

Mike Walsh



Sams **Teach Yourself**

SharePoint® 2007

in **24**
Hours

SAMS

**Using Windows SharePoint®
Services 3.0**

Sams Teach Yourself SharePoint 2007 in 24 Hours

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Introduction

This book is based on my experience in using the various versions of Windows SharePoint Services throughout the years and on my experience of reading and answering innumerable messages in the SharePoint newsgroups and thus being aware of common problems and misunderstandings.

This book reflects those years of experience by giving considerable space early on to issues that have consistently confused people over the years and by including occasional notes and hints where my experience from the newsgroups tells me such asides will be useful.

Two main products fit the SharePoint 2007 description: Windows SharePoint Services 3.0 (WSS 3.0) and Microsoft Office SharePoint Server 2007 (MOSS 2007).

This book concentrates almost exclusively on the “smaller” of those two products (WSS 3.0). Apart from it being considerably cheaper (WSS 3.0 itself is free) than MOSS 2007, it is simpler to learn and—despite some Microsoft peoples’ attempts to pitch MOSS 2007 as the only useful SharePoint product—is a full and useful product in its own right.

Even if you intend to move to MOSS 2007, everything you learn about WSS 3.0 will be of use to you. After all, MOSS 2007 is based entirely on WSS 3.0. MOSS 2007 is a superset of WSS 3.0.

This book covers all the different aspects of working with WSS 3.0, with one exception—programming. Programming is something that probably over 90 percent of users of SharePoint systems never consider doing and which is in any case well covered by several specialist “development” books.

Target Audience for This Book

This book is for beginners in SharePoint 2007. By the time they finish reading it, however, they are likely to be intermediate level.

You will find this book useful whether you are a budding SharePoint administrator, a user who will have some administrative responsibilities, a user who will provide content, or a user who will mostly use content provided by others.

You will also find this book helpful if you have ASP.NET 2.0 programming skills but no SharePoint experience. If this describes you, this book will help you better under-

stand the background that those SharePoint development books often assume. It will also give you a feeling for what you don't need to program because it's already either included or is available elsewhere.

The full-time administrator will in time need to follow up with a specialist book on administration, but for many of the other reader groups (except the programmer!) this book will be enough for their needs for quite a while and maybe forever.

Organization of This Book

Instead of making this a reference book with every exhaustive lists and every parameter described, I've written this book as a teaching tool based on my experience of using SharePoint products for more than six years. Instead of dealing with everything, I have picked out a few more commonly used elements and described them. This approach, in turn, has given me the space needed to discuss topics that many books of this size don't cover, such as using add-in products, sample templates, and third-party web parts with SharePoint sites.

This book gives you an overview of the building blocks that are available to you when creating your own sites. I use these building blocks throughout this book to build and add to a set of test sites.

I developed those sites while writing this book, and I wrote the book in order. Therefore, if you follow it in order you will recognize in your test system most of the screen shots included in this book.

In the long term, this method of instruction will work better for you than if I just focused on one solution area. About halfway through this book (Hour 11, "Using What We've Learned So Far in a Site"), however, I do consider one such solution area and how the things we have learned up to and including Hour 10, "Learning About Authentication and Access Rights," can be used to create sites suitable for that solution area. After all, the real world is out there, and even quality building blocks need to be used in such a way that they suit the demands of that real world. Learning what sort of things to use for that sample solution area should help you when you need to create sites for your own real-world scenario.

Each hour breaks down as follows:

- ▶ Hour 1, "Introducing SharePoint 2007." This hour introduces SharePoint.
- ▶ Hour 2, "Installing Windows SharePoint Services 3.0." This hour starts with an already installed Windows 2003 Server (Standard Edition) and shows the steps that you take to first prepare for WSS 3.0 and then install WSS 3.0. (Details of

how to install Windows 2003 Server are in Appendix A; details of how to install Windows 2008 Server and prepare it for WSS 3.0 are in Appendix B.)

