

Windows® Small Business Server 2008 Administrator's Companion

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Customizing a SharePoint Site

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Windows Small Business Server 2008 includes Windows SharePoint Services 3.0 Service Pack 1, and the SBS installation automatically creates an internal Web site called Companyweb, which is a custom SharePoint site designed for small businesses. This default site meets the needs of most small businesses with little customization required, but you can easily add features to Companyweb to make it even more useful for your environment and needs without being a developer or Web designer.

SharePoint keeps getting better with each version, and whole books have been written about how to create, manage, and develop for SharePoint sites. We won't pretend to try to cover everything, but in this chapter we'll cover some of the features and configuration of Companyweb and SharePoint in general, and show you how to add a useful set of links to TS RemoteApps.

Introducing SharePoint Services

Windows SharePoint Services is a Web-based collaboration and document management system that is easily and quickly deployed to provide an effective intranet solution for businesses of all sizes. In SBS, SharePoint is installed automatically, and an internal Web site (*http://companyweb*), shown in Figure 22-1, is created and configured with a range of features that make sense for small businesses.

NOTE In this chapter, we shorten Windows SharePoint Services to simply SharePoint. Windows SharePoint Server 2007, which is designed for hosting multiple, independent, SharePoint portals, is a separate product.

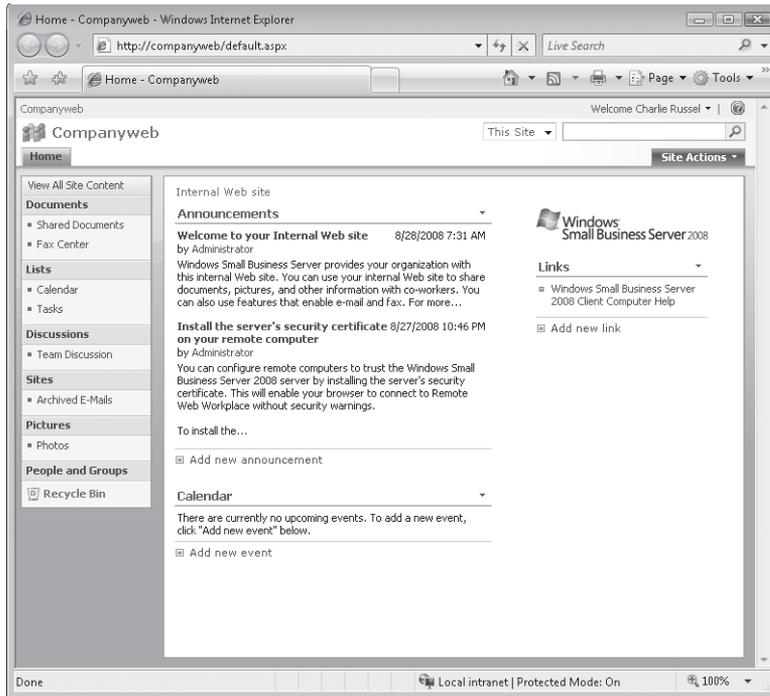


FIGURE 22-1 The default internal Web site for SBS 2008

The main center pane of Companyweb has a section for announcements and a calendar section. On the left pane are links into other main areas of the Web site, including document libraries, a fax library, calendar and tasks lists, a team discussion area, and a photo library. These items are generally available from other pages of the Web site, giving you quick access without having to navigate back to the home page. On the righthand side of the page is the Links pane, a place to put links to important external resources or applications that users can run.

The default Companyweb site is a good starting point, but there are plenty of ways you can extend it and add additional features and sections without having to be a Web developer. Of course, if you *are* a Web developer, you can use myriad options to create additional features and functionality. SharePoint is easily extensible, and there are good books for both professional developers and interested users.

Understanding SharePoint Items

Let's start by looking at the pieces that can make up a SharePoint site. Some have been around since the earliest days, but others are new to version 3 of SharePoint.

- **Libraries** Libraries come in various formats, including:
 - Document libraries for storing and collaborating on documents, including basic versioning features

- Picture libraries for storing photos and graphics
- Form libraries for storing InfoPath form templates
- Wiki page libraries that let you build interactive basic wiki sites
- **Lists** Lists come in various formats for presenting and storing list-based information, including:
 - Communications lists such as announcements and contacts
 - Tracking lists such as links, calendar, and tasks
 - Custom lists including a datasheet view
- **Web pages** Web pages include a basic Web page, sites, and workplaces or a Web Parts page.
- **Discussions** Discussions are a type of list used to build a basic forum for ongoing collaborative discussions.
- **Tasks** Tasks come in both basic tasks lists and project tasks that include Gantt chart functionality to graphically track project status.

Understanding SharePoint Roles

SharePoint has three basic user roles for a site: visitor, member, and owner. In SBS 2008, three security groups correspond to these roles: Windows SBS SharePoint_VisitorsGroup, Windows SBS SharePoint_MembersGroup, and Windows SBS SharePoint_OwnersGroup.

For the default Companyweb site, the CompanyWeb Visitor group has only the Windows SBS SharePoint_VisitorsGroup as a member. This group can read but can't edit the site or its contents, nor can they add discussion items. By default, no SBS Users are in Windows SBS SharePoint_VisitorsGroup, though you can move users into it.

For the default Companyweb site, the CompanyWeb Member group has only the Windows SBS SharePoint_MembersGroup as a member. This group can read, write, and contribute to the Companyweb site, including posting to discussions and customizing the site. By default, all user accounts with Standard User role and Standard User with Administrative Links role are part of this group.

For the default Companyweb site, the CompanyWeb Owner group has only the Windows SBS SharePoint_OwnersGroup as a member. This group has full administrative rights on the Companyweb site and can create new workspaces, change user and site permissions, and create new user roles and permissions. By default, all Network Administrators are part of this group.

The CompanyWeb Member group is a powerful group that has the ability to change the look and feel of your Companyweb site; can add or delete sections, documents, or articles; and generally has very nearly the full power of the Owner, with the sole exception of not being able to control the permissions of other users. As shown in Figure 22-2, there is a lesser level of permissions called Contribute, which still allows users to view, add, and update content, but doesn't give them full design capabilities. We think this is a more appropriate role

for most users and you should consider changing the default permissions for CompanyWeb Members to Contribute instead of Design.

