

WRAPPING YOUR HEAD AROUND THE SHAREPOINT BEAST

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Presentation Outline

- **The Importance of Community**
- **SharePoint Overview**
- **Logical Architecture & Taxonomy**
- **Governance**
- **Path to development**
 - **End User**
 - **Admin**
 - **Development**
- **Avoiding Beginner Hurdles**

A Word (or two) About Community

Don't leave home without it!



Microsoft **Group Events**

SHAREPOINT OVERVIEW

Product Capabilities of

Microsoft Office SharePoint Server 2007



From <http://blogs.zdnet.com/Hinchcliffe>

SHAREPOINT OVERVIEW

**Microsoft Office SharePoint Server 2007
(MOSS)**

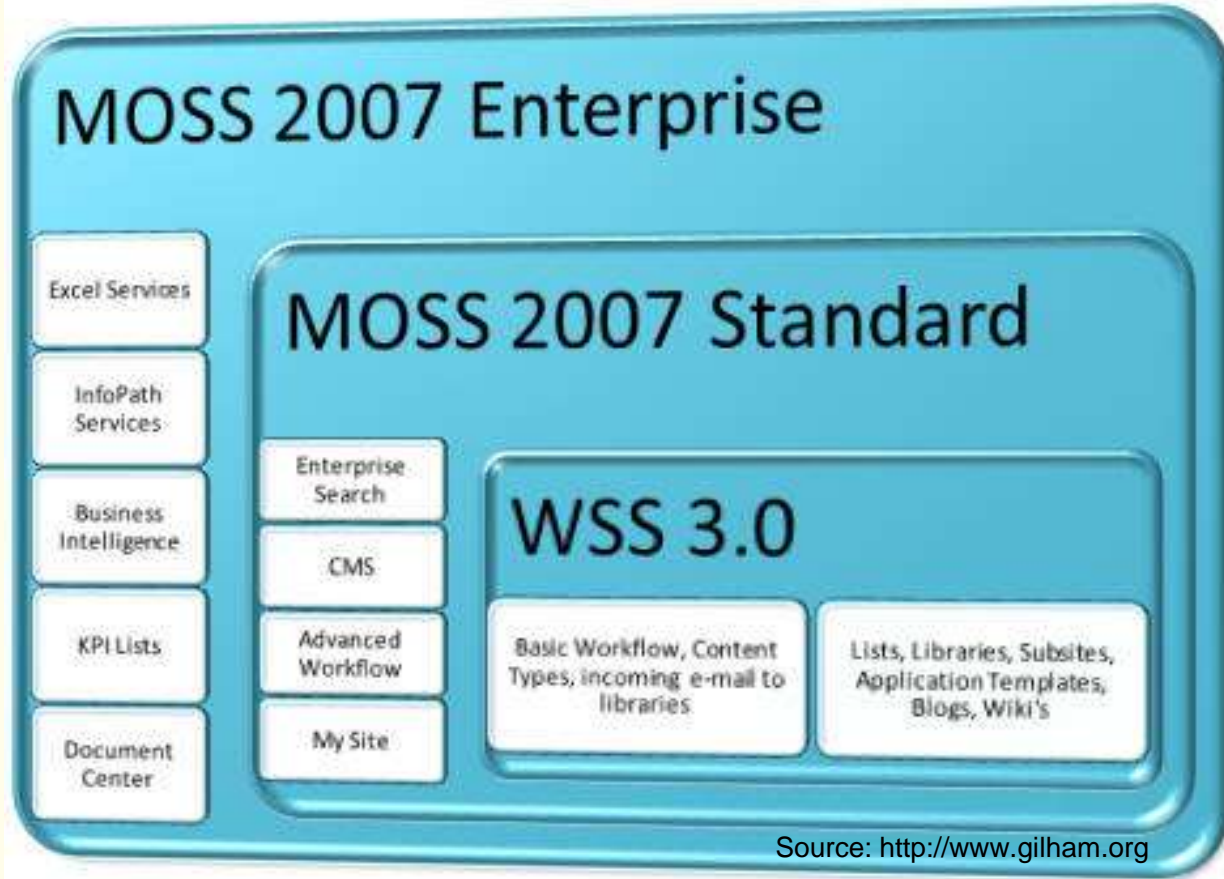
Windows SharePoint Services 3.0 (WSS)

.NET 2.0 FX | ASP.NET 2.0 | .NET FX 3.0

Internet Information Services 6.0 (or later)

Windows Server 2003 (or later)