- ▶ Hour 3, “Adding Users and Giving Them Rights.” This hour discusses the various types of users; creates users required later and then gives them rights to access the WSS 3.0 site.
- ▶ Hour 4, “Using the Administration Site.” This hour looks at the Administration site and goes through some actions that usually need to be done there.
- ▶ Hour 5, “Planning a Site’s Structure.” This hour describes the different types of sites and how (and when) to create them.
- ▶ Hour 6, “Using Libraries and Lists.” This hour is an introduction to libraries and lists and to the relationship between a list and the web part of a list.
- ▶ Hour 7, “Creating and Using Libraries.” This hour looks at the different types of libraries and at how to add files to Picture Libraries and Document Libraries.
- ▶ Hour 8, “Creating and Using Views and Folders.” This hour describes how to create and use views and why you shouldn’t use folders.
- ▶ Hour 9, “Looking at List Types and the Included Web Parts.” This hour continues looking at lists and then looks at the web parts that come with the product that aren’t directly related to lists (see Hour 6).
- ▶ Hour 10, “Learning About Authentication and Access Rights.” This hour has more information about authentication and shows how you can change the user being used to access a site or web page.
- ▶ Hour 11, “Using What We’ve Learned So Far in a Site.” This hour takes a practical working case where WSS 3.0 could usefully be used and shows how data is collected and then used to build a suitable site structure.
- ▶ Hour 12, “Using Wikis and Blogs.” This hour looks at the standard Wiki and Blog functions provided by the product and then shows how the Blog functions can be extended by use of a free add-on product.
- ▶ Hour 13, “Using WSS 3.0 Search and Installing Search Server 2008 Express.” This hour covers the standard WSS 3.0 function and then installs the free Search Server 2008 Express product in order to (in Hour 14) improve the search function.
- ▶ Hour 14, “Improving Searches.” This hour shows how to use Search Server 2008 Express to improve the search function of the standard WSS 3.0.

- ▶ Hour 15, “Using Different Versions of the Main Office Products with WSS 3.0.” This looks at how the 2003 and 2007 versions of Word, Excel, and PowerPoint work with WSS 3.0. Time is in particular spent on Document Workspaces.
- ▶ Hour 16, “Using Different Versions of Outlook with WSS 3.0.” This hour describes what functionality is available when Outlook 2003 is used with WSS 3.0 and compares this with the much greater functionality available when using Outlook 2007 with WSS 3.0.
- ▶ Hour 17, “Sharing OneNote 2007 Notebooks and Access 2007 Tables with WSS 3.0.” This hour describes how you can create shared OneNote 2007 notebooks that can be stored on a WSS 3.0 site and accessed and synchronized from different client PCs. It also considers the relationship between Access 2007 tables and WSS lists.
- ▶ Hour 18, “Using Access 2007 Tables to Produce Reports from WSS 3.0 Lists.” This hour uses Access 2007 tables that have been created from WSS lists in order to provide reports on WSS 3.0 lists. Both simple (wizard driven) and complicated (manual, combining two lists) reports are explained.
- ▶ Hour 19, “Creating Workflows in WSS 3.0.” This hour briefly mentions the different methods of creating workflows and then concentrates on the three-stage workflow included in WSS 3.0.
- ▶ Hour 20, “Using SharePoint Designer 2007 to Create Workflows.” This hour follows Hour 19 and shows how to use SharePoint Designer 2007 to produce more complicated workflows than the ones described in Hour 19.
- ▶ Hour 21, “Using SharePoint Designer 2007 to Create Data View Web Parts.” This hour shows how Data View web parts are created and used.
- ▶ Hour 22, “Making Safety Copies of Your Data and Using Them.” This hour takes an end-user (or part site administrator) view of various methods of saving copies of part of a WSS 3.0 installation.
- ▶ Hour 23, “Enhancing Your WSS 3.0 Sites—Microsoft Official Possibilities.” This hour looks at how to install and use (foreign) language templates; application templates and also what is required when using InfoPath 2007 to add value to a WSS 3.0 site.
- ▶ Hour 24, “Enhancing Your WSS 3.0 Sites—Using Third-Party Web Parts.” This hour looks at two commercial web parts and one free web part all of which enable you to enhance your WSS 3.0 site at little or no cost and without writing any code yourself.