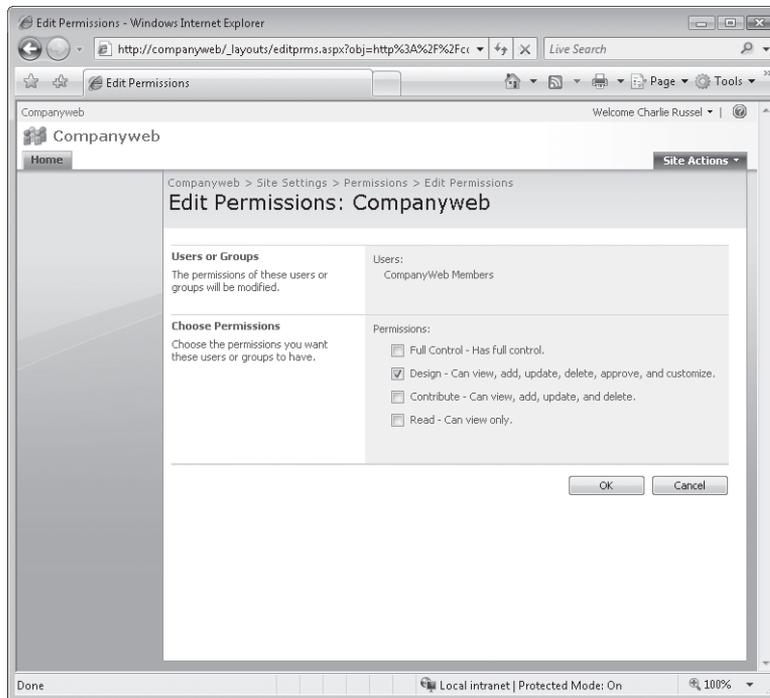


FIGURE 22-2 The default permissions for CompanyWeb Members are Design permissions

To change the permissions for all CompanyWeb Members, follow these steps:

1. Log on to the Companyweb site with an account that has Owner permissions.
2. On the main Companyweb page, select Site Settings from the Site Actions drop-down list to open the Site Settings page shown in Figure 22-3.
3. Click Advanced Permissions under Users And Permissions to open the Permissions: Companyweb page shown in Figure 22-4.
4. Click CompanyWeb Members to open the Edit Permissions: Companyweb page shown in Figure 22-2.
5. Clear the Design – Can View, Add, Update, Delete, Approve, And Customize check box and check the Contribute – Can View, Add, Update, And Delete check box.
6. Click OK to return to the Permissions: Companyweb page.

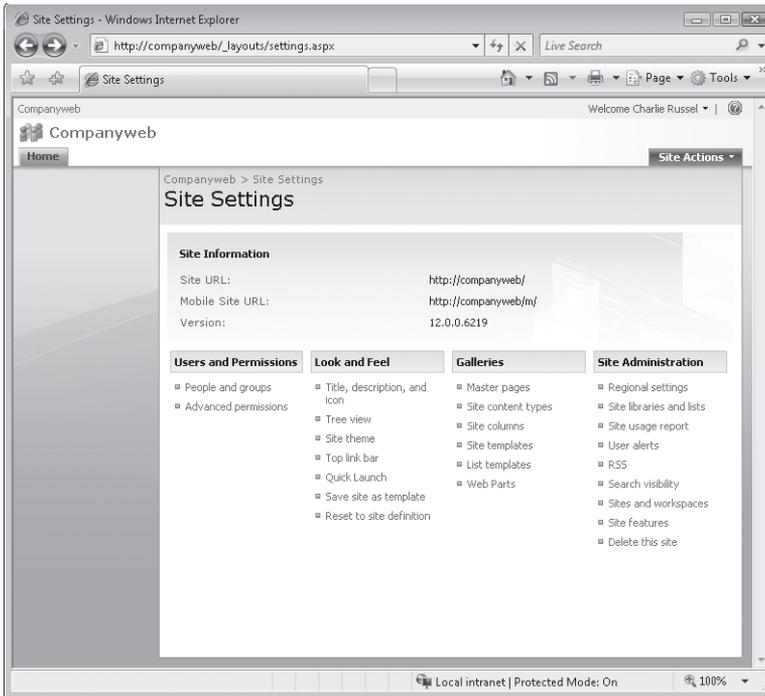


FIGURE 22-3 The Site Settings page of the Companyweb site

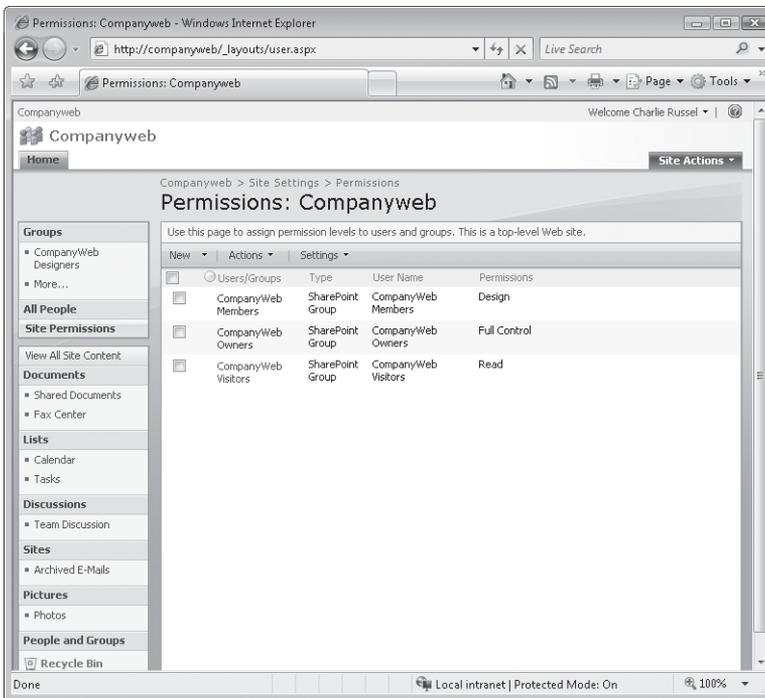


FIGURE 22-4 The Permissions: Companyweb page

From the Permissions: Companyweb page you can also create a new group and assign permissions and users to it, or directly add users and assign them permissions. These permissions are carried throughout the site.

To edit the permissions for a particular section of the Companyweb site, open that section of the site and then select Settings from the Settings drop-down list. Here you can customize the particular section and edit the permissions for the section. As an example, let's modify the permissions of the default Shared Documents Library to allow our user "Alfie" to have full control of the library, using these steps:

1. Open *http://Companyweb* if it isn't already open.
2. Click Shared Documents in the left pane to open the Shared Documents page, shown in Figure 22-5.

