

Microsoft® Office SharePoint® Server 2007 Administrator's Companion

*Bill English with the
Microsoft SharePoint
Community Experts*

To learn more about this book, visit Microsoft Learning at
<http://www.microsoft.com/MSPress/books/9537.aspx>

9780735622821
Publication Date: January 2007

Microsoft
Press

Table of Contents

<i>Acknowledgments</i>	<i>.xxxiii</i>
<i>Introduction</i>	<i>.xxxvii</i>

Part I

Planning Your Deployment and Installing Microsoft Office SharePoint Server 2007

1	Introducing Microsoft Office SharePoint Server 2007	3
	Microsoft Office SharePoint Server 2007 Product Matrix	4
	Portal Services	5
	Search and Indexing	7
	Content Management	8
	Business Forms	10
	Business Intelligence	10
	Collaboration	11
	Improvements in Windows SharePoint Services 3.0	12
	Data Platform Improvements	13
	Security Improvements	16
	Administrator Platform Improvements	17
	Summary	20
2	Architecture for Microsoft Office SharePoint Server 2007	21
	Enterprise Architecture and Office SharePoint Server 2007	22
	Modularity and Reusability	22
	Extensibility	22
	Scalability	23
	Separation of Concerns	23

What do you think of this book?
We want to hear from you!

Microsoft is interested in hearing your feedback about this publication so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit: www.microsoft.com/learning/booksurvey/

The 2007 Microsoft Office System Logical Architecture	23
A Strong Move Toward Service-Oriented Architecture	24
The Services of the 2007 Microsoft Office System	24
What Are the Operating System Services?	25
What Are the Database Services?	25
What Are the Workflow Services?	26
What Are the Supporting Services?	26
What Are the Core Services?	31
Application Pools and Office SharePoint Server 2007	43
Application Pool Architecture	44
Discussion of Application Pool Architecture and Office SharePoint Server 2007 Integration	46
Summary	47
3 Design Considerations and Deployment	49
Understanding the Design Life Cycle	50
Defining the Stakeholders	50
Creating a Problem Statement	51
Defining Objectives	52
Establishing an Administrative Model	52
Identifying Hardware and Software Costs	53
Defining Service Level Agreements	53
Defining Requirements	54
Obtaining Approvals and Implementing the Solution	54
Understanding Your Current Environment	54
Determining Staffing Needs	55
Surveying Current Content	55
Documenting the Network Infrastructure	56
Choosing Server Platforms	57
Identifying Infrastructure Dependencies	57
Windows Server Software	58
Active Directory	58
Domain Name System	58
E-Mail Servers	59
SQL Server	59

Identifying Other Design Considerations	60
Deploying Web Front-End Servers	60
Deploying Query and Indexing Servers	60
Deploying Excel Calculation Services	61
Ensuring Availability and Performance	62
Implementing Web Front-End Load Balancing	62
Implementing Search and Query Server Load Balancing	62
Scaling Excel Calculation Services	63
Designing a Network Infrastructure	63
Considering User Location	64
Performing Capacity Planning	64
Organizing Your Content	65
Reorganizing and Consolidating SharePoint Services 2003 Content	65
Using Enterprise Content Management Services	66
Deploying SharePoint Portals	66
Managing Your Content	67
Using Site Collections	67
Deploying Self-Service versus Administratively Created Sites	68
Using Administrative Delegation	69
Using the Two-Stage Recycle Bin	69
Implementing Mobile Access	69
Connecting to External Data Sources	70
Planning Security	70
Planning and Implementing Security Accounts	70
Securing Internet Information Services	72
Understanding Critical Services Placement	75
Securing the Central Administration Interface	75
Securing SQL Server	76
Securing Extranets and Internet-Facing Collaborative Solutions	76
Extending Existing Web Applications	77
Deploying SharePoint Server Farms	77
Single-Server Deployment	78
Small Server Farms	78
Medium Server Farms	79

Large Server Farms	80
Multiple Farms	81
Summary.....	83
4 Multilingual Planning, Deployment, and Maintenance	85
Multilingual Support in Windows SharePoint Services 3.0 and SharePoint Server 2007	86
Preparing Front-End Servers for Multiple Languages	86
Installing Additional Language Files.....	87
Selecting a Product Installation Language	87
Understanding Language Template Packs.....	88
Installing Language Packs on Front-End Servers	89
Uninstalling Language Packs	90
Hosting Sites in Different Languages	90
Creating a Variation Hierarchy of Web Sites.....	91
Managing Variation Settings	92
Planning Considerations.....	92
Incorporating Variation Concepts into Planning	94
Planning Variation Configurations	96
Configuring the Variation System.....	96
Designating Source and Target Sites with Variation Labels	99
Building Sites with the Variation Hierarchy	102
Propagating Content from Source to Target Sites	103
Managing Variation Sites	104
Managing Translations	106
Local Translation Management Tools.....	106
What Is a Translation Management Library?.....	107
Creating a Translation Management Library.....	107
Uploading a Document	111
Completing the Translation Management Workflow Process	112
Customizing a Translators List	113
Forwarding to External Translation Services	113
Identifying Content Needing Translation	114
Using Variation Packaging for Export and Import	114
Deploying Content	116
Summary.....	118

5	Installing Microsoft Office SharePoint Server 2007	119
	The Product Feature Matrix	120
	Hardware Recommendations	121
	Preparing for Installation	122
	Web/Application Server	122
	Database Server	122
	Active Directory	123
	User and Service Accounts	123
	Installing SharePoint Server 2007	127
	Running Through the Installation	127
	Advanced Options	129
	Installation Complete	131
	The Configuration Wizard	131
	Server Farm Connection	132
	Create a New Farm	133
	Create the Central Administration Web Application	134
	Complete Wizard Input	135
	Moving to Central Administration	136
	Understanding the Default Databases and Changes from the Database Structure in SharePoint Portal Server 2003	136
	Modifying Your Farm	139
	Adding Servers to Your Farm	139
	Understanding How Your Server Has Changed as a Result of Installing SharePoint Server 2007	140
	File System Changes	140
	Registry Changes	141
	Web Sites and Application Pools	141
	Removing Servers from Your Farm	142
	Installing Windows SharePoint Services 3.0	142
	Running Through the Installation	142
	Uninstalling SharePoint Server 2007	143
	Uninstalling Windows SharePoint Services 3.0	144
	Summary	144

Part II

Administrating and Configuring Your Implementation

6 Performing Central Administration and Operations Configuration.....	147
Introducing Central Administration	148
Using the Central Administration Home Page	149
Performing Administrative Tasks.....	150
Understanding the Farm Topology View	153
Using the Central Administration Operations Page.....	156
Farm-Level Server Management.....	157
Security Configuration	164
Logging and Reporting	170
Upgrade and Migration	172
Global Configuration.....	172
Backup and Restore.....	174
Data Configuration	174
Content Deployment	175
Scenario: Expanding a Server Farm	181
Configuring the Server Farm	181
Configuring the Farm Services	183
Configuring Network Load Balancing	185
Summary.....	188
7 Application Management and Configuration	189
SharePoint Web Application Management.....	191
Hosting a Web Application	191
Creating a New Web Application	194
Provisioning a Web Application	204
Additional Web Application Management Settings	205
SharePoint Site Management	212
Create Site Collection	213
Delete Site Collection	214
Site Use Confirmation and Deletion.....	215
Quota Templates	216

Site Collection Quotas and Locks	216
Site Collection Administrators	217
Site Collection List	218
Application Security	218
Security for Web Part Pages	219
Self-Service Site Management	220
User Permissions for Web Applications	220
Policy for Web Applications	221
Authentication Providers	222
External Service Connections	223
Records Repository	224
HTML Viewer	224
Document Conversions	225
Workflow Management	225
Summary	226
8 Administrating Personalization and Portal Taxonomies	227
Understanding Taxonomies	229
What Is Taxonomy?	229
Industry Best Practices for Developing a Taxonomy	233
Taxonomy Considerations in Office SharePoint Server 2007	234
Personalization in Office SharePoint Server 2007	239
User Profiles	239
My Sites	239
Configuring Personalization Settings in SSP	239
Configuring and Customizing User Profiles	241
Importing User Profiles	242
Viewing and Editing User Profiles	246
Managing Profile Properties	249
Configuring Profile Property Policies	251
Deleting User Profiles	252
Managing My Sites	253
User Rights for My Site Creation	255
Creating My Sites	257
Social Networking in My Sites	260

Configuring My Home	260
Configuring My Profile	271
Configuring User Alerts	276
Navigating to Users' My Sites	276
Publishing Links to Office Clients	277
Personalization Links	278
Setting Quotas for My Sites	279
Creating My Sites with Duplicate User Names	281
Deleting My Sites	281
Personalization Sites	282
Searching for People	284
Configuring and Managing Audiences	287
Creating Audiences	287
Setting Audience Compilation Schedule	294
Updating Existing Audiences	295
Targeting Content Using Audiences	296
Introduction to Knowledge Networks	297
Overview of Knowledge Network for Office SharePoint Server 2007	298
Installing and Configuring Knowledge Network for Office SharePoint Server 2007	298
Installing Knowledge Network	300
Configuring Knowledge Network Server for Office SharePoint Server 2007	300
Knowledge Network Database Configuration	302
Knowledge Network Job Configuration	302
Knowledge Network Manage Members Configuration	303
Summary	306
9 Document Management	307
Understanding Informal and Formal Communications	307
Informal Communication	308
Formal Communication	308
The Importance of Document Libraries	309
Working with Document Libraries	311
Opening a Document Library	311

