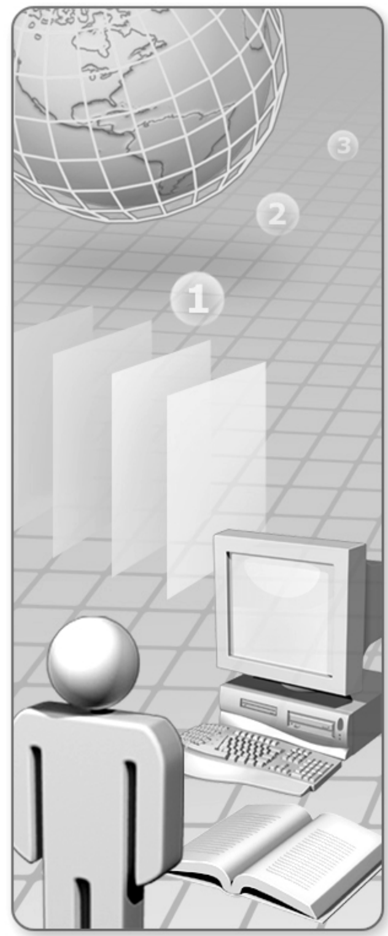
Hands-On Lab 3374A: First Look: Getting Started with Microsoft® Office SharePoint® Server 2007



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Contents

About This Hands-On Lab

This section provides you with a brief description of the course, audience, suggested prerequisites, and course objectives.

Description

At the end of this one-day hands-on lab, the students will have a high-level understanding of the features and technologies available in Microsoft® Office SharePoint® Server 2007. This hands-on lab describes the design goals and features of Office SharePoint Server 2007. The features explained include enterprise content management, portals, and Search. In addition, building business solutions using Office SharePoint Server 2007 is discussed.

Audience

The primary audience for this hands-on lab is the IT Professional who generally works with both Microsoft Windows® and Office technologies. The types of duties that are typical of this IT Pro are administrative and support duties such as planning and deployment of Office server products in a Windows environment, configuration and security administration, and updates of Office upgrades and patches. They will be specifically interested in getting high-level information about Windows SharePoint Services and how this relates to other Office Server technologies from this hands-on lab.

Student prerequisites

To get the most out of these hands-on labs, participants should meet the following prerequisites:

- 1 year experience with Office system technologies
- 1 year experience with Windows client and server operating systems
- Experience installing, configuring, and supporting Microsoft Office technologies
- Working knowledge of Windows SharePoint Services 3.0

Hands-on labs objectives

After completing these hands-on labs, students will be able to:

- Describe the design goals and features of Office SharePoint Server 2007
- Describe how to manage documents and Web content using Office SharePoint Server 2007
- Describe the Office SharePoint Server 2007 features for organizing and finding resources.
- Describe how to implement business solutions using Office SharePoint Server 2007

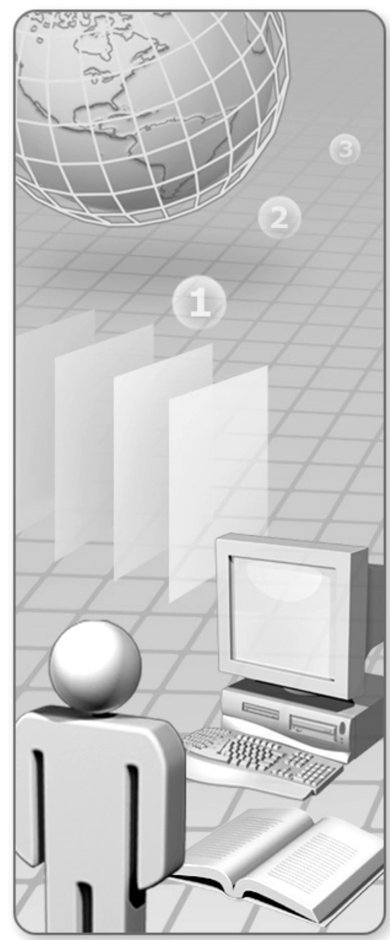
Document Conventions

The following conventions are used in course materials to distinguish elements of the text.

Convention	Use
Bold	Represents commands, command options, and syntax that must be typed exactly as shown. It also indicates commands on menus and buttons, dialog box titles and options, and icon and menu names.
Italic	In syntax statements or descriptive text, indicates argument names or placeholders for variable information. Italic is also used for introducing new terms, for book titles, and for emphasis in the text.
Title Capitals	Indicate domain names, user names, computer names, directory names, and folder and file names, except when specifically referring to case-sensitive names. Unless otherwise indicated, you can use lowercase letters when you type a directory name or file name in a dialog box or at a command prompt.
ALL CAPITALS	Indicate the names of keys, key sequences, and key combinations—for example, ALT+SPACEBAR.
`monospace`	Represents code samples or examples of screen text.
[ ]	In syntax statements, enclose optional items. For example, [*filename*] in command syntax indicates that you can choose to type a file name with the command. Type only the information within the brackets, not the brackets themselves.
{ }	In syntax statements, enclose required items. Type only the information within the braces, not the braces themselves.
|	In syntax statements, separates an either/or choice.
►	Indicates a procedure with sequential steps.
...	In syntax statements, specifies that the preceding item may be repeated.
. . .	Represents an omitted portion of a code sample.

Introduction

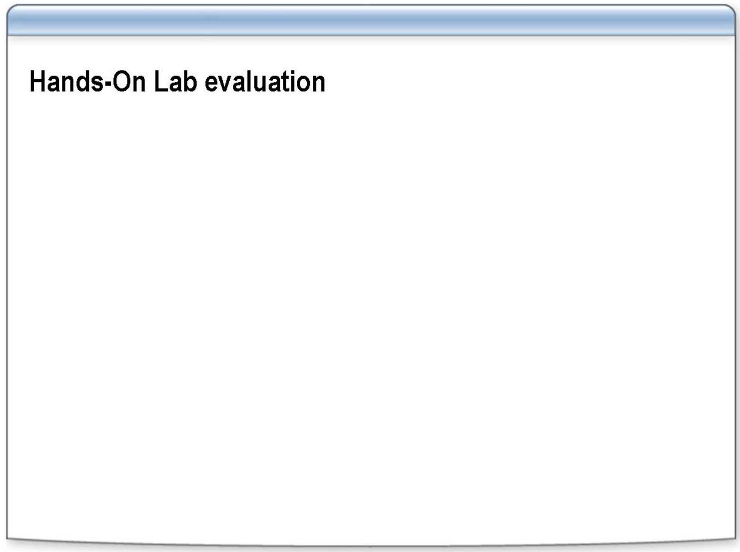
Contents



Introduction

- Name
- Company affiliation
- Title/function
- Job responsibility
- Networking experience
- Windows SharePoint Services experience
- SharePoint Portal Server 2003 experience
- Expectations for these hands-on labs

Hands-On Lab Materials



The following materials are included with your kit:

- *Hands-on lab evaluation*. To provide feedback on the hands-on labs, training facility, and instructor, you will have the opportunity to complete an online evaluation near the end of these hands-on labs.

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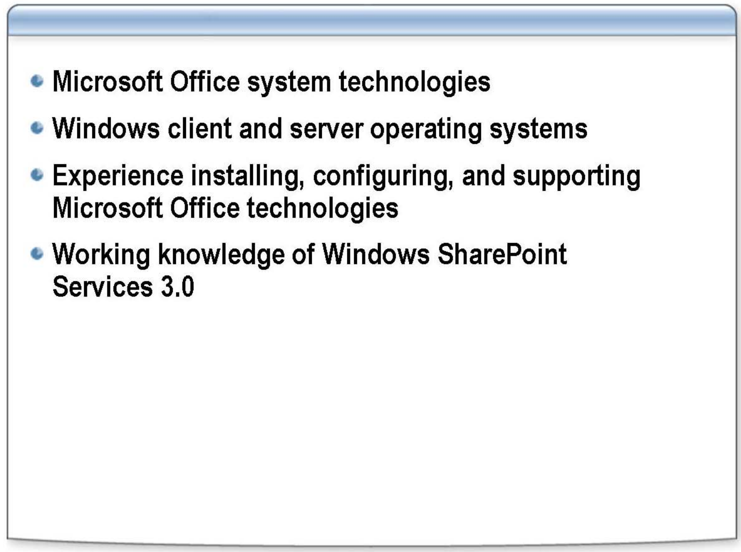
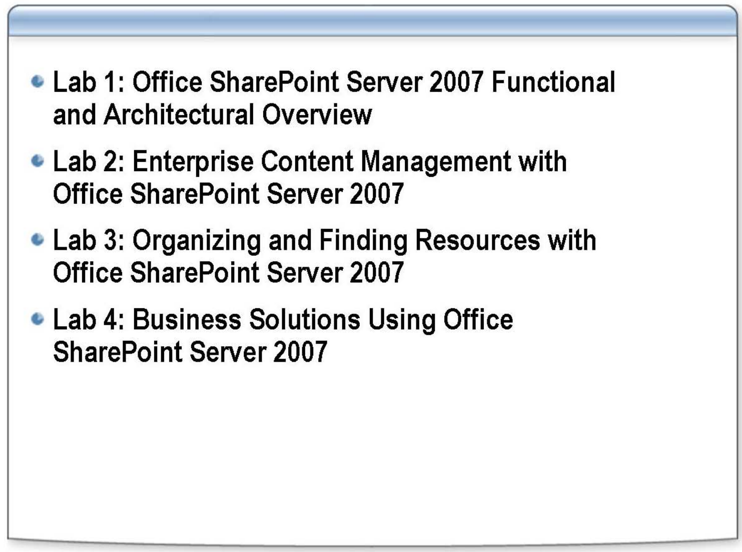
Prerequisites