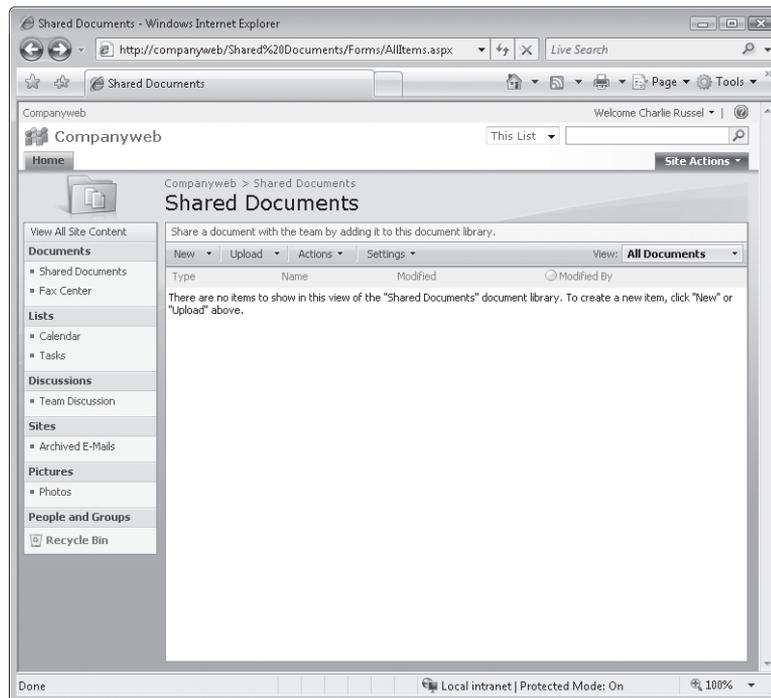


FIGURE 22-5 The Shared Documents library of the default Companyweb site

3. Click Settings in the menu bar above the main library list and select Document Library Settings from the drop-down list, as shown in Figure 22-6.
4. Select Permissions For This Document Library from the Permissions And Management section to open the Permissions: Shared Documents page shown in Figure 22-7.

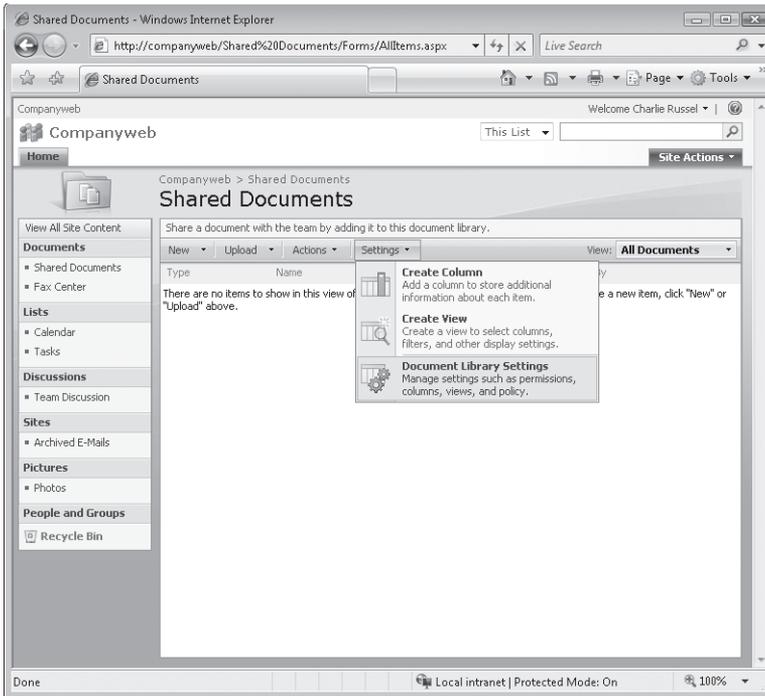


FIGURE 22-6 Changing the settings for the Shared Documents library

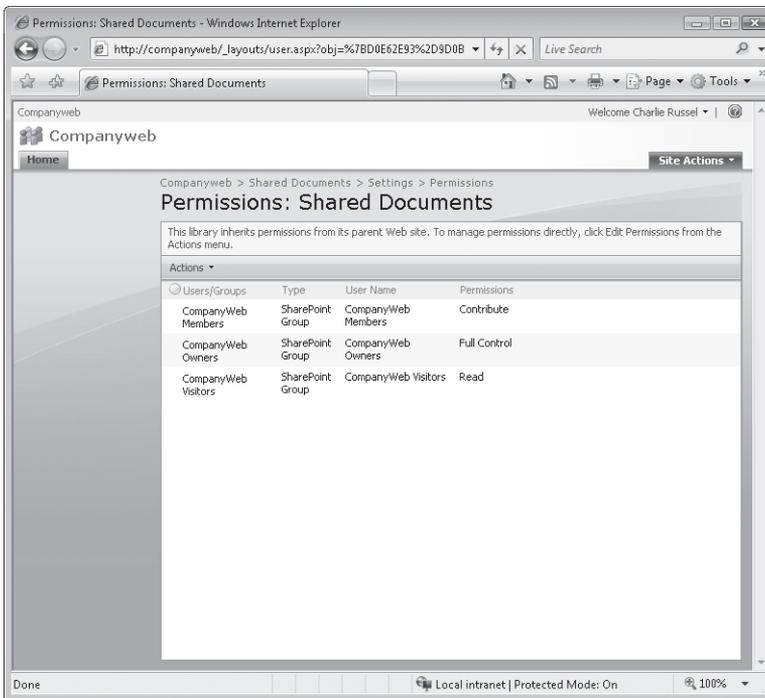


FIGURE 22-7 Changing the Permissions for the Shared Documents library

5. Click Edit Permissions from the action menu. You'll see the warning message shown in Figure 22-8.

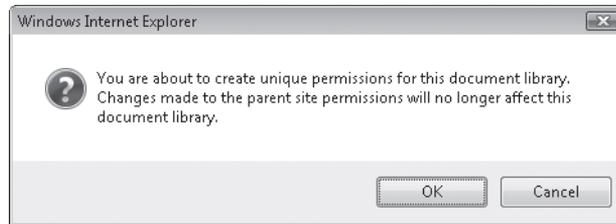


FIGURE 22-8 Warning message when you change permissions on a document library

IMPORTANT This is a good time to emphasize that after you change permissions on a portion of a site, you lose the inheritance that makes it easy to keep track of what permissions are granted. If you do need to change permissions as we are in this example, be sure to clearly document the changes. Or resist the temptation and find another way to manage things. It is possible, however to revert to inherited permissions, using the Actions drop-down list of a section that is no longer inheriting.

6. Click OK and the page changes as shown in Figure 22-9 to show that it is no longer inheriting permissions.

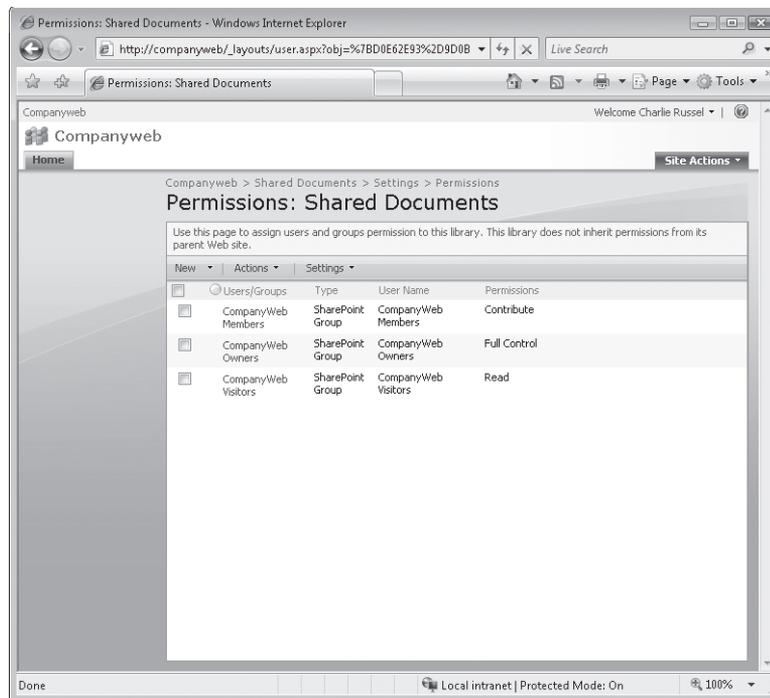


FIGURE 22-9 The Shared Documents library is no longer inheriting permissions from the site.

