

## Chapter 1

# Getting to Know SharePoint

### *In This Chapter*

- ▶ Starting simply with Windows SharePoint Services
- ▶ Taking things to the next level with SharePoint Portal Server 2003
- ▶ Understanding the many forms of SharePoint
- ▶ Putting your content where it fits
- ▶ Weighing the pros and cons of getting SharePoint

**T**here's SharePoint, and then there's SharePoint. Microsoft has two products with the same name:

- ✓ Windows SharePoint Services (WSS)
- ✓ SharePoint Portal Server 2003 (SPS)

With me so far?

You can have Windows SharePoint Services (WSS) without having SharePoint Portal Server 2003 (SPS). But you *can't* have SPS without WSS. Clear as mud? I thought so. Wait, it gets better:

- ✓ **WSS is part of Windows Server 2003.** When you install Windows Server 2003, WSS is included by default.
- ✓ **SPS is part of Office 2003.** But when you install Office 2003, you don't automatically get SPS. You have to buy it separately.

## *Keeping It Simple with WSS*

Windows SharePoint Services (WSS) is part of the core technologies of Windows Server 2003. WSS is the engine behind SharePoint sites; without WSS, there is no SharePoint site. Which reminds me . . .

*SharePoint sites* are internal Web sites intended for team collaboration. But a SharePoint site isn't just any old Web site. It has features that would require

many programming hours to create if you built it on your own. WSS is so valuable on its own — you can create an entire Web site for any number of people to use, complete with these features:

- ✓ Built-in security and e-mail notification to new users
- ✓ Administrative tools to back up and restore
- ✓ A database for storing Web site content
- ✓ Reusable templates for adding content

You get all these features with just the click of a few buttons. WSS provides templates that let you specify which kind of site you want to create. WSS provides templates for

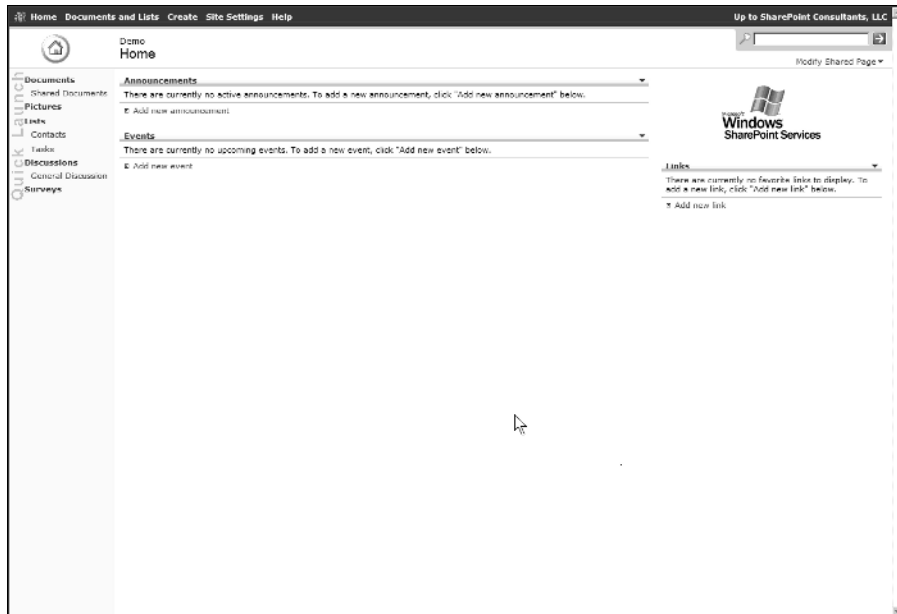
- ✓ Team sites
- ✓ Meeting workspaces
- ✓ Document workspaces

Each of these site templates creates a Web site that has all the administrative features mentioned in the bulleted list earlier in this section. The sites also let you add content by using reusable templates. Here are some handy examples of what you can add with reusable templates.

