# Lab 04: Creating a Collaboration Portal

**Lab Overview:** In this lab you will create the web application portal.tpg.local. Then you will create the root site collection using the collaboration portal template. This will simulate what many companies do to start building their intranet.

## Exercise 1: Creating the portal.tpg.local web application

1. Open Central Administration by clicking **Start > All Programs > Microsoft Office Server > SharePoint 3.0 Central Administration\**
2. Click the **Application Management** tab
3. Under SharePoint Web Application Management click **Create or extend Web application**
4. Click **Create a new Web application**
5. Change the port to **80**
6. Enter **portal.tpg.local** for the host header
7. Change the authentication provider to **Negotiate (Kerberos)**
8. Under Create a new application pool select **Configurable**
9. For user name enter **tpg\SP\_PortalAppPool**
10. For password enter **pass@word1**
11. Change Database Name to **WSS\_Content\_Portal**
12. Click **OK** twice

Exercise 2: Creating the Collaboration Portal site collection

1. When the Application Created screen appears click the blue link **Create Site Collection** in the middle of the page.
2. For Title enter **The TPG Portal**
3. Click the **Publishing Tab**
4. Choose **Collaboration Portal**
5. Enter **TPG\SP\_Admin** for the Primary Site Collection Administrator
6. Click **OK**

Exercise 3: Setting Up Security

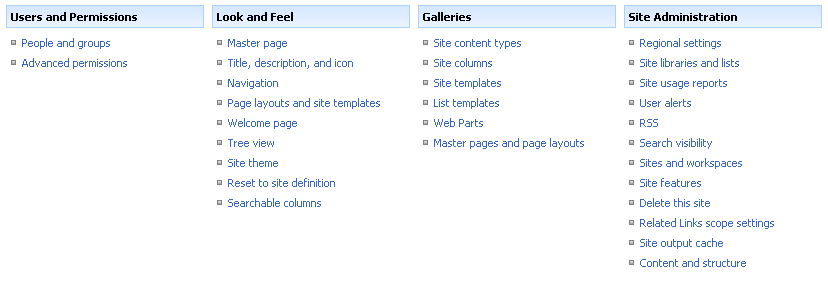
1. Open the new portal by clicking the **http://portal.tpg.local** link on the center of the page.
2. Username enter **tpg\sp\_admin**
3. Password is **pass@word1**
4. Click **OK**

This now brings you to The TPG Portal. Take a moment to look around. Notice that it comes with several preconfigured sites and some sample data. This information is just to help get your thought processes started. When you go to build your actual environment you will delete most of the template information.

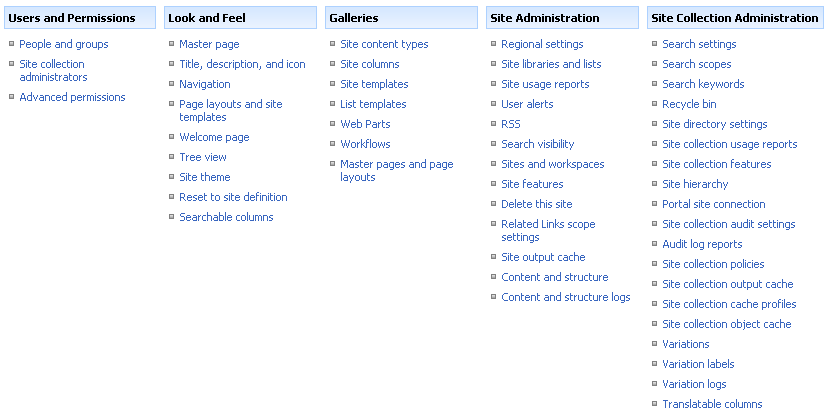
1. From the home page of the portal click the Site Actions > Site Settings > **Modify All Site Settings**
2. From the Users and Permissions section click **People and Groups**

If you were to click through the groups you would see that only SP\_Admin has any permissions right now. This is because you made that account the Site Collection Owner/Administrator.