Online, you can find some appendixes (www.informit.com/title/9780672330001):

- ▶ Appendix A, “Full Installation Details for Windows Server 2003.” This appendix gives the full details for how to install Windows Server 2003 so that you can (in Hour 2) prepare for and install WSS 3.0. It is provided for people who have not in the past installed Windows Server 2003.
- ▶ Appendix B, “Installing WSS 3.0 on Windows Server 2008.” Installing Windows Server 2008 and preparing it for the installation of WSS 3.0 is sufficiently different to installing and preparing Windows Server 2003 to make this appendix (which also includes less detailed WSS 3.0 installation information than Hour 2) essential if you have never installed Windows Server 2008.
- ▶ Appendix C, “Creating a Virtual Machine.” This appendix shows how to install a virtual machine system. Even if you do not install this particular virtual machine system (Parallels), you should find it useful when installing any of the other virtual machine systems (listed in the text).

Hardware and Software Used to Write This Book

Finally, a brief word about my working environment when writing this book:

- ▶ I had a desktop running XP Pro and Office 2003, on which I wrote the chapters (using the publisher’s Word 2003 template) and which I also used as a client PC when writing the sections on using Office 2003 applications with WSS 3.0.
- ▶ I had a portable running Vista Ultimate and Office 2007, which I used as a client PC both for normal browser access to the WSS 3.0 site and for writing the sections on using Office 2007 applications with WSS 3.0.
- ▶ I had a MacBook (OS X Tiger) running the Parallels virtual machine software. I had a Parallels VM on which I had installed WSS 3.0+SP1 on top of Windows Server 2003 R2. I also used the MacBook to create the VM running Windows Server 2008 (and WSS 3.0), which was needed for the on-line Appendix B.

The screen shots were mostly done using the SnagIt product from TechSmith (www.techsmith.com/screen-capture.asp). The SnagIt Editor, which is part of that product, was used to reduce the size of some screen shots. I heartily recommend SnagIt to you. I had it installed on both my client PCs.

Other screen shots were done using the free Macintosh utility Portrait, which comes with the Macintosh operating system, OS X. These were typically screen shots of actions performed on the server.

That's it. Good luck with your exploration into SharePoint 2007!

HOUR 1

Introducing SharePoint 2007

What You'll Learn in This Hour

- ▶ Main SharePoint 2007 products
- ▶ A brief history of the product range

Getting Familiar with the SharePoint 2007 Products

If you look at the latest list of SharePoint 2007 products (at the time of writing), you'll see that the first three products in that list are what I call the “main” products:

- ▶ Windows SharePoint Services 3.0
- ▶ Microsoft Office SharePoint Server 2007—Standard Edition
- ▶ Microsoft Office SharePoint Server 2007—Enterprise Edition
- ▶ Microsoft Office SharePoint Server 2007 for Internet Sites
- ▶ Microsoft Office SharePoint Server 2007 for Search Standard
- ▶ Microsoft Office SharePoint Server 2007 for Search Enterprise

These main products are Windows SharePoint Services 3.0 (WSS 3.0). The two different versions—Standard and Enterprise editions—of Microsoft Office SharePoint Server 2007 are a mouthful, so much so that even Microsoft often calls it just SharePoint Server 2007. In this book, I refer to these products as MOSS 2007.

The three products at the end of this list all derive from the MOSS 2007 product: MOSS 2007 for Internet Sites is actually MOSS 2007—Enterprise Edition licensed for

Internet usage (and not much else). The two search products are really only Microsoft packaging to sell the search aspects (only) of the MOSS 2007 products.

Tip

Don't assume that (MOSS for) Search Standard is equivalent to MOSS 2007 Standard or that (MOSS for) Search Enterprise is equivalent to MOSS 2007 Enterprise. In fact, Search Standard has tight restrictions on how much can be searched and Search Enterprise doesn't, whereas for MOSS itself the difference between Standard and Enterprise is that Enterprise offers more functionality.

