

SharePoint

Mega Guide

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What Is SharePoint?

First, a question that is on every SharePoint newcomer's mind: "Exactly what IS SharePoint, anyway?" Microsoft SharePoint is a multi-tier Web-based collaboration and document management software program. The first thing to understand is that the current generation of SharePoint comes in two "flavors":

- **Windows SharePoint Services 3.0:** Free add-on to Windows Server 2003 SP1; often called WSS 3.0
- **Microsoft Office SharePoint Server (MOSS) 2007:** Retail enterprise product; essentially a superset of WSS 3.0

The idea behind SharePoint is that an administrator can easily provision one or several related Web sites to support a business's intranet collaboration needs. The term "SharePoint portal" denotes the fact that a single page in SharePoint can display pointers to several different types of content, including:

- Announcement lists
- Discussion forums
- Document libraries
- Form libraries
- Picture libraries
- PowerPoint slide libraries
- Weblogs (blogs)
- Wikis

SharePoint has an interesting product history. Although I won't belabor this history in this document, it is instructive to have at least a cursory idea of where WSS 3.0 and MOSS 2007 come from in terms of product lineage:

- **SharePoint Team Services (STS):** Released in 2001 as an optional component of FrontPage in the Office XP product suite
- **SharePoint Portal Server (SPS) 2001:** Released in early 2001; retail product that built upon features offered in the free STS product
- **Windows SharePoint Services 2.0:** Totally revamped upgrade of STS; available natively in Windows Server 2003 R2 or as a free download from Microsoft.com
- **SharePoint Portal Server 2003:** Released in...well...2003; retail product intended as a major upgrade from SPS 2001
- **Windows SharePoint Services 3.0:** Released on November 16, 2006, as part of the 2007 Office System launch; available as a free download from Microsoft.com
- **Microsoft Office SharePoint Server 2007:** Released in 2007 as the next-gen successor to SPS 2003

The following image is helpful for differentiating between WSS 3.0 and MOSS 2007:

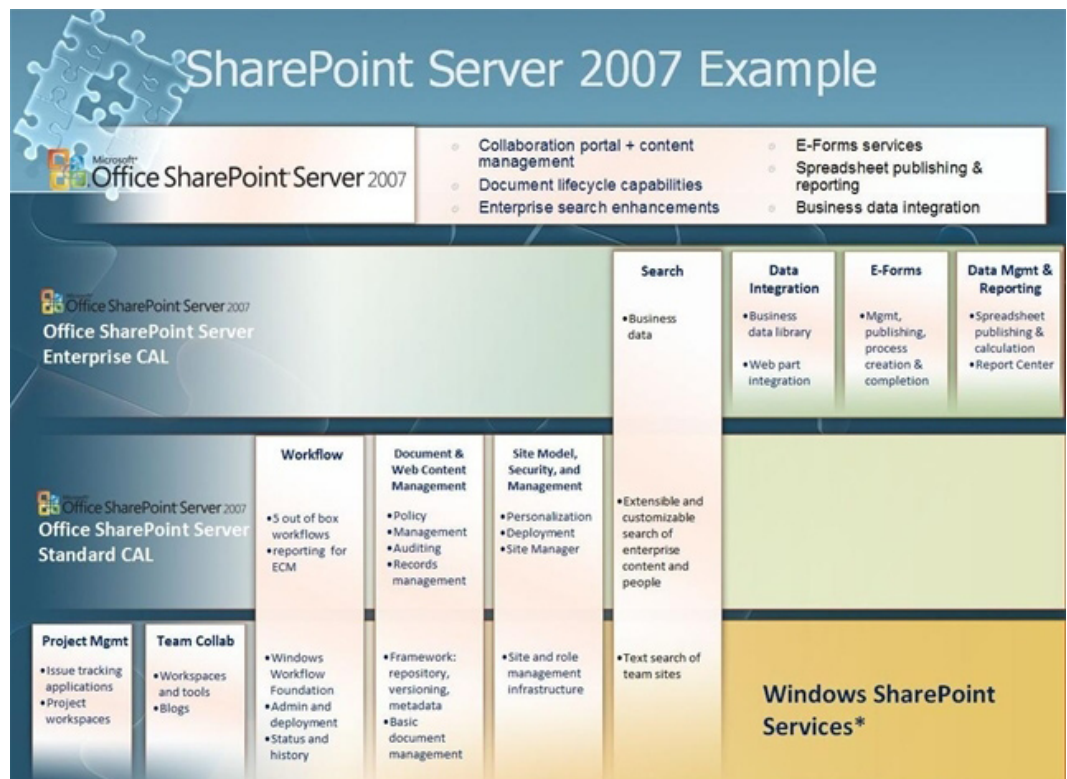


Figure 1: WSS/MOSS Feature Comparison

What you should notice first is the lower third of the diagram: these are the core features offered by the "freebie" WSS 3.0 product. Working your way upward you will see that MOSS 2007 ships in two editions: Standard and Enterprise.

Many businesses will want to pony up the extra money for the Enterprise edition of MOSS to take advantage of the following enterprise-only features:

- **Much more robust searching:** Your content sources can include data both internal and external to SharePoint.
- **InfoPath Forms Services:** You can deploy browser-based InfoPath forms and route them by using workflow.
- **Excel Services:** You can deploy browser-based Excel content to users. (Users don't need to have Excel installed locally on their computers to interact with the spreadsheet content.)
- **Business Data Catalog (BDC):** This service allows you to tap into external data (say, from an Oracle PeopleSoft database) and present that data meaningfully and securely to your users through SharePoint.

How can businesses leverage SharePoint (any edition) to solve collaboration challenges? Let us count the ways:

- Document libraries solve document versioning problems introduced by traditional file-sharing environments.
- Lists and libraries record document/item workflow. (Stuff doesn't get lost or slip through the cracks like it does when users employ e-mail to share data.)
- Announcements and calendars help keep employees "in the know" regarding goings-on in the company.
- Document security allows companies to adhere to compliance schemes such as Sarbanes-Oxley (SOX) or the Health Insurance Portability and Accountability Act (HIPAA).
- IT departments save licensing costs by deploying browser-based content instead of having to perform local installation on all users' workstations.
- Users can build their own personal sites in a MySpace-type fashion, increasing employee "ownership" in the intranet portal and enhancing collaboration.
- Data are stored securely and version-controlled; therefore, document archiving is a breeze.

Planning and Installing SharePoint

Perhaps more so than with other Microsoft enterprise products, prior planning is key to a successful SharePoint implementation. After all, managing a SharePoint site involves skill in many different systems management areas:

- Microsoft SQL Server for back-end data storage
- Internet Information Services (IIS) for hosting and presenting the SharePoint ASP.NET 2.0 Web application(s)
- Windows Server 2003 know-how (security, performance tuning, disaster recovery, et al.)
- Business analysis skills (to create a meaningful taxonomy of data in the SharePoint sites)
- Web design/development expertise (customizing SharePoint sites is not a trivial matter, with or without .NET programming skills)

In its literature Microsoft divides SharePoint administration into three discreet job roles:

- **Tier 1 Administrators** are concerned with Windows Server management. These folks back up SharePoint, IIS, SQL Server databases, and the like, and make sure the server hosting the SharePoint services is humming along properly.
- **Tier 2 Administrators** are primarily SharePoint farm administrators/business analysts. These individuals concern themselves with farm-wide feature implementation and management.
- **Tier 3 Administrators** are site-level administrators. As you will learn shortly, a SharePoint farm consists of one or more Web applications, which in turn are composed of site collections, Web sites, and subsites. There is much work to perform at this level; SharePoint site administrators work closely with the SharePoint site members and visitors in order to maximize their efficiency in using the sites.

Planning Farm Topology

The term “topology” refers to the physical arrangement of servers in a SharePoint farm, as well as the distribution of services among those server computers. SharePoint farms can be built in one of three sizes:

- **Small farm:** All SharePoint services (and SQL Server) running on a single box. Alternatively, you can separate the back-end data storage by setting up a separate SQL Server computer and placing all other SharePoint services on the second computer.
- **Medium farm:** Two or more SharePoint Web front-end (WFE) servers using Microsoft Network Load Balancing (NLB); SQL Server running on separate hardware.
- **Large farm:** Two or more SQL Servers arranged as a Windows Clustering Service (WCS) cluster group; SharePoint application services distributed on separate hardware; multiple NLB-enabled WFEs.