SHAREPOINT OVERVIEW

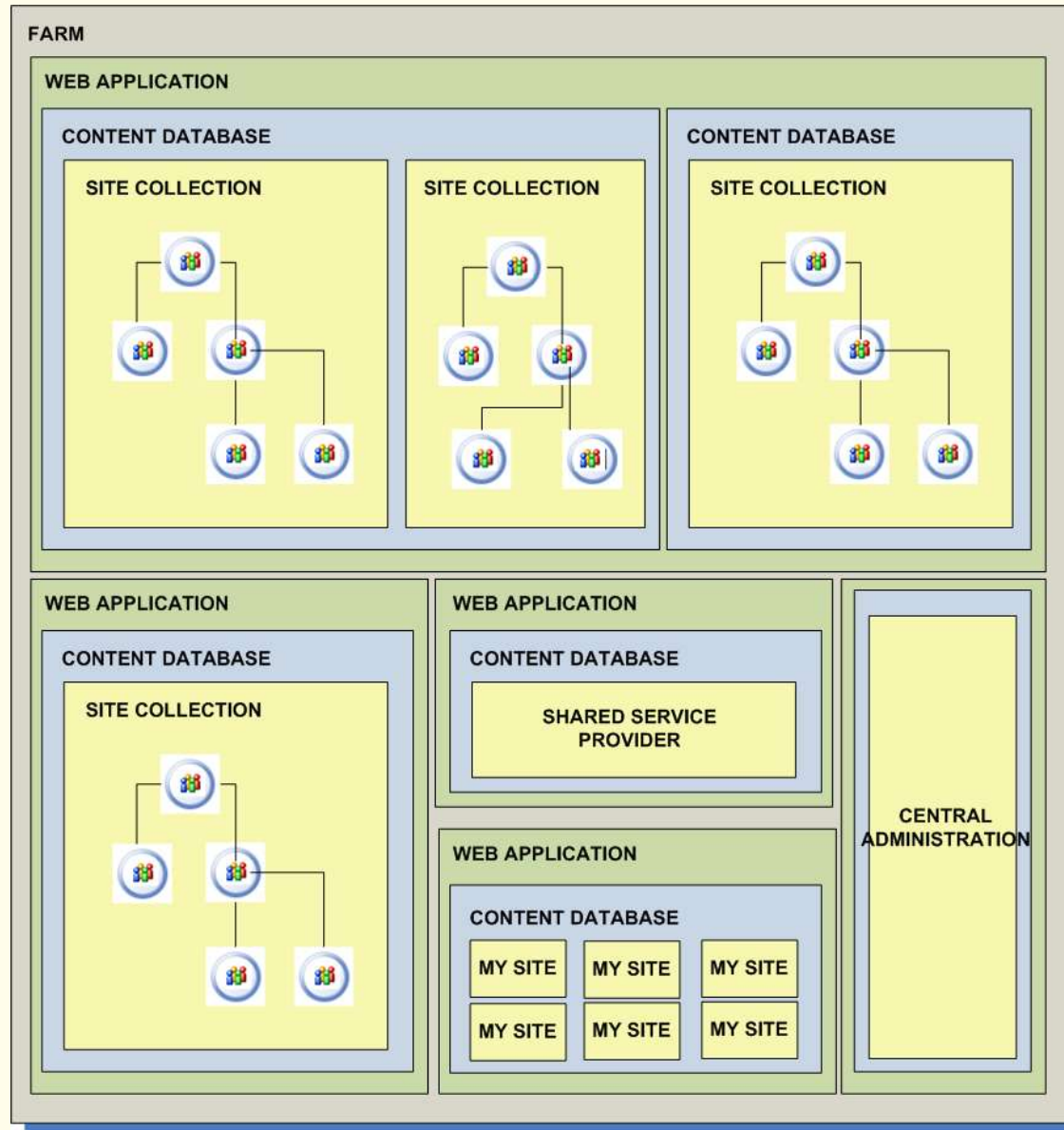


Source: <http://www.gilham.org>

Which SharePoint technology is right for you?

