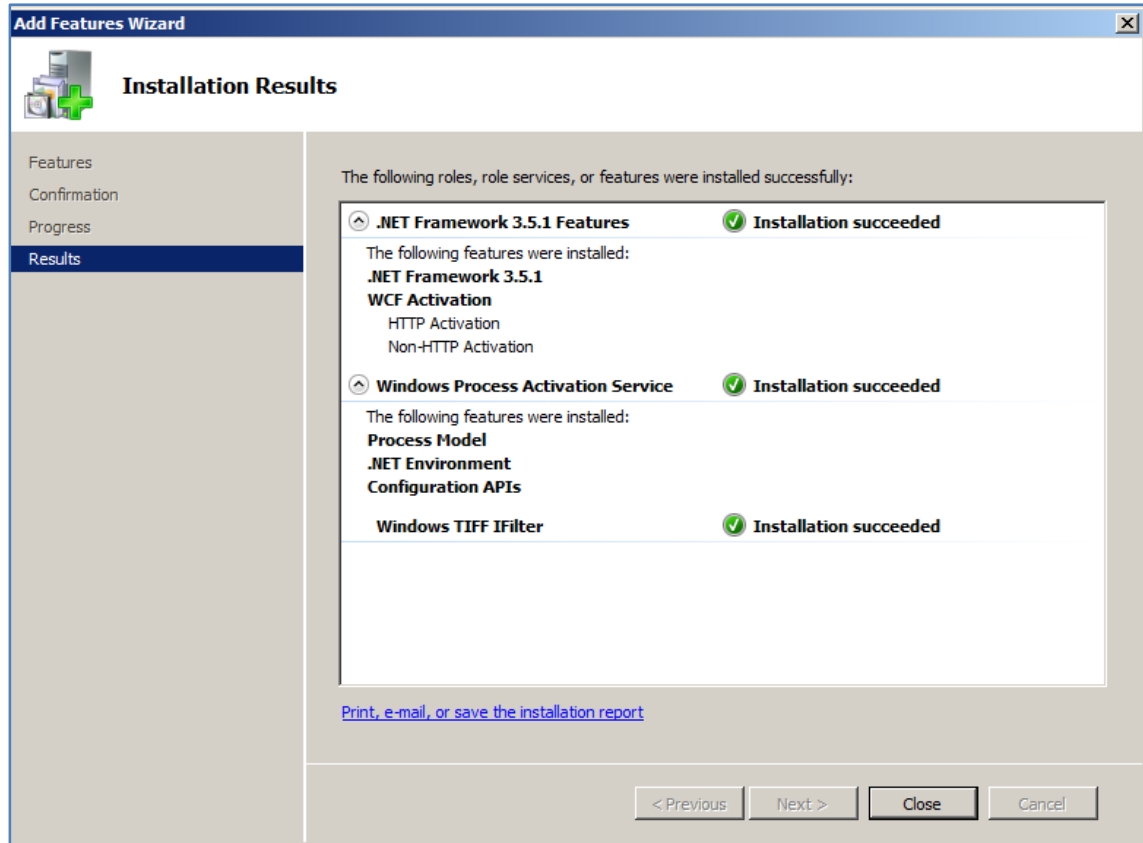
Click the **Install** button to commence the process.

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During the installation you will see a progress bar move across the screen as shown above.