Tip

Look at the respective prices at <http://office.microsoft.com/en-us/sharepointserver/FX102176831033.aspx>. This pricing shows you why, despite these restrictions, some companies choose Search Standard anyway.

Given the cover of the book—which clearly says Windows SharePoint Services 3.0—you might ask yourself why I am even mentioning the two MOSS 2007 products.

The answer is simple. This book deals mainly with WSS 3.0, but almost all the knowledge you acquire by working through this book is equally valid for you even if you have a MOSS 2007 installation to use.

Knowledge of WSS 3.0 will also enable you to use Office 2003 and Office 2007 better. You'll see, too, that you get more functionality when using Office 2007 products with WSS 3.0 than with using Office 2003 products with WSS 3.0.

There is added functionality in both these Office product sets that is available only if the users of them have a SharePoint server they can access.

The good news is that the SharePoint server can be one running WSS 3.0, even if sometimes you might get the impression from (especially) Microsoft presentations that the more expensive MOSS 2007 is needed.

This book includes chapters to help you work through and see this additional functionality. Hours 15, 16, and 17 cover both combinations, because not everyone is working with Office 2007.

Tip

For Office 2003 users, the added benefits that Office 2007 provides with SharePoint sites might justify upgrading. For some users, the differences compared to using Office 2003 with SharePoint can be *that* important.

While teaching you how to use WSS 3.0, this book also gives you at least an idea about what more MOSS 2007 could offer you in certain areas. All the working sections and diagrams are WSS 3.0 only, but there is the occasional mention of relevant MOSS 2007 additions/differences.

Brief History of the SharePoint Products

The present versions of SharePoint listed in Table 1.1 are version 3 products. So what were the version 1 and 2 products?

TABLE 1.1 Development over Time of the CMS and SPS Products

2001–2002	2003	2007
CMS 2002	CMS 2003	Main path: MOSS 2007 Enterprise Sub path: MOSS 2007 Standard
SPS 2001	SPS 2003	Main path: MOSS 2007 Standard Sub path: MOSS 2007 Enterprise

Version 1 SharePoint Products

SharePoint version 1 started with a product called SharePoint Portal Server 2001 (SPS 2001).

SPS 2001

SPS 2001 was an internal effort using the same kind of data storage as Exchange, and Microsoft allocated it to the intranet category when it bought a company that made expensive Internet software. Microsoft then renamed that company's product Content Management Server (CMS 2002).

However, the hardware and software costs for CMS 2002 were so high that companies believed that using that for the “unimportant” intranet was overkill, and so they were interested in something less expensive. This was where Microsoft positioned their SPS 2001 product.

SPS 2001, as well as being cheaper than CMS 2002, still ran best when it used numerous servers. However, it didn't need those staging servers, and it didn't need such powerful servers, especially if each major service (such as indexing) was given its own server in the farm.

SPS 2001 didn't need staging servers—not because it wouldn't have been a good design, but because the design assumed that, in an intranet, you could make anything live and then remove it if it was wrong. (At least that's my assumption of how it was regarded.)

Suffice to say, SPS 2001 was cheaper, so many companies ran both CMS 2002 and SPS 2001.

Now, neither CMS 2002 or SPS 2001—for the Internet and intranet, respectively—have that much to do with the present products in SharePoint 2007. However, some of their best ideas have trickled down. Table 1.1 shows how CMS and SPS products developed over time.

It looks clear-cut, doesn't it? In fact, Table 1.1 gives a false impression because the product that both versions (MOSS 2007 and WSS 3.0) came from was an internal Microsoft effort that was never intended to become a Microsoft product! It was just supposed to provide services that would be useful to a team.

SharePoint Team Services (STS)

Members of an Office team decided that in a web-based age, there must be a better way of interteam communications than email.

