Microsoft® SharePoint® 2007 FOR DUMMIES®

by Vanessa Williams

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About the Author

Vanessa Williams is an author and consultant specializing in SharePoint technologies. She helps organizations, technology professionals, and end users find meaningful uses for technologies, such as SharePoint, Office 2007, Visual Studio, and the .NET Framework.

Vanessa grew up in Indianapolis, where she graduated from the Kelley School of Business at Indiana University with a Bachelor of Science degree in Business Management and Computer Information Systems. She still lives in Indy, about three miles south of downtown in the wonderful Garfield Park South neighborhood.

In her spare time, Vanessa likes to read books about sociology, religion, spirituality, and current affairs. She enjoys hiking, traveling, and spending time with her family, including her two dogs Rosie and Buffy. She also enjoys staying current on enterprise technologies and consumer electronics.

Vanessa loves to talk about SharePoint. You can contact her via her Web site at `www.sharepointgrrl.com`.

Author's Acknowledgments

In the time that's passed since I wrote *SharePoint 2003 For Dummies* (Wiley), I now have two dogs and another cat. I couldn't have finished this book if I didn't have Buffy (Dog # 1) to lick my toes and Rosie (Dog # 2) to play tug-of-war with. The cat lies on my desk while I'm trying to work. I could do without the cat.

The number of people (and animals) it takes to produce a book is mind-numbing. I came in contact with a brave few this time around. I know them mostly by their assigned color and the initials they used to sign their editorial comments. Many thanks to pgl (pink), Jen (green), and kc (red). I'll never forget our time together in SharePoint purgatory.

I must also thank all the poor souls who've had to endure my SharePoint-babble while writing this book — over breakfast with Mel, over far too many coffees with Denis, over e-mail with Katie, and over dinner with Mel. I promise to stop talking about SharePoint eventually.

Finally, I need to thank all the readers. You bought the first SharePoint book and sent wonderful feedback. You took me with you to your server rooms, board rooms, and rest rooms. I hope to have that privilege again.

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Introduction

SharePoint is nothing new. Heck, it's been around since 2001. As fast as technology changes, SharePoint should be ancient history by now. Quite to the contrary, SharePoint has finally found its legs after all these years.

ShareWhat, you say? SharePoint is the server-side connective tissue that binds the slippery client-side outputs of office workers into a manageable, searchable, and accessible information environment. Gone are the days when workers just organized their files in electronic folders and had to call the help desk every time something was deleted accidentally. SharePoint provides a self-service environment where office workers can take control of information — how it's organized, who gets access to it, and how it's displayed.

Don't feel bad if you don't know SharePoint from Shinola. You aren't alone. Many obstacles are along the path to a successful SharePoint implementation. This book uses plain English to get you started on your SharePoint journey so that nothing trips you up along the way.

Coming Out of the Shadows

Since SharePoint was first released in 2001, Microsoft has made steady progress on the product's features. The first few releases of SharePoint consisted primarily of the ability to dynamically generate team Web sites. These sites hosted document libraries, tasks lists, and calendars to enable a small team of users to manage documents and collaborate on a project. The initial product was called SharePoint Team Services but was changed in 2003 to Windows SharePoint Services (WSS).

The building blocks — lists, libraries, and user-customizable Web pages — used by WSS to create team sites turned out to be very versatile and could be used for more than just team collaboration. Many companies started creating SharePoint sites to solve all kinds of business problems, such as managing help desk tickets and automating expense check requests.

Microsoft created a more expensive add-on product, SharePoint Portal Server, that added the ability to create portals and search across team sites. The portal allowed companies to provide centralized access to all their team sites.

Despite SharePoint's usefulness, the product's adoption was nichey and sporadic. Also, there was (and still is) significant confusion in the marketplace about what SharePoint is and what it does. When Microsoft sat down to consider the product's future after the 2003 release, they saw an opportunity to more tightly integrate the product with the Office clients that virtually all office workers already have on their desktops. Increased integration with Office 2007 catapulted SharePoint onto center stage.

Microsoft used a host of existing and newly created products to develop the 2007 release of SharePoint. Like pieces of a puzzle, the following product opportunities came together to create a better SharePoint:

- **ASP.NET 2.0:** The release of ASP.NET 2.0 provided the foundational layer that was missing in previous versions of SharePoint. By using ASP.NET 2.0, Microsoft was able to focus on building a better SharePoint without spending so much time on low-level services. Some of the ASP.NET 2.0 features used or extended by SharePoint include the Web Parts framework, personalization, pluggable authentication, and master pages. WSS 3.0 is truly a testimony to what you can build with ASP.NET 2.0!
- **Content Management Server 2002:** Like chocolate and peanut butter, many companies, including Microsoft, realized that Content Management Server could be used to support SharePoint. Instead of having a separate server, Microsoft decided to roll Web content management into SharePoint.
- **Office 2007:** Microsoft realized that companies need a compelling reason to upgrade to Office 2007. Adding more features to Word and Excel doesn't cut it any more. In addition to completely redesigning the look and feel of most Office clients for the Office 2007 release, Microsoft added many new features that are available only via a server infrastructure. SharePoint is a major player in providing the Office 2007 server infrastructure.
- **Search:** In 2006, Google went after the desktop, and Microsoft went after search. Microsoft introduced a family of search products that target the Web, desktop, and enterprise with the expressly stated intent of taking Google head-on. SharePoint is the key element that delivers enterprise search.
- **Windows Workflow Foundation (WF):** The release of WF with version 3.0 of the .NET Framework brings a workflow engine to SharePoint, Office 2007, and all applications that run on Windows. Workflows make it possible to step through a process, such as submitting a document for approval. Building a separate workflow engine decouples workflow capabilities from specific server products. Instead of having only a few products with workflow, all products can have workflow. SharePoint extends WF and provides several out-of-the-box workflow implementations that businesses can use to automate business processes without writing custom code.

By taking advantage of these products along with the new goals of winning search while keeping its talons securely fastened to the business desktop, Microsoft completely re-architected SharePoint into a layer of technologies that consists of these two primary products:

- **Windows SharePoint Services (WSS) version 3.0** is the foundational product that provides a set of building blocks for creating SharePoint applications. The two primary usage scenarios for WSS are still document management and collaboration. The third usage scenario is a platform for creating applications with SharePoint.
- **Microsoft Office SharePoint Server (MOSS) 2007** is the server-side infrastructure that turns Office 2007 clients into generators and consumers of content for SharePoint applications. MOSS 2007 is the successor to SharePoint Portal Server 2003. Although MOSS supports the creation of portals, Microsoft has expanded it to include many enterprise-level services, such as business intelligence and business process integration. MOSS 2007 is an example of an application created using WSS as a platform.

At this point, I could give you the obligatory laundry list of SharePoint's features. Even if I did that, you still wouldn't understand how to use SharePoint. Instead, this book focuses on using SharePoint's out-of-the box application building blocks to get up and running solving problems relevant to your business.

Who Should Read This Book

Now that SharePoint is no longer the red-headed stepchild of Microsoft's server family, an increasing amount of buzz surrounds it. Whether you're brand new to SharePoint or you're looking to get acquainted with SharePoint's new features, this book is for you.

To help you cut through the hype, this book tells you everything you need to know to start using WSS or MOSS 2007 in your business today. If you're unsure about which SharePoint product to implement, I give you the breakdown of where WSS features end and MOSS 2007 picks up.

You'll get guidance for planning your project and ideas for ways you might use SharePoint in your organization. I don't go into the details of performing upgrades in this book, although I do explain how to set up and configure a SharePoint infrastructure.

This book isn't really intended for end-users unless you're curious about SharePoint's configuration options. Instead, I suggest my book *Office 2007 and SharePoint Productivity For Dummies* (Wiley). Also, I don't cover customizing SharePoint in this book. I suggest you see my book *SharePoint Designer 2007 For Dummies* where I show you how to create custom sites and solutions for SharePoint that don't require you to write code.

How to Use This Book

I know you don't want to read this book cover to cover, and you don't have to. Your role in SharePoint's implementation makes some topics more relevant than others. If you want to zero in on a particular topic, you can use the table of contents and index to focus on that coverage. Part II focuses almost exclusively on Windows SharePoint Services, whereas Parts III and IV lean more toward MOSS 2007 coverage. I compiled a list of topics that I know many of you are interested in:

- Setting up, configuring, deploying, and administering SharePoint — see Chapters 1, 2, 3, 18, and 19.
- Understanding the basics of SharePoint sites, including how to create, configure, and secure them — see Chapters 4, 5, and 6.
- Understanding how to add and manage content in SharePoint — see Chapters 7 and 8.
- Figuring out how end users interact with SharePoint — see Chapters 9 and 10.
- Setting up your portal and people directory in MOSS 2007 — see Chapters 11, 12, and 13.
- Configuring and understanding SharePoint's search features — see Chapter 14.
- Diving into SharePoint's options for document and records management — see Chapter 15.
- Using SharePoint to manage and publish content to portals and Internet-facing sites and exploring your options for customizing SharePoint's look and feel — see Chapter 16.
- Getting introduced to SharePoint's features for integrating enterprise applications into SharePoint, creating business intelligence (BI) dashboards and reports, and displaying Excel spreadsheets in SharePoint — see Chapter 17.

You'll get the most out of this book if you work through the examples when you read the text. You may also find it helpful to have access to both a WSS server and a MOSS 2007 server so you can see the differences between the products.