7. Select Add Users from the New menu to open the Add Users: Shared Documents page shown in Figure 22-10.

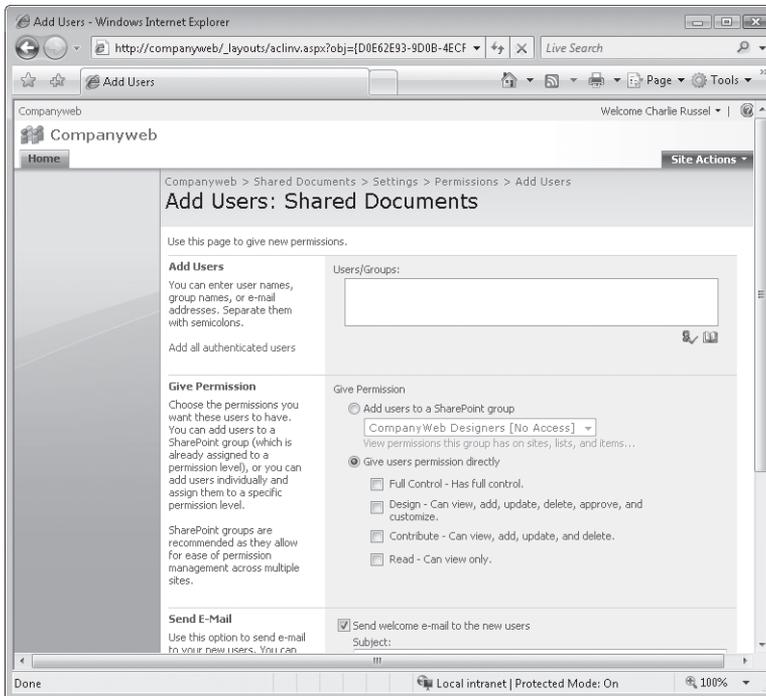


FIGURE 22-10 The Add Users: Shared Documents page

8. Type **Alfie** in the Users/Groups box and click the Check Names button in the lower right of the box. SharePoint verifies the user and substitutes his full name, Alfredo N. Fettuccine.
9. Select Full Control – Has Full Control from the Give Users Permission Directly section.
10. If you want to send Alfie an e-mail message telling him that he’s in charge now, select the Send Welcome E-mail To The New Users check box and edit the message as appropriate.
11. Click OK to make the change and return to the Permissions: Shared Documents folder.

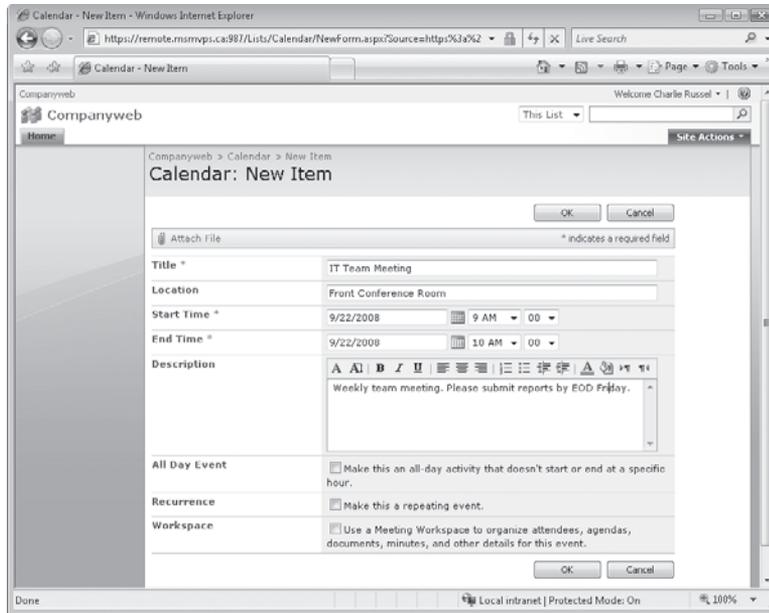
Customizing Companyweb

You can customize Companyweb to add additional lists, links, and libraries. Working with a SharePoint site to customize it is pretty straightforward and follows a similar logic wherever you are. We’ll start by adding a regular IT Team meeting and creating a Workspace for it that allows IT team members to file their reports ahead of time and add comments to other’s reports.

Adding a Workspace

Adding a Workspace creates an area where a group of users can directly interact and share documents and discussions, separate from the overall document libraries. For our example, let's first create a recurring meeting and assign users to the meeting, following these steps:

1. From the main Companyweb page, click Add New Event in the Calendar section of the center pane to open the Calendar: New Item page.
2. Type in a title and location for this meeting, set the time and date to next Monday at 9 AM, finishing at 10 AM, and add a description as shown in Figure 22-11.



The screenshot shows a web browser window displaying the 'Calendar: New Item' form. The browser's address bar shows the URL: <https://remote.msrvps.ca:987/Lists/Calendar/NewForm.aspx?Source=https%3A%2>. The form is titled 'Calendar: New Item' and includes the following fields and options:

- Title ***: IT Team Meeting
- Location**: Front Conference Room
- Start Time ***: 9/22/2008 9 AM
- End Time ***: 9/22/2008 10 AM
- Description**: Weekly team meeting. Please submit reports by EOD Friday.
- All Day Event**: Make this an all-day activity that doesn't start or end at a specific hour.
- Recurrence**: Make this a repeating event.
- Workspace**: Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

Buttons for 'OK' and 'Cancel' are visible at the top and bottom of the form.

FIGURE 22-11 Adding a new Calendar item

3. Select the Make This A Repeating Event check box. The Recurrence section will expand as shown in Figure 22-12.
4. Set the meeting for Weekly and set it to end after 10 occurrences.
5. Select the Use A Meeting Workspace... check box and click OK to open the New Meeting Workspace page shown in Figure 22-13.

FIGURE 22-12 The Make This A Repeating Event section of a new calendar item

FIGURE 22-13 Creating a new workspace for the IT team meeting

6. Select Use Unique Permissions in the User Permissions section and click OK to open the Template Selection page.
7. Select Basic Meeting Workspace for this meeting and click OK to open the Set Up Groups For This Site page shown in Figure 22-14.