<http://office.microsoft.com/en-us/products/FX101758691033.aspx?ofcresset=1>

SHAREPOINT OVERVIEW

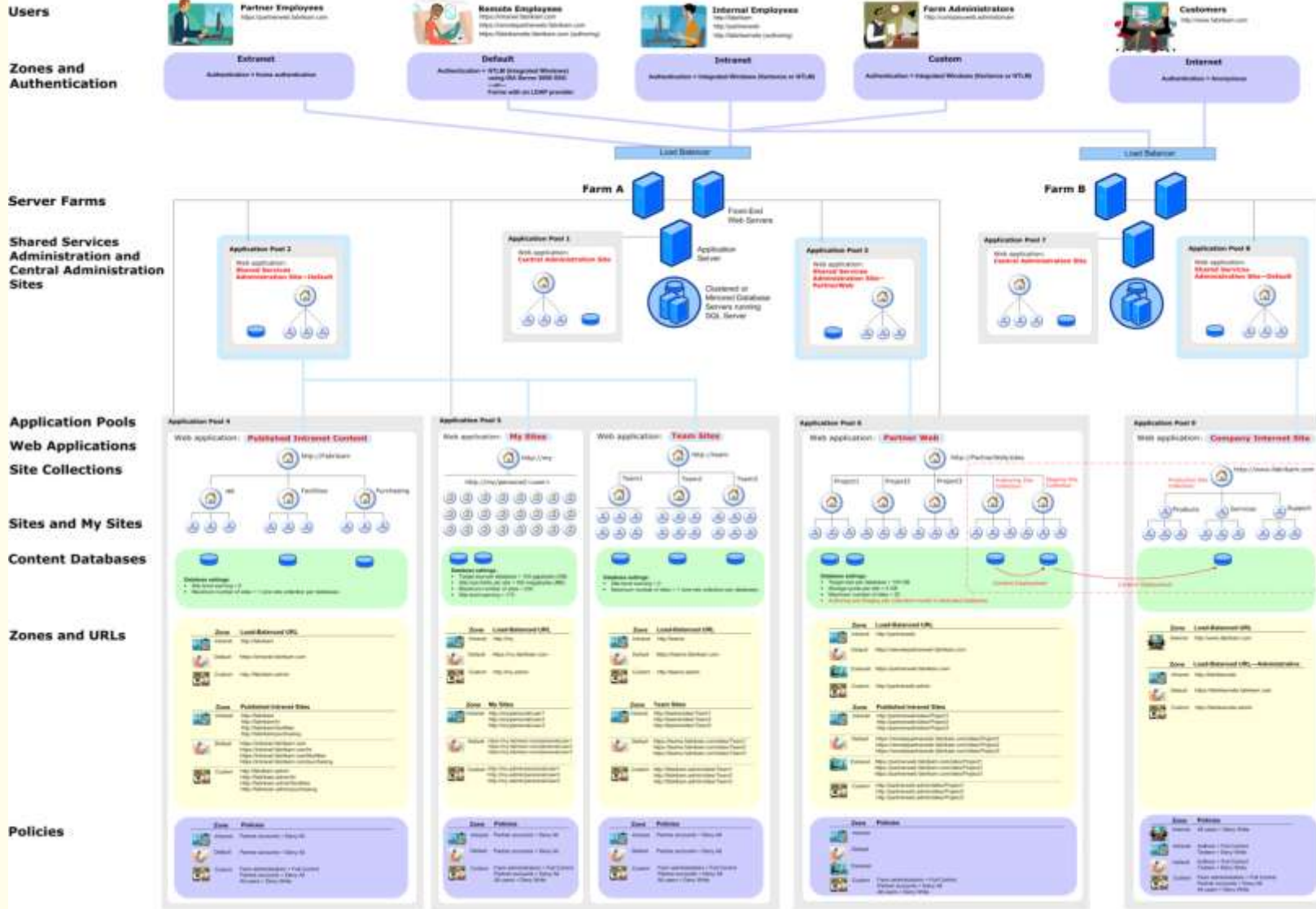


Logical Architecture & Taxonomy

- **Plan... Plan... Plan...**
 - Where do you want to be in 2 years?
 - Ensure you have the ability to expand
 - Take into account licensing costs
 - How are users going to connect?
 - ISA? F5? SSL? FBA?
- **Logical architecture model: Corporate deployment**
 - <http://technet.microsoft.com/en-us/library/cc261995.aspx>
 - <http://go.microsoft.com/fwlink/?LinkId=82151&clcid=0x409>

Logical Architecture Diagram

Logical Architecture Sample Design: Corporate Deployment



Application Pools

Web Applications

Site Collections

Sites and My Sites

Content Databases

Zones and URLs

Policies




Application Pool 4




Web application: **Published Intranet Content**



Database settings:

- Site level warning = 0
- Maximum number of sites = 1 (one site collection per database).

Zone	Load-Balanced URL
 Intranet	http://fabrikam
 Default	https://intranet.fabrikam.com
 Custom	http://fabrikam.admin

Zone	Published Intranet Sites
 Intranet	http://fabrikam http://fabrikam/hr http://fabrikam/facilities http://fabrikam/purchasing
 Default	https://intranet.fabrikam.com https://intranet.fabrikam.com/hr https://intranet.fabrikam.com/facilities https://intranet.fabrikam.com/purchasing
 Custom	http://fabrikam.admin http://fabrikam.admin/hr http://fabrikam.admin/facilities http://fabrikam.admin/purchasing

Zone	Policies
 Intranet	Partner accounts = Deny All
 Default	Partner accounts = Deny All
 Custom	Farm administrators = Full Control Partner accounts = Deny All All users = Deny Write

Taxonomy Diagrams

MP3_SSP: Shared Services Provider

Application Pool 1

Web application: **Web Application 1**



Managed Path: one.test.com/apps

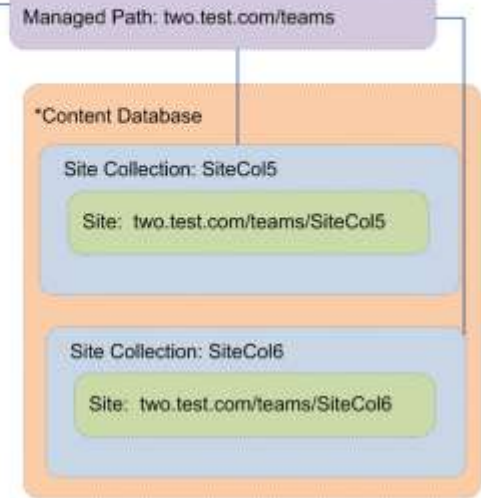


Application Pool 2

Web application: **Web Application 2**



Managed Path: two.test.com/apps



Avoid Analysis Paralysis!



PLANNING

MUCH WORK REMAINS TO BE DONE BEFORE WE CAN ANNOUNCE
OUR TOTAL FAILURE TO MAKE ANY PROGRESS.