Adding Documents to the Library	312
Working with Documents in the Document Library	316
Managing Document Versioning	318
Using Document Management Site Templates.	322
Managing Documents and Workflow	323
Creating Metadata.	323
Creating Site Columns	329
Defining Workflow	330
Using Document Templates.	335
Converting Documents.	336
Integrating with 2007 Microsoft Office System Clients.	338
Working with Document Security.	339
Using Document Inspector	340
Using Digital Signatures	341
Item-Level Permissions	344
Rights Management Services.	345
Summary.	346
10 Records Management in Microsoft Office SharePoint Server 2007	347
Introduction to Enterprise Records Management	348
Representative Regulations	349
The Records Management Plan	349
The Compliance Requirements Document	350
Records Management Roles.	350
The File Plan	351
Setting Up Records Management in SharePoint Server 2007	353
Creating and Managing Content Types.	354
Creating the Records Center	355
Creating Document Libraries.	357
Defining Metadata	358
Defining Information Management Policies	359
Configuring the Record Routing Document Library	363
Managing Documents in the Records Center.	365
Placing a Hold on Documents.	365
Exempting a Document from Expiration Policy	368

Configuring Security on the Records Center	369
Configuring User and Group Permissions	370
Configuring Policy Settings in Central Administration	371
Creating Policy Templates	372
Submitting Content to the Records Center	373
Submitting Content from Microsoft Exchange and Outlook	375
Submitting Content Using Managed Mail Folders	375
Submitting Content Automatically Through Custom Workflow	375
Submitting Content Programmatically Using the Records Repository Web Service	376
Configuring Document Retention and Disposal	377
Using the Disposition Approval Workflow	377
Configuring Information Management Policy Reporting	379
Configuring Audit Log Reports	379
Configuring Site Collection Auditing	380
Configuring Information Management Policy Usage Reporting	381
Viewing Policy Reports	382
Summary	382
11 Web Content Management and Publishing Features	383
Understanding Web Content Management Sites	384
New Permission Levels and Security Groups	385
Separating Content and Presentation	385
Using Variations	386
Administering Web Content Management Sites	386
Creating Publishing Sites	387
Configuring the Welcome Page	387
Configuring Master Page Settings	389
Managing the Master Page And Page Layout Gallery	390
Managing Site Content and Structure	392
Configuring Navigation Settings	395
Assigning SharePoint Groups and Permission Levels	397
Smart Client Content Authoring	398
Configuring Document Conversion Services	398
Document Converters	400

Configuring Content Caching	400
Configuring Cache Profiles	401
Enabling Page Output Caching	402
Enabling Disk Caching	404
Publishing a Site Collection	404
Enable the Publishing Feature on the Farm	407
Summary	412
12 Administrating Data Connections	413
What Is the Business Data Catalog?	414
Understanding the Business Data Catalog Architecture	415
Metadata	416
Business Data Catalog APIs	419
Implementing BDC Security Options	420
Authentication Methods	421
Authorization	423
Central Security and Auditing	423
Managing Data Connections	425
Deploying Metadata Package	426
Business Data Actions	431
How to Use Business Data Catalog Features	434
Business Data Web Parts	434
Business Data in Lists	437
Business Data and User Profiles	439
Business Data and My Site	442
Connection Reuse in Excel, SharePoint, InfoPath, and Reporting Services	442
Business Data Catalog and Search	443
Summary	448
13 Performance Monitoring and Microsoft Operations Manager 2005	449
Understanding System Monitor	450
System Monitor	450
Counter Logs	451

Trace Logs	452
Alerts	453
Preparing to Monitor Performance	454
Monitoring Processor Utilization	454
Monitoring Memory Utilization	455
Monitoring Disk Utilization	456
Monitoring Network Utilization	458
Working with the Performance Tool	461
Customizing the Display	463
Additional Features	465
Microsoft Operations Manager 2005 and SharePoint Server 2007	467
Microsoft Operations Manager 2005 Architecture	468
Microsoft Operations Manager 2005 Components	468
MOM Management Packs	477
Rules	478
Alerts	478
Knowledge	479
Tasks	479
Views	479
Using MOM 2005 to Monitor SharePoint Server 2007	479
Deploying the MOM 2005 Management Packs for SharePoint Server 2007	480
Identifying Computers to Manage	481
Increasing the Size of Log Files	481
Disabling Event Log Replication on Clustered Servers	481
Considering Slow or Expensive Network Links	482
Installing Microsoft Operations Manager 2005 Agents	482
Installing Management Packs	482
Supplementary Management Packs	482
Key Monitoring Scenarios	484
Summary	485
14 Information Security Policies	487
Password Policies	490
Personal Use of Sites	493

Information Storage Policies	495
Administrative Policies	496
Logging Events	496
Authorized Web Parts and Applications	497
Change Control	498
Information Privacy	498
Data Classification Schemes	499
Extranet Considerations	500
Summary	501
15 Managing Content Types	503
Introducing Content Types	503
Understanding Metadata	506
Default Content Types	506
Understanding the Content Type Inheritance Model	508
Understanding Content Type IDs	512
Creating Content Types	513
Permissions for Creating and Modifying Content Types	514
Creating a New Content Type at the Site Level	514
Configuring Columns for Content Types	518
Configuring Document Libraries	521
Configuring Document Library Views for Multiple Content Types	528
Associating Documents with Content Types	529
Uploading Multiple Documents to a Multiple Content Type Document Library	532
Versioning and Modifications to Existing Content Types	532
Creating Content Types when Deploying InfoPath Forms	534
Extending Content Types	534
Attaching Workflow to a Content Type	534
Using Content Types to Format E-Mails	541
Searching by Using Content Types	545
Summary	550

Part III

Search, Indexing, and Shared Services Provider

16 Enterprise Search and Indexing Architecture and Administration	555
Understanding the Microsoft Vision for Search	556
Crawling Different Types of Content	556
Desktop Search	557
Intranet Search	557
Enterprise Search	557
Internet Search	558
Architecture and Components of the Microsoft Search Engine	558
Crawler Process	561
Indexer Process	562
Understanding and Configuring Relevance Settings	563
Click Distance	563
Hyperlink Anchor Text	564
URL Surf Depth	565
URL Matching	565
Automatic Metadata Extraction	565
Automatic Language Detection	565
File Type Relevance Biasing	566
Search Administration	566
Creating and Managing Content Sources	566
SSP-Level Configurations for Search	577
Managing Index Files	578
Troubleshooting Crawls Using the Crawl Logs	579
Working with File Types	582
Creating and Managing Search Scopes	584
Removing URLs from the Search Results	594
Understanding Query Reporting	595
The Client Side of Search	597
Executing Queries to Query the Index	598
Managing Results	599
Adding Properties to Advanced Search in SharePoint Server 2007 ...	600
Modifying Other Search Web Parts	601

Server Name Mappings	601
Thesaurus	602
Noise Word File	604
Managing Keywords	604
Working with the Result Set	606
Receiving Notifications from Search Results	608
Customizing the Search Results Page	609
Results Collapsing	612
Finding People in the Search Center	613
Summary	617
17 Enterprise Search and Indexing Deployment	619
Enterprise Search Administration	619
End-User Experience	621
Enterprise Administration for Farms	622
Farm-Level Search Settings	623
Query and Index Servers	627
Shared Services Providers with Search Enabled	627
Choosing a Search Implementation Topology Model	628
Role of the Index Server	628
Role of the WFE Server	628
Role of the Query Server	631
Role of the Database Server	631
Sample Deployment Scenarios	631
Collaboration Sites	632
Enterprise Portal Deployments	632
Internet-Facing Site	634
Disabling Search at the List Level	634
Summary	636
18 Administrating Shared Services Providers	637
Introduction to the Shared Services Provider	637
Configuring an SSP	638
Managing Shared Services Providers	640
Configuring User Profiles, Audiences, and Personal Sites Settings ...	642
Configuring Search Settings	648

- Configuring Portal Usage Reporting Settings..... 648
- Configuring Audiences Settings 650
- Configuring Excel Services Settings 653
- Configuring Business Data Catalog Settings..... 654
- Managing SSPs at the Farm Level..... 654
 - Creating a New SSP..... 655
 - Modifying Web Application Associations 656
 - Configuring Inter-Farm Shared Services 657
- Restoring an SSP 659
- Summary..... 659

Part IV

Integrating Additional Server Platforms

- 19 Publishing SharePoint Server 2007 Data to Mobile Devices Through ISA Server 2006 663**
 - Designing a Secure Mobile Infrastructure..... 664
 - Understanding Firewall Configurations..... 665
 - Using ISA Server 2006 with SharePoint Server 2007 Implementations 668
 - Configuring Servers for Secure Mobile Access to SharePoint Data..... 671
 - Configuring Windows Mobile Devices to Access SharePoint 688
 - Summary..... 690
- 20 Excel Services and Building Business Intelligence Solutions..... 691**
 - Understanding Excel Services Components 692
 - Excel Calculation Services..... 692
 - Excel Web Access..... 692
 - Excel Web Services 693
 - Excel Calculation Service Proxy..... 693
 - The Report Center Template 693
 - Configuring Excel Services..... 693
 - Enabling Excel Services..... 694
 - Configuring a Trusted Connection 694