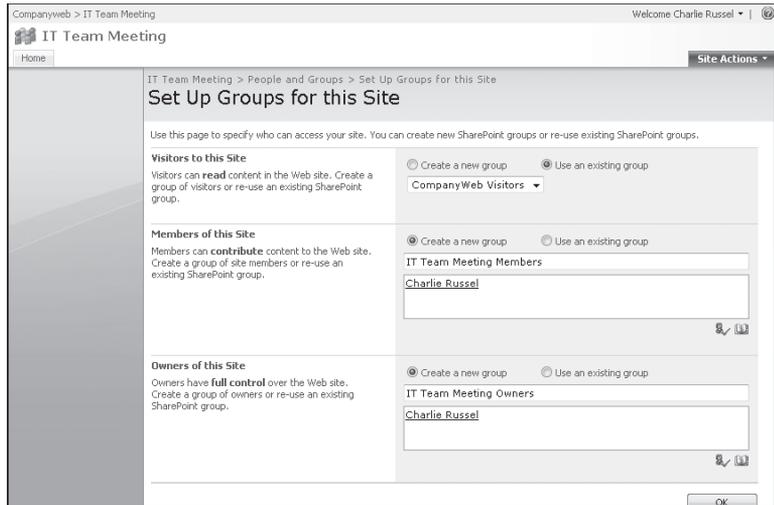


FIGURE 22-14 The Set Up Groups For This Site page

8. Add users as members of this site by selecting the Create A New Group option and typing in their account names, separated by semicolons. Click the Check Names icon to verify the names.
9. To add additional owners, repeat the previous step with names for the owners of this site.
10. When you've set the permissions as you want, click OK to open the Workspace you've created, as shown in Figure 22-15.

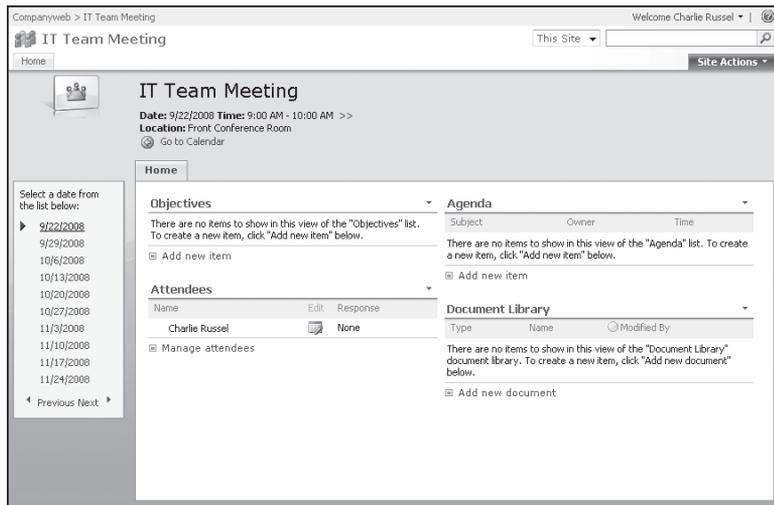


FIGURE 22-15 The new IT Team Meeting site

11. Click Manage Attendees to open the Attendees page and click New to open the Attendees: New Item page shown in Figure 22-16. Type in the name for the attendee and click OK.

Companyweb > IT Team Meeting | Welcome Charlie Russel | This List | Site Actions

IT Team Meeting > Attendees > New Item

Attendees: New Item

OK Cancel

* indicates a required field

Name *  

Comment

Response *

Attendance *

OK Cancel

FIGURE 22-16 The Attendees: New Item page

12. Repeat the previous step until you've added all the attendees to the list, as shown in Figure 22-17.

Companyweb > IT Team Meeting | Welcome Charlie Russel | This List | Site Actions

IT Team Meeting > Attendees

Attendees

Use the Attendee list to track who is planning to attend the meeting.

New Actions Settings View: Manage Attendees

Name	Edit	Attendance	Response	Comment
Alfredo N. Fettuccine		Required	Accepted	
Charlie Russel		Organizer	None	
Sharon Crawford		Optional	Tentative	
Sir William Wallace		Required	Accepted	

FIGURE 22-17 Attendees have been added to our team meeting.

13. Click IT Team Meeting in the upper left to return to the main page for this workspace.

- Click Add New Item in the Agenda section to create an agenda for the current meeting, as shown in Figure 22-18.

The screenshot shows a SharePoint form titled "Agenda: New Item". At the top, there are "OK" and "Cancel" buttons. Below is an "Attach File" section with a note that an asterisk indicates a required field. The form contains the following fields:

- Subject ***: Network Status
- Owner**: Charlie
- Time**: 10 Minutes
- Notes**: A rich text editor containing the text "Quick update on current network status." with various formatting options (bold, italic, underline, link, etc.) visible above the text area.

At the bottom of the form, there are two more "OK" and "Cancel" buttons.

FIGURE 22-18 Adding an agenda item to the meeting

- Repeat the previous step as required to add items to the agenda, as shown in Figure 22-19.

The screenshot shows the "IT Team Meeting" page. The top navigation bar includes "Companyweb > IT Team Meeting" and "Welcome Charlie Russel". The page title is "IT Team Meeting". Meeting details are displayed: "Date: 9/22/2008 Time: 9:00 AM - 10:00 AM >>" and "Location: Front Conference Room". A "Go to Calendar" link is also present.

The "Home" section contains a date selector and a list of dates from 9/22/2008 to 11/24/2008. The "Objectives" section is empty, with a message: "There are no items to show in this view of the 'Objectives' list. To create a new item, click 'Add new item' below." There is an "Add new item" link.

The "Attendees" section shows a table of attendees:

Name	Edit	Response
Alfredo N. Fettuccine		Accepted
Charlie Russel		None
Sharon Crawford		Tentative
Sr William Wallace		Accepted

Below the attendees table is a "Manage attendees" link.

The "Agenda" section is expanded, showing a table of agenda items:

Subject	Owner	Time
Network Status ↑ NEW	Charlie	10 Minutes
SBS 2008 Migration Follow-Up ↑ NEW	All	40 minutes
Migration Cleanup Projects ↑ NEW	Alfie	10 Minutes

There is an "Add new item" link below the agenda table.

The "Document Library" section is empty, with a message: "There are no items to show in this view of the 'Document Library' document library. To create a new item, click 'Add new document' below." There is an "Add new document" link.

FIGURE 22-19 The agenda for the next IT Team Meeting is filled out.

- Click Companyweb in the top bar to return to the main Companyweb site.

Adding TS RemoteApps Links

You can add links to TS RemoteApps programs to your Companyweb SharePoint site. This gives your users direct access to applications from their main Companyweb page. The process has five basic steps:

- Add the TS WebAccess role service on the SBS 2008 server.
- Add the missing .NET Framework 3.0 features.
- Register the Web Part as a safe control.
- Create a folder to store the Web Part.
- Add the Web Part to Companyweb.

The first two steps involve the native Windows 2008 Server Manager. If you need a refresher on Server Manager, see Chapter 17, “Windows SBS Console v. Server Manager.”