This hands-on lab requires that you have general knowledge and competence in managing Microsoft Windows Server™ 2003 environment, and it requires that you have knowledge of and experience with the following:

- 1 year experience with Microsoft Office system technologies
- 1 year experience with Microsoft Windows® client and server operating systems
- Experience installing, configuring, and supporting Microsoft Office technologies
- Working knowledge of Microsoft Windows SharePoint® Services 3.0

Hands-On Labs Outline



Lab 1: "Office SharePoint Server 2007 Functional and Architectural Overview"

Lab 2: "Enterprise Content Management with Office SharePoint Server 2007"

Lab 3: "Organizing and Finding Resources with Office SharePoint Server 2007"

Lab 4: "Business Solutions Using Office SharePoint Server 2007"

Microsoft Learning

Introduction

Microsoft Learning develops Official Microsoft Learning Products for computer professionals who design, develop, support, implement, or manage solutions by using Microsoft products and technologies. These learning products provide comprehensive, skills-based training in instructor-led and online formats.

Additional recommended learning products

Each learning product relates in some way to another learning product. A related learning product may be a prerequisite, a follow-up in a recommended series, or a learning product that offers additional training.

It is recommended that you take the following learning products in this order:

- Clinic 3369: *First Look: Getting Started with Windows SharePoint Services 3.0*
- Clinic 3370: *First Look: Getting Started with Microsoft Office SharePoint Server 2007*
- Clinic 3199: *First Look: Getting Started with the 2007 Microsoft Office System*

Other related learning products may become available in the future, so for up-to-date information about recommended learning products, visit the Microsoft Learning Web site.

Microsoft Learning information

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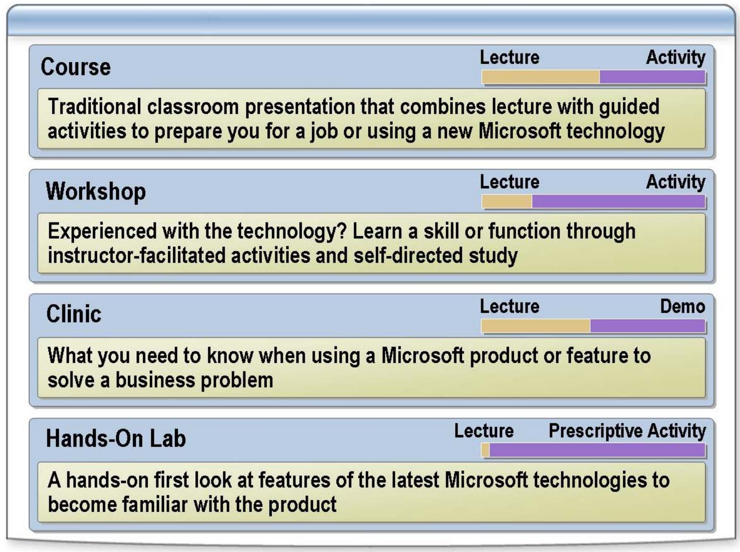

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Courses are for information technology (IT) professionals and developers who are new to a particular product or technology and for experienced individuals who prefer to learn in a traditional classroom format. Courses provide a relevant and guided learning experience that combines lecture and practice to deliver thorough coverage of a Microsoft product or technology. Courses are designed to address the needs of learners engaged in the planning, design, implementation, management, and support phases of the technology adoption lifecycle. They provide detailed information by focusing on concepts and principles, reference content, and in-depth, hands-on lab activities to ensure knowledge transfer. Typically, the content of a course is broad, addressing a wide range of tasks necessary for the job role.

Workshops are for knowledgeable IT professionals and developers who learn best by doing and exploring. Workshops provide a hands-on learning experience in which participants can use Microsoft products in a safe and collaborative environment based on real-world scenarios. Workshops are the learning products in which students learn by doing through scenario and through troubleshooting hands-on labs, targeted reviews, information resources, and best practices, with instructor facilitation.

Clinics are for IT professionals, developers, and technical decision makers. Clinics offer a detailed presentation that may describe the features and functionality of an existing or new Microsoft product or technology, provide guidelines and best practices for decision making, and/or showcase product demonstrations and solutions. Clinics focus on how specific features will solve business problems.

Stand-alone Hands-On Labs provide IT professionals and developers with hands-on experience with an existing or new Microsoft product or technology. Hands-on labs provide a realistic and safe environment to encourage knowledge transfer by learning through doing. The labs provided are completely prescriptive so that no lab answer keys are required. There is very little lecture or text content provided in hands-on labs, aside from lab introductions, context setting, and lab reviews.

Microsoft Certification Program

Introduction

Microsoft Learning offers a variety of certification credentials for developers and IT professionals. The Microsoft Certification Program (MCP) is the leading certification program for validating your experience and skills, keeping you competitive in today's changing business environment.

MCP certifications

The MCP program includes the following certifications.

- MCDST on Windows XP

  The Microsoft Certified Desktop Support Technician (MCDST) certification is designed for professionals who support end users and successfully troubleshoot desktop environments running on the Microsoft Windows operating system.

- MCSA on Windows Server 2003

  The Microsoft Certified Systems Administrator (MCSA) certification is designed for professionals who implement, manage, and troubleshoot existing network and system environments based on the Windows Server 2003 platform. Implementation responsibilities include installing and configuring parts of the systems. Management responsibilities include administering and supporting the systems.

- MCSE on Windows Server 2003

  The Microsoft Certified Systems Engineer (MCSE) credential is the premier certification for professionals who analyze the business requirements and design and implement the infrastructure for business solutions based on the Windows Server 2003 platform. Implementation responsibilities include installing, configuring, and troubleshooting network systems.

- MCAD

  The Microsoft Certified Application Developer (MCAD) for Microsoft .NET credential is appropriate for professionals who use Microsoft technologies to develop and maintain department-level applications, components, Web or desktop clients, or back-end data services or who work in teams developing enterprise applications. The credential covers job tasks ranging from developing to deploying and maintaining these solutions.

- MCSD

  The Microsoft Certified Solution Developer (MCSD) credential is the premier certification for professionals who design and develop leading-edge business solutions with Microsoft development tools, technologies, platforms, and the Microsoft Windows DNA architecture. The types of applications MCSDs can develop include desktop applications and multi-user, Web-based, N-tier, and transaction-based applications. The credential covers job tasks ranging from analyzing business requirements to maintaining solutions.

- MCDBA on Microsoft SQL Server™ 2000

  The Microsoft Certified Database Administrator (MCDBA) credential is the premier certification for professionals who implement and administer Microsoft SQL Server databases. The certification is appropriate for individuals who derive physical database designs, develop logical data models, create physical databases, create data services by using Transact-SQL, manage and maintain databases, configure and manage security, monitor and optimize databases, and install and configure SQL Server.

- MCP

  The Microsoft Certified Professional (MCP) credential is for individuals who have the skills to successfully implement a Microsoft product or technology as part of a business solution in an organization. Hands-on experience with the product is necessary to successfully achieve certification.

- MCT

  Microsoft Certified Trainers (MCTs) demonstrate the instructional and technical skills that qualify them to deliver Official Microsoft Learning Products through Microsoft Certified Technical Education Centers (Microsoft CTECs).

Certification requirements

Requirements differ for each certification category and are specific to the products and job functions addressed by the certification. To become a Microsoft Certified Professional, you must pass rigorous certification exams that provide a valid and reliable measure of technical proficiency and expertise.

Note For additional information see the Microsoft Learning Web site at http://www.microsoft.com/learning.

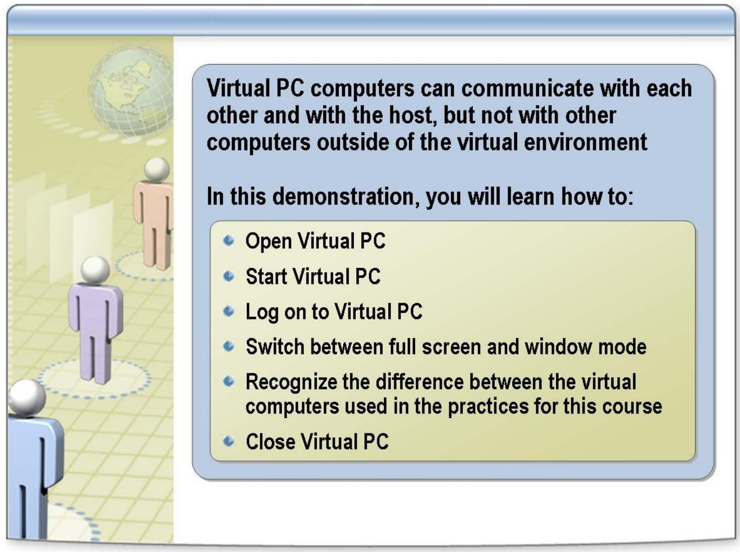
You can also send e-mail to mcphelp@microsoft.com if you have specific certification questions.