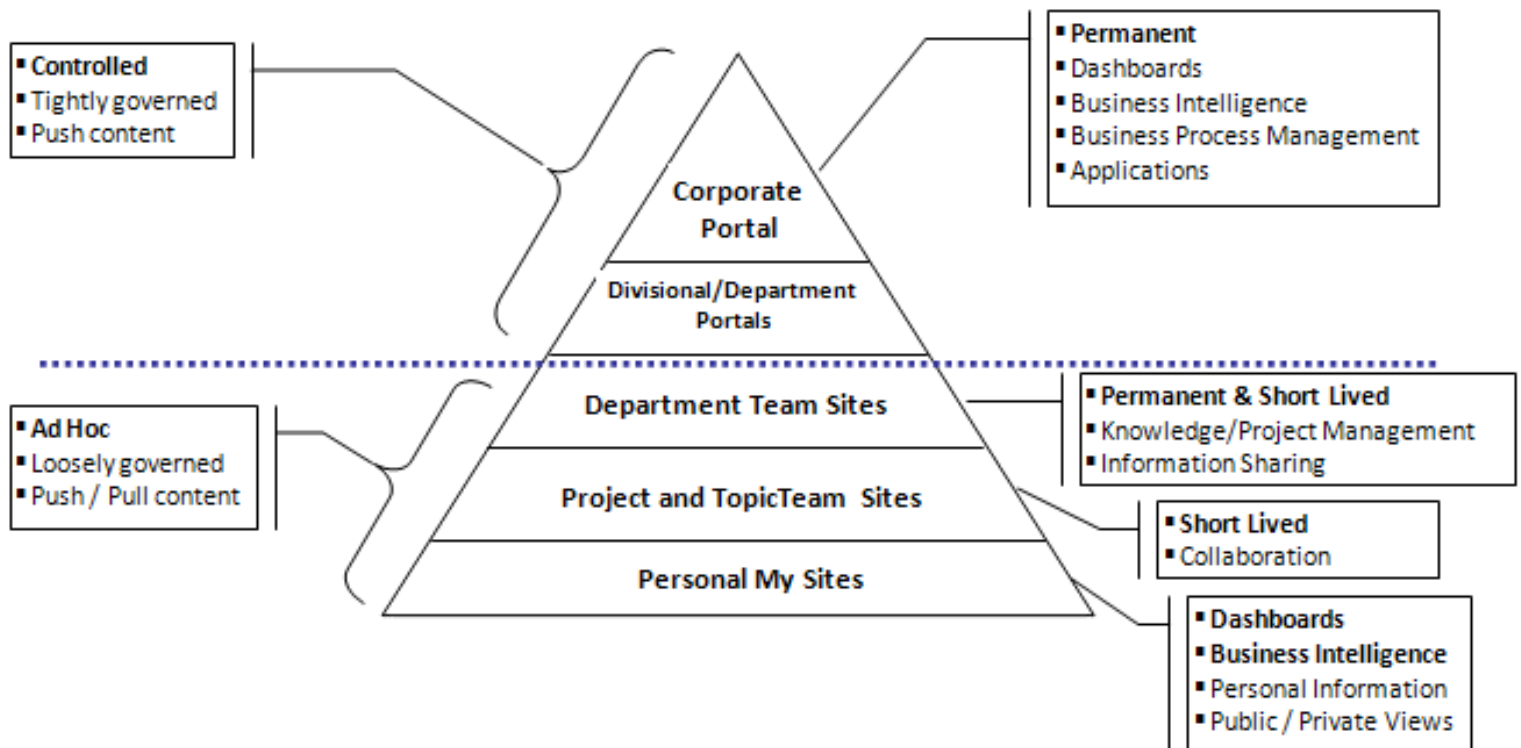
www.despair.com

Governance

- **What is this thing everyone talks about?**
- **Get executive buy-in**
- **Set up committee**
 - As few IT people as possible, but led by IT
 - Make sure decision makers from important departments play key role
- **Document policies**
- **Determine correct level of control**
 - Too much will frustrate users
 - Too little will render sites unusable
- **Enforce Policies**

Taxonomy & Governance

Community/Microsoft Recommended Core Corporate Intranet Taxonomy



Path To SharePoint Developer



End User -> Admin -> Developer

Path To SharePoint Developer

- **End Users**
 - Create sites
 - Work with lists & Document Libraries
 - Use basic web parts
 - Manage content
 - Add users
 - Manage simple workflows

<http://www.enduserssharepoint.com>

Path To SharePoint Developer

- **Admins**
 - **Be End User**
 - **Configure SharePoint farm**
 - **Use Central Admin**
 - **Use STSADM**
 - **Deploy Features**
 - **Add Workflows to Lists**
 - **Configure Search**
 - **Be familiar with all out of the box web parts**
 - **Know 12 Hive structure and what's in there**

Path To SharePoint Developer

- **Developers**
 - **Be Admin**
 - **Know how & WHEN to use SharePoint Designer**
 - **Be .NET developer**
 - **Know XSLT, CAML, XML, JavaScript, jQuery, and other acronyms**
 - **Be familiar with SharePoint Object Model**
 - **Be familiar with SharePoint Web Services**
 - **Be able to debug**
 - **Be able to Package**

What About Architects?

- **Architects**
 - **Be able to use all the acronyms appropriately**
 - **Fake everything else**

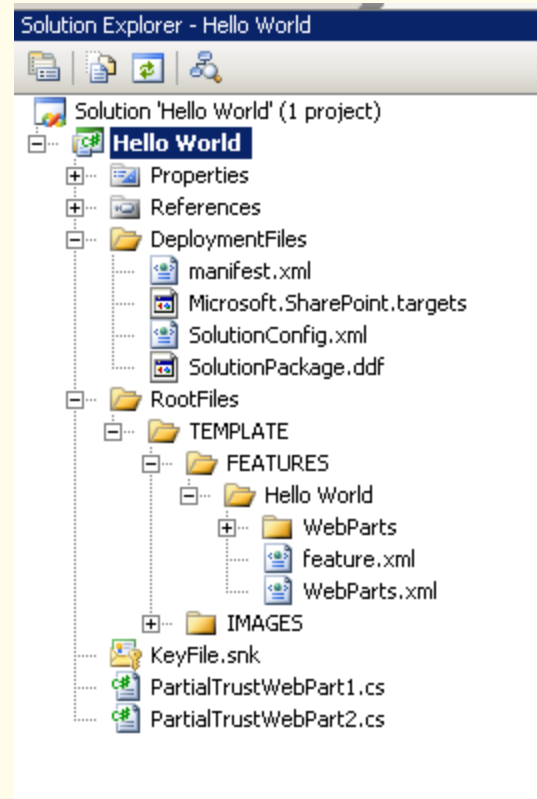
(I'm kidding of course)

Dev... Rubber Meets The Road

- **Dev on VM**
 - **Free VHD from Microsoft (time bombed)**
 - <http://www.microsoft.com/downloads/details.aspx?familyid=67F93DCB-ADA8-4DB5-A47B-DF17E14B2C74&displaylang=en>
 - **Build your own if possible**
 - Windows Server 2003
 - SQL Server 2005
 - MOSS 2007 (Don't do basic install!)
 - Office 2007 Professional
 - SharePoint Designer
 - Visual Studio 2008 & Source Safe
 - SDK's etc..