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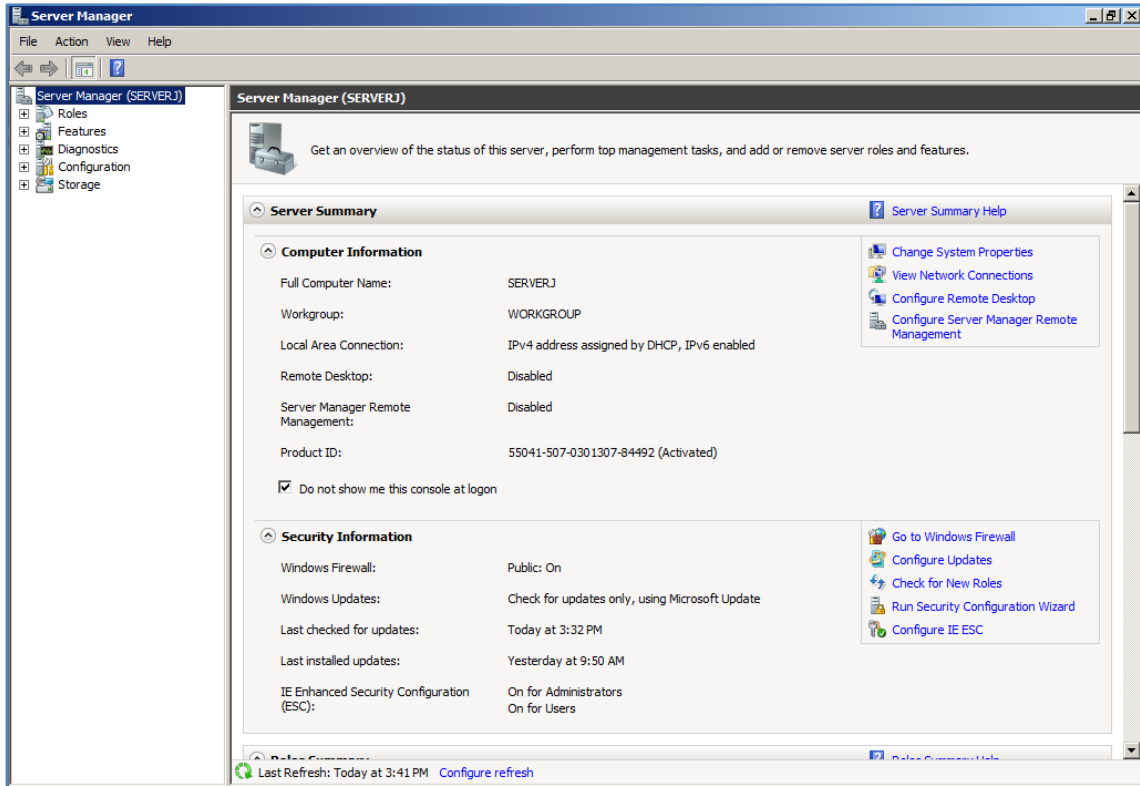


When the process is complete you will see a summary screen like shown above.

Press the **Close** button to complete the process.

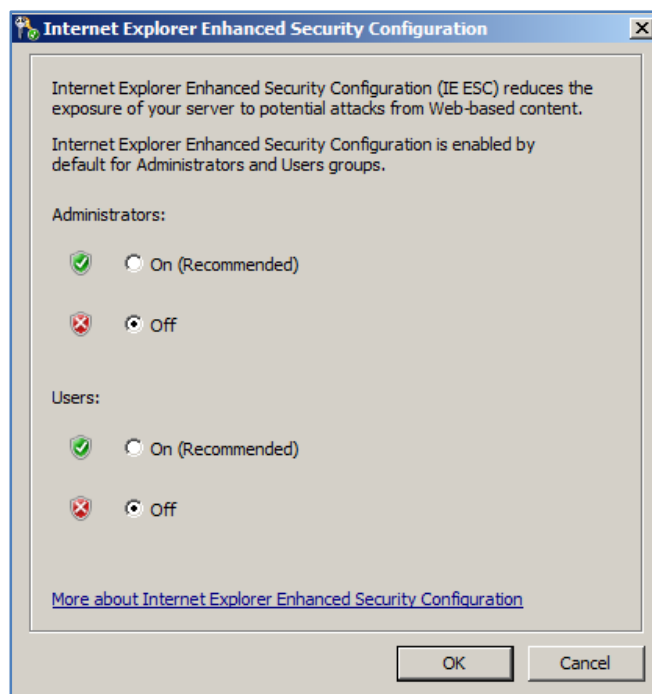
You have now completed the requires to install WSS v3 on the Windows Server, however there a few more options that are worth configuring.

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If you return to the *Server Manager* console and select the **Configure IE ESC** hyper link the lower right.





You should now see a window like shown above. If you are planning on working with the SharePoint site on the Windows server in any capacity it is recommended that you set the Internet Explorer Enhanced Security Configuration (IE ESC) to off for both administrators and users. This will prevent continual login prompts appearing while using SharePoint on the server.

Press the **OK** button to save the changes.

### 9.99 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](mailto:director@ciaops.com).