Acquiring the skills tested by an MCP exam

Official Microsoft Learning Products can help you develop the skills that you need to do your job. They also complement the experience that you gain while working with Microsoft products and technologies. However, no one-to-one correlation exists between the learning products and MCP exams. Microsoft does not expect or intend for learning products to be the sole preparation method for passing MCP exams. Practical product knowledge and experience are also necessary to pass MCP exams.

To help prepare for MCP exams, use the preparation guides that are available for each exam. Each Exam Preparation Guide contains exam-specific information, such as a list of the topics on which you will be tested. These guides are available on the Microsoft Learning Web site at http://www.microsoft.com/learning/.

Demonstration: Using Microsoft Virtual PC



In this demonstration, your instructor will help familiarize you with the Virtual PC environment in which you will work to complete the practices and labs in this course. You will learn:

- How to open Virtual PC.
- How to start Virtual PC.
- How to log on to Virtual PC.
- How to switch between full screen and window modes.
- How to tell the difference between the virtual machines that are used in the practices for this course.
- That the virtual machines can communicate with each other and with the host, but they cannot communicate with other computers that are outside of the virtual environment. (For example, no Internet access is available from the virtual environment.)
- How to close Virtual PC.

Keyboard shortcuts

While working in the Virtual PC environment, you might find it helpful to use keyboard shortcuts. All Virtual PC shortcuts include a key that is referred to as the HOST key or the RIGHT-ALT key. By default, the HOST key is the ALT key on the right side of your keyboard. Some useful shortcuts include:

- ALT+DELETE to log on to the Virtual PC
- ALT+ENTER to switch between full screen mode and window modes
- ALT+RIGHT ARROW to display the next Virtual PC

For more information about Virtual PC, see Virtual PC Help.

Facilities


Class hours
Building hours
Parking
Restrooms
Meals
Phones
Messages
Smoking
Recycling

Lab 1: Office SharePoint Server 2007 Functional and Architectural Overview

Objectives

After completing this lab, you will be able to:

- Describe the user interface for Microsoft® Office SharePoint® Server 2007.
- Describe the administration interface for Office SharePoint Server 2007.
- Describe the security for Office SharePoint Server 2007.

Scenario

You are the network administrator for Contoso, Ltd. The company uses SharePoint Portal Server 2003, but it is planning on deploying Office SharePoint Server 2007 to use enhanced features for enterprise content management, search, business intelligence, and business process management. In preparation for the migration, you need to understand the architecture of Office SharePoint Server 2007.

Lab Components

This lab includes two components:

- Exercises—The exercises include detailed step-by-step instructions and are required. The exercises cover the core information needed to meet the lab objectives.
- Additional Tasks—The additional tasks are listed at the end of an exercise and provide tasks that you can perform to extend your learning about the product. The additional tasks do not provide step-by-step instructions, but they are similar to the steps that you performed in the exercises. The additional tasks are optional, but it is recommended that you complete them to gain a fuller understanding of the product.

Computers

This lab uses three virtual machines performing the following roles:

- 3370A-3374A-SEA-DC1
  - Domain controller
  - Exchange server
- 3370A-3374A-SEA-SRV1
  - Microsoft Office SharePoint Server 2007 Web front-end and application server
  - Database server
- 3370A-3374A-SEA-CL1
  - 2007 Microsoft Office system client

Estimated time to complete this lab: 90 minutes

Before You Begin

Virtual PC

This lab makes use of Microsoft Virtual PC 2004, an application that allows you to run multiple virtual machines on one physical computer. During the lab, you will switch between different windows, each containing a separate virtual machine running Microsoft Windows Server™ 2003 or Microsoft Windows® XP.

Before you start the lab, familiarize yourself with the following basics of Virtual PC:

- To switch the focus for your mouse and keyboard to the virtual machine, click inside the virtual machine window.
- To remove the focus from a virtual machine, move the mouse pointer outside the virtual machine window.
- To issue the CTRL+ALT+DELETE keyboard combination inside a virtual machine, use RIGHT-ALT+DELETE instead. Virtual PC designates the RIGHT-ALT key as the Host key.
- To enlarge the size of the virtual machine window, drag the lower-right corner of the window.
- To switch to and from full-screen mode, press RIGHT-ALT+ENTER.

To Start the Lab

Before you can perform any of the lab exercises, you must start the virtual machines and then log on to the computer. If an error message warns you that the disk's parent appears to have been modified, click OK to continue. This error message appears when you move Virtual PC images between computers with different time-zone settings.

Important If a service startup error appears on SEA-DC1 during the startup process, check to ensure that all Automatic services have started as expected. If you attempt to start all three virtual machines at one time, it is common for the Exchange Information Store to time out.

You should fully start SEA-DC1 first before starting any other virtual machines.

Note These lab exercises have been developed using beta software. If a specific task results in an error message or a time-out screen, try performing the task again. The task will most likely be completed successfully at the second attempt.

Exercise 1: Office SharePoint Server 2007 Features

Office SharePoint Server 2007 has a user interface that is consistent with Microsoft Windows SharePoint Services 3.0. The same terminology and components apply in many cases—for example, Web page components are called Web Parts. In this exercise, you will see an overview of the features and user interface in Office SharePoint Server 2007, including Web Parts, Search, and My Site.

Task 1-1: Using a Web Part

Web Parts are the building blocks of pages in a Microsoft Office SharePoint Server 2007 site. Each Web Part on a page performs a different task. In this task, you will log on to a Microsoft Office SharePoint Server 2007 site and modify the Calendar Web Part.

Using a Web Part	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-CL1 as **Jeff** with a password of **Pa$$w0rd**.
1. Access the SharePoint site at http://sea-srv1.	**a.** Click **Start**, point **All Programs**, and then click **Internet Explorer**. **b.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER. **c.** Click the **Sales** page.
2. Add a new event to the calendar.	**a.** Under the **Calendar** section, click **Add new event**. **b.** On the **Calendar: New Item** page, in the **Title** box, type **Project Meeting**. **c.** Leave the default start and end date of today. **d.** In the **Description** box, type **Planning meeting for implementing Microsoft Office SharePoint Server 2007**. **e.** Select the **All Day Event** check box, and then click **OK**.
3. View the **Day**, **Week**, and **Month** views of the calendar, and then change the view to **Current Events**.	**a.** Click **Calendar**. **b.** Scroll to the right-hand side of the calendar. Click **Day**. **c.** Click **Week**. **d.** Click **Month**. **e.** In the **View** drop-down list, click **Current Events**. **f.** Click the **Sales** link found above the Calendar heading.
4. Modify the Calendar Web Part.	▪ Next to the **Calendar** heading, click the small arrow and then click **Modify Shared Web Part**.
5. In the appearance section, change the frame style to **Title and Border**.	**a.** In the right pane, expand **Appearance**. **b.** Scroll down in the right pane. In the **Chrome Type** list, click **Title and Border**. **c.** Click **OK**.

Task 1-2: Searching for People

Integrated search is a powerful feature in Microsoft Office SharePoint Server 2007. The search feature is able to find data in SharePoint sites, file shares, and line-of-business applications. In addition to searching for data, you can also search for people. This task shows you a brief overview of searching for a user.

Searching for People	
Tasks	**Detailed Steps**
1. Access the Search Center.	▪ Click the **Search Center** page tab.
2. Click the **People** tab.	**a.** Click the **People** tab. **b.** On the **People** tab, click **Search Options**.
3. Search for **Administrator**.	▪ In the text box, type **Administrator**, and then press ENTER.
4. View the details for **Administrator**.	▪ Under the **Everyone Else** heading, click **Administrator**.

Task 1-3: Creating Links in My Site

Office SharePoint Server 2007 includes the My Site feature for users to create a personal Web space. My Site can serve as a customizable personal portal for users. Users can store documents in My Site, configure a personal calendar, and store other information. In this task, you will create a My Site site for a user and create links in My Site.

Creating Links in My Site	
Tasks	**Detailed Steps**
1. Go to **My Site**.	▪ At the top right of the page, click the **My Site** link.
2. Add a new link to **http://www.microsoft.com**.	**a.** Under **My Information**, click **Links**. **b.** On the **My Links** page, click **Add Link**. **c.** In the **Title** box, type **Microsoft Web Site**. **d.** In the **Address** box, type **http://www.microsoft.com**. **e.** Click **OK**.
3. Go to **My Site**.	▪ Click the **My Site** link found above the **My Links** heading.
4. View the link in the **General** category of **My Links**.	**a.** At the top of the page, click **My Links**, and then point to **My Links**, and then point to **General**. **b.** Close Microsoft Internet Explorer®.
CLEANUP STEPS ONLY	▪ Log off from SEA-CL1.

