

Contents

Acknowledgments	ix
Introduction	xix
Chapter 1: Introduction to SharePoint 2003	1
What Is SharePoint?	1
The History of SharePoint	2
The Future of SharePoint	3
Differences between WSS and SPS	4
Windows SharePoint Services 2003	4
SharePoint Portal Server 2003	5
What You Need to Run SharePoint	5
Software Requirements	5
Hardware Requirements	6
Building a Test Environment	6
Integrating with MS Office 2003	7
Built-In Features of SharePoint	8
Alerts (WSS and SPS)	9
File and Document Management (WSS and SPS)	9
Project Management (WSS)	10
Managing Meetings (WSS)	11
Keeping Your Organization Updated (SPS)	12
Finding Your Information Faster (SPS)	14
What File Types Can You Search?	15
What Type of Searching Can You Do?	16
Accessing SharePoint over the Internet	17
How You Do It	17
Allowing External Partners Access	18
Summary	19
Chapter 2: Installing Windows SharePoint Services	21
Preparing to Install WSS	21
Types of WSS Configurations	23
Hardware Requirements	25
Software Requirements	27

Contents

Installing WSS	29
The Config and Content Databases	29
Installing a Single-Server with the WMSDE Database	30
Installing a Single-Server with a Local MS SQL Database	36
Installing a Single-Server Using a Remote MS SQL Database	42
Upgrading WMSDE to MS SQL Server	47
Preparing to Upgrade Your WMSDE	48
Upgrading WSS to a Local MS SQL Server	50
Migrating WSS to a Remote MS SQL Server	51
Uninstalling WSS	52
Uninstalling WSS but Leaving the Database Files	52
Removing WSS Completely	52
Summary	53
Chapter 3: Configuring and Managing Windows SharePoint Services	55
Important Concepts	56
Administrative Web Sites and User Web Sites	56
Top Sites, Subsites, and Site Collections	61
The Security Mechanism	62
Beginning SharePoint Administration	64
Creating Your First Sites	64
Creating a New Top Site	67
Configuring WSS to Use an SMTP Mail Server	72
Managing Access Control of Web Sites	74
More Advanced WSS Administration	76
Site Groups	76
Cross-Site Groups	81
Anonymous Access	83
Working with Custom Site Templates	86
Removing User Accounts	93
Summary	96
Chapter 4: Installing SharePoint Portal Server	99
Preparing for SPS	99
When Do You Need SPS?	100
Three Database Combinations	101
The Databases in SPS	102
The Front-End and Back-End Roles	102
Hardware Requirements	106
Software Requirements	108

Installing SPS	111
Installing a Stand-Alone Server with the MSDE Database	111
Installing a Single-Server with a Local MS SQL Database	117
Installing SPS in a Small Farm	127
Backing Up SPS 2003	133
Upgrading MSDE to MS SQL Server	136
Preparing to Upgrade to MS SQL Server	136
Upgrading SPS to a Local MS SQL Server	136
Post-Installation Tasks	138
The Configuration Database	138
The Content Database	139
The User Profile Database	140
The Service Database	140
Uninstalling SPS	141
Uninstalling SPS but Leaving the Database Files	141
Removing SPS Completely	142
Summary	142
Chapter 5: Configuring and Managing SharePoint Portal Server	145
Changing the Look and Feel of the Portal Site	146
Modifying the Portal Site	146
SharePoint's Folder Tree	149
Branding the Portal Site	153
Changing the CSS File	156
Managing Portal Areas	161
The Home Area Page	162
The Topics Area Page	175
The News Area Page	187
The Site Area Page	194
Managing Access to the Portal Site	200
Managing Users and Groups	200
Site Groups	202
Anonymous Access	204
Summary	205
Chapter 6: Advanced Administration	207
SPS-Related Administration Topics	207
Managing Portal Area Templates	207
Managing User Profiles	212
Managing Audiences	221
Managing My Sites	227
Security in the Portal Site	238

Contents

Searching	241
Searching in WSS	242
Searching in SPS	244
Summary	259
Chapter 7: Comparing WSS and SPS	261
<hr/>	
The History of SharePoint	261
SharePoint Team Services (STS)	261
SharePoint Portal Server 2001 (SPS)	262
The Road Ahead from 2001	262
Comparing the Objectives	263
The SharePoint Philosophy	263
The Primary Objective for WSS	265
The Primary Objective for SPS	265
Comparing Security	266
List Security	266
Site Security and Rights	267
Visibility of Objects	270
Cross-Site Groups	272
Comparing Web Parts	272
Comparing Customization	274
Customizing Colors and Styles	274
Customizing the Site Layout	275
Comparing Templates	280
Creating Site Templates	281
Creating Lists and Library Templates	283
Copying Templates	284
Comparing Administrative Web Pages	286
Comparing Backups	287
Summary	287
Chapter 8: Working with Web Parts	289
<hr/>	
Introduction to Web Parts	289
Web Part Zones	290
Default Web Parts	291
Finding More Web Parts	306
Free Web Parts	307
Not-So-Free Web Parts	314
Installing Web Parts	319
Developing Web Parts	320
Summary	321