1. Make Owen Owner a member of the The TPG Portal Owners
   1. Click New > **Add Users**
   2. For User/Groups enter **TPG\Owen**
   3. For Give Permission select Add users to a SharePoint group and choose **The TPG Portal Owners [Full Control]** group
   4. Deselect **Send welcome e-mail**
   5. Click **OK**
2. Now Owen has full control of this site but not necessarily of the site collection. Login as Owen and compare the options available to him compared to SP\_Admin.
   1. Click **Welcome SharePoint Setup Account**
   2. Click **Sign in as Different User**
   3. Username is **tpg\Owen**
   4. Password is **pass@word1**
   5. Click **OK**
   6. Click Site Actions > Site Settings > **Modify All Site Settings**



Compared to SP\_Admin



Notice that SP\_Admin has an extra column called Site Collection Administration. These are settings that affect the entire Site Collection not just the current site. Owen was set only to have Full Control of the current site The TPG Portal.

1. Everyone who will see the Site Collection Administration options are members of the Site Collection Administrators group. To view this group you will need to log back in as SP\_Admin.
   1. Click **Welcome Owen Owner**
   2. Click **Sign in as Different User**
   3. Username is **tpg\sp\_admin**
   4. Password is **pass@word1**
   5. Click **OK**
   6. Click Site Actions > Site Settings > **Modify All Site Settings**
2. Under users and permissions click **Site collection administrators**
3. From this screen you can see that only SharePoint Setup Account is in the group. Enter **tpg\alan** to make Alan Admin a member also and click **OK**.
4. Add Mary Member as a member of the The TPG Portal Members group using the browse functionality
   1. Under Users and Permissions click **People and Groups**
   2. Click New > **Add Users**
   3. Click the **browse icon** below Users/Groups:



* 1. In the Find box enter **Ma** and click the **magnifying glass**



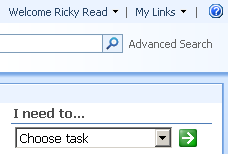
* 1. Select **Mary Member** and click **Add ->**
  2. Click **OK**
  3. For Give Permission select Add users to a SharePoint group and choose **The TPG Portal Members [Contribute]** group
  4. Deselect **Send welcome e-mail**
  5. Click **OK**

1. Add Domain Users to the The TPG Portal Visitors group
   1. Click New > **Add Users**
   2. For User/Groups enter **TPG\Domain Users**
   3. For Give Permission select Add users to a SharePoint group and choose **The TPG Portal Visitors [Read]** group
   4. Deselect **Send welcome e-mail**
   5. Click **OK**

Exercise 4: Testing Security Trimming

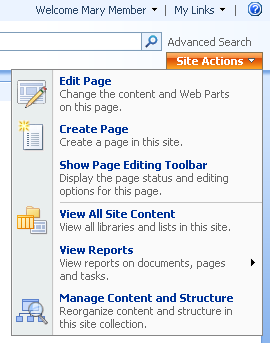
Security trimming is a beautiful thing. The goal is to never show a user a link to things they cannot access.

1. Click **The TPG Portal** link to be taken to the home page of the portal
2. Login as Ricky Read and see what his experience is like
   1. Click **Welcome SharePoint Setup Account**
   2. Click **Sign in as Different User**
   3. Enter **tpg\Ricky**
   4. Password **pass@word1**
   5. Click **OK**
   6. Notice on right side of the screen the Site Actions menu is not present.



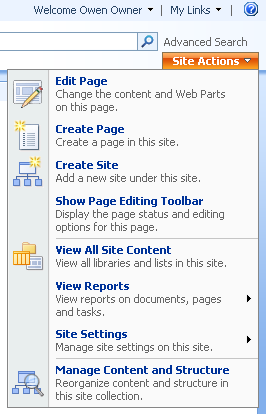
* 1. Ricky has only read access to the portal because he is a member of domain users.

1. Login as Mary Member and see what her experience is like
   1. Click **Welcome Ricky Read**
   2. Click **Sign in as Different User**
   3. Enter **tpg\Mary**
   4. Password **pass@word1**
   5. Click **OK**
   6. Click **Site Actions** and review her options



* 1. Notice Mary has some page options. This is because she is in the Members group that has the contribute permission level.

1. Login as Owen Owner and see what his experience is like
   1. Click **Welcome Mary Member**
   2. Click **Sign in as Different User**
   3. Enter **tpg\Owen**
   4. Password **pass@word1**
   5. Click **OK**
   6. Click **Site Actions** and review his options.



* 1. These options are available because Owen is a member of the Owners group which has Full Control.