Additional Tasks

If time permits, complete the following tasks to learn more about the user interface in Office SharePoint Server 2007:

- Create a team site to see the components that are included.
- Create a blog subsite in the team site.
- Create a wiki subsite in the team site.

Exercise 2: Office SharePoint Server 2007 Administration Overview

Office SharePoint Server 2007 has a three-tier administrative model for management. This allows management to be effectively delegated for different management roles. In this exercise, you will learn about central administration, shared services administration, and site administration.

Task 2-1: Using Central Administration

Central administration is typically performed by IT administrators. The tasks performed in central administration are farm-level tasks such as configuring database locations or logging.

Using Central Administration	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open Central Administration.	▪ Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**.
2. View the **Finalize Shared Services Configuration for SharedServices1** administrative task.	**a.** Scroll down to view all of the services running on SEA-SRV1. **b.** In the **Administrative Tasks** list, click **Finalize Shared Services Configuration for SharedServices1**. **c.** Click **Close**.
3. View the options on the **Operations** page.	▪ On the menu bar, click **Operations**.
4. View the users in the SharePoint Administrators group.	▪ Under **Security Configuration**, click **SharePoint administrator's group**.
5. Add **Rob** as a farm administrator.	**a.** Click **New**, and then click **Add Users**. **b.** In the **Users** box, type **Rob**. **c.** Confirm that **Farm Administrators [Full Control]** is selected in the **Add users to a SharePoint group** box. **d.** Click **OK**.
6. View the options on the **Application Management** page.	**a.** On the menu bar, click **Application Management**. **b.** Under **SharePoint Web Application Management**, click **E-mail settings**. **c.** After viewing the e-mail configuration, click **Cancel**.
7. View the list of features in the farm.	**a.** In the left-hand pane, click **Operations** **b.** Under **Global Configuration**, click **Manage Farm Features**. **c.** Scroll down the list of features. **d.** In the left-hand pane, click **Back to Central Administration**.

Task 2-2: Administering Shared Services

Shared services administration is also configured by using a SharePoint site. The management of shared services can be delegated to a power user responsible for managing Office SharePoint Server 2007 rather than to a person responsible for core IT services. In this task, you will delegate the permissions to manage shared services.

Administering Shared Services	
Tasks	**Detailed Steps**
1. Open the shared services configuration.	**a.** On the menu bar, click **Application Management**. **b.** Under **Office SharePoint Server 2007 (Beta) Shared Services**, click **Create or Configure this Farm's Shared Services**.
2. Open **SharedServices1 (Default)**.	▪ Click **SharedServices1 (Default)**.
3. View the existing users and groups with permissions at the shared services level. Add **Rob**, and then give him full permissions.	**a.** Under **User Profiles, Audiences, and Personal Sites**, click **Personalization services permissions**. **b.** Click **Add Users/Groups**. **c.** In the **Users/Groups** box, type **Rob**. **d.** In the **Choose Permissions** area, check all permissions. **e.** Click **Save**.
4. View the detailed permissions for **NT AUTHORITY\Authenticated Users**.	**a.** Select the **NT AUTHORITY\Authenticated Users** check box, and then click **Modify Permissions of Selected Users**. **b.** Click **Cancel**.
5. View the policy settings for user profiles.	**a.** Under **User Profiles, Audiences, and Personal Sites**, click **Profile services policies**. **b.** On the **Manage Policy** page, scroll down and read the personal properties that can be controlled.
6. View some of the search settings that are available.	**a.** On the menu bar, click **Home**. **b.** In the **Search** area, click **Search Settings**. **c.** Close Internet Explorer and log off of SEA-SRV1.

Task 2-3: Administering Site Settings

Just as you can delegate permissions to manage central administration and shared services administration, you can also delegate permission to create and manage sites. One preconfigured group with permissions to create subsites is the Owners group for a site. You can add users to the Owners group for a site to delegate management permissions. In this task, you will add a user to the Owners group for the home site.

Administering Site Settings	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-CL1 as **Paul** with a password of **Pa$$w0rd**.
1. Access the SharePoint site as **Paul**.	**a.** Click **Start**, point to **All Programs**, and then click **Internet Explorer**. **b.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER.
2. View the **People** and **Groups** that have permissions to the **Home** site.	**a.** At the top of the page, click **Site Actions**, point to **Site Settings** and then click **People and Groups**. **b.** Under **Groups**, click **Home Owners**.
3. Add **Rob** to the **Home Owners** group.	**a.** Click **New**, and then click **Add Users**. **b.** In the **Users** box, type **Rob**. **c.** Click **OK**.
CLEANUP STEPS ONLY	▪ Log off as **Paul**.

Additional Tasks

If time permits, complete the following tasks to learn more about the administration interface in Office SharePoint Server 2007:

- Explore additional Central Administration site options.
- Explore additional shared services configuration options.
- Explore additional site configuration options.

Exercise 3: Office SharePoint Server 2007 Security Overview

For a single-server installation, the entire security configuration for Office SharePoint Server 2007 is performed automatically. However, for more advanced installations, you must understand the infrastructure objects that are a part of Office SharePoint Server 2007 and their security requirements. In this exercise, you will see an overview of the infrastructure objects in Office SharePoint Server 2007 and their security configuration.

Task 3-1: Viewing Web Applications

There are separate Web sites and Web applications for the Central Administration site, shared services administration site, and content sites. In this task, you will view the Web sites and the Web applications.

Viewing Web Applications	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open **Internet Information Services (IIS) Manager**.	▪ Click **Start**, point to **Administrative Tools**, and then click **Internet Information Services (IIS) Manager**.
2. View the Web sites in IIS Manager.	▪ Expand **SEA-SRV1 (local computer)**, and then expand **Web Sites**.
3. View the application pool and application for the **Home** site and for shared services administration.	**a.** Right-click **SharePoint (80)**, and then click **Properties**. **b.** Click the **Home Directory** tab. **c.** Click **Cancel**. **d.** Right-click **SharePoint (2814)**, and then click **Properties**. **e.** Click the **Home Directory** tab. **f.** Click **Cancel**.
4. View the application pools, and then view the identity used by **DefaultAppPool** and **SharedServices1AppPool**.	**a.** Expand **Application Pools**. **b.** Right-click **DefaultAppPool**, and then click **Properties**. **c.** Click the **Identity** tab. **d.** Click **Cancel**. **e.** Right-click **SharedServices1AppPool**, and then click **Properties**. **f.** Click the **Identity** tab. **g.** Click **Cancel**.
CLEANUP STEPS ONLY	▪ Close IIS Manager.

Task 3-2: Viewing Database Configuration

Office SharePoint Server 2007 uses databases to store content and configuration information. Each Web application has its own content database. The Shared Services Provider (SSP) has two additional databases for Search and SSP configuration.

Viewing Database Configuration	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ If necessary, log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open the Central Administration site.	▪ Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**.
2. Click the **Perform a backup** option to view all of the databases that are in use.	**a.** On the menu bar, click **Operations**. **b.** Under **Backup and Restore**, click **Perform a backup**.
3. View the properties of **SharedServices1** to see the databases that it uses.	**a.** On the menu bar, click **Application Management**. **b.** Click **Create or Configure this Farm's Shared Services**. **c.** Rest the mouse pointer over **SharedServices1 (Default)** until a down arrow appears. **d.** Click the down arrow, and then click **Edit Properties**. **e.** Scroll down and view the databases that are configured. **f.** Click **Cancel**.
CLEANUP STEPS ONLY	**a.** Close Internet Explorer. **b.** Shut down all virtual machines. Do not save changes.

Lab 2: Enterprise Content Management with Office SharePoint Server 2007

Objectives

After completing this lab, you will be able to:

- Describe document management in Microsoft® Office SharePoint® Server 2007.
- Describe workflows in Office SharePoint Server 2007.
- Describe records management features in Office SharePoint Server 2007.
- Describe creating Web sites in Office SharePoint Server 2007.
- Describe creating Web Parts in Office SharePoint Server 2007.
- Describe advanced Web content management features in Office SharePoint Server 2007.

Scenario

You are the network administrator for Contoso, Ltd. The company uses SharePoint Portal Server 2003, but it is planning on deploying Office SharePoint Server 2007 to use enhanced features for enterprise content management, search, business intelligence, and business process management. In preparation for the migration, you need to understand the enterprise content management features of Office SharePoint Server 2007.

Lab Components

This lab includes two components:

- Exercises—The exercises include detailed step-by-step instructions and are required. The exercises cover the core information needed to meet the lab objectives.
- Additional Tasks—The additional tasks are listed at the end of an exercise and provide tasks that you can perform to extend your learning about the product. The additional tasks do not provide step-by-step instructions, but they are similar to the steps that you performed in the exercises. The additional tasks are optional, but it is recommended that you complete them to gain a fuller understanding of the product.