REAL Development

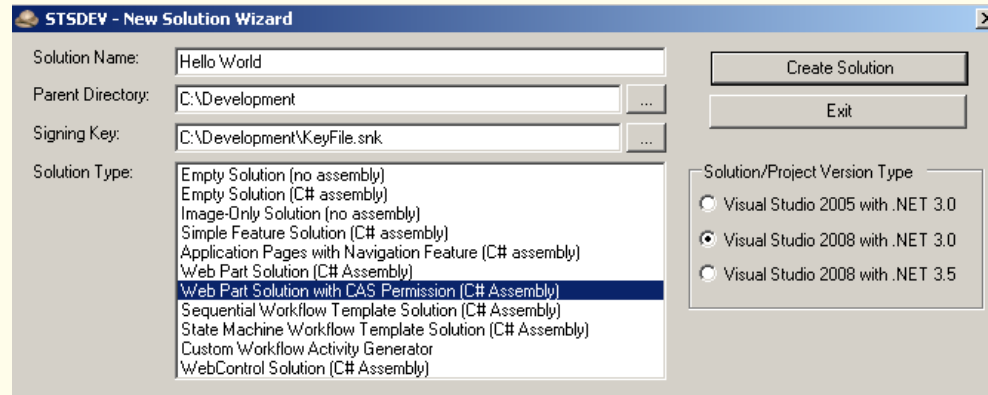
- **Web Part Development**
 - Understand how to build structure and XML files



Development Tools...

(There's an App For that)

- **Web Part Development cont.**
 - **STSEDev from <http://codeplex.com>**



- **Creates structure and XML files for you – avoids typos in XML**
- **Great build options:**



More Development Goodness

- **Dev/QA Farm**
 - Have One or Both!
 - Should be as identical to production as possible
- **80/20 Rule**
 - If it doesn't make sense to do in SharePoint **DON'T DO IT** in SharePoint
- **Packages? We don't need no stinking Packages! Oh wait.. Yes we do...**
 - Create Deployable Solutions wherever possible
 - If 50% of deployment is packages you are ahead of 90% of the companies out there

It's SORTA Development

SharePoint Designer (SPD)

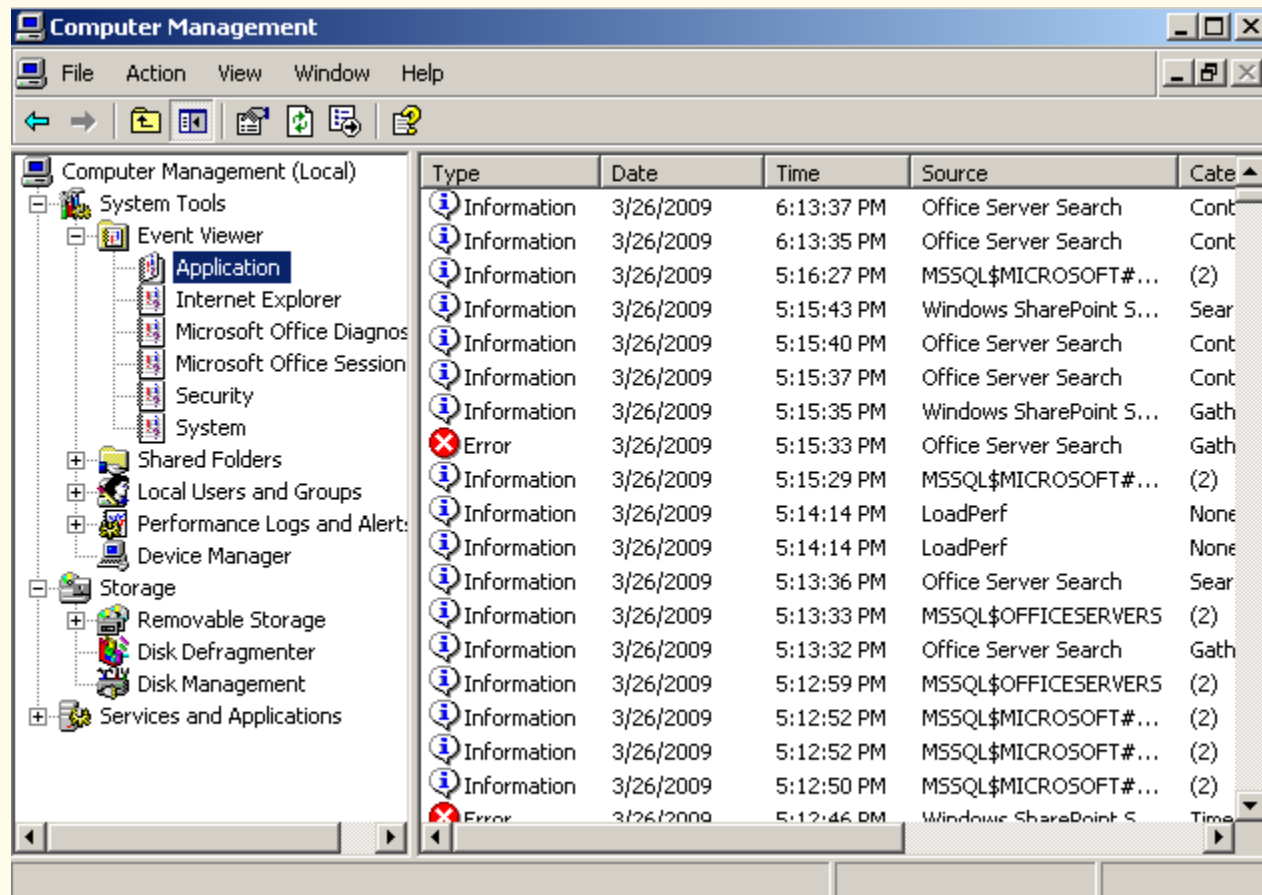
- **The Good**
 - Don't have to develop on the server
 - SPD Workflows
 - Developing Branding
- **The Bad**
 - SPD Workflows
 - Un-Ghosting
- **The Ugly**
 - Possible to break a site collection
 - Be careful modifying default aspx files
 - Migration & Restores
 - Disconnect Workflows
 - Maintenance
 - Don't tell your boss what you have to do

CONCLUSION - Don't give End Users Access! Don't connect to Production Server unless you have no choice!