- ✓ Libraries for
  - Managing documents by using version control and check-in/check-out
  - Entering data into data-entry forms
- ✓ Lists for entering data into forms or grids such as spreadsheets
- ✓ Reusable pieces of content (called *Web parts*) that can display any library or list on the site — and other content as well, such as the weather
- ✓ Threaded discussions and surveys, similar to what you'd find in a newsgroup or online forum
- ✓ Additional pages for displaying all this content and more

Figure 1-1 shows an example of a team site created with WSS. On the team site's home page, you can see

- ✓ Announcements
- ✓ Events
- ✓ Links



**Figure 1-1:**  
Windows  
SharePoint  
Services  
creates  
this team  
Web site.

You can customize everything you see on the team Web site shown in Figure 1-1; you can add, modify, and remove everything. Plus you have a lot more options to play with that you can't see from just this screen. (For more about customizing team sites, get a look at Chapter 3.) Best of all, you can do all this customizing from your Web browser — you don't have to know HTML, CSS, or any programming languages. If you can point and click, then you can build a usable team Web site with Windows SharePoint Services.

## *Kicking It Up a Notch with SPS*

You can create hundreds, even thousands, of Web sites by using the site and content templates of Windows SharePoint Services. But having hundreds of individual team Web sites creates a new set of problems.

Say a company is trucking along, using Windows SharePoint Services to create sites whenever the need arises. Before long, this company has sites for

- ✓ Filling out benefits forms
- ✓ Submitting ideas to the new product development team
- ✓ Surveying employees for ideas for Christmas decorations
- ✓ Storing and organizing the warehouse manager's music collection

Okay, you have all these sites — but no real way to connect them. You have no central jumping-off place where the people in your company can go to find what they're looking for.

The problem is classic: A technology that solves a problem often creates new needs. So how do you solve this dilemma? Use a new technology, of course!

You need a centralized administration tool that lets you

- ✓ Search across all your WSS sites
- ✓ Bring in content from WSS sites to a central site
- ✓ Connect with people on other WSS sites

Back in the early days of the Internet, you could have a really hard time finding other people's Web sites. People soon discovered that they needed a directory. Enterprising entrepreneurs invented Web sites like Yahoo and Google to connect all the sites that had just been floating around on the Web.

At Yahoo, you find Web sites grouped into categories. Such sites (which categorize other sites) are called *portals*. Yahoo is a central place that many people go to look for something on the Web.

Google, on the other hand, provides a tool for searching other Web sites: a *search engine*. (Yahoo also has a search engine, in addition to its portal.) A search engine is a valuable way to find information without using structured categories. Portals often use search engines in addition to their categorizing of Web sites.

As more people use highly connected sites such as Yahoo and Google, suddenly the world is a little smaller. It's like the game the Six Degrees of Kevin Bacon. In this game, you try to figure how to connect an actor or actress to Kevin Bacon through common costars, using the fewest links possible. Amazingly, you can connect most actors and actresses to Kevin Bacon within three links. (Don't believe me? You can play an online version of Six Degrees of Kevin Bacon at the University of Virginia's Web site at [www.cs.virginia.edu/oracle](http://www.cs.virginia.edu/oracle).)

Kevin Bacon is highly connected in the same way that a portal like Yahoo is highly connected: Easy to find, and easy to use to find others.

To solve the problem of having hundreds of unconnected Windows SharePoint Services sites, Microsoft created Microsoft SharePoint Portal Server 2003 (SPS). The SPS portal is as highly connected as Yahoo (or, for that matter, Kevin Bacon). As with any portal, you can use SPS to