Computers

This lab uses three virtual machines performing the following roles:

- 3370A-3374A-SEA-DC1
  - Domain controller
  - Exchange server
- 3370A-3374A-SEA-SRV1
  - Microsoft Office SharePoint Server 2007 Web front-end and application server
  - Database server
- 3370A-3374A-SEA-CL1
  - 2007 Microsoft Office system client

Estimated time to complete this lab: 90 minutes

Before You Begin

Virtual PC

This lab makes use of Microsoft Virtual PC 2004, an application that allows you to run multiple virtual machines on one physical computer. During the lab, you will switch between different windows, each containing a separate virtual machine running Microsoft Windows Server™ 2003 or Microsoft Windows® XP.

Before you start the lab, familiarize yourself with the following basics of Virtual PC:

- To switch the focus for your mouse and keyboard to the virtual machine, click inside the virtual machine window.
- To remove the focus from a virtual machine, move the mouse pointer outside the virtual machine window.
- To issue the CTRL+ALT+DELETE keyboard combination inside a virtual machine, use RIGHT-ALT+DELETE instead. Virtual PC designates the RIGHT-ALT key as the Host key.
- To enlarge the size of the virtual machine window, drag the lower-right corner of the window.
- To switch to and from full-screen mode, press RIGHT-ALT+ENTER.

To Start the Lab

Before you can perform any of the lab exercises, you must start the virtual machines and then log on to the computer. If an error message warns you that the disk's parent appears to have been modified, click OK to continue. This error message appears when you move Virtual PC images between computers with different time-zone settings.

Important If a service startup error appears on SEA-SRV1 during the startup process, check to ensure that all Automatic services have started as expected. If you attempt to start all three virtual machines at one time, it is common for the Exchange Information Store to time out.

You should fully start SEA-DC1 first before starting any other virtual machines.

Note These demonstrations have been developed using beta software. If a specific task results in an error message or a time-out screen, try performing the task again. The task will most likely be completed successfully at the second attempt.

Exercise 1: Using Content Types

Content types are a feature that is used extensively in Office SharePoint Server 2007. A content type defines metadata that can be collected about a document to make document management easier. Many predefined content types are included with Office SharePoint Server 2007, but you can also create content types to suite your own specialized needs. In this exercise, you create an enterprise document library, create a content type, create a new document from a content type, and use the document information panel.

Task 1-1: Creating a Managed Document Repository

A managed document repository is designed for managing a large number of documents. Document management features are automatically enabled. In this task, you learn how to create a managed document repository.

Creating a Managed Document Repository	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-CL1 as **Paul** with a password of **Pa$$w0rd**.
1. Open http://sea-srv1.	**a.** Click **Start**, point **All Programs**, and click **Internet Explorer**. **b.** In the **Address** bar, type **http://sea-srv1** and press Enter.
2. Create a managed document repository.	**a.** Click **Site Actions**, and then click **Create Site**. **b.** In the **Title** box, type **Enterprise Documents**. **c.** In the **Description** box, type **Central storage location for enterprise documents**. **d.** In the **URL name** box, type **docs**. **e.** In the **Select a template** box, select **Managed Document Repository**. **f.** Click **Create**.
3. Create and **IT** folder and an **HR** folder in the document library.	**a.** In the left pane, click **Documents**. **b.** Click the down arrow next to **New**, and then click **Folder**. **c.** In the **Name** box, type **IT**. **d.** Click **OK**. **e.** Click the down arrow next to **New**, and then click **Folder**. **f.** In the **Name** box, type **HR**. **g.** Click **OK**.
4. View the folders in the document library.	▪ In the left pane, expand **Documents**.

Task 1-2: Creating a Content Type

Content types are used to associate additional properties with documents stored in SharePoint sites. In this task, you create a new content type that has additional properties and a document template.

Creating a Content Type	
Tasks	**Detailed Steps**
1. Create a new content type in **Site Settings**.	**a.** Click **Site Actions**, and then click **Site Settings**. **b.** Under **Galleries**, click **Site content types**. **c.** Click **Create**.
2. Make the new content type a **Memo**. This will be a modification of the **Document** content type.	**a.** In the **Name** box, type **Memo**. **b.** In the **Description** box, type **Memo document with custom template**. **c.** In the **Select parent content type from** list, select **Document Content Types**. **d.** In the **Parent Content Type** list, select **Document**. **e.** In the **Existing group** list, select **Custom Content Types**. **f.** Click **OK**.
3. Add additional columns to the **Memo** content type.	**a.** Under the **Columns** heading, click **Add from existing site columns**. **b.** In the **Select columns from** list, select **Core Document columns**. **c.** In the **Available columns** list, select **Author**, and click **Add**. **d.** In the **Available columns** list, select **Subject**, and then click **Add**. **e.** Click **OK**.
4. Require the **Author** column for the **Memo** content type.	**a.** Under the **Columns** heading, click **Author**. **b.** In the **Column Settings** area, click **Required (Must contain information)**. **c.** Click **OK**.

(*continued*)

Creating a Content Type	
Tasks	**Detailed Steps**
5. Upload the Memo.dotx template for the **Memo** content type.	**a.** Under the **Settings** heading, click **Advanced settings**. **b.** Click the **Upload a new document template** option, and then click the **Browse** button. **c.** Browse to **D:\Labfiles\Paul**. **d.** Select **Memo**, and then click **Open**. **e.** Click **OK**.
6. Associate the **Memo** content type with the document library.	**a.** Click the **Enterprise Documents** page at the top of the browser window. **b.** In the left pane, click **Documents**. **c.** Click **Settings**, and then click **Document Library Settings**. **d.** Under the **Content Types** heading, click **Add from existing site content types**. **e.** In the **Select site content types from** list, select **Custom Content Types**. **f.** In the **Available Site Content Types** box, select **Memo**, and click **Add**. **g.** Click **OK**.

Task 1-3: Creating a New Document

After a new content type is created for a document library, you can create new documents of that type. When documents are created directly from the SharePoint site, the document template is downloaded from the SharePoint site. In this task, you create a new document from the new Memo content type.

Creating a New Document	
Tasks	**Detailed Steps**
1. Create a new **Memo** from the document library.	**a.** Click the **Documents** link found above the **Customize Documents** heading. **b.** Click the drop-down arrow next to **New** and then click **Memo**.
2. Edit the new memo, and then save it to the document library.	**a.** To the right of the **Memo** heading, type **Test Memo**. **b.** To the right of the **From** heading, type **Paul Koch**. **c.** To the right of the **To** heading, type **Everyone**. **d.** Click the disk icon in the upper left to save the document. **e.** In the **File name** box, type **http://sea-srv1/docs/documents/Memo**. **f.** Click **Save**. This may take a couple of minutes to complete.
3. Close the notification.	▪ Click **OK** to close the notification.
4. Close the notification.	▪ Click **OK** to close the notification.
5. Close Word, and then check in the document.	**a.** Close Office Word, and then click **Yes** when asked to check in the document. **b.** Click **OK** to select a minor version.
6. View the properties of **Memo** in the document library.	**a.** On the left-hand pane, click the **Documents** link to refresh the view **b.** Position the mouse pointer over **Memo** until a drop-down list appears, and then select **View Properties** in the list.
7. Close the **Memo Properties**.	▪ Click **Close**.

Task 1-4: Using the Document Information Panel

The Document Information Panel is a Microsoft Office InfoPath® form that is available when you use 2007 Office system clients. It allows you to fill in additional document properties without using the Office SharePoint Server 2007 Web interface. In this task, you design a new Document Information Panel for the Memo content type.

Using the Document Information Panel	
Tasks	**Detailed Steps**
1. View the **Memo** content type.	**a.** On the **Documents** Web page, click **Settings**, and then click **Document Library Settings**. **b.** Under the **Content Types** heading, click **Memo**.
2. Start creating a new custom template for the document information panel. Publish the new template to a **SharePoint List** content type.	**a.** Click **Change Document Information Panel Settings**. **b.** At the bottom of the **Document Information Panel Template** section, click **Create a new custom template**. Microsoft Office InfoPath opens. **c.** On the Data Source Wizard, click **Finish**. **d.** On the **File** menu, click **Publish**. **e.** Click **OK** to save the form template. **f.** Click **Save** to accept the default location of **My Documents**. **g.** Ensure that **As a Property Editor Template on a SharePoint content type** is selected, and then click **Next**. **h.** Click **Publish**, and then click **Close**. **i.** Close InfoPath.
3. Configure the **Memo** content type to show the document information panel.	**a.** Click **Go back to the Document Information Panel settings page**. **b.** Select the **Always show Document Information Panel on document open and initial save for this content type** check box. **c.** Click **OK**. **d.** Click the **Documents** link found above the **List Content Type: Memo** heading.
4. Open the **Memo** document from the document library.	**a.** Click **Memo**. **b.** Click **Check Out and Edit**. **c.** Click **OK**. *Note that it may take up to five minutes for the document pane to automatically appear with the document open task.*

(*continued*)

Using the Document Information Panel	
Tasks	**Detailed Steps**
5. Edit the properties in the document information panel.	**a.** Click the **View** tab and then in the **Show/Hide** section, click **Properties**. **b.** Click the drop-down arrow next to **document** and then click **Standard**. **c.** In the **Author** box, type **Paul Koch**. **d.** In the **Title** box, type **Test Memo**. **e.** In the **Subject** box, type **A Memo for Testing**. **f.** Close Office Word. **g.** Click **Yes** to save the changes. **h.** Click **Yes** to check in the document. **i.** Click **OK** to create a new minor version. It may take a few minutes for the save to complete.