I run both servers on a single physical machine using Virtual Server 2005. As long as you have a fast processor along with plenty of RAM and disk space, you should be fine using a virtual server for a testing environment.

Foolish Assumptions

While writing this book, I had to make a few assumptions about you — the reader. Don't worry, I didn't take you for the pocket protector type with a dozen servers in your bedroom. But I wouldn't be surprised to find a hipster PDA and a pile of Mountain Dew cans.

In order to work the examples in this book, you need access to a working SharePoint installation with either WSS version 3 or MOSS 2007. If you don't already have a SharePoint server, I walk you through how to install SharePoint in Chapter 2. I'm assuming you know your way around a Windows server and have basic networking skills. You certainly don't need to be certified or know how to build a server.

I also assume that you're working inside a Windows network that's running Active Directory (AD). You don't have to run AD to perform most of the examples in this book. The examples in this book haven't been tested when accessing SharePoint from the Internet.

SharePoint is a server-based technology, so you have to know the name of your server in order to access SharePoint's resources. Because I don't know what the names of your servers are, I have to assume that you know the server names and URL paths to your SharePoint server. While I walk you through all the various ways you can access SharePoint (it isn't just the browser, you know — see Chapter 6), you have to substitute your server and path names to access the resources in your SharePoint deployment.

How This Book Is Organized

This book groups related SharePoint topics together in parts. Each part covers a different aspect of implementing or using SharePoint.

Part 1: Setting Up SharePoint

In this part, you get your first lessons in SharePoint-speak. I walk you through setting up SharePoint servers and configuring the high-level infrastructure that holds your business content. You probably want to read Chapter 1, but you can browse Chapters 2 and 3 if you already have a functioning SharePoint server.

Part II: Exploring SharePoint's Building Blocks

Part II walks you through all the foundational elements used to create solutions in SharePoint. Chapters 4, 5, and 6 address issues related to creating, navigating, and securing a site infrastructure. Chapters 7 and 8 get into the meat and potatoes of solving business problems with two of SharePoint's most useful features: data and business process management.

Part III: Improving Information Worker Collaboration and Productivity

In Part III, I start to look at some of the ways that end users interact with SharePoint in their native habitat, Windows client applications. Chapter 9 focuses on accessing SharePoint through Office 2007 clients, other Windows applications, and alternatives to using Web browsers. In Chapter 10, I explore using e-mail to send information to and receiving information from SharePoint. Chapters 11–14 deal primarily with MOSS 2007 features, including portals, user profiles, personalization, and enterprise search.

Part IV: Enterprise Applications for SharePoint

In this part, I cover some of the more advanced features of MOSS 2007. Chapter 15 explains the document management features offered by WSS and how MOSS 2007 expands on those with advanced document management and records management features. Chapter 16 explores Web content publishing, along with opportunities for customizing SharePoint's look and feel. I explain the opportunities for data integration and creating business intelligence dashboards in Chapter 17.

Part V: Administering SharePoint

The chapters in this part follow up on the material covered in Chapters 2 and 3 by explaining SharePoint's server farm administration features. You'll see how to monitor your server farm and perform a backup.

Part VI: The Part of Tens

When it comes to SharePoint, a single resource is never enough. In Chapter 20, I share with you my top ten list of resources for staying up to speed on all things SharePoint. And because making the business case is vital to all successful SharePoint implementations, I offer you ten positive outcomes that you might aspire to achieve with your SharePoint implementation.

Icons Used in This Book

You'll find a handful of icons in this book, and here's what they mean:

Tips point out a handy shortcut or help you understand something important to SharePoint.

This icon marks something to remember, such as how you handle a particularly tricky part of SharePoint configuration.

This icon means that what follows is technical, insider stuff. You don't have to read it if you don't want to, but if you want to become a SharePoint pro (and who doesn't?), take a look.

Although the Warning icon appears rarely, when you need to be wary of a problem or common pitfall, this icon lets you know.

Where to Go from Here

Alright, you're all set and ready to jump into Chapter 1. You don't have to start there; you can jump in anywhere you like — the book was written to allow you to do just that. But if you want to get the full story from the beginning, jump to Chapter 1 first — that's where all the action starts. (If you already have a SharePoint server up and running, you might want to jump ahead to Chapter 4, where you can get your hands dirty with some site content.)

Part I

Setting Up SharePoint

The 5th Wave By Rich Tennant

"Okay, well, I think we all get the gist of where Jerry was going with the site map."

In this part . . .

Discover SharePoint's features and how they fit into your existing technology environment. I show you how to get up and running with your very own SharePoint server. Because installing SharePoint is only half the battle, I also get you started on the necessary next steps you'll need to carry out before you can hang that Open sign on your SharePoint deployment.