Exercise 5: Looking at Security Inheritance

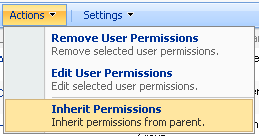
Now if you were to take one of your new users and click around the portal you would notice they have the same access in all of the sub sites throughout the portal. This is because all of the sub sites are setup to inherit permissions. So what permissions you assign to a user at the Portal level will propagate down. This makes for an easy to manage portal. But sometimes you don’t want this. Try setting up unique permissions on an existing site.

1. Still logged in as Owen click the **Document Center** tab
2. Click Site Actions > **Site Settings**
3. Under Users and Permissions click **People and groups**
4. Everything is the same as the top level portal. Click **Site Permissions** in the quick launch.
5. Notice now there are no check boxes beside the groups or accounts. Click **Actions**

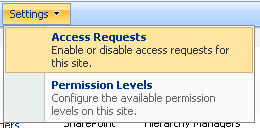


You have two options. Either manage the permissions of the site it is inheriting from or edit permissions. If you choose edit permissions it will copy the existing permissions and break the inheritance.

1. Click Actions > **Edit Permissions**
2. Click **OK** at the warning
3. Click that **Actions** menu now. Notice your choices have changed.



1. There is also now a Settings menu. Click **Settings** and see your other options.



1. Remove access to the Document Center for the Visitors group
   1. Select the box next to the **The TPG Portal Visitors** group
   2. Click Actions > **Remove User Permissions**
   3. Click **OK** at the warning message
2. Set the Members group to only have read access to the Document Center.
   1. Click **The TPG Portal Members** group from the list of permissions
   2. In the Choose Permissions section deselect **Contribute** and select the link to **Read**
   3. Click **OK**
3. Go back to the home page of the portal by click **The TPG Portal** tab
4. Login in as **Ricky Read**. If you need help use exercise 4 step 2 above to login as Ricky Read.
   1. Notice he no longer see’s the document center in the global navigation (The tabs across the top of the page).
   2. If he enters http://portal.tpg.local/docs in the address bar of the browser he gets Error: Access Denied
5. Go back to **the home page** of the portal
6. Login in as **Mary Member**. If you need help use exercise 4 step 3 above to login as Mary.
   1. Click on the link to the **Document Center**
   2. Notice that she does not have a Site Actions menu. This is because she can now only read the site.

Exercise 6: Permission Levels

1. Login as Alan Admin
   1. Click **Welcome Mary Member**
   2. Click **Sign in as Different User**
   3. User name: **tpg\Alan**
   4. Password: **pass@word1**
   5. Click **OK**
2. Click **The TPG Portal** tab to return to the home page
3. Click Site Actions > Site Settings > **Modify All Site Settings**
4. Under Users and Permissions click **Advanced Permissions**
5. Click Settings > **Permission Levels**
6. Click the **Contribute Permission**

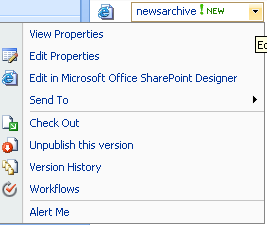
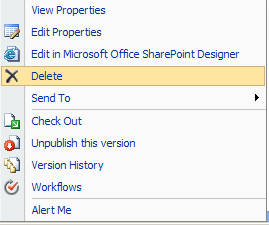
This is the permission level the The TPG Portal Members use. After you review these permissions you have decided that you do not want that group to be able to delete items by default. Now from this screen you could modify the Contribute Permission level to meet your needs. But that is not the best practice. You will always run that risk that an upgrade or service pack may reset the permission level back to the default. A better solution is to create a new permission level.

1. Scroll to the bottom of the page and click **Copy Permission Level**
2. Now you have a replica of contribute. Set the name to **TPG Contribute.**
3. Set the description to **The same as contribute except no delete permission.**
4. Deselect **Delete Item**
5. Click **Create**
6. Now assign the Members group this permission level
   1. Click **Permissions** from the breadcrumb
   2. Click **The TPG Portal Members** group from the list
   3. Deselect **Contribute**
   4. Select **TPG Contribute**
   5. Click **OK**

Notice you could give a group multiple permission levels if that was a need.

Now if you were to go into a list or library and click the drop down menu you would notice Delete is missing.

Contributor Permission TPG Contributor Permission



Screen shots from the Pages Library in the News site.

Exercise 7: Creating Sub Sites

Now that you have setup security it is time to grow out your portal a little. In this section you are going to create a departments site and then several departments below it. One of those sites the HR site you are going to grow out that site tree also.