Debugging

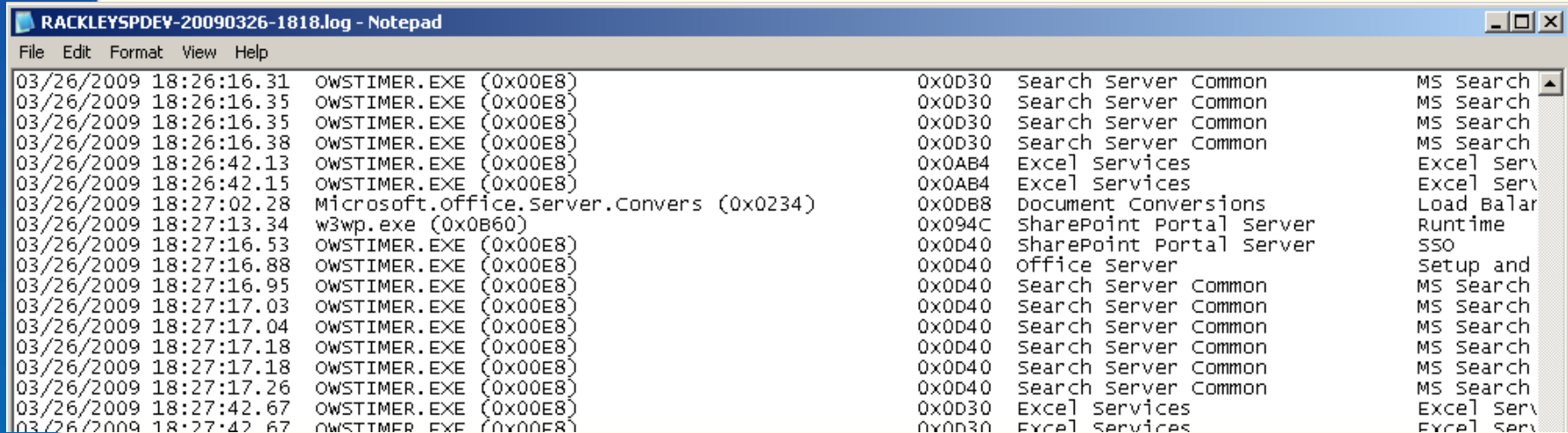
- **Event Logs**

- **Admin Tools->Computer Management->Event Viewer**



Debugging

- SharePoint Logs
 - C:\Program Files\Common Files\Microsoft Share\Web Server Extensions\12\LOGS
 - Can write to logs when writing custom code



```

RACKLEYSDEV-20090326-1818.log - Notepad
File Edit Format View Help
03/26/2009 18:26:16.31 OWSTIMER.EXE (0x00E8) 0x0D30 Search Server Common MS Search
03/26/2009 18:26:16.35 OWSTIMER.EXE (0x00E8) 0x0D30 Search Server Common MS Search
03/26/2009 18:26:16.35 OWSTIMER.EXE (0x00E8) 0x0D30 Search Server Common MS Search
03/26/2009 18:26:16.38 OWSTIMER.EXE (0x00E8) 0x0D30 Search Server Common MS Search
03/26/2009 18:26:42.13 OWSTIMER.EXE (0x00E8) 0x0AB4 Excel Services Excel Serv
03/26/2009 18:26:42.15 OWSTIMER.EXE (0x00E8) 0x0AB4 Excel Services Excel Serv
03/26/2009 18:27:02.28 Microsoft.office.Server.Convers (0x0234) 0x0DB8 Document Conversions Load Balan
03/26/2009 18:27:13.34 w3wp.exe (0x0B60) 0x094C SharePoint Portal Server Runtime
03/26/2009 18:27:16.53 OWSTIMER.EXE (0x00E8) 0x0D40 SharePoint Portal server SSO
03/26/2009 18:27:16.88 OWSTIMER.EXE (0x00E8) 0x0D40 Office Server Setup and
03/26/2009 18:27:16.95 OWSTIMER.EXE (0x00E8) 0x0D40 Search Server Common MS Search
03/26/2009 18:27:17.03 OWSTIMER.EXE (0x00E8) 0x0D40 Search Server Common MS Search
03/26/2009 18:27:17.04 OWSTIMER.EXE (0x00E8) 0x0D40 Search Server Common MS Search
03/26/2009 18:27:17.18 OWSTIMER.EXE (0x00E8) 0x0D40 Search Server Common MS Search
03/26/2009 18:27:17.18 OWSTIMER.EXE (0x00E8) 0x0D40 Search Server Common MS Search
03/26/2009 18:27:17.26 OWSTIMER.EXE (0x00E8) 0x0D40 Search Server Common MS Search
03/26/2009 18:27:42.67 OWSTIMER.EXE (0x00E8) 0x0D30 Excel Services Excel Serv
03/26/2009 18:27:42.67 OWSTIMER.EXE (0x00E8) 0x0D30 Excel Services Excel Serv
  
```

Deployment

- **Create deployable solutions when possible**
 - Site Definitions
 - Content Types
 - Lists
 - Branding
 - Web Parts
 - Workflows
 - Data Connection Files
- **Create detailed deployment scripts for admins**
- **Test scripts in QA environment**

Free Tools Rock

- **Internet Information Services (IIS) 6.0 Resource Kit Tools**
 - <http://www.microsoft.com/downloads/details.aspx?FamilyID=56fc92ee-a71a-4c73-b628-ade629c89499&displaylang=en>
 - Metabase Explorer to fix port conflicts
- **CKS Forms Based Authentication Solution**
 - Manage SQL users/roles easily in SharePoint
 - <http://www.codeplex.com/CKS/Release/ProjectReleases.aspx?ReleaseId=17901>
- **Fiddler – Web Debugging Proxy**
 - <http://www.fiddler2.com/Fiddler2/version.asp>
 - Performance Tuning, inspect session data, etc
- **Application Pool Manager**
 - <http://www.harbar.net/articles/APM.aspx>
 - IIS Reset usually not necessary, recycle app pools is much quicker

OH COME ON!!