Publishing Workbooks to Excel Services	696
Limiting the Area That Can Be Viewed.	698
Defining Parameters	699
Working with Spreadsheets Through Excel Web Access.	700
Viewing a Spreadsheet in the Browser.	700
Commands Available Within the Browser	702
Analyzing Data in the Browser	703
Unsupported Features	704
Using Excel Services in Dashboards	705
The Excel Web Access Web Part	705
Key Performance Indicators Web Parts	706
Filter Web Parts	707
Configuring Security	707
File Access Security	707
Data Access Security	708
User Access Security	710
Performance Considerations	710
Scaling Excel Services	711
Modifying the Default TCP Settings.	715
Limiting the Number and Duration of Open Sessions.	716
Accessing Data from Other Sources.	717
Trusted Data Providers	719
User-Defined Function Assembly	719
Summary.	720
21 Administrating Office Forms Server 2007 in Office SharePoint Server 2007.	721
Office Forms Server 2007 Features and Enhancements	722
Office Forms Server 2007 Architecture	723
Configuring Office Forms Server 2007.	725
Authentication, Security, and Forms Server 2007 Web Services Proxy.	729
Deploying Forms Server 2007.	731
Planning Deployment.	732
Form Types and Forms Server 2007	734
Understanding User-Deployed Forms	735

- Choosing a Where to Deploy Forms. 739
- Single Site Collection Content Type—User Deployment 740
- Farm Wide Content Type—Administrative Approved Deployment. 745
- Understanding Security Permissions 749
 - Some Common Rules 750
 - Using Forms that Contain Code 750
 - Using InfoPath Forms in Custom ASP.NET Pages 752
 - Controls Available to Forms Server Forms. 752
 - Understanding Browser Compatibility Issues 753
 - Data Connections Used with Forms Server 754
 - Forms Server 2007 Compatibility with InfoPath 2003. 755
 - Compatibility with Existing InfoPath 2003 Forms. 755
 - Using New InfoPath Forms. 756
- Summary. 756

Part V

Upgrading to Microsoft Office SharePoint Server 2007

- 22 Migrating from Content Management Server 2002 to Microsoft Office SharePoint Server 2007. 759**
 - Why Migrate? 760
 - End Users Can Do More Without Developer Assistance 760
 - Out-of-the-Box Features Replace Customizations 762
 - SharePoint Has More Built-In Capabilities 762
 - Customization in SharePoint Is Less Intensive. 762
 - Understanding the Two-Part Migration Process 763
 - Content Migration Phase 763
 - Code Migration Phase 764
 - Understanding Migration Options 765
 - Side-by-Side Migration Option. 765
 - In-Place Migration Option 765
 - Incremental Migration Option. 766
 - Understanding the Different Types of Migration Tasks 766
 - Administrator-Oriented Migration Tasks 766
 - Developer-Oriented Migration Tasks 766

SharePoint Server 2007 Content Migration	767
Creating Migration Profiles	768
Running Content Migration Jobs	770
CMS Assessment Tool	771
Installing and Running the CMS Assessment Tool	772
Reviewing CMS Assessment Tool-Generated Reports	779
Summary of Migration Steps	788
Planning the Migration	788
Preparing for Migration	789
Migrating Content Management Server 2002 to SharePoint Server 2007	791
Testing and Deployment	793
Summary	793

23 Upgrading from Microsoft Windows SharePoint Services 2.0 . . . 795

Understanding Your Upgrade Options	796
In-Place Upgrade	797
Gradual Upgrade	798
Content Database Migration	798
Planning Your Upgrade	799
Microsoft FrontPage Customizations	801
Organizing and Resizing Content Databases	802
Pre-Upgrade Tasks	803
The Upgrade Process	807
Task 1: Installing Windows SharePoint Services 3.0 Binaries—In-Place/Gradual Upgrade Approach	808
Task 2: Running the Prescan Tool	811
Task 3: Running the SharePoint Products And Technologies Configuration Wizard	814
Task 4a: Upgrading and Migrating Windows SharePoint Services 2.0 Web Sites—In-Place Upgrade Approach	818
Task 4b: Upgrading and Migrating Windows SharePoint Services 2.0 Web Sites—Gradual Upgrade Approach	821
Task 4c: Performing a Content Database Migration	827

Post-Upgrade Tasks	830
Completing the Windows SharePoint Services 3.0 Installation	830
Confirming Upgraded Sites	831
Finishing the Upgrade Process	833
Redistributing Content or Sites as Needed	834
Summary.	834
24 Upgrading from Microsoft SharePoint Portal Server 2003	837
Understanding Upgrade Options	838
Planning the Upgrade	840
Deprecated Features	843
Listings.	846
Sites Directory	847
Search	849
Shared Services	850
Performing Pre-Upgrade Tasks	854
Performing the Upgrade Process	857
Task 1: Installing SharePoint Server 2007	
Binaries—In-Place/Gradual Upgrade Approach	857
Task 2: Running the Prescan.exe Tool.	858
Task 3: Running the SharePoint Products And Technologies	
Configuration Wizard	859
Task 4a: Performing In-Place Upgrade of SharePoint Portal	
Server 2003 Web Sites	862
Task 4b: Performing a Gradual Upgrade	864
Task 4c: Performing the Content Database Migration.	866
Performing Post-Upgrade Tasks	867
Summary.	868
25 Upgrading Site Customizations and Custom Site Definitions	
to Microsoft Windows SharePoint Services 3.0.	869
Windows SharePoint Services 2.0 Site Definitions and Unghosting . .	870
Custom Site Definitions	873
Exploring Windows SharePoint Services 3.0 Site Definitions	875
Windows SharePoint Services 2.0 Site Definitions versus	
Windows SharePoint Services 3.0 Site Definitions	879

Upgrading Your Customized Windows SharePoint Services 2.0 Site Definitions to Windows SharePoint Services 3.0	880
Changing a Windows SharePoint Services 2.0 Site Definition to Incorporate Version 3.0 Functionality	887
Upgrading Existing Sites with an Upgrade Schema Definition File	889
Upgrading Customized Pages	893
The _Layouts Virtual Directory	895
Upgrading Web Parts	895
Summary	896

Part VI

Extending Microsoft Office SharePoint Server 2007

26 Introducing Features	899
Understanding the Default Feature Files	900
Configuring Feature Components	901
Feature.xml File	901
Element files	903
Resource Files	906
Administering Feature Scope	908
Element Scoping	910
An Example of a Site Collection-Scoped Feature	911
Creating Features in Visual Studio 2005	912
Creating the Project Class Library	913
Creating the Feature.xml File	913
Creating Feature Element Files	918
Adding Element Files to the Feature.xml File	921
Installing and Activating a Feature	921
Deploying Features	924
Using Stsadm.exe and Feature Commands	925
Permissions for Deploying Features	927
Adding Feature Files to a Web Server File Location	927
Installing Features	928
Activating Features	928
Using Activation Dependencies and Scopes	929

- Deploying Features by Using Solutions 930
- Deactivating and Uninstalling Features 934
- Updating an Existing Feature. 936
- Accessing Information with the Feature Object Model. 937
- Creating an Event Handler Feature 938
 - Synchronous and Asynchronous Events. 939
 - Building the Solution 940
- Implementing Feature Events 945
 - Instantiating the SPFeatureReceiver Class Provisioning Callouts. 946
- Including Features in Site Definitions. 948
 - Creating a Custom Site Definition. 949
 - Adding a Feature to the Site Definition. 950
 - Removing a Feature from ONET.XML File 952
- Summary. 953

27 Using Microsoft Office SharePoint Designer 2007 with Microsoft Windows SharePoint Services 3.0 955

- What Is Office SharePoint Designer 2007? 956
 - When Do You Use SharePoint Designer 2007? 957
- Working with SharePoint Designer 2007. 957
 - Opening SharePoint Sites. 957
 - Getting to Know SharePoint Designer 2007 958
 - Configuring Contributor Settings 962
 - Adding Contributor Settings to Site Templates 970
 - Creating New Files. 970
- Understanding Master Pages. 971
 - Content Pages 972
 - Customize Master Pages. 977
- Customizing a Web Site 981
 - Cascading Style Sheets, WYSIWYG, and Tools. 981
 - Site Definition. 990
 - Revert To Template 992
- Working with Data Integration 992
 - The Data Source Library 993
 - Using the Data Form Web Part 1002