Add TS WebAccess Role Service

The default installation of SBS includes the TS Gateway role service of Terminal Services, but doesn't include the TS WebAccess role service, so the first thing we need to do is add that role service, using the following steps:

1. Open Server Manager from the Start menu.
2. Expand Roles and then click Terminal Services.
3. Select Add Role Services from the action menu to open the Select Role Services page shown in Figure 22-20.

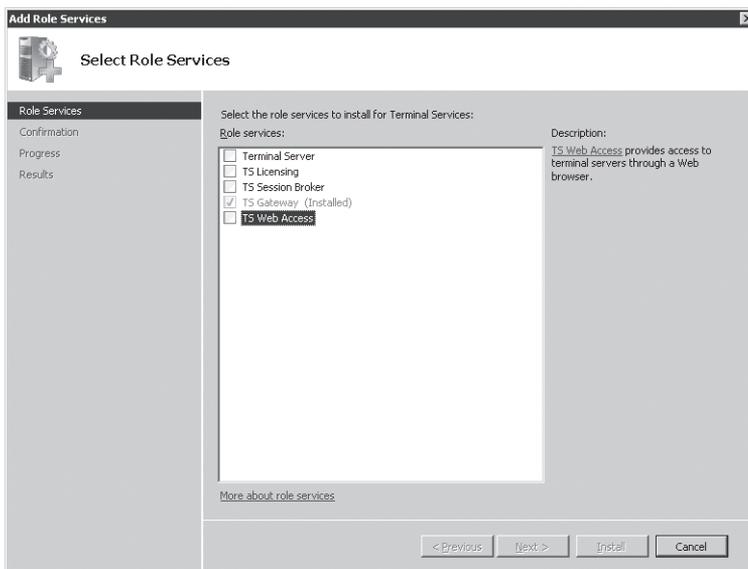


FIGURE 22-20 The Select Role Services page of the Add Role Services Wizard for Terminal Services

Register the Web Part as Safe

Next we need to register the Web Part we're going to use as a *safe control*. This allows it to run without needing an elevated prompt. To register the Web Part, follow these steps:

1. Open an elevated Cmd or PowerShell command prompt using Run As Administrator.
2. Change to the directory where the configuration file for Companyweb is and open web.config in Notepad or your favorite plain text editor, as shown in Figure 22-22.

```
cd "C:\Program Files\Windows Small Business Server\Bin\webapp\InternalWebSite"  
notepad web.config
```

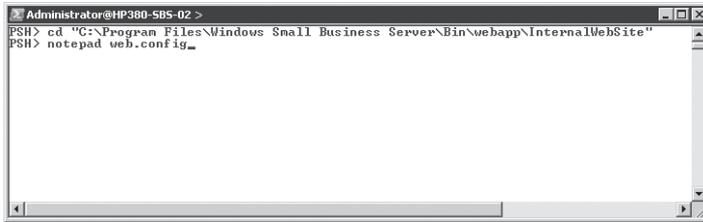


FIGURE 22-22 Editing the web.config file for Companyweb

3. In the web.config file, locate the <SafeControls> section of the file. At the end of the section of SafeControl Assembly entries, add the following line:

```
<SafeControl Assembly="TSPortalWebPart, Version=6.0.0.0, Culture=neutral,  
PublicKeyToken=31bf3856ad364e35"  
Namespace="Microsoft.TerminalServices.Publishing.Portal" TypeName="*" Safe="True"  
AllowRemoteDesigner="True" />
```

NOTE Add this as a single line, with no line breaks.

4. Save the change and exit Notepad. Keep the elevated command prompt open. You'll need it in the next section.

IMPORTANT Always make a copy of important files before editing them—just in case.

Create a Folder to Store the Web Part

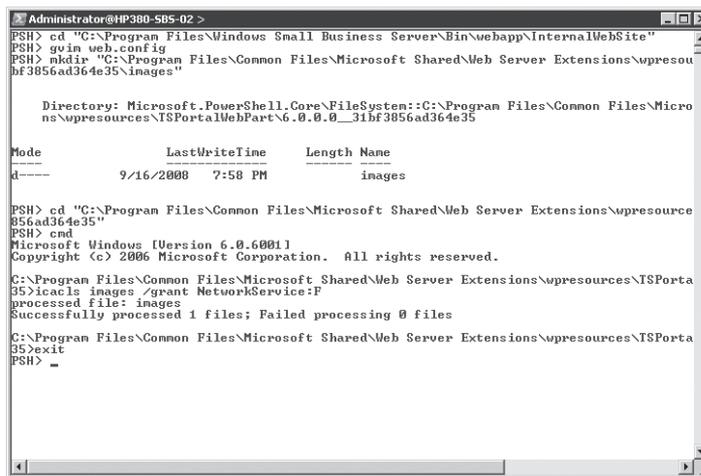
Next you need to create a folder to hold the Web Part and its images, and to give the Network Services account full control on the folder. Use the following steps:

1. In the elevated command prompt from the previous section, type the following command:

```
mkdir "C:\Program Files\Common Files\Microsoft Shared\Web Server  
Extensions\wpresources\TSPortalWebPart\6.0.0.0__31bf3856ad364e35\images"
```

NOTE Notice the two underscores after 6.0.0.0 in the preceding single command line.

2. Change directories to the parent folder of the images folder you just created:
`cd "C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\wpressources\TSPortalWebPart\6.0.0.0__31bf3856ad364e35"`
3. Give the Network Service account full control over the images folder you created in Step 1:
`icacls images /grant NetworkService:F`
4. Close the Command Prompt window if you see a success message, as shown in Figure 22-23.



```
Administrator@HP380-SB5-02 >
PSH> cd "C:\Program Files\Windows Small Business Server\Bin\webapp\InternalWebSite"
PSH> gci web.config
PSH> mkdir "C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\wpressou
bf3856ad364e35\images"

Directory: Microsoft.PowerShell.Core\FileSystem::C:\Program Files\Common Files\Micro
ns\wpressources\TSPortalWebPart\6.0.0.0__31bf3856ad364e35

Mode                LastWriteTime         Length Name
----                -
d-----          9/16/2008   7:58 PM         images

PSH> cd "C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\wpressourc
e36ad364e35"
PSH> end
Microsoft Windows [Version 6.0.6001]
Copyright (c) 2006 Microsoft Corporation. All rights reserved.

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\wpressources\TSPorta
35>icacls images /grant NetworkService:F
processed file: images
Successfully processed 1 files; Failed processing 0 files

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\wpressources\TSPorta
35>exit
PSH> _
```

FIGURE 22-23 The Windows PowerShell session for marking the Web Part safe and creating an images folder for it

Add the Web Part to Companyweb

Finally, the reason we're doing all this—to add the Web Part to Companyweb, follow these steps:

1. Open Companyweb with an account that has SharePoint Owner privileges.
2. Select Site Settings from the Site Actions menu to open the Site Settings page.
3. Click Web Parts under the Galleries section to open the Web Part Gallery page, as shown in Figure 22-24.