What they decided to write—based on, but adding to, Front Page Server Extensions—were various services. These services included such things as the ability to store and access documents in an easier way than that offered by the file system; to have online discussions (simple and thus nothing like Notes, which was prevalent outside Microsoft at the time); to have a place to announce key meetings (or, who knows, maybe team parties); a calendar; and so on. When those standard things weren't enough, they included the ability to note ad-hoc information and make it easily accessible by team members.

They were concerned with quick results and something they could use immediately. Therefore, there was no major architectural effort: The documents were just stored in the file system, and links to them were stored in a simple table.

But then, other teams wanted it, too. And then teams outside the Office part of Microsoft wanted it. In no time (and with no sales effort), it was being used throughout Microsoft (reputedly by several thousand teams).

I imagine what happened then was that a visiting customer saw it and wanted it, and there was a sudden stop.

This was before CodePlex and other Microsoft initiatives to get unsupported code into the public domain, so someone probably needed to make a choice, and they chose that Microsoft release the code (suitably tidied up, no doubt) as a product.

The Internet and intranet areas were already catered for with CMS 2002 and SPS 2001, respectively, so deciding to make this product for “teams” was an obvious choice.

The *Teams Services* part of the name was natural, and using *SharePoint* in the name was equally obvious a marketing person keen on creating “families” from completely different products.

So, the name SharePoint Team Services (STS) was coined, and *that* is what the present SharePoint 2007 products descend from.

Both these 2001 SharePoint products were virtually unknown except for in a few markets where keen Microsoft people were pushing them. This all changed with the 2003 versions, where version 2 of both the SPS and the STS products were closely tied to the Office 2003 beta process. Via this tie in, the 2003 versions managed to get the attention of Microsoft people in local offices. When the Office 2003 betas became public betas, these people started talking about both SPS 2003 and WSS 2.0.

Version 2 SharePoint Products

Windows SharePoint Services 2.0 (or just WSS with no 2.0, because it was the only WSS at the time) became the new name for SharePoint Team Services 2.0. The STS name was abandoned midway through the private beta process when WSS 2.0 became free to use, provided you had a Windows Server 2003 license.

This connection to a Windows Server 2003 license led to the use of *Windows* in the name and, incidentally, to some confusion at Microsoft. WSS 2.0 was regarded as a (Microsoft) Server division product, but the developers were still part of the Office division. Some duplication of effort occurred in documentation, and often each division seemingly expected the other one to do things, such as provide a support web page.

SPS 2003 was more clearly divided because it was an Office division product and was written by part of the Office division.

Tip

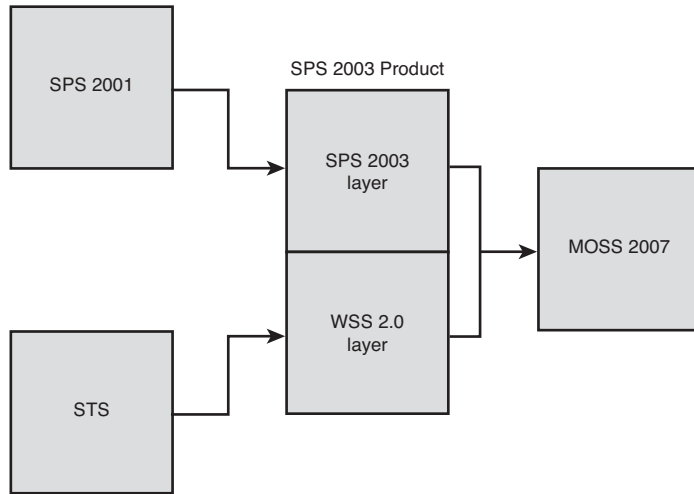
SPS 2003 was an attempt to retain most of what had been in SPS 2001 while using the WSS 2.0 platform. Therefore, it was two separate layers: a WSS layer and a SPS layer. It was messy, but because SPS 2003 was pricey and WSS 2.0 was, in effect, free, Microsoft people naturally described SPS 2003. However, the key product was WSS 2.0 because that was where the main changes had been made.

With WSS 2.0, nearly everything was stored in the database (thus putting an end to the synchronization problems that had often troubled STS users).