Viewing Reports.....	1007
Summary.....	1010
28 Implementing Microsoft Windows Workflow Services	1011
Benefits of Windows Workflow Foundation	1011
Tools for Extending the Workflow Model	1012
Understanding Workflow Architecture	1012
Activity Management	1014
Storing Source Files in Document Libraries	1015
Workflow Markup Language	1016
Compiling Source Files	1016
Windows Workflow Authoring	1018
Comparing SharePoint Designer 2007 and Visual Studio 2005 Designer	1019
What Is the Same.....	1019
What Is Different	1020
Considerations	1021
Building a Workflow by Using SharePoint Designer 2007	1023
Creating a Workflow	1023
Customizing the Workflow Initiation Settings	1025
Configuring the Predefined Conditions and Activities	1026
Generating the Workflow Definition Template and Deploying the Workflow	1035
Using Custom Activities in SharePoint Designer 2007.....	1037
Extending Built-In Business Document Workflows.....	1039
Deploying a Workflow Created with Visual Studio 2005 Designer	1040
Pre-Deployment Tasks	1040
Performing Deployment and Activation	1042
Post-Deployment Tasks.....	1042
Summary.....	1043
29 Microsoft Office SharePoint Server 2007 Web Parts	1045
Creating and Modifying Web Part Pages	1045
Adding Web Parts to a Page	1047
Using the Web Part Gallery and Advanced Options	1049

Arranging Web Parts on a Page	1051
Methods of Arranging Web Parts	1052
Removing Web Parts	1052
Modifying Web Part Settings	1052
Connecting Web Parts	1055
Customizing and Personalizing Web Parts	1056
Summary of Built-In Web Parts	1057
Libraries	1057
Communications	1059
Tracking	1059
Content Rollup	1060
Dashboard	1062
Filters	1063
Miscellaneous	1066
Outlook Web Access	1068
Site Directory	1070
Summary	1071
30 Microsoft Office SharePoint Server 2007 Disaster Recovery	1073
Understanding and Documenting Your Environment	1074
Documenting Your Infrastructure and Plan for Disaster	1074
Documenting Your Server Farm Configuration	1076
Documenting Your Farm Installation	1080
Testing Your Disaster Recovery Plan	1081
Backing Up and Restoring SharePoint Server 2007	1081
Performing Content Recovery	1082
Performing Disaster Recovery	1087
Implementing Fault Tolerance	1094
Summary	1100
31 Administrating Code Access Security	1101
Architecture and Terminology	1101
Identity-Based Security	1102
Code Access Security	1102
Calculating Permissions for Assemblies	1104

Stack Walk Modifiers	1105
Declarative Security	1106
Setting a Secure Default Policy	1109
Configuring Security Settings in the Web.config File	1110
The SafeControls Section	1110
The securityPolicy Section	1112
The trust Element.	1113
Understanding Security Policy Files	1114
The SecurityClasses and CodeGroup Sections	1114
The NamedPermissionSets Section.	1118
Creating Policy Files	1119
Partially Trusted Callers.	1122
Calculating the Required Assembly Permission Set	1122
Summary.	1127
About the Author	1129
Index	1133

What do you think of this book?
We want to hear from you!

Microsoft is interested in hearing your feedback about this publication so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit: www.microsoft.com/learning/booksurvey/

Installing Microsoft Office SharePoint Server 2007

The Product Feature Matrix	120
Hardware Recommendations	121
Preparing for Installation	122
User and Service Accounts	123
Installing SharePoint Server 2007	127
Running Through the Installation	127
The Configuration Wizard	131
Understanding the Default Databases and Changes from the Database Structure in SharePoint Portal Server 2003	136
Modifying Your Farm	139
Understanding How Your Server Has Changed as a Result of Installing SharePoint Server 2007	140
File System Changes	140
Removing Servers from Your Farm	142
Installing Windows SharePoint Services 3.0	142
Uninstalling SharePoint Server 2007	143
Uninstalling Windows SharePoint Services 3.0	144
Summary	144

This chapter focuses on the installation of Microsoft Office SharePoint Server 2007. The goal of the chapter is to prepare you to plan for the installation of Office SharePoint Server 2007 and Microsoft Windows SharePoint Services 3.0. You will also learn how to add and remove servers from a server farm. This chapter also covers the process for uninstalling the products and items that are not removed during the uninstall process.

Installing SharePoint Server 2007 is a straightforward process, but some of the decisions you'll make are pivotal to your farm deployment. There's much to learn, so let's get started.

The Product Feature Matrix

The first installation decision you'll make is to select the appropriate SharePoint product for your implementation. In general, Windows SharePoint Services 3.0 offers only collaboration tools, but is covered by the operating system license. SharePoint Server 2007 is offered in two editions: Standard and Enterprise. The binaries installed are the same for both the Standard and Enterprise editions, but some features are disabled in the Standard edition. The same installation source is used for both editions, and the choice of Standard or Enterprise is determined by the Product Key entered during installation. An installation of Standard Edition can be upgraded to Enterprise in Central Administration without performing additional installation. To change from Enterprise to Standard however requires an uninstall and reinstall of the product. Table 5-1 provides a feature comparison of Windows SharePoint Services 3.0 and the two versions of SharePoint Server 2007.

Table 5-1 Feature Comparison

	Windows SharePoint Services 3.0	SharePoint Server 2007 Standard Edition	SharePoint Server 2007 Enterprise Edition
Services	Central Administration	Web Content Services:	Excel Server
	Site Administration	Publishing, Content	InfoPath Forms
	Incoming Email	Deployment, Variations	Line Of Business
	Windows SharePoint Services 3.0 Search	Portal Services: Profiles, Audiences, Personalization	Interoperability (Business Data Catalog)
	Windows SharePoint Services 3.0 Web Application	Document & Records Management	
		Office Search	
		Document Conversions	

Table 5-1 Feature Comparison

	Windows SharePoint Services 3.0	SharePoint Server 2007 Standard Edition	SharePoint Server 2007 Enterprise Edition
Features	Mobility Shortcut URL Team Collaboration Lists Standard Content Type Definitions Standard Field Definitions Issue Tracking Workflow Alerts Discussions RSS Feeds Data Connection Library	Document Center Enhancements Translation Management Library Publishing Slide Library Office Server Standard (User profiles, Search, Personalization, and so on) Workflows (Approval, Collect Signatures, Collect Feedback, Disposition, Translation Management) Reporting	Office Enterprise: Business Data Catalog, Forms services, Excel services, Key Performance Indicator and various Business Intelligence Web Parts
Site Templates	Blank, Team, Document Workspace, Wiki, Blog, Meeting Workspaces	Records Center, My Site Host, Document Center, Personalization, Site Directory, Report Center, Search Center, Search Center with tabs, Publishing Portal, Collaboration Portal, Publishing, Publishing with workflow	

Hardware Recommendations

Before you install and configure SharePoint Server 2007, make sure your servers have the recommended hardware and software. For a small server farm, you need at least one server performing all SharePoint roles and one server acting as a database server. The server computers should meet the following requirements:

- **Web server and application server** Dual-processor computer with processor clock speeds of 2.5 gigahertz (GHz) or higher and a minimum of 2 gigabytes (GB) of RAM.
- **Database server** Dual-processor computer with processor clock speeds of 2.0 GHz or higher and a minimum of 2 GB of RAM.

Field experience shows us that nearly everyone now is purchasing hardware with a minimum of 4 GB of RAM. This amount is preferred and should be considered a best practice in all but the smallest environments.

Preparing for Installation

Before installing SharePoint Server 2007, you'll also need to consider three different server roles: Web application server, database server, and Active Directory. These roles are described in this section. A detailed discussion of hardware and software requirements can be found in Chapter 3, "Design Considerations and Deployment."

Web/Application Server

The server hosting the SharePoint components must have the following minimum software configuration:

- Microsoft Windows Server 2003 (Standard, Enterprise, Datacenter, or Web Edition) with Service Pack 1 (SP1).
- Microsoft .NET Framework 3.0 installed, which includes Microsoft Windows Workflow Foundation
- Microsoft Internet Information Services (IIS) in IIS 6.0 worker process isolation mode, with Microsoft ASP.NET 2.0 installed and enabled. IIS 6.0 is in the correct mode unless you upgraded the Web server from Windows 2000 to Windows Server 2003. Upgraded Web servers default to IIS 5.0 mode and need to be changed to IIS 6.0 mode.
- NTFS file system.

Database Server

SharePoint requires SQL databases and prefers Windows Authentication. SharePoint is hardware agnostic, so the hardware configuration, physical location of the SQL server, and location of the databases—such as a storage area network (SAN)—is fine with SharePoint as long as SharePoint can communicate efficiently with its databases. SharePoint is unaware of any non-SharePoint databases on the SQL server. If you have multiple named instances of SQL, identify the instance you are using for SharePoint as part of identifying the SQL server.

Therefore, the SQL Server configuration characteristics are flexible and include the following:

- Any operating system version that supports Microsoft SQL Server 2000 or 2005.

- Microsoft SQL Server 2005 or Microsoft SQL Server 2000 with Service Pack 3 (SP3) or later.
- The database server does not have to be dedicated to SharePoint.
- Optionally, the database server can be an SQL cluster.

Active Directory

Planning is essential for every part of implementing SharePoint. A crucial part of preparing for installing SharePoint Server 2007 is planning the various Active Directory accounts that will be needed throughout your implementation, not just for the installation process. The time that you spend on this process will be appreciated when you do not have to modify the accounts later.

Accounts Requirements

SharePoint Server 2007 will require many dedicated accounts. These accounts are discussed in greater detail in the Security Accounts section of Chapter 3. Before beginning your installation, plan for and create these dedicated accounts with these considerations:

- Provide the appropriate rights and permissions so that they are available when needed.
- The dedicated accounts need to have passwords that do not automatically expire.