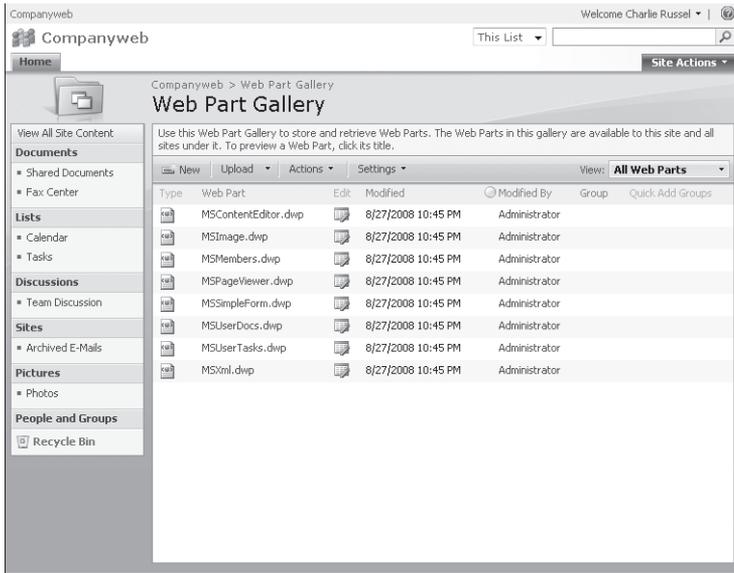


FIGURE 22-24 The Web Part Gallery page

- Click New to open the Web Parts Gallery: New Web Parts page, scroll down to the bottom, and select the Microsoft.TerminalServices.Publishing.Portal.TSPortalWebPart check box, as shown in Figure 22-25.

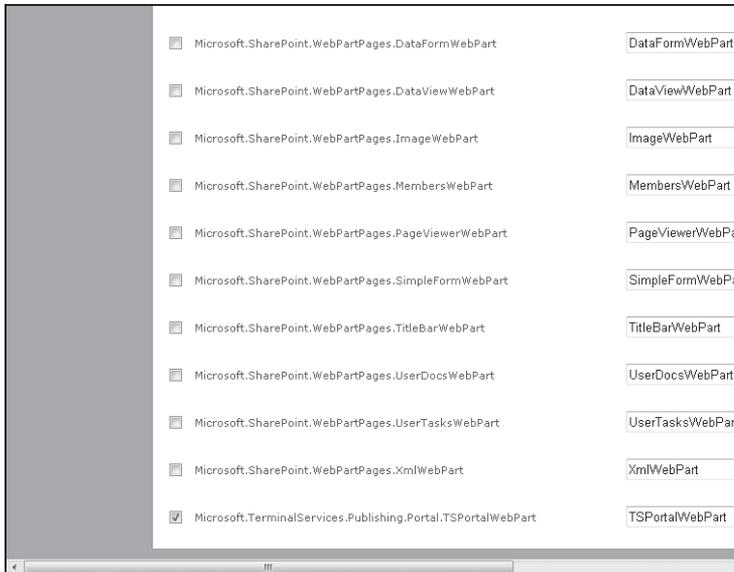


FIGURE 22-25 Adding the TS RemoteApps Web Part

5. Click Populate Gallery to add the Web Part and return to the Web Part Gallery.
6. Click Home to return to the main Companyweb page.
7. Select Edit Page from the Site Actions menu to open Companyweb in edit mode, as shown in Figure 22-26.

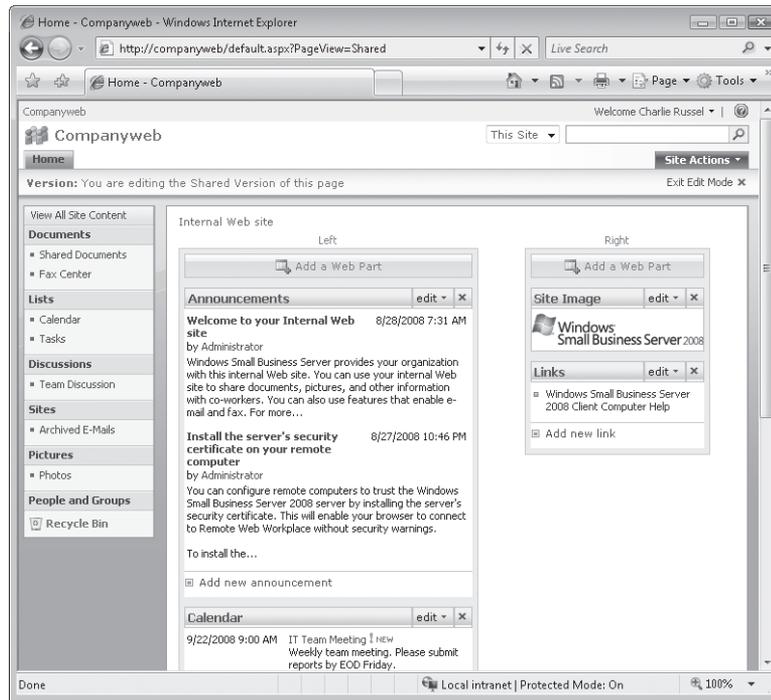


FIGURE 22-26 The Companyweb site in edit mode

8. In the Right section, click Add A Web Part to open the Add Web Parts To Right page, shown in Figure 22-27.
9. Scroll down to the Miscellaneous section and select the TSPortalWebPart check box.
10. Click Add to return to the Companyweb page in edit mode, with the Web Part added.
11. Drag the Web Part below the Site Image.
12. Click Edit in the upper-right corner of the Web Part and then select Modify Shared Web Part to open the TS Web Access properties.
13. Type in the name of the Terminal Server to connect to in the Terminal Server Name field and click OK to close the properties of the Web Part.
14. If you see the error shown in Figure 22-28, you need to add the SBS server to the TS Web Access Computers local security group on your Terminal Server.



FIGURE 22-27 The Add Web Parts To Right page

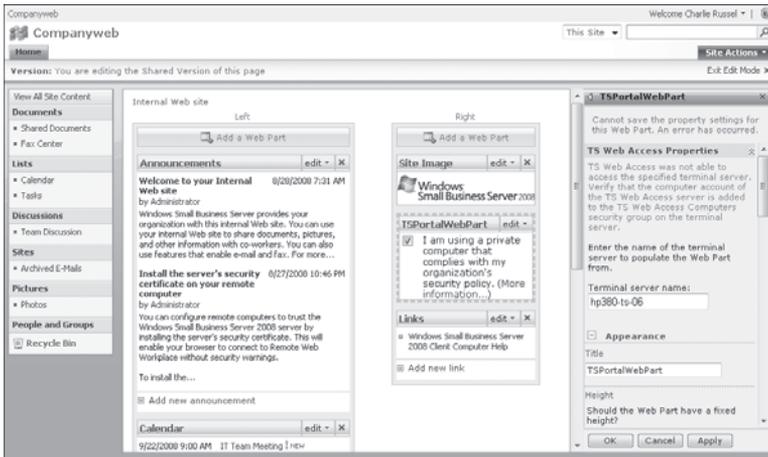


FIGURE 22-28 By default, the SBS server doesn't have permission to access the list of TS RemoteApps.