1. Still logged in as Alan navigate back to the **home page** of the portal.
2. Create the Departments Site
   1. Click Site Actions > **Create Site**
   2. Title = **Departments**
   3. URL = **departments**
   4. Click the **Publishing** tab
   5. Choose **Publishing Site**
   6. Accept the other **defaults** and click **Create**
3. When the site is created you are taken to the home page of the Departments site. Click the **Publish button**.
4. Create the HR, IT, Sales, and Accounting sub sites.
   1. Click Site Actions > **Create Site**
   2. Title = **HR**
   3. URL = **hr**
   4. Click the **Publishing** tab
   5. Choose **Publishing Site**
   6. Accept the other **defaults** and click **Create**
   7. Click **Publish**
   8. Navigate back to **Departments**
   9. Now repeat this step for **IT**, **Sales**, and **Accounting**
5. Create the HR Work Site
   1. Hover over **Departments** and click **HR**
   2. Click Site Actions > **Create Site**
   3. Title = **HR Work Site**
   4. Description = **Site for the HR team to work together privately.**
   5. URL = **hrwork**
   6. Choose **Team Site**
   7. Select **Use unique permissions**
   8. Click **Create**
6. Set the unique permissions for the HR Work Site
   1. For Visitors to this Site select **Create a new group**
   2. Take the **default name** and leave the users field **blank**
   3. For Members of this Site add **TPG\HR Users**
   4. For Owners of this Site take the **default**
   5. Click **OK**
7. Check out unique permissions
   1. Click Site Actions > **Site Settings**
   2. Click **People and groups**
   3. Click **Site Permissions**
   4. You should see three groups only. Notice that The TPG Portal groups don’t have any permissions. So that means Owen Owner who has so many permissions up in TPG portal has no access at all to this site. But SP\_Admin who you did not give any permissions to this site can still access it with full control. Because he is a Site Collection Administrator all sites created in this Site Collection he has complete control of the collection.

Exercise 8: Creating a New Site Collection

As you just discovered there are some potential security headaches with Site Collections. The HR team has requested a private site where they can work on confidential documents without having to worry about SharePoint Administrators “accidently” accessing the site. To do this you will create a HR Site Collection. Using Managed paths you will place the site at http://portal.tpg.local/sites/hr. The /sites/ is a container called a managed path.

1. Open Central Admin by clicking Start > All Programs > Microsoft Office Server > **SharePoint 3.0 Central Administration**
2. Click the **Application Management** tab
3. Under SharePoint Site Management click **Create Site Collection**
4. Make sure your Web Application says **http://portal.tpg.local**
5. Title = **HR Team**
6. Description = **A secure place for HR to work**
7. URL = **http://portal.tpg.local/sites/hr**
8. Choose the **Team Site** template
9. Primary Site Collection Administrator = **tpg\betsy**
10. Click **OK**
11. At the Successfully Created message click the link to **http://portal.tpg.local/sites/hr**
12. When it tries to automatically log you in as Alan you will get access denied. You can try to login as any of the admin accounts sp\_farm, sp\_admin, Owen, etc. None of them have access to the site only Betsy.
13. Login as Betsy
    1. Click **Sign in as a different user**
    2. Username **tpg\betsy**
    3. Password **pass@word1**
    4. Click **OK**
14. Now you could build out an environment where the HR people can work without worry of other site collection administrators seeing their site. You could also assign this site collection a quota or put it in its own database.

Exercise 9: Creating Your Own Managed Path

Some companies place a great deal of emphasis on proper URLs. To them using the default container sites is unacceptable. Try creating a managed path for project sites called projects. Then create a basic meeting site as the root site collection. When you create the projects managed path it will be a wildcard inclusion. Like sites it will allow you to create multiple site collections. Example /projects/project1 and /projects/project2

The other type of type of managed paths are explicit inclusions. These are managed paths you can only use for one site. These are powerful because you can create a URL of http://portal.tpg.local/blogs and have a site collection at this URL instead of a sub-site of the portal site collection.

Finally, in this lab you will examine how Site Collection quotas work.