User and Service Accounts

It is strongly recommended that you use a dedicated account to log in and install Windows SharePoint Services and SharePoint Server 2007 servers. This account can also be used as the identity of the Central Administration site application pool, or it can be unique. By design, the Welcome menu displays “system account” if that account is used to log on to any application pool or Web site. This behavior continues even if the application pool identity is changed to the Network Service. This means your administrator account should not be used as an application pool identity or to install an SharePoint Server 2007 server.

Table 5-2 provides a detailed list of the accounts that are required by a SharePoint Server 2007 farm installation.

Table 5-2 Accounts Required by an SharePoint Server 2007 Farm Installation

Account	Purpose	Scope	Used by	Needed	Requirements
Setup User	User account that is used to run setup on each server.	Farm	Person installing	Setup	Member of the administrator group on each Web front-end (WFE) server and application server computer in the farm. Member of the following SQL Server groups with SQL Security administrator and database creator rights on SQL servers.
SQL Server Service	This is the security context used By Central Administration for creating databases and other SQL configurations.	Farm	MSSQLSERVER, SQLSERVERAGENT	Setup	Member of the administrators group on each server on which setup runs, administrators group on each SQL Server computer, database system administrator, and member of the SQL security administrator and database creator SQL Server groups.
Server Farm	This account is also referred to as the <i>database access account</i> .	Farm	Central administration site application pool identity	Setup	Member of administrators group on each WFE server and application server computer in the farm with SQL security administrator and database creator rights on SQL Servers. Database Owner (DBO) for all databases and additional permissions on WFE server and application server computers are automatically configured for this account when SharePoint is installed.
SSP App Pool		App	SSP App Pool Identity	SSP Creation	No configuration is necessary. The following permissions are automatically configured for this account when SharePoint is installed: DBO for the Share Service Provider (SSP) content database, read/write permissions for the SSP content database, read/write permissions for content databases for Web applications that are associated with the SSP, read permissions for the configuration database, read permissions for the central administration content database, and additional permissions on WFE server and application server computers.
SSP Service Account	Used to run timer jobs and for interserver communications.	Farm	SSP Timer service; SSP Web services	SSP Creation	Same as SSP App Pool Account

Table 5-2 Accounts Required by an SharePoint Server 2007 Farm Installation

Account	Purpose	Scope	Used by	Needed	Requirements
Windows SharePoint Services Search	Used as the service account for the Windows SharePoint Services Search service. There is only one instance of this service, and it is used by all SSPs.	Farm	Windows SharePoint Services 3.0 Search service	SSP Creation	Must be a domain account, but must not be a member of the farm administrators group. Permissions automatically configured for this account when SharePoint is installed include the following: read/write permissions for content databases for Web applications, read permissions for the configuration database, and read/write permissions for the Windows SharePoint Services Search database.
Search Default Content Access Account	The default account used by a specific SSP to crawl content. It is used when an account is not specified for a content source.	App	Windows SharePoint Services 3.0 Search service	SSP Creation	Must be a domain account, but must not be a member of the farm administrators group. It requires read access to external or secure content sources that you want to crawl using this account. Additional permissions for this account are automatically configured when SharePoint is installed.
Search Specific Content Access Account	This is an optional account that is configured to replace the default content access account to crawl a specific content source.	Rule	Windows SharePoint Services 3.0 Search service	Create a new crawl rule	Read access to external or secure content sources that this account is configured to access.

Table 5-2 Accounts Required by an SharePoint Server 2007 Farm Installation

Account	Purpose	Scope	Used by	Needed	Requirements
User Profile and Properties Content Access Account	Account used to connect to a directory service, such as Active Directory, a Lightweight Directory Access Protocol (LDAP) directory, Business Data Catalog (BDC) application, or other directory source and used to import profile data from a directory service. Note: If no account is specified, the Search Default Content Access account is used. If the Search Default Content Access account does not have read access to the directory or directories that you want to import data from, you will need to specify a different account. You should plan for one account per directory connection.	App	Profile Import	SSP Creation	Read access to the directory service. For an Active Directory service connection that enables Server Side Incremental, the account must have the Replicate Changes permissions for Active Directory directory services provided by Windows 2000 Server. This permission is not required for Windows 2003 Active Directory. Manage user profiles right. View rights on entities used in Business Data Catalog import connections.
Excel Services Unattended Service Account	Excel Calculation Services uses this account to connect to data sources that require user name and password strings for authentication. The SSP App Pool account is used if none is specified. For security, plan to use a low-privileged account that does not have the database privileges of the SSP App Pool Account.	App	Excel Services Service	SSP Creation	Read/write access to the Excel data sources.

Table 5-2 Accounts Required by an SharePoint Server 2007 Farm Installation

Account	Purpose	Scope	Used by	Needed	Requirements
App Pool Identity	Used to access content databases associated with the Web application. Plan one for each application pool.	App	Web Applications	App Pool Creation	No configuration is necessary. SQL Server privileges that are automatically assigned to this account are member of Database Owners Group for content databases associated with the Web application, read/write access to the associated SSP database only, and read permission for the configuration database. Additional privileges for this account on WFE servers and application servers are automatically configured by SharePoint.

Installing SharePoint Server 2007

SharePoint Server 2007 installation is much more modular than previous versions. The installation walkthrough involves the following processes that can be accomplished by different individuals or roles in production environments:

- Installation process
- Run the Configuration Wizard
- Assign services
- Create the corporate intranet portal

Running Through the Installation

To begin the installation process for SharePoint Server 2007, complete the following steps:

1. Log in to your computer using the installation account that was previously created.
2. Start the SharePoint Server setup program from your source files, which are located on either a network or CD.
3. Enter your product key on the Enter Product Key page. Note in Figure 5-1 that the page confirms the correct key before permitting you to proceed.



Figure 5-1 Enter Product Key page

4. Accept the end-user license agreement (EULA) on the End-User License Agreement page.
5. Next you need to decide which installation type is required for your system. (See Figure 5-2.) Your decision will determine the number of configuration pages you see during installation, as well as the installation process and results.

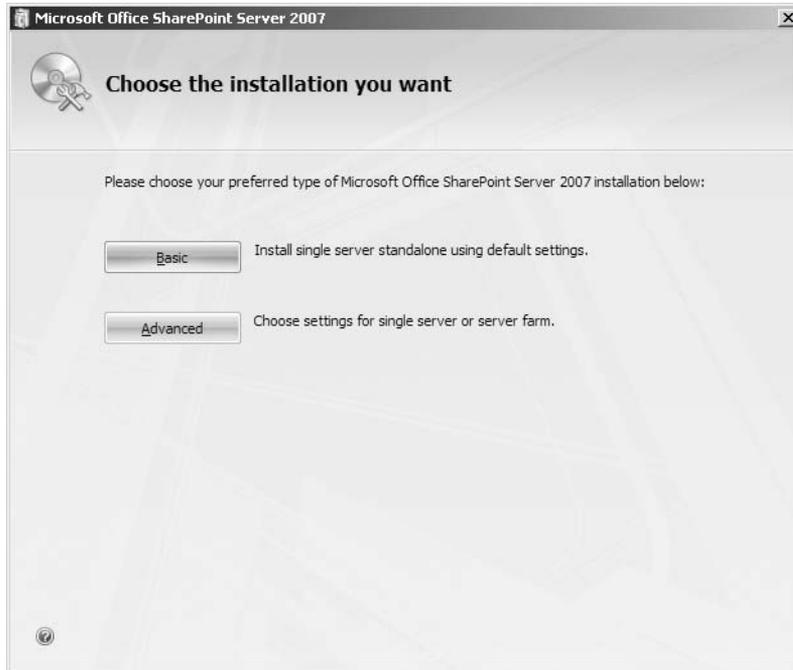


Figure 5-2 The Installation Types page

The Basic, or single-server, option installs the product on a single server with no options of later adding other servers or building a farm. This limitation exists because this option installs and uses Microsoft SQL Server 2005 Embedded Edition. A basic installation does not present any opportunity to change from the default options. Use the basic installation only when you know your deployment will not grow very large and will not ever need to scale out with additional servers.

Advanced Options

If you choose the Advanced option, you are presented with a page that has three tabs: Server Type, File Location, and Feedback. (See Figure 5-3.) We'll discuss your options on each of these three tabs in this section.