Chapter 9: More Effective File and Document Management	323
Traditional File Chaos	323
Document Management Systems	324
Traditional File Management Systems	325
What You Really Need	326
The SharePoint Way	327
Allowed File Types	328
Creating Document Libraries	330
Understanding Columns and Views	332
Working with Alerts	341
Checking Out and Checking In	342
Document Version History	345
Document Management with MS Office	346
Working with Datasheets and MS Excel	350
Managing List Access	353
Managing Document Workflow	354
Working with Document Workspaces	356
Using SharePoint as a File Share	357
Summary	360
Chapter 10: More Effective Meetings	361
The Typical Meeting Process Today	361
Before the Meeting	362
During the Meeting	362
After the Meeting	363
The Problems of Today	363
What You Really Need	364
Before the Meeting	364
During the Meeting	364
After the Meeting	364
How to Do This with SharePoint	365
Before the Meeting	366
During the Meeting	366
After the Meeting	367
Integrating Outlook and SharePoint	368
Managing Integration Features in Outlook	368
Meeting Workspace Templates	370
Creating a Meeting Workspace	370
Modifying a Meeting Workspace	373
Managing Pages	377

Contents

Managing a Series of Meetings	379
Joining an Existing Meeting	379
Managing List Content for a Series of Meetings	380
Tips about Series of Meetings	381
Meetings with Other Users	383
Allowing Additional Internal User Access	383
Allowing External User Access	384
Summary	384
Chapter 11: Case Study: Building an Intranet	387
Analyzing the Needs	387
WSS or SPS?	388
Analyzing an Intranet	389
An Intranet Based on WSS	390
General Features of the Intranet	390
Building an Intranet Using WSS	391
Creating Local Team Intranets	396
Creating Top-Level Local Intranets	397
An Intranet Based on SPS	399
The Portal Site Overview	400
Creating Picture Libraries	400
Targeting Audience Groups	401
Hiding Links from Users	404
Adding Calendars	404
Weather Reports	404
External News Reports	405
Personal Calendars	406
Searching with SPS	407
Displaying Web Content	407
Departmental Intranets	408
Smarter Navigation	410
Summary	412
Chapter 12: Designing with FrontPage	413
Why FrontPage?	413
A Quick Guide for FrontPage	414
Opening Sites with FrontPage	414
FrontPage's Display Modes	415
Modifying the Site	416
Saving Your Work	416
Differences between SPS and WSS	417
Ghosting and Un-ghosting	417

Basic Design	418
Adding Text Outside Web Parts	418
Adding Links to Team Sites	419
Adding a Background Picture	420
Changing the Team Site Logo	420
Interactive Buttons	420
Hiding Fields on a Web Form	422
Managing Site Templates	423
Page Transitions	425
Managing Web Part Zones	425
Adding an IFrame	426
Retrieving a SharePoint Summary	427
Extended Design	428
Managing Themes	428
Adding Pages to SharePoint	432
Creating a Blog Package	436
Data Sources and Data Views	438
Summary	444
Chapter 13: Backup and Restore	445
What Data Should You Protect?	445
The SharePoint Database	446
SharePoint Files	446
Backup Options	448
Moving and Copying Information	448
Backing Up with Stsadm	450
Preparing for Stsadm	451
Running the Stsadm Backup	451
Tools for Stsadm	452
Backing Up with Smigrate	454
Preparing for Smigrate	455
Running the Smigrate Backup	456
Tools for Smigrate	456
Backing Up with Spsbackup	457
Making Backups Using the Graphical Interface	459
Making Backups Using the Command-Line Interface	460
Restore Procedures	460
Restoring a Single Item	461
Restoring a Single Site	464
Restoring a Single Site Collection	466
Restoring a Complete Portal Server	467
Making a Backup Plan	469

Contents

Third-Party Backup Tools	470
General Backup Agents	470
MS SQL Backup Tools	471
AvePoint Tools	472
NSE Tools	472
Summary	473
Chapter 14: SharePoint 2007	475
Why a New Version?	476
The Next Generation	476
The MS Office 2007 Suites	477
Windows SharePoint Services	480
The New SharePoint Portal Server	486
News for Developers	491
Master Pages	491
Page Layout	492
Content Pages	492
The New Concept “Features”	492
Upgrading to SharePoint 2007	493
Different Upgrade Scenarios	493
A Default Site	494
A Customized Site	494
Summary	494
Index	497