To illustrate the division of services that occurs when you scale out a SharePoint farm, consider the following exhibit, which depicts a typical large-farm implementation (<http://naveedullah.files.wordpress.com/2007/04/six-server-farm.jpg>):

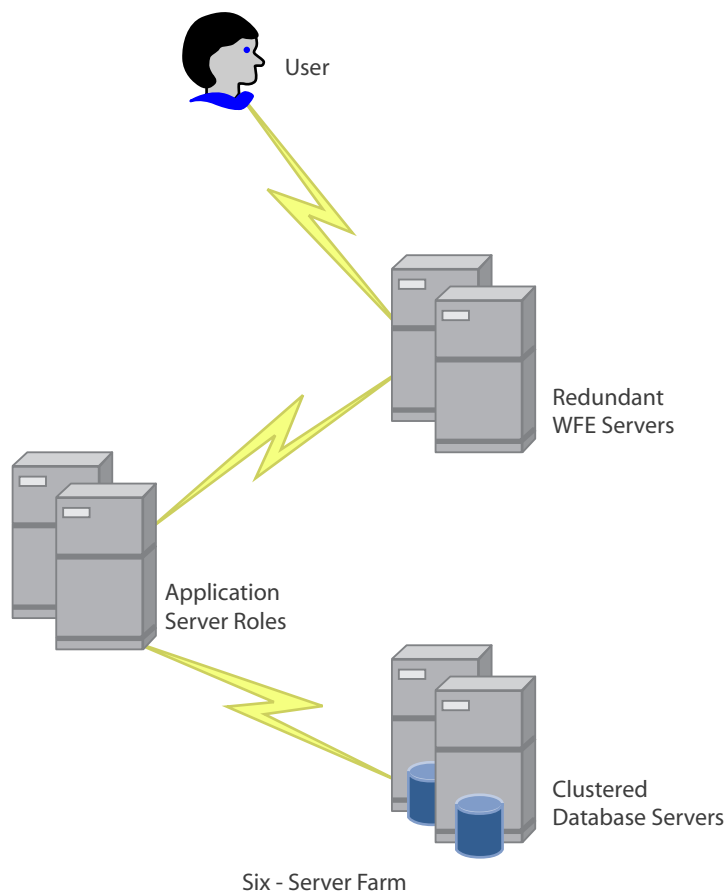


Figure 2: SharePoint Farm Topology

Installing SharePoint

Regardless of whether you are installing WSS 3.0 or MOSS 2007, you need to ensure that your server(s) meet the minimum system requirements. The minimum hardware and software requirements for installing SharePoint are as follows:

- CPU of at least 2.5 GHz
- RAM of at least 2 GB
- At least 100 Mbps available network bandwidth for deployment
- At least 5 GB available hard disk space (for binaries and user data)
- Microsoft Windows Server 2003 Service Pack 1, x64 or Small Business Server
- .NET Framework 3.0 (includes ASP.NET 2.0)
- Internet Information Services (IIS) 6.0 with Common Files, WWW service, and SMTP service
- Web browser: Internet Explorer 6.0 or higher for full fidelity; Mozilla Firefox for low fidelity with SharePoint site content

WSS 3.0 and MOSS 2007 installation share the same basic two steps:

1. Running the initial setup, which lays down the program binaries and creates content folders
2. Running the SharePoint Products and Technologies Configuration Wizard, which provisions the Central Administration application

From there, you have more work to do:

1. Provision the Shared Services Provider (SSP) Web application (MOSS only)
2. Provision the MySite Web application (MOSS only)
3. Provision the Port 80 Web application (both WSS and MOSS)
4. Attach a top-level site collection to all new Web applications (WSS and MOSS)

In this example (and for the rest of this tutorial) we will perform a single-server installation of MOSS 2007. I will note any differences in functionality between MOSS and WSS wherever appropriate.