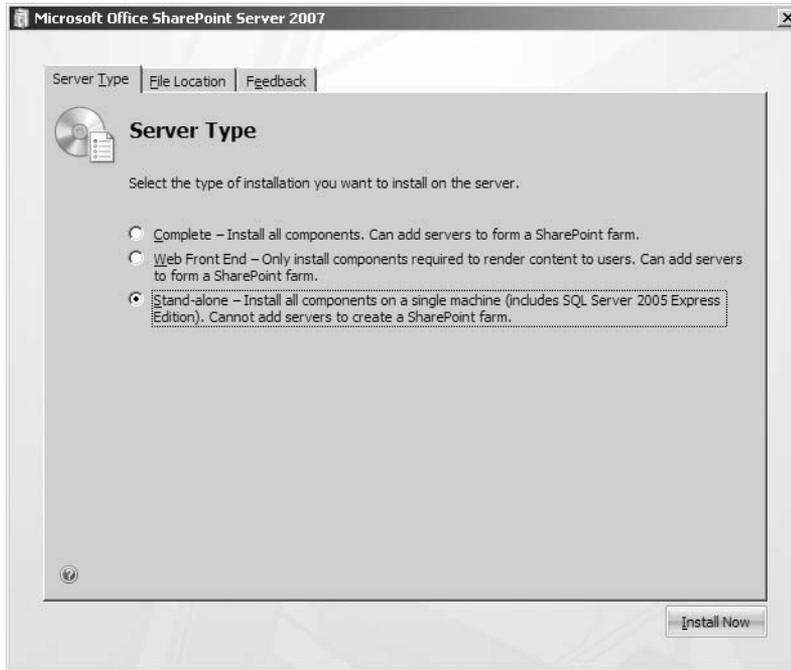


Figure 5-3 The first of the advanced options tabs

The Server Type tab presents three installation options. The first option we'll mention is the Stand-alone option. This option is the same as Basic on the previous page except that you now have the options on the other two tabs to configure along with setting up a basic server. The second option is the Web Front End option. This option installs only the services required for Web services and features. This option will require a reinstall if you need to support other services on this server later. You should have a Complete installation on one server before starting a WFE installation so that the Shared Services Provider (SSP) services will be available for the WFE.

Note In most cases, you'll not want to choose the Web Front End option because it limits your ability to quickly change a server's role without reinstalling the SharePoint binaries on the WFE server.

Finally, the Complete installation option installs all the SharePoint binaries on the server necessary to perform any or all roles and to deploy either a Standard or Enterprise edition of this product in your environment. Services and features can be turned on and off as needed on each server that has a Complete installation when you expand or shrink your farm.

Both Web Front End and Complete will require the selection of an SQL server, preferably a remote server. For a small environment or for test purposes, you can install SharePoint

Server 2007 on a server that is running as a domain controller, SQL server, and Exchange Server services. But except in rare circumstances, it is not a best practice to do this.

The remaining two tabs can be used to customize your installation as follows:

- **File Location** Allows you to choose alternate locations for your binaries. Choices made on this tab will not affect the installation location of the common files, which will be discussed later in this chapter during the review of installation changes to your system.
- **Feedback** Allows you to choose whether or not to participate in the Microsoft feedback program.

Installation Complete

This will be the first indication that, to permit separation of roles, this product is very modular in its installation and configuration. At this point, you have only installed the binaries. No databases have been created, and no modifications have been made to IIS. In your environment, another team might be involved in configuring the server. If this is the case, that team will run the Configuration Wizard later. However, for the purpose of this chapter, it is assumed that you are responsible for all tasks.

The Configuration Wizard

The Welcome page (shown in Figure 5-4) explains the information you will need to provide during the configuration.



Figure 5-4 Configuration Wizard Welcome page

When you click Next, a warning dialog box is displayed explaining that some services will need to be restarted during the configuration. This does not present issues if you are working with a new, dedicated Web server. However, if your server is currently serving other Web sites, restarting the Web services will disrupt services, which might be unacceptable during certain time periods. If this is the case, you'll need to perform this action during off-hours. Also, it is highly recommended that you check network connectivity and DNS resolution from the server to the SQL server prior to running the wizard.

Server Farm Connection

Farm membership is defined by servers that are registered with the same configuration database. To join an existing farm, the server must use the same configuration database that the other servers are using. (See Figure 5-5.) If you want to set up a new farm, you need to create a new configuration database. You also need to know the SQL service account and password to join it to the farm. As was discussed earlier, in most instances this will be a domain account.

Best Practices Best practice is to always use domain accounts to install, configure, and secure your SharePoint deployment. If you use local server accounts and then later want to move to a domain environment, all your accounts in the farm and the Web applications need to be reassigned to domain accounts. This can be a challenging activity that can be avoided by simply using domain accounts initially.

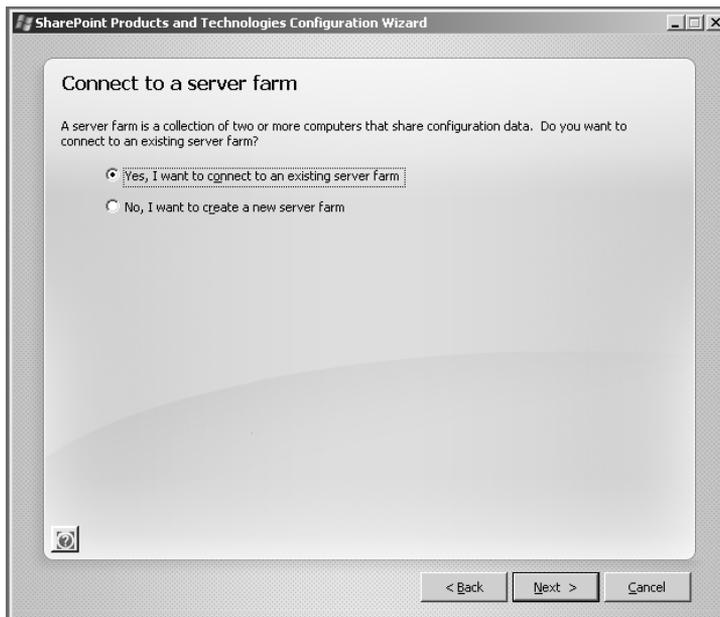
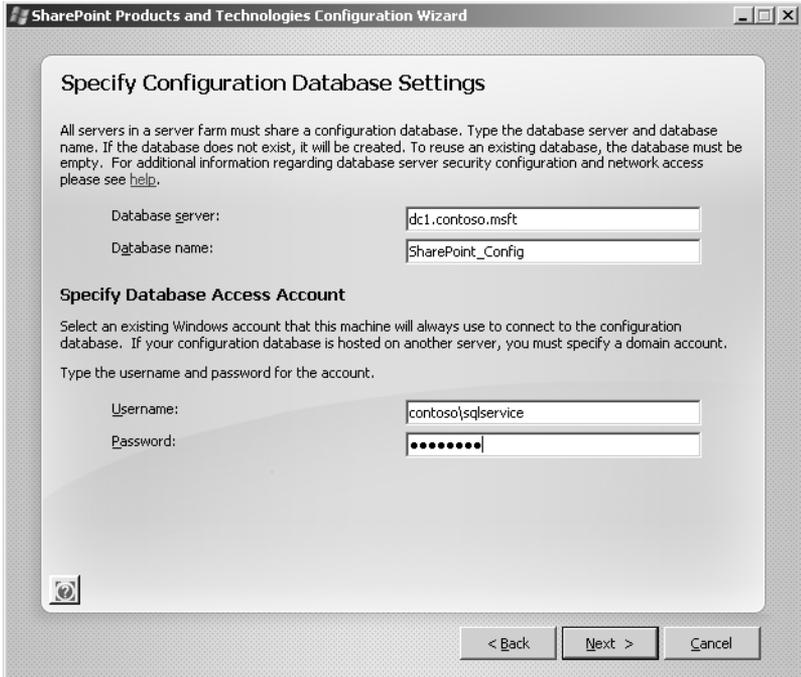


Figure 5-5 Farm connection choices

Create a New Farm

When you configure a new farm, you must specify a SQL Server instance and a new configuration database name. (See Figure 5-6.) At this point, you should have a naming convention in place not only for the configuration databases, but also for the other databases that will be configured later. You also need the SQL account username and password that has db_creator and db_security admin permissions on your SQL server. If this is your first SharePoint deployment, you need to ensure this account is also a member of the local Administrator's group on the SharePoint server. (See Table 5-2.)



The screenshot shows a window titled "SharePoint Products and Technologies Configuration Wizard". The main content area is titled "Specify Configuration Database Settings". Below the title is a paragraph of instructions: "All servers in a server farm must share a configuration database. Type the database server and database name. If the database does not exist, it will be created. To reuse an existing database, the database must be empty. For additional information regarding database server security configuration and network access please see [help](#)." Below this text are two input fields: "Database server:" with the value "dc1.contoso.msft" and "Database name:" with the value "SharePoint_Config".

Below these fields is a section titled "Specify Database Access Account". It contains the following text: "Select an existing Windows account that this machine will always use to connect to the configuration database. If your configuration database is hosted on another server, you must specify a domain account. Type the username and password for the account." Below this text are two input fields: "Username:" with the value "contoso\sqlservice" and "Password:" with a masked password represented by ten dots. At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

Figure 5-6 Specify Configuration Database Settings page

The username being requested on this page also will be used by the application pool in the Central Administration Web site. This is the same application pool account that was discussed earlier that has the appropriate rights on the SQL server and on all members of the farm. This is the security context for central administrative functions in SQL. In other words, all the system calls between the SharePoint servers and the SQL server will be committed within the security context of the Central Administration application pool account.

Note Remember that in SharePoint, user accounts should always be entered as domainname\username to distinguish them from local accounts.

Create the Central Administration Web Application

On the next page (shown in Figure 5-7), you instruct setup to create the Central Administration Web application. On this page, you can use the randomly generated port number or specify your own port number. In addition, you can choose if you want the Central Administration Web site to use Kerberos or NTLM authentication.