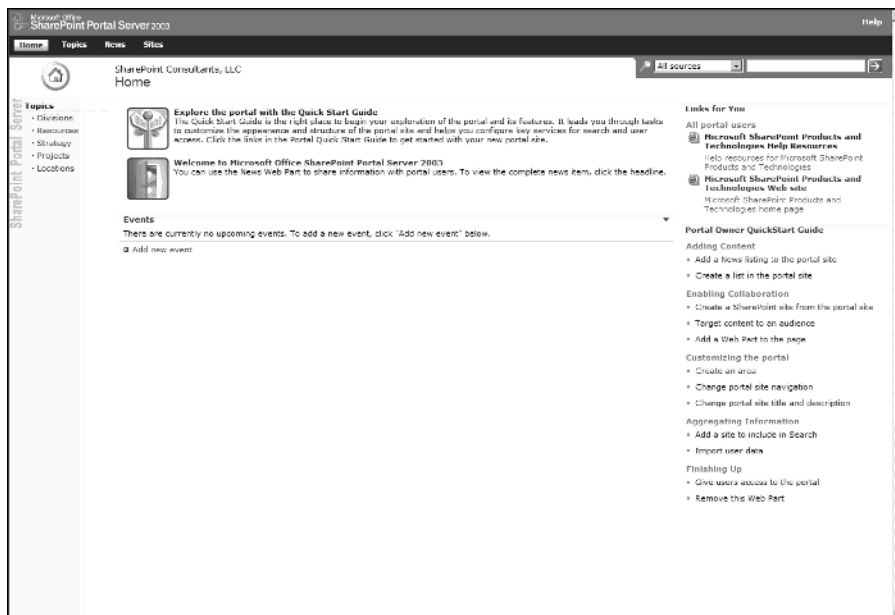
- ✓ Categorize WSS sites
- ✓ Provide links to WSS sites or sites on the Web
- ✓ Search WSS sites for content and people
- ✓ Display content from WSS sites

SPS creates a small world of connected WSS sites so you can perform centralized administration tasks such as site backups and WSS site creation. It gives your users a single place to go when they're looking for information in your enterprise. (In this case, even the capitalist inside Bill Gates can attest that centralization is better.)

You can see the SharePoint Portal Server home page in Figure 1-2.

The SPS home page may look familiar because SharePoint Portal Server 2003 is a kind of Windows SharePoint Services site; SPS and WSS use the same underlying technology. SPS just expands on the already-wonderful WSS features. Think of SPS as a WSS site on steroids, where you can create

- ✓ Lists
- ✓ Libraries



**Figure 1-2:**  
The  
SharePoint  
Portal  
Server 2003  
home page  
connects  
SharePoint  
sites.

- ✓ New pages
- ✓ Everything else you can create on a WSS site

Many WSS features take on different names in SPS. For example, you call a Web page an *area*, and links (as in hyperlinks) become *listings*.

In addition to the standard WSS features, SPS also has the following features:

- ✓ **Area pages:** These display links to WSS sites and other content stored on the SPS site.
- ✓ **Tools:** Among these are Topics and Keyword Best Bets for directing people to content.
- ✓ **Site directory:** This feature categorizes and browses all WSS sites connected to the SPS site.
- ✓ **Search engine:** This searches the content in the WSS sites connected to the site directory — as well as the content on the portal itself.



SharePoint Portal Server is both a portal *and* a site, so you may sometimes hear it called the *portal site*. SPS can do everything a WSS site can do, plus it has features you would expect of a highly connected portal such as Yahoo.

## Splitting Hairs

At the end of the day, you can call it WSS, SPS, or SharePoint. Heck, I just call it *the portal*. Here's why:

- ✓ If your company uses only WSS, you call it SharePoint.
- ✓ If your company uses WSS *with* SPS, you still call it SharePoint.
- ✓ If your company starts out using WSS, and then adds SPS later . . . yep, you call it SharePoint in this case, too.

Here's where it gets, um, interesting: The products do have different setup approaches. WSS can be installed as part of Windows Server 2003, but SharePoint Portal Server requires a separate server or two (at minimum). Even if you use only WSS, at some point you probably want to evaluate SPS. Either way, you still use SharePoint.

The only time this distinction really matters is when you're reading a book like this one or getting help on the Web. You may buy a book on SharePoint without understanding whether the book covers WSS or SPS. And people on the Web can be brutal if you ask a question about SPS on a site that discusses

WSS. (They assume you already know the difference and treat the two as separate. Picky, picky.)

From the perspective of someone using SharePoint, I argue that you may not even want to use the name SharePoint to describe your portal. You can give your portal a functional name like *corporate portal* or *company intranet*. SharePoint is the underlying technology, not the solution itself. (You don't gab with your average end user about the fine points of .NET, CSS, Java, and iterative development, right?)