Follow these steps to add the SBS server to the TS Web Access Computers security group on your Terminal Server:

- a. Log on to the Terminal Server with an administrative account.
- b. Open Computer Management in the Administrative Tools folder.
- c. Expand Local Users And Groups and then click Groups.
- d. Double-click TS Web Access Computers Properties to open the dialog box in Figure 22-29.

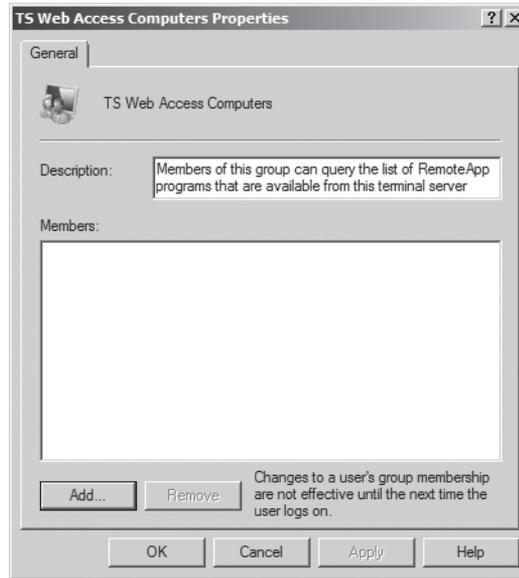


FIGURE 22-29 The TS Web Access Computers Properties dialog box

- e. Click Add to open the Select Users, Computers, Or Groups dialog box shown in Figure 22-30.

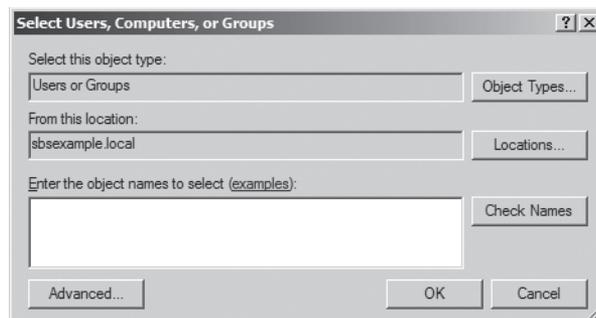


FIGURE 22-30 The Select Users, Computers, Or Groups dialog box. Note that Object Types doesn't include Computers by default.

- f. Click Object Types and select Computers. Click OK to return to the Select Users, Computers, Or Groups dialog box.
 - g. In the Enter The Object Names To Select (Examples) field, type the name of your SBSweb server and click Check Names.
 - h. Click OK to return to the TS Web Access Computers Properties dialog box.
 - i. Click OK and then close the Computer Management console.
15. Return to the Companyweb site in edit mode and click OK again. The TS RemoteApps are populated on the SharePoint site automatically.
 16. Click Exit Edit Mode to return to the Companyweb site, with the application icons in the right pane, as shown in Figure 22-31.

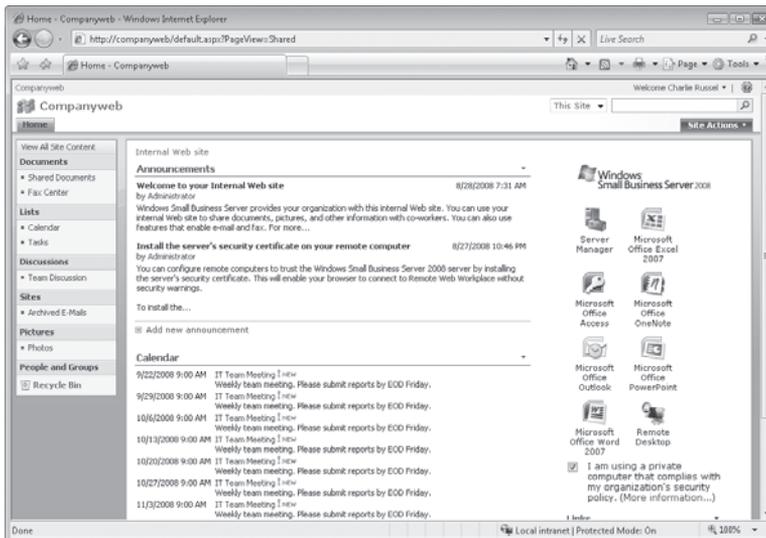


FIGURE 22-31 When permissions are correct, the available TS RemoteApps automatically populate the Companyweb home page.

17. Click any of the applications to open a TS RemoteApp. Figure 22-32 shows Microsoft OneNote 2007 running on a Windows Vista computer that doesn't have any applications installed on it at all.

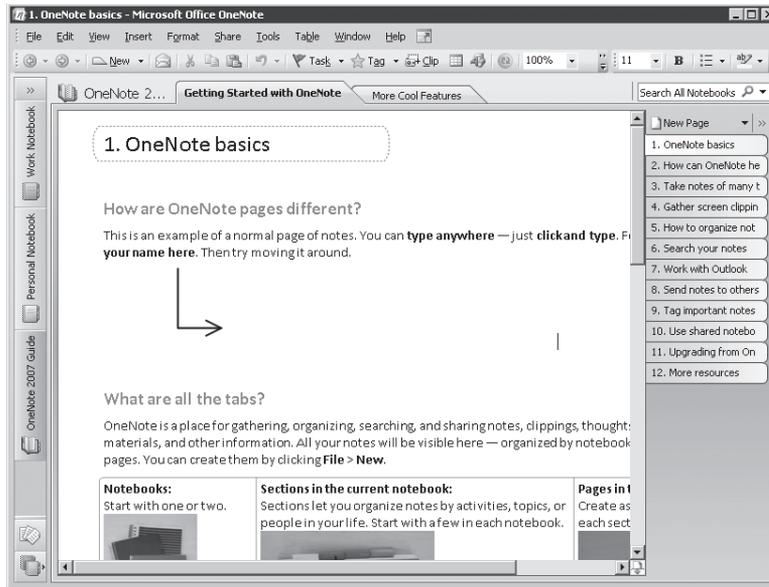


FIGURE 22-32 Running OneNote as a TS RemoteApp

This just begins to scratch the surface of what you can do with SharePoint and the Companyweb site, but we think the new features that are enabled with SharePoint Services 3.0 are exciting. And having our TS RemoteApps on the Companyweb page is a great addition.

Summary

In this chapter, we've covered customizing the default SharePoint site, Companyweb. We shown how to modify permissions, add a workspace, and modify the site to use Companyweb as a TS Web Access portal for running remote applications directly from Companyweb.

In the next part, we move on to installing and using the Premium Edition features, including installing the second server, installing Microsoft SQL Server 2008, and configuring Terminal Services on the second server.