Figure 5-7 Configuration page for the Central Administration Web application

Important Choose your port number carefully. You cannot change the port number for Central Administration after SharePoint is installed.

The choice between Kerberos and NTLM authentication is important. In most cases, you will use NTLM because even though Kerberos authentication is more secure and more efficient, it must be supported throughout your environment. The Kerberos option will require you to configure service principal names (SPNs) for your accounts used as application pool identities. The Negotiate (Kerberos) option will allow IIS to authenticate users with Kerberos or NTLM authentication if the user's machine cannot access the KDC (Key Distribution Center) or has an unsynchronized clock.

Enabling Kerberos Authentication

Kerberos authentication requires special configuration. When creating a Central Administration Web application, choose Kerberos as your authentication mechanism and configure an SPN for your Web application pool process account identity by using the `setspn.exe` tool from `Support.cab` in the `Support` folder of your server install CD or the Windows Server Resource Kit. Enter the following at a command prompt:

```
setspn.exe -A HTTP/ServerName Contoso\UserName
```

In this example, *ServerName* is your IIS system name, *Contoso* is the name of our Active Directory Domain, and *UserName* is the identity of the Web application's application pool.

For more information about configuring Kerberos, see Microsoft Knowledge Base article 832769, "How to Configure Windows SharePoint Services to Use Kerberos Authentication," found at <http://support.microsoft.com/default.aspx/kb/832769>.

Complete Wizard Input

At this point, the Configuration Wizard has sufficient information to begin. Review the accuracy of the information (shown in Figure 5-8) before you click Next. If necessary, back up and make changes.

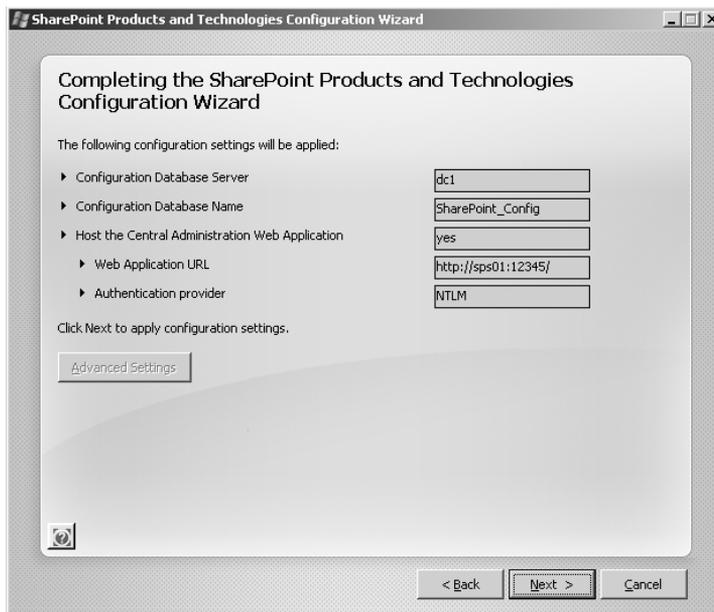


Figure 5-8 Completing the wizard

Once you click Next, a progress screen displays while the following actions are taken:

1. Initialize SharePoint products and technologies configuration.
2. Create configuration database.
3. Install Help collections.
4. Secure SharePoint resources.
5. Install and register SharePoint services.
6. Install and register SharePoint features.
7. Provision the SharePoint Central Administration Web application.
8. Install Web application files.
9. Finalize SharePoint products and technologies configuration, followed by IIS reset.

Moving to Central Administration

When the installation has been successfully completed, the wizard presents a report on its actions. When you click Finish, you are directed to the SharePoint Central Administration Web page. To open the Central Administration page, you need to add it to your Trusted Sites zone in Internet Explorer. The default settings of Internet Explorer require authentication for all Trusted Sites. To pass through your current logon credentials, you need to either modify the settings for Trusted Sites zone in Internet Explorer or add the Web site to the Local Intranet zone using the Sites button. If you are using a proxy server to access the Internet, ensure that your local sites are listed as local addresses in the Bypass Proxy Server For Local Servers dialog box.

Understanding the Default Databases and Changes from the Database Structure in SharePoint Portal Server 2003

The installation of SharePoint Server 2007 implements many changes to the database structure, particularly when compared to SharePoint Portal Server 2003. As part of the reduction in resource overhead of a portal, setup creates only one content database for each Web application, unlike the three databases that were created for each portal in SharePoint Portal Server 2003.

The Configuration database, which was always central to a farm, has taken on many new important roles. One major shift you will see is that the configuration database must be backed up for disaster recovery. In SharePoint Portal Server 2003, the configuration data-

base was rebuilt “on-the-fly” during a recovery operation. In SharePoint Server 2007, the configuration database is restored from backup. However, members of the farm still must check the configuration database constantly to see whether their role in the farm has changed, as well as to check where all the other roles within the farm are located. By default, each server in the farm checks with the configuration database every 30 seconds.

The Job Server role in SharePoint Portal Server 2003 has been eliminated in SharePoint Server 2007. The configuration database now stores information on the various jobs, their parameters, and their schedules. In addition, many SharePoint settings formerly stored only in an individual member’s registry are now also stored in the configuration database, as well as the IIS metabase configurations and file system changes on the WFE servers. When new applications are “created” in Central Administration, the information is first placed in the configuration database and then all WFEs complete the appropriate actions on their servers. This new centralized storage enables quick duplication when a new WFE is added to the farm, and it allows for replication of local changes on the WFE members. This also means that changes to a Web application’s configurations in IIS Manager made after the Web application has been created are not written to the configuration database. Best practice is to not make configuration changes to this Web application using the IIS Manager after the Web application has been created.

In addition to the configuration database, the following databases are created as part of the installation and configuration of SharePoint Server 2007:

- **Admin_content database** Stores the information related to lists, document libraries, tasks, and so on of the Central Administration site. You can add information and documents to the site.
- **SSP database** Each SSP requires a database for service-specific data. The SSP database stores any nonsearchable data that needs to be accessed by multiple sites. This data includes, but is not limited to, the following:
 - User information imported from Active Directory or another directory—for example, people profiles
 - Calculated audiences and organizational hierarchies
 - Security information needed for the rights for the administrative delegation of the SSP site
 - Business Data Catalog (BDC)–related imported data
 - Business application data such as Service Advertising Protocol (SAP)
 - Business Intelligence (BI) methods
 - Site usage data
 - IPFS session state information

- **SSP search database** Separated from the SSP database primarily to ease the management of these databases. The SSP search database also enables a database administrator to back up other Office Server databases at a more granular level. One SEARCH database is created per SSP. The search database contains frequently changing search-related data that is created during the search indexing process, such as crawl properties, document properties, and propagation properties. This is similar to the metadata information stored in the Embedded Database Engine (edb) database by the search service of SharePoint Portal Server 2003. The SEARCH database serves as the data store for the following:
 - Search metadata (also called the *property store*)
 - History log
 - Search log
 - Calculation tables for crawl statistics
 - Links tables and statistical tables

These SSP databases do not contain the index created by the gatherer service.

- **Content databases** Used for site collections to store all Office Server data, including the following data:
 - All site details
 - Structure details
 - User content
 - Files
 - Security information
 - InfoPath form server templates
 - Excel server data

A significant change in database structure is the creation of content databases for each application regardless of the application's function. So although we no longer get the extra `_serv` and `_prof` databases for each portal as we did in SharePoint Portal Server 2003, we do get content databases for the Shared Service Provider (SSP) application, the Web Services application, and the Central Administration application. These content databases serve the same functions as those of every other Web application's content database.

Modifying Your Farm

Technically, your farm exists as soon as you create the configuration database with the first Complete installation type. Depending on your design, you can immediately begin to expand your farm with additional servers to support WFE or other functions. You might need to move search, index, personal sites host, Excel services, and other services to separate hardware to reduce workload on the WFE.

Alternatively, your farm can continue for some time as a single server hosting all services (other than SQL Server) until performance monitoring indicates a need to expand. We recommend that the SQL server always be on a separate server except in very small production implementations or development and staging implementations.

Adding Servers to Your Farm

The installation process is the same for additional servers as for the first server in the farm except for the installation type selection that you make. Your only options are Complete or Web Front End. You can choose to always use Complete and turn off services not required for the WFE server when installing a WFE so that you retain the flexibility of changing roles later. If you use the WFE option and choose to add other services to the server later, you must reinstall SharePoint Server 2007 to add the new functionality to the server.

When you run the Configuration Wizard, however, you must choose to join the farm by picking the appropriate configuration database that defines the farm. The information in the configuration database will be used to configure SharePoint Server 2007 on the new server. The existing configuration database names can be retrieved after you identify the database server.

After the Configuration Wizard completes, you will define the role of the new server in Central Administration by starting and stopping services. If you're coming from a SharePoint Portal Server 2003 background, you'll find that there is no server selection screen with clean check boxes. Instead, starting and stopping services in Central Administration on each server is the method you'll use to assign server roles in the farm. This is much more granular in defining roles, and the hard-coded farm structures of SharePoint Portal Server 2003 are gone.