1. Open **Central Admin**
2. Create your managed paths
   1. Navigate to the **Application Management** tab
   2. Under SharePoint Web Application Management click **Define managed paths**
   3. Make sure you are in the proper Web Application **http://portal.tpg.local**
   4. For Path: enter **/projects**
   5. Click **OK**
   6. The page reloads and you will see Projects in the Included Paths
   7. For Path: enter **/blogs**
   8. Change type to **Explicit inclusion**
   9. Click **OK**
3. Click the **Application Management** tab
4. Create a Project site collection
   1. Click **Create Site Collection**
   2. Title = **Windows Server 2008**
   3. URL change the drop down from blogs to **projects**
   4. URL = **http://portal.tpg.local/projects/win2k8**
   5. Click the **Meetings** tab
   6. Choose the **Basic Meeting Workspace**
   7. Primary Site Collection Administrator = **tpg\alan**
   8. Click **OK**
5. You probably noticed in the quota section at the bottom of the screen that you choose no quota. Take a look at quota management.
   1. Click the **Application Management** tab
   2. Under SharePoint Site Management click **Site Collection quotas and locks**
   3. Click Site Collection > **Change Site Collection**
   4. Click **/projects/win2k8**
   5. Click **OK**
   6. Select **Individual quota**
   7. Check **Limit site storage** and set it to **200** MB
   8. Check **Send warning e-mail** and set it to **175** MB
   9. Click **OK**

Now if the site collection reaches 175 MB in size Alan (the primary site collection owner) will receive an email warning him. If he ignores the warning and lets the site get to 200 MB then they will no longer be able to add data.

1. Create a quota template
   1. Under SharePoint Site Management click **Quota Templates**
   2. Click **Create a new quota template**
   3. Start from **[new blank template]**
   4. New template name = **Blog site quota**
   5. Limit site = **500**
   6. Send warning = **450**
   7. Click **OK**
2. Create the blog site collection
   1. Under SharePoint Site Management click **Create site collection**
   2. Title = **Company Blog**
   3. URL = **http://portal.tpg.local/blogs**
   4. Choose the **Blog template**
   5. Primary Site Collection Administrator = **tpg\alan**
   6. Select a quota template = **Blog Site quota**
   7. Click **OK**

Exercise 10: Giving Admin Access to the Entire Web Application

After all of your efforts creating multiple site collections to separate security and lock out the other administrator from things like the HR site you have upset Bob. Bob Farmer is the owner of SharePoint and a control freak. He needs full access to all SharePoint sites all of the time. Luckily instead of going and adding him all over the place to security you can give him full control of the entire Web Application with a couple simple steps.

1. Navigate to **Central Admin**
2. Go to the **Application Management** tab
3. Under Application Security click **Policy for Web application**
4. Make sure the web application says **http://portal.tpg.local**
5. Click **Add Users**
6. Click **Next**
7. For users enter **tpg\bob**
8. Select **Full Control**
9. You could select Account operates as System. Then every time Bob makes a change to the site it will reflect as System instead of as Bob Farmer. You do not want to select this for the lab.
10. Click **Finish** – Now Bob is happy.

Exercise 11: A Quick Peek at Excel Services

While you were clicking around the portal you may have noticed that you got Access Denied from the Sample Dashboard under the Reports site. This is because Excel Services needs a security change before it can render Excel Workbooks even from within the portal.

1. Check out the Access Denied error
   1. Open the **portal** logged in as **Alan**
   2. Click the **Reports** tab
   3. From the Quick Launch bar on the left click **Sample**

Once the page loads you will see Access Denied – You do not have permissions to open this file on Excel Services.

1. To correct this error you need to navigate back to the SSP
   1. Open **Central Administration**
   2. Click **Primary SSP**
   3. User name **tpg\sp\_admin**
   4. Password **pass@word1**
   5. Click **OK**
2. Setting up the Trusted File Locations in Excel Services
   1. Under Excel Services Settings click **Trusted File Locations**
   2. This is the list of location Excel Services trust. Only files located in these location can be displayed and calculated by Excel Services. As you might notice the list is empty. For now you will set the entire portal to be trusted.
   3. Click **Add Trusted File Location**
   4. Address = **http://portal.tpg.local**
   5. Click **Trust Children**
   6. Take the other **defaults** and click **OK**

You could specify only a certain document library or file share as trusted if you wanted.

1. Now return to the sample dashboard window and refresh the page. Now you can get a quick peek at some of the power of Excel Services.

**End of lab –** Now would be a good time to reboot your virtual machine.