Additional Tasks

If time permits, complete the following tasks to learn more about document management in Office SharePoint Server 2007:

- Create an additional content type for Microsoft Office PowerPoint® slides.
- Configure a new template for the PowerPoint content type.
- Add additional columns to the PowerPoint content type.
- Configure a document information panel for the PowerPoint content type.

Exercise 2: Using Out-of-the-Box Workflows

Office SharePoint Server 2007 includes a number of out-of-the-box workflows. You can use workflows to automate and control the document creation process and enforce company processes. In this exercise, you will learn how to configure a workflow and how to use a workflow.

Task 2-1: Configuring a Workflow

Although you can create your own workflows, it is much faster to configure out-of-the-box workflows instead. In this task, you will configure a workflow.

Configuring a Workflow	
Tasks	**Detailed Steps**
1. Edit the workflow settings for the document library.	**a.** Click **Settings**, and then click **Document Library Settings**. **b.** Under the **Permissions and Policies** heading, click **Workflow settings**.
2. Add the **Approval** workflow, and then name it **Memo Approval**.	**a.** In the **Select a workflow template** list, select **Approval**. **b.** In the **Type a unique name for this workflow** box, type **Memo Approval**.
3. Accept the default **Start Options**.	▪ Click **Next**.
4. Configure approvals to be serial.	▪ Confirm that the **One participant at a time (serial)** option is selected.
5. Add Susan and Jeff as approvers.	▪ In the **Approvers** text box, type **susan; jeff**.
6. Add a message to the approval, and allow one day for responses.	**a.** In the **Type a message to include with your request** box, type **Please approve this memo or contact the author if there are problems**. **b.** In the **Give each person the following amount of time to finish their task (serial)** box, type **1 day**.
7. Select to end the workflow if the document is rejected.	▪ Check the **Document is rejected option**.
8. Complete the workflow configuration.	**a.** Click **OK**. **b.** Click **Go back to “Documents”**.

Task 2-2: Using a Workflow

Workflows can be automatically attached to documents when they are created or attached manually. In this task, you manually attach and use a workflow.

Using a Workflow	
Tasks	**Detailed Steps**
1. Open workflows for the **Memo** document.	▪ Position the mouse pointer over **Memo** until a drop-down list appears, and then select **Workflows** on the list.
2. Select the **Memo Approval** workflow.	▪ Click **Memo Approval**.
3. Start the workflow with default settings.	▪ Click **Start**.
4. Log on as **Susan**.	**a.** On the upper-right menu, click **Welcome Paul Koch**, and then click **Sign in as Different User**. **b.** Log on as **Contoso\Susan**, with a password of **Pa$$w0rd**.
5. Open the **Please approve memo** task.	**a.** Under **Memo Approval**, click **In Progress**. **b.** Under **Tasks**, click **Please approve memo**.
6. Approve the memo.	**a.** Click **Approve**. **b.** Close **Internet Explorer**.
7. Log on as **Jeff**.	**a.** Log off SEA-CL1. **b.** Log on to SEA-CL1 as **Jeff**, with a password of **Pa$$w0rd**.
8. Approve the memo.	**a.** Click **Start**, point to **All Programs**, and then click **Internet Explorer**. **b.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER. **c.** Click **Enterprise Documents**. **d.** In the **Upcoming Tasks** section, click **Please approve Memo**. **e.** Click **Approve**. **f.** Close Internet Explorer.
9. Log on as **Paul**, and then read the most recent e-mail message.	**a.** Log off from SEA-CL1. **b.** Log on as **Paul**, with a password of **Pa$$w0rd**. **c.** Click **Start**, and then click **E-mail**. **d.** Click the most recent e-mail message. **e.** Close Microsoft Office Outlook®.

(***continued***)

Using a Workflow	
Tasks	**Detailed Steps**
10. View the status of the workflow.	**a.** Click **Start**, point to **All Programs**, and then click **Internet Explorer**. **b.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER. **c.** Click **Enterprise Documents**. **d.** Under the **Relevant Documents** section, click the **View Properties** icon. **e.** Click **Workflows**. **f.** Under the **Completed Workflows** heading, click **Memo Approval**. **g.** Click **Go Back to "Documents"**. **h.** Click **Home**.

Additional Tasks

If time permits, complete the following tasks to learn more about the workflows in Office SharePoint Server 2007:

- Configure a Collect Feedback workflow for a document, and then test it.
- Configure a Collect Signatures workflow for a document, and then test it.

Exercise 3: Using Records Management Features

Office SharePoint Server 2007 has features specifically designed for records management. The Official File Web service is used to submit documents for archiving. The Records Repository site template is used to create a site for archiving company content. Policies can be used to control the expiration of documents or audit document access. In this exercise, you learn how to create an official file site, how to use an official file site, and how to apply a policy.

Task 3-1: Creating a Records Repository Site

Office SharePoint Server 2007 includes a Records Repository site template to act as a storage location for archived documents. In this task, you will create a Records Repository site.

Creating a Records Repository Site	
Tasks	**Detailed Steps**
1. Create a Records Repository site.	**a.** Click **Site Actions**, and then click **Create Site**. **b.** In the **Title** box, type **Archive**. **c.** In the **Description** box, type **Managed storage space for archiving files**. **d.** In the **URL name** box, type **archive**. **e.** In the **Select a template** list, select **Records Repository**. **f.** Click **Create**.
2. Create a document library in the Records Repository site for storing memos.	**a.** Click **Site Actions**, and then click **Create**. **b.** Under the **Libraries** heading, click **Document Library**. **c.** In the **Name** box, type **Memos**. **d.** Click **Create**.
3. Create a **Memo** record series type.	**a.** On the left-hand pane, under **Lists**, click **Record Routing**. **b.** In the **Record Routing** page, click **New**. **c.** In the **Title** box, type **Memo**. **d.** In the **Description** box, type **Memos kept for 180 days**. **e.** In the **Location** box, type **Memos**. **f.** Click **OK**.

(*continued*)

Creating a Records Repository Site	
Tasks	**Detailed Steps**
4. Configure the Official File Web service to connect with the Records Repository site that you created.	**a.** If necessary, log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**. **b.** Click **Start**, and then click **SharePoint 3.0 Central Administration**. **c.** Click **Application Management**. **d.** Under the **External Service Connections** heading, click **Records Repository**. **e.** Click the **Connect to a Records Repository** option. **f.** In the **Web Address** box, type **http://sea-srv1/archive/_vti_bin/officialfile.asmx**. **g.** In the **Display name** box, type **Records Repository**. **h.** Click **OK**.
5. Make the **Network Service** account an **Official File User**.	**a.** On SEA-CL1, on the **Record Routing** page, click **Site Actions**, and then click **Site Settings**. **b.** Under **Users and Permissions**, click **People and groups**. **c.** In the left-hand pane, click **More**. **d.** Click **Records Repository Users for archive**. **e.** On the **New** menu, click **Add Users**. **f.** In the **Users** box, type **Network Service**, and then click the **Check Names** button. **g.** Remove the check mark next to **Send welcome e-mal to the new users**. **h.** Click **OK**.
6. Give the **Network Service** account **Submitter** permissions.	**a.** Click **Site Actions**, and then click **Site Settings**. **b.** Under **Users and Permissions**, click **Advanced Permissions**. **c.** Click the **Actions** button and then click **Manage Permissions of Parent**. **d.** Click the **New** button and then click **Add Users**. **e.** In the **Users** box, type **Network Service**, and then click the **Check Names** button. **f.** Click **Give users permission directly**. **g.** Select the **Submitters—Can complete missing properties on submitted files** check box. **h.** Remove the check mark next to **Send welcome e-mail to the new users**. **i.** Click **OK**.

Task 3-2: Using a Records Repository

After you have configured the Official File Web service connection, you can submit files to the Records Repository. In this task, you will submit a file to the Records Repository.

Using a Records Repository	
Tasks	**Detailed Steps**
1. Send **Memo** to the Records Repository.	**a.** On SEA-CL1, click **Enterprise Documents**. **b.** In the left pane, click **Documents**. **c.** Position the mouse pointer over **Memo** until a drop-down list appears. **d.** Click **Edit Properties** and then click **OK**. **e.** Change the **Content Type** to **Memo**. Click **OK**. **f.** Highlight **Memo** and then click the drop-down arrow. **g.** Click **Check-in** and then click **OK** on the **Check in** page. **h.** Highlight **Memo** and then click the drop-down arrow. **i.** Point to **Send To**, and then click **Records Repository**. This may take a few minutes to complete. **j.** On the **Operation Completed Successfully** page, click **OK**.
2. View **Memo** in the Records Repository.	**a.** Click the **Archive** page at the top of the browser window. **b.** In the left pane, click **Memos**. *Note: if Memos does not appear in the Memos archive folder, check unclassified records. If this is the case, go back to the memo and edit it to be in memo format.*

Task 3-3: Applying a Policy

Policies let you automate tasks such as removing old documents. In this task, you will apply a policy for document expiration and auditing.