Understanding How Your Server Has Changed as a Result of Installing SharePoint Server 2007

Sometimes, especially for troubleshooting purposes, you'll need information on how the SharePoint installation changed your server. In this section, we will review how the installation of SharePoint Server 2007 modifies the following:

- File system
- Registry
- IIS 6.0
- Databases

File System Changes

The binaries were installed in the location specified during installation. The default location is C:\Program Files\Microsoft Office Servers\12.0. Here you will find global files for the installation and applications. For instance, the C:\Program Files\Microsoft Office Servers\12.0\Data\Applications\(instance ID)\Config folder contains global configuration files used by the search engine, like the language-specific noise word and Thesaurus files along with the Thesaurus schema xml file. Other folders are also installed as follows:

- **Projects** This is the location for the various indexes.
- **Single sign-on** Common files are installed to C:\Program Files\Microsoft Shared\Microsoft Office 12\ Single Sign-on.
- **Global executables** C:\Program Files\Common Files\Microsoft Shared\OFFICE12 contains the dll's used globally.
- **1033** This folder is used for US English. Other folders will appear as you install additional language packs.
- **Setup files** Critical setup files that might be needed later for re-running certain aspects of the setup and Configuration Wizard are placed at C:\Program Files\Common Files\Microsoft Shared\SERVER12.
- **Web services** Common files are installed to C:\Program Files\Microsoft Shared\Web server extensions\.
- **The new "12 hive"** C:\Program Files\Common Files\Microsoft Shared\Web server extensions\12 is the equivalent of what we affectionately called the "60 hive" in SharePoint Portal Server 2003.

Some files that you find here are global, some are language specific (En-us or enus is US English), and some are application (Web site) specific.

In addition, there is a hierarchy to many of the files. For instance, in C:\Program Files\Common Files\Microsoft Shared\Web server extensions\12\Data\Config, you will find another set of noise word and thesaurus files that supersede those discussed previously. In the C:\Program Files\Common Files\Microsoft Shared\Web server extensions\12\Data\Applications\SPS2\Config folder, you will find a set of noise word and thesaurus files that are specifically for the SPSv2 application. Under this folder, you will also find other search files and logs specific to this application.

In the C:\Program Files\Common Files\Microsoft Shared\Web server extensions\12\TEMPLATE\LAYOUTS folder, you will find the administrative pages address by the _layouts relative path on your sites. Also, in the C:\Program Files\Common Files\Microsoft Shared\Web server extensions\12\TEMPLATE\images is the _images relative path for images addressable anywhere in your sites.

Registry Changes

The Configuration Wizard makes hundreds of registry entries as it installs and registers dlls, services, and features. For example, the installation of SharePoint Server 2007 adds several entries to the registry under HKEY_LOCAL_MACHINE\Software\Microsoft\Office Server and HKEY_LOCAL_MACHINE\Software\Microsoft\Shared Tools\Web Server Extensions\12.0.

The creation of the first SSP adds 48 keys to the registry, many of which have up to 36 entries within the key. These changes are found in a file named RegistryBlob.reg located in the SSP: C:\Program Files\Microsoft Office Servers\12.0\Data\Office Server\Applications\{Site GUID} directory.

Configuring the Search and Index server adds 186 keys to the registry, many of which have up to 53 entries within the key. These changes are found in a file named RegistryBlob.reg located in the C:\Program Files\Microsoft Office Servers\12.0\Data\Applications\{site GUID} directory. These registry changes are also stored in the configuration database so that other WFEs can replicate them.

Web Sites and Application Pools

No changes were made to IIS during the installation of SharePoint Server 2007. However, the Configuration Wizard made several changes, including the following ones:

- The following two application pools were created:
 - SharePoint Central Administration v3 using the SQL service account specified during the wizard
 - OfficeServerApplicationPool using the Network Service account

- The Central Administration Web site was created using the SharePoint Central Administration 3.0 application pool.
- The Office Server Web Services Web site was created using the OfficeServerApplicationPool.

With SharePoint Server 2007, new Web sites and new application pools, such as Corporate Portal, must be created from within Central Administration so that the process includes storing the configuration in the configuration database. Also, modifications to IIS configuration, with the exception of adding more host headers, should be made with Central Administration.

Removing Servers from Your Farm

How you remove a server from the farm will depend on the future use of the server. In both instances, if you have other members of the farm, you should modify the roles of the members before removing a server that supports a critical role.

If you want to move a server from one farm to another, run the Configuration Wizard and choose to disconnect from the configuration database. You can now run the wizard again and connect to another configuration database to join the new farm or create a new configuration database for a new farm. If you are going to uninstall SharePoint Server 2007 from the server, you do not need to run the Configuration Wizard, as the uninstall program will remove the appropriate configuration database settings. (See the “Uninstalling SharePoint Server 2007” section later in the chapter.)

Installing Windows SharePoint Services 3.0

The Windows SharePoint Services 3.0 installation prerequisites and process are the same as for SharePoint Server 2007 with only a limitation of options. Other than their titles, the screens look exactly like those in the SharePoint Server 2007 installation and Configuration Wizard with some limitations unique to Windows SharePoint Services 3.0.

Running Through the Installation

The first page with options presents the same Basic and Advanced choices as before with essentially the same results. The Basic option installs on the server using SQL Express with no installation options and no capability of expanding into a farm later.

Figure 5-9 presents the Advanced page that differs from SharePoint Server 2007. There are only two options: Web Front End and Stand-alone.

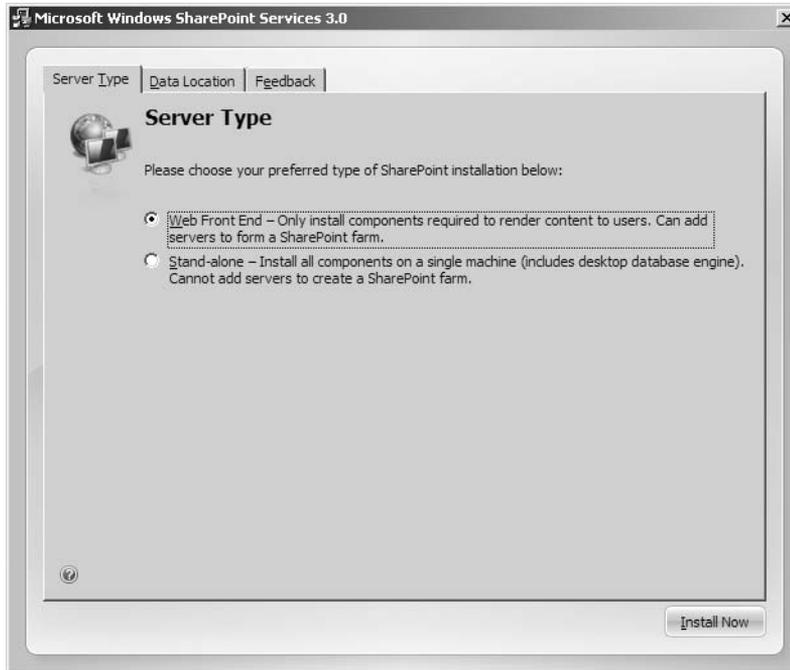


Figure 5-9 Advanced page of the Windows SharePoint Services 3.0 installation

WFE Installation

Because Windows SharePoint Services 3.0 provides only Web services, the WFE choice is similar to the Complete option with SharePoint Server 2007. This option uses a remote SQL database and has the option to expand the farm to have multiple load-balanced servers.

Stand-Alone Installation

As with SharePoint Server 2007, this option installs SQL Embedded and cannot be expanded.

Uninstalling SharePoint Server 2007

To remove SharePoint Server 2007 from the server entirely, simply uninstall the product using Add/Remove Programs in Control Panel. The setup program that uninstalls the program modifies the configuration database and reverses other modifications accomplished during the installation, including changes made to IIS 6.0. In the case of a Basic or Stand-alone installation using SQL Embedded, SQL Embedded is uninstalled as well but the SQL client tools remain.

With Add/Remove Programs, the product is uninstalled, including all program files except for those that might contain custom information. The following program files however are not removed:

- Noise word and thesaurus files
- Webconfig files for applications
- Index files
- Database files, including the configuration database

These files remain in their original locations, so the directory structure remains as well. This allows the farm to be rebuilt using another server and the same databases, files, and index.

Uninstalling Windows SharePoint Services 3.0

As with SharePoint Server 2007, use Add/Remove Programs to uninstall Windows SharePoint Services 3.0 from your server. This will remove all changes to IIS but leave the log files, the web.config for Central Administration and Site Administration, and the databases, including the search database.

Summary

This chapter covered the installation and farm configuration for both SharePoint Office Server 2007 and Windows SharePoint Services 3.0. In many instances, these will be ongoing processes, so the chapter also included the preparation steps and a summary of decisions required before beginning installation, modifying the farm by adding and removing servers, making changes to the servers during installation, and removing the services. Some of the best practices from this chapter were as follows:

- Except in very small implementations, use a separate server to provide SQL Server services.
- Use domain accounts if there is any possibility of having more than one member of the farm or if you are using SQL Server services on a separate server.
- Create accounts and determine naming conventions prior to beginning installation.
- Choose a Complete installation for Web front-end servers to provide more flexibility in modifying farm roles without requiring a reinstallation.