Also, WSS 2.0 used ASP.NET. This meant that the “web part” technology became available both in the form of third-party add-ins you could get for free, buy from small companies, or write them yourself. It also meant that you could use the SharePoint subset of ASP.NET to program other additions to your out-of-the-box SharePoint product.

Figure 1.1 shows the move from the version 1 SharePoint products to the version 2 SharePoint products to MOSS 2007.

FIGURE 1.1
Move from STS and SPS 2001 to MOSS 2007.



There was still only one installation routine for SPS 2003. If you watched that installation routine carefully, however, you saw that it first installed WSS 2.0 before seamlessly installing the additional SPS 2003 bits.

Version 3 SharePoint Products

This combination of SPS 2003 and WSS 2.0's code bases wasn't satisfactory. Therefore, when the 2007 versions were being developed (as part of the Office 2007 beta process), the SPS parts—called Microsoft Office SharePoint Server 2007 (MOSS 2007)—provided WSS 3.0 with additional functionality.

The main change in WSS 3.0, and thus in MOSS 2007, is the move to pure ASP.NET 2.0, which meant that now ASP.NET 2.0 developers could write code that adds functionality to the SharePoint products.

In both WSS 3.0 and MOSS 2007, Search uses the same engine. In Hour 13, you see the search in WSS 3.0 is restricted to only a single site and its subsites, and the MOSS 2007 search is more thorough. However, Hour 14 shows how to extend the scope of the WSS 3.0 search by adding Search Server 2008 Express.

Note

Some other changes within WSS 3.0 filled the gaps found in earlier versions:

- ▶ You can recover data without restoring an entire earlier copy on a spare server.
- ▶ You can have a tree view showing the structure of your site without using a third-party product.
- ▶ You can have a menu line showing where you were in the structure, and thus allowing you to jump back to an earlier level without needing to hit your browser's Back button.
- ▶ Views are in alphabetic order.
- ▶ Folders are improved (but still not that great in some purists' opinions).

So now, we have WSS 3.0: the main foundation product and two main versions of MOSS 2007—Standard and Enterprise. Each version has different levels of additional packaged functionality.

Whenever Microsoft demonstrates SharePoint 2007, its representative invariably mentions all the possible functions of the (top-of-the-line) Enterprise version. Rarely does he clarify that he's describing Enterprise-only functions.

Summary

This chapter familiarized you with SharePoint 2007 products. This chapter examined the historical development of the SharePoint products. You now know that WSS 3.0 is the basis from which all the SharePoint 2007 products derived. Therefore, what you learn about WSS 3.0 in this book (and elsewhere) will be of use to you with all the versions of MOSS 2007 and with other Microsoft products.

Q&A

Q. *Why can't I find function X in my copy of WSS 3.0?*

A. Often, documents about SharePoint functions make no mention of the SharePoint product in which the function is included.

Unfortunately, because the two MOSS 2007 products are in effect WSS 3.0 plus bundled software, many functions are available in only one version of MOSS 2007 (the Enterprise Edition). They are not included in WSS 3.0. (In many cases, they are not included in the Standard version of MOSS 2007, either.)

Q. *Why is X, which was in the 2.0 version, no longer in the 3.0 version?*

A. Microsoft had a good reason to drop some of the functionality found in WSS 2.0. Mostly, it is a good technical reason, but sometimes it's also political.

Workshop

Quiz

1. Which version 1 SharePoint product forms the basis of today's SharePoint product range?
2. Name a couple of improvements in WSS 3.0 compared to WSS 2.0.
3. What do you upgrade CMS 2002 to and via which path?

Quiz Answers

1. SharePoint Team Services (STS).
2. A menu line showing where you are in the site structure; being able to easily recover deleted data.
3. You can upgrade CMS 2002 to either the Enterprise version of MOSS 2007 or (with a loss of function) to the Standard version of MOSS 2007.

You must, however, first upgrade from CMS 2002 to CMS 2003 to use Microsoft's migration tools. (Microsoft also provides tools to migrate from CMS 2002 to CMS 2003.)

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