Applying a Policy	
Tasks	**Detailed Steps**
1. Create a policy for managing documents.	**a.** In the **Memos** document library, click **Settings**, and then click **Document Library Settings**. **b.** Under the **Permissions and Policies** heading, click **Information management policy settings**. **c.** Click **Define a policy**. **d.** Click **OK**.
2. Configure the **Description** and **Policy Statement** for the policy.	**a.** In the **Administrative Description** box, type **Documents expire after 180 days**. **b.** In the **Policy Statement** box, type **This document will be expired after 180 days**.
3. Configure the policy to audit file check in/check out, deletes, and restores.	**a.** Select the **Enable Auditing** check box. **b.** Select the **Editing items** check box. **c.** Select the **Checking out or checking in items** check box. **d.** Select the **Deleting or restoring items** check box.
4. Configure an expiration period of 180 days from last modified date.	**a.** Select **Enable Expiration**. **b.** Select the **A time period based on the item's properties** option. **c.** In the drop-down list, select **Modified**. **d.** Type a value of **180 days**. **e.** Under **When the item expires**, select the **Perform this action** option. **f.** Confirm that **Delete** is selected. **g.** Click **OK**. **h.** Close all windows and log off of both SEA-CL1 and SEA-SRV1.

Additional Tasks

If time permits, complete the following tasks to learn more about records management in Office SharePoint Server 2007:

- Create a new content type and a record series for the content type in the Records Repository.
- Add an additional column to the library holding a record series type, and then require that the column contains information. Submit a file, and then add the additional information during submission.

Exercise 4: Creating and Configuring Web Sites

Office SharePoint Server 2007 has many features specifically designed for Web content management. Several site templates are included that are specifically designed for Web publishing. When you choose the Publishing Site template, all the Web content management functions are enabled. In this exercise, you learn how to create a new site collection.

Creating and Configuring Web Sites	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Begin creating a Web application.	**a.** Click **Start**, and then click **SharePoint 3.0 Central Administration**. **b.** Click **Application Management**. **c.** Click **Create or extend Web application**. **d.** Click **Create a new Web Application**.
2. Configure the new Web application as **http://beta.contoso.com**.	**a.** In the **Description** box, replace the existing text with **BetaWeb**. **b.** In the **Port** box, type **80**. **c.** In the **Host Header** box, type **beta.contoso.com**. **d.** In the **Load Balanced URL** area, in the **URL** box, type **http://beta.contoso.com:80**. **e.** In the **Application Pool** area, in the **Application pool name** box, type **BetaPool**. **f.** Click **Predefined**, and then select **Network Service**. **g.** In the **Search Server** area, select **SEA-SRV1**. Click **OK** **h.** Click **OK** at the message box. It may take 5-10 minutes to complete the site creation process. *Note: If you get an error at this point, delete the Web application and try this step again. In a worse case scenario, turn off SEA-SRV1 without saving changes, restart the server and re-attempt this task.*
3. Create a new site collection for the new Web application.	**a.** Open a command prompt and type **iisreset**. Press Enter. **b.** Switch back to Internet Explorer. **c.** On the **Application Created** page, click **Create a new Windows SharePoint Services site collection**. **d.** In the **Title** box, type **BetaWeb**. **e.** Click **Create site at this URL**, and then select **(root)**. **f.** In the **Primary Site Collection Administrator** area, in the **User name** box, type **Contoso\Administrator**. Click the **Check Names** button. **g.** In the **Secondary Site Collection Administrator** area, in the **User name** box, type **Contoso\Paul**. Click the **Check Names** button.

(*continued*)

Creating and Configuring Web Sites	
Tasks	**Detailed Steps**
4. Use the **Internet Presence Web Site** template.	**a.** In the **Select a template** list, click **Internet Presence Web Site**. **b.** Click **OK**. It will take several minutes to complete this step.
5. Access the new SharePoint site.	**a.** On the **Top-Level Site Successfully Created** page, click **http://beta.contoso.com**. Verify that the Web page opens successfully. If the connection initially fails, click the back button and try accessing it again from the link provided. **b.** Close all open windows and log off.

Exercise 5: Creating Web Pages

Office SharePoint Server 2007 includes features to make creating Web site content easier. Reusable content ensures consistency across Web pages, and makes updating boilerplate content easier. Rich Client Authoring lets you quickly convert existing documents into Web pages. In this exercise, you learn how to make use of reusable content and how to implement Rich Client Authoring.

Task 5-1: Using Reusable Content

Reusable content makes managing boilerplate content easier because it is maintained in a single location. Reusable content can be embedded in many pages but edited only in one. In this task, you will implement reusable content.

Using Reusable Content	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-CL1 as **Paul** with a password of **Pa$$w0rd**.
1. Open the http://beta.contoso.com site as **Paul**.	**a.** Click **Start**, point to **All Programs**, and then click **Internet Explorer**. **b.** In the **Address** bar, type **http://beta.contoso.com**, and then press ENTER.
2. Open the **Reusable Content** list.	**a.** At the top right-hand corner of the page, click **Site Actions**. **b.** Click **View All Site Content**. **c.** Under the **Lists** heading, click **Reusable Content**.
3. Add a text disclaimer to the **Reusable Content** list.	**a.** On the **Reusable Content** page, click the **New** menu, and then click **Reusable Text**. **b.** In the **Title** box, type **Disclaimer**. **c.** At the bottom of the page, in the **Reusable Text** box, type **All information was accurate at time of publishing, but may change without notice**. **d.** Click **OK**.
4. Add the disclaimer to a Web page.	**a.** At the top of the page, click **Press Releases**. **b.** At the top right-hand corner of the page, click **Site Actions**. **c.** Click **Edit Page**. **d.** In the **Page Content** area, click **Edit Content**. **e.** In the HTML editor, click the **Open a new window to Insert Reusable Content** button. **f.** In the Select Reusable Content page, click **Disclaimer**, and then click **OK**. **g.** Click **OK** to close the HTML editor.
5. Approve the changes to the Web page.	**a.** Scroll to the top of the page and then click **Submit for Approval**. **b.** Click **Approve**. The modified Web page now displays. **c.** Close all windows and log off.

Task 5-2: Implementing Rich Client Authoring

Rich Client Authoring lets you take advantage of existing content in your organization. Using Rich Client Authoring, you can convert existing documents to Web pages. In this task, you will implement Rich Client Authoring.

Implementing Rich Client Authoring	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Enable the **Office Document Transforms Launcher Service** and the **Office Document Transforms Load Balancer Service**.	**a.** Click **Start**, point to **Administrative Tools**, and then click **Services**. **b.** Scroll down in the list of services, and then double-click **Office Document Conversions Launcher Service**. **c.** Change the **Startup type** to **Automatic**, and then click **OK**. **d.** Scroll down in the list of services, and then double-click **Office Document Conversions Load Balancer Service**. **e.** Change the **Startup type** to **Automatic** and then use the Browse button to change the logon account to be **Network Service** (with no password). Click **OK**. **f.** Close **Services**.
2. Enable document conversion in Central Administration. Begin adding a new component for conversion.	**a.** Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**. **b.** Click **Application Management**. **c.** Under **External Service Connections**, click **Document conversions**. **d.** Ensure that **http://beta.contoso.com/** is selected as the Web application. **e.** Under **Enable document conversions for this site** click **Yes**. **f.** Under **Load Balancer server** select SEA-SRV1. **g.** Click **OK**.
3. Start the **Office Document Transforms Launcher Service** and the **Office Document Transforms Load Balancer Service**.	**a.** Click **Start**, click **Run**, type **net start dcloadbalancer**, and then click **OK**. **b.** Click **Start**, click **Run**, type **net start dclauncher**, and then click **OK**.

(***continued***)

Implementing Rich Client Authoring	
Tasks	**Detailed Steps**
4. Access the content types for http://beta.contoso.com.	**a.** If necessary, on SEA-CL1, log on as **Paul** with a password of **Pa$$w0rd**. **b.** Click **Start**, point to **All Programs**, and then click **Internet Explorer**. **c.** In the **Address** bar, type **http://beta.contoso.com/** and press ENTER. **d.** Click **Site Actions**, and then point to **Site Settings**. **e.** Click **Modify all Site Settings**. **f.** Under **Galleries**, click **Site content types**.
5. Configure the **Document** content type for conversion.	**a.** Under **Document Content Types**, click **Document**. **b.** Click **Manage document conversion for this content type**. **c.** Next to **From Word 2003 XML Documents to Web Page**, click **Configure**. **d.** Click **OK**. **e.** Click **OK**.
6. Upload **WordDoc** to the **beta.contoso.com** document library.	**a.** In the top right-hand side of the page, click **Site Actions**. **b.** Click **View All Site Content**. **c.** Under **Document Libraries**, click **Documents**. **d.** Click **Upload**. **e.** Click the **Browse** button. Browse to **D:\Labfiles\Paul**. **f.** Click **WordDoc**, and then click **Open**. **g.** Click **OK**. **h.** Click **Check In**.
7. Convert **WordDoc** to Hypertext Markup Language, or HTML.	**a.** Highlight the **WordDoc** file and then click the drop-down arrow. **b.** Point to **Convert Document**. **c.** Take note of the **From Word Document to Web Page** command. **d.** Close the properties menu.