In this book, I usually refer to SPS as *SharePoint*, *the portal*, or *the portal site*. If I talk about a WSS site, I call it a *SharePoint site*. Outside of this chapter, I don't differentiate between SPS and WSS again. It's all SharePoint to me.

## Equal-Opportunity Content

This book takes a marble-cake approach to the two SharePoint products. Some chapters may be more about SPS than WSS and vice versa, but there is often a little bit of both sprinkled throughout.

Any time you add content to SharePoint, you face the question of which SharePoint to use. You have several options:

- ✓ Store the content on the portal (meaning SPS) and display it on the portal
- ✓ Store the content on a site (meaning WSS) and display it on the portal
- ✓ Store the content on a site, and display it on a site *and* on the portal
- ✓ Store and display the content on a site, but don't display it on the portal
- ✓ Store the content outside SharePoint altogether (in a file share, for example) and display it on a site, the portal, or both

Because you have so many choices, you need to understand the role of each SharePoint product. Also, some limitations can influence this decision. You need to understand your available options and the advantages and limitations of choosing the portal site or a regular site. This book shows you how to decide whether to store content on the portal, a site, or both.



I recommend that you store as much as possible on sites — then you can use the portal to search and categorize. The only content I like to store on the portal itself is all the listings and links to site and external content.

I think this approach works well because it makes administration and maintenance easier. You can group like content together on a site and assign an administrator to the site. You can assign an administrator for the whole portal or divide the portal for many administrators. You can have one administrator for one area of the portal and a different administrator for another area. The site administrators can then submit content to the portal administrators, or the portal administrators can solicit content from the site administrators. You don't have to give a ton of people administrative access to your enterprise portal.

This approach allows people to specialize because you can have enterprise folks who are really good at navigation or Web design. You can put additional talent on figuring out ways to drive employees to use the portal.

## *Deciding Whether to Invest*

This book assumes that your company uses SharePoint Portal Server 2003, even if it's only installed in a test environment right now. If you aren't already using WSS, SPS installs WSS for you.

You have to take SharePoint as a serious investment. Implementing SharePoint takes significant resources:

✓ **Software:** An SPS installation requires this software:

- Windows Server 2003
- Internet Information Server 6.0
- SQL Server 2000
- Windows SharePoint Services

You get the best bang for your buck if you use SharePoint with Microsoft Office 2003, even though Office 2003 isn't required.

It's technically possible to host everything on one server, but SharePoint flourishes with two different servers for

- Hosting the front-end Web pages that users see
- Running all the jobs and storing data on the back-end server

✓ **Hardware:** Each server needs

- At least two CPUs
- One to two gigabytes of memory



**✓ Hard-drive space**

- **Less than 50 gigabytes (GB):** Use this small amount if you're just playing around
- **250GB:** Now you're getting serious
- **One terabyte:** Thank goodness storage is cheap

The nice thing about SharePoint is that you can start with one or two servers and expand as your needs grow.



For more about the hardware requirements for SharePoint, you can find a useful Microsoft article on capacity planning at this location:

[www.microsoft.com/technet/prodtechnol/office/sps2003/plan/cappisps.mspx](http://www.microsoft.com/technet/prodtechnol/office/sps2003/plan/cappisps.mspx)

If you aren't quite sure that you want to make the commitment to SharePoint just yet, you can test-drive a Windows SharePoint Services site free for 30 days at [www.sharepointtrial.com](http://www.sharepointtrial.com). Thirty days gives you enough time to work the examples in this book and decide whether SharePoint is right for your business.

If you don't have the extra hardware for building a test server, you can use Microsoft Virtual PC instead. You use Virtual PC to host all the software you need to run SharePoint on an existing piece of hardware. I installed Virtual PC on my computer running Windows XP and then hosted Windows 2003 Server and SharePoint on the Virtual PC. My test environment worked great after I bumped the machine up to 1GB of memory.

No matter what your installation environment looks like, many technologies play a part in setting up SharePoint. Having access to the folks with the right skills to support these technologies makes a huge difference.