A Little Knowledge is a Dangerous Thing

- **Site Collections**

- Make sure you want it to be a top level site; non-trivial to move to sub-site
- All content for site-collection & sub-sites in same content database
- All list data for every site in content database is in same table
- Site features must be activated on parent site to be available to sub-sites

- **Document Libraries**

- Avoid Sub-Folders unless structure is well defined
- Use Metadata when possible
- Be aware of Versioning!

Trying to make your life easier

- **Don't host non-SharePoint Sites on Farm**
- **SSL (Secure Sockets Layer)**
 - Create Site Collection as SSL with self signed certificate if don't have certificate yet
 - Use wildcard cert – use of SAN (Subject Alternate Name) certificate will mean buying whole new certificate if you add servers
- **Service Accounts**
 - Basic install uses logged in user as service account
 - Should not be obvious
 - Locked out account will bring down farm
- **Site Templates**
 - Master Pages and Themes must exist on target site
 - 10mb Size Limit???

```
stsadm.exe -o setproperty -pn max-template-document-size -pv 500000
```

How the heck do I...

Create a blog/wiki/etc. sub-site under a Publishing Site??

Publishing Site > Create > New SharePoint Site

New SharePoint Site

Use this page to create a new site or workspace under this SharePoint site. You can specify a title, Web site address, and access permissions.

Create Cancel

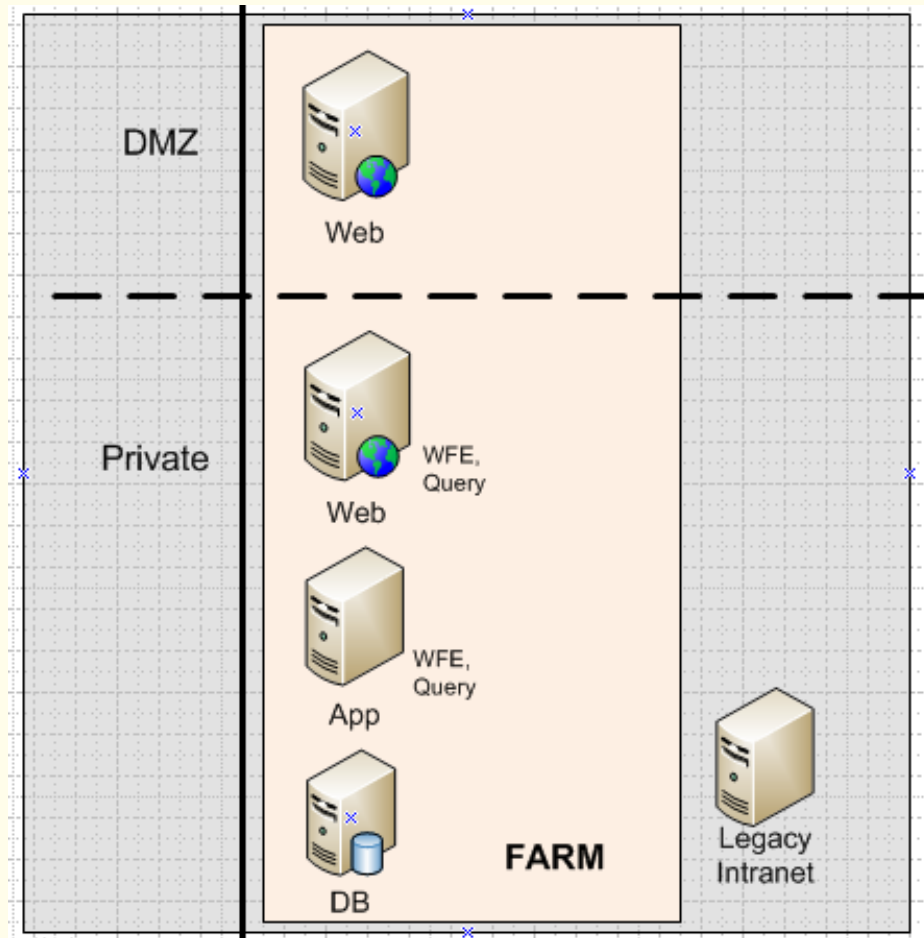
<p>Title and Description</p> <p>Type a title and description for your new site. The title will be displayed on each page in the site.</p>	<p>Title:</p> <input type="text"/> <p>Description:</p> <input type="text"/> <input type="button" value="↑"/> <input type="button" value="↓"/>
<p>Web Site Address</p> <p>Users can navigate to your site by typing the Web site address (URL) into their browser. You can enter the last part of the address. You should keep it short and easy to remember.</p> <p>For example, http://rackleypdev/sites/publishing/sitename</p>	<p>URL name:</p> <p>http://rackleypdev/sites/publishing/ <input type="text"/></p>
<p>Template Selection</p> <p>A site for publishing Web pages on a schedule by using approval workflow. It includes</p>	<p>Select a template:</p> <p>Publishing</p> <ul style="list-style-type: none"> Publishing Site with Workflow

GLOBAL#0 = Global template
 STS#0 = Team Site
 STS#1 = Blank Site
 STS#2 = Document Workspace
 MPS#0 = Basic Meeting Workspace
 MPS#1 = Blank Meeting Workspace
 MPS#2 = Decision Meeting Workspace
 MPS#3 = Social Meeting Workspace
 MPS#4 = Multipage Meeting Workspace
 CENTRALADMIN#0 = Central Admin Site
 WIKI#0 = Wiki Site
 BLOG#0 = Blog
 BDR#0 = Document Center
 OFFILE#0 = Records Center
 OFFILE#1 = Records Center
 OSRV#0 = Shared Services Administration Site
 SPS#0 = SharePoint Portal Server Site
 SPSPEERS#0 = SharePoint Portal Server Personal Space
 SPSMSITE#0 = Personalization Site
 SPSTOC#0 = Contents area Template
 SPSTOPI#0 = Topic area template
 SPSNEWS#0 = News Site
 CMSPUBLISHING#0 = Publishing Site
 BLANKINTERNET#0 = Publishing Site
 BLANKINTERNET#1 = Press Releases Site
 BLANKINTERNET#2 = Publishing Site with Workflow
 SPSNHOME#0 = News Site SPSSITES#0 = Site Directory
 SPSCOMMU#0 = Community area template
 SPSREPORTCENTER#0 = Report Center
 SPSPORTAL#0 = Collaboration Portal
 SRCHCEN#0 = Search Center with Tabs
 PROFILES#0 = Profiles
 BLANKINTERNETCONTAINER#0 = Publishing Portal
 SPSMSITEHOST#0 = My Site Host
 SRCHCENTERLITE#0 = Search Center
 SRCHCENTERLITE#1 = Search Center
 SPSWEB#0 = SharePoint Portal Server BucketWeb Template

stsadm.exe -o createweb -url http://path-to-publishing-site/subsite-name -sitetemplate <template name> -title <title of site>

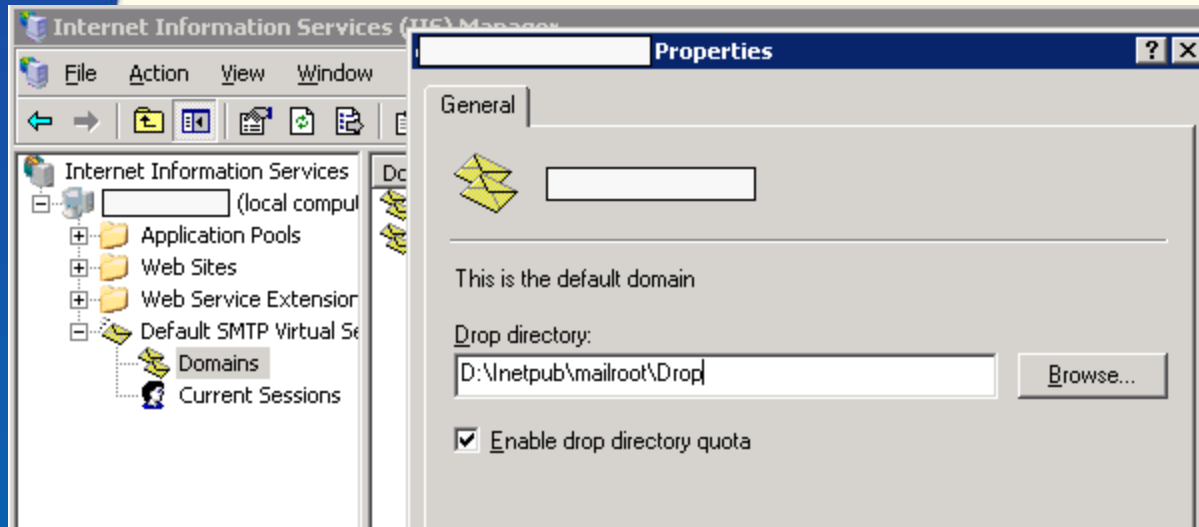
Why Did They Do That?

I don't think it means what you think it means...



OH! That's how...

- Email settings
 - Change drop folder in both IIS and Central Admin



Operations->Incoming Email Settings (Advanced Settings Mode)

E-Mail Drop Folder

Windows SharePoint Services checks periodically for incoming e-mail messages from the SMTP service. This setting specifies the folder in which to look for e-mail messages. When incoming e-mail settings are set to automatic mode, the e-mail drop folder is set automatically to the folder specified by the SMTP service.

Note: When incoming e-mail settings are set to advanced mode you need to ensure that the log on account for the Windows service "Windows SharePoint Services Timer" has modify permissions on the e-mail drop folder.

E-mail drop folder:

d:\inetpub\mailroot\drop

For example, c:\inetpub\mailroot\drop

Really???

- **SQL Forms Based Authentication (FBA) Limitations**
 - **Roles in Audiences**

> People and Groups

People and Groups: FBA Pricing Role


The screenshot shows a table with columns for 'Picture', 'Name', and 'About me'. There are two rows. The first row has a picture of a person and the name 'Mark Rackley'. The second row has a picture of a person and the name 'pricing'. A red circle is drawn around the word 'pricing', and a red line points from the text 'FBA Role' to this circle.

The screenshot shows a dialog box titled 'Content Editor Web Part [4]'. It contains several fields and options:

- Title URL:
- Description:
- Help URL:
- Help Mode:
- Catalog Icon Image URL:
- Title Icon Image URL:
- Import Error Message:
- Target Audiences:

At the bottom, there are three buttons: 'OK', 'Cancel', and 'Apply'.

Isn't That Just Peachy!

- **SQL Forms Based Authentication (FBA) Limitations cont.**
 - **Crawling content secured by FBA (extend for Windows authentication and crawl that)**
 - **Office 2007 integration**
 - **Resolving names**

 - **http://msdn.microsoft.com/en-us/library/bb977430.aspx#MOSSFBAPart3_Introduction**
- **Limitations if using ISA**

To Avoid SharePoint Fail...



Image Source: <http://theroosterstrikes.files.wordpress.com>

You Gotta Drink the Kool-Aid!

- Read Books
- Setup a VHD
- Read the blogs
- Join the Community
- Start a blog
- Attend events
- **DON'T BE AFRAID TO DO SOMETHING!**



Additional Resources

- **Microsoft Ramp Up – Free online training**
 - <http://msdn.microsoft.com/en-us/rampup/default.aspx>
- **CodePlex – Lots of free tools**
 - <http://www.codeplex.com/>
- **Other Online Training**
 - <http://www.criticalpathtraining.com> (WCM course)

QUESTIONS?

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