Additional Tasks

If time permits, complete the following tasks to learn more about creating Web pages in Office SharePoint Server 2007:

- Add a Summary Link Web Part.
- Add a Table of Contents Web Part.

Exercise 6: Using Content Variations

Office SharePoint Server 2007 provides a number of advanced Web content management features for enterprise-level Web sites. Content variations can be used to manage sites that are translated into multiple languages. Content variations can also be used to manage sites that are formatted differently to support different devices.

Using Content Variations

Tasks	Detailed Steps
1. Access the content variation settings for **beta.contoso.com**.	**a.** On the **Documents** page, click **Site Actions**, point to **Site Settings** and then click **Modify All Site Settings**. **b.** Under **Site Collection Administration**, click **Variation Settings**.
2. Configure the root as the location of the content variations.	**a.** In the **Location** box, type /. **b.** Click **OK**.
3. Create the English variation, and then set it to be the source variation.	**a.** Under **Site Collection Administration**, click **Variation labels**. **b.** Click **New Label**. **c.** In the **Label** box, type **EN**. **d.** In the **Display Name**, type **EN**. **e.** In the **Locale** list, select **English (United States)**. **f.** Select the **Set this variation to be the source variation** check box. Click **OK**. **g.** Select the **Publishing Site** template. **h.** Click **OK**.
4. Create the French variation.	**a.** Click **New Label**. **b.** In the **Label** box, type **FR**. **c.** In the **Display Name**, type **FR**. **d.** In the **Locale** list, select **French (Canada)**. **e.** Click **OK**.
5. Create the variation hierarchy.	▪ Click **Create Hierarchies**. This will take several minutes to complete.

(*continued*)

Using Content Variations	
Tasks	**Detailed Steps**
6. View the English variation.	▪ In Microsoft Internet Explorer, in the Address bar, type **http://beta.contoso.com/EN**, and then press ENTER.
7. Edit and approve the English variation.	**a.** Click **Edit Page** in the authoring console. **b.** In the **Page Content** field, click **Edit Content**. **c.** In the HTML editor, type **This Web page is in English**. **d.** Click **OK**. **e.** Click S**ubmit for Approval**. **f.** Click **Approve**. **g.** Click **Site Actions**, and then click **Show Page Editing Toolbar**. **h.** Click **Tools**, and then click **Update Variations**. **i.** Shut down all virtual machines and do not save changes.

Additional Tasks

If time permits, complete the following tasks to learn more about advanced Web content management in Office SharePoint Server 2007:

- Create a new site collection with the host header www.contoso.com.
- Configure content deployment from beta.contoso.com to www.contoso.com.
- Configure anonymous authentication for www.contoso.com.

Lab 3: Organizing and Finding Resources with Office SharePoint Server 2007

Objectives

After completing this lab, you will be able to:

- Describe portal management in Microsoft® Office SharePoint® Server 2007.
- Describe content targeting in Office SharePoint Server 2007.
- Describe personal SharePoint sites in Office SharePoint Server 2007.
- Describe the Colleagues Web Part in Office SharePoint Server 2007.
- Describe managing search in Office SharePoint Server 2007.
- Describe search relevance in Office SharePoint Server 2007.

Scenario

You are the network administrator for Contoso, Ltd. The company uses SharePoint Portal Server 2003, but it is planning on deploying Office SharePoint Server 2007 to use enhanced features for enterprise content management, search, business intelligence, and business process management. In preparation for the migration, you need to understand the portal and search features of Office SharePoint Server 2007.

Lab Components

This lab includes two components:

- Exercises—The exercises include detailed step-by-step instructions and are required. The exercises cover the core information needed to meet the lab objectives.
- Additional Tasks—The additional tasks are listed at the end of an exercise and provide tasks that you can perform to extend your learning about the product. The additional tasks do not provide step-by-step instructions, but they are similar to the steps that you performed in the exercises. The additional tasks are optional, but it is recommended that you complete them to gain a fuller understanding of the product.

Computers

This lab uses three virtual machines performing the following roles:

- 3370A-3374A-SEA-DC1
  - Domain controller
  - Exchange server
- 3370A-3374A-SEA-SRV1
  - Microsoft Office SharePoint Server 2007 Web front-end and application server
  - Database server
- 3370A-3374A-SEA-CL1
  - 2007 Microsoft Office system client

Estimated time to complete this lab: 90 minutes

Before You Begin

Virtual PC

This lab makes use of Microsoft Virtual PC 2004, an application that allows you to run multiple virtual machines on one physical computer. During the lab, you will switch between different windows, each containing a separate virtual machine running Microsoft Windows Server™ 2003 or Microsoft Windows® XP.

Before you start the lab, familiarize yourself with the following basics of Virtual PC:

- To switch the focus for your mouse and keyboard to the virtual machine, click inside the virtual machine window.
- To remove the focus from a virtual machine, move the mouse pointer outside the virtual machine window.
- To issue the CTRL+ALT+DELETE keyboard combination inside a virtual machine, use RIGHT-ALT+DELETE instead. Virtual PC designates the RIGHT-ALT key as the Host key.
- To enlarge the size of the virtual machine window, drag the lower-right corner of the window.
- To switch to and from full-screen mode, press RIGHT-ALT+ENTER.

To Start the Lab

Before you can perform any of the lab exercises, you must start the virtual machines and then log on to the computer. If an error message warns you that the disk's parent appears to have been modified, click OK to continue. This error message appears when you move Virtual PC images between computers with different time-zone settings.

Important If a service startup error appears on SEA-SRV1 during the startup process, check to ensure that all Automatic services have started as expected. If you attempt to start all three virtual machines at one time, it is common for the Exchange Information Store to time out.

You should fully start SEA-DC1 first before starting any other virtual machines.

Note These demonstrations have been developed using beta software. If a specific task results in an error message or a time-out screen, try performing the task again. The task will most likely be completed successfully on the second attempt.

Exercise 1: Managing Portals

Office SharePoint Server 2007 provides many advanced functions for portals, such as Web Parts and security. These advanced functions reduce or eliminate the need for custom code when creating a portal. In this exercise, you learn how to use Site Manager.

Managing Portals	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on SEA-CL1 as **Paul** with a password of **Pa$$w0rd**.
1. Open http://sea-srv1, and then access Site Manager.	**a.** Click **Start**, point **All Programs**, and then click **Internet Explorer**. **b.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER. **c.** Click **Site Actions**, and then click **Manage Content and Structure**.
2. Copy the **Contacts** site underneath **Sales**.	**a.** In the left-hand pane, click to expand **Sales**. Notice that the Sales site does not have a Contacts list. **b.** If necessary, in the left-hand pane, click **Home**. **c.** In the Details pane, click the check box next to the **Contacts** list. **d.** Click **Actions**, and then click **Copy**. **e.** In the **Copy Web Page Dialog** box, click **Sales**, and then click **OK**.
3. Delete the **Contacts** site.	**a.** In the left pane, click **Sales**. **b.** In the details pane, click the check box next to **Contacts**. **c.** Click **Actions**, and then click **Delete**. **d.** Click **OK**. **e.** Close Internet Explorer. **f.** Close all windows.

Exercise 2: Audience Targeting

Personalizing content based on audiences is one of the advanced portal features included in Office SharePoint Server 2007. You can use this feature to present the most relevant information to portal users. In this exercise, you will learn how to create audiences and target content.

Task 2-1: Creating an Audience

Audiences are used for targeting content. An audience can be based on user profile properties, Active Directory® directory service groups, or reporting to a particular manager. In this task, you create an audience.

Creating an Audience	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ If necessary, log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open the shared services administration site.	**a.** Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**. **b.** Click **Application Management**. **c.** Under **Office SharePoint Server 2007 (Beta) Shared Services**, click **Create or Configure this Farm's Shared Services**. **d.** Click **SharedServices1 (Default)**.
2. Create a new audience for the **IT** department.	**a.** Under the **User Profiles, Audiences, and Personal Sites** heading, click **Audiences**. **b.** Click **Create audience**. **c.** In the **Name** box, type **IT**. **d.** In the **Description** box, type **IT Department Staff**. **e.** Click **OK**.
3. Configure a rule to include users that are in the **IT** department.	**a.** In the **Operand** area, click **Property**. **b.** In the **Property** list, click **Department**. **c.** In the **Value** box, type **IT**. **d.** Click **OK**.
4. Schedule compilation of audiences to happen each day, and then force compilation to happen now.	**a.** In the link above the **View Audience Properties: IT** heading, click **Manage Audiences**. **b.** Click **Specify compilation schedule**. **c.** Click **Enable scheduling**. **d.** Click **Every day**. **e.** Click **OK**. **f.** On the Manage Audiences page, click **Start compilation**. **g.** Close all windows.

Task 2-2: Targeting Content

Targeted content lets you give users just the information they need. This is essential for a well-designed portal. Users will stop using a portal if it is cluttered with information they do not want or need. In this task, you target content.

Targeting Content	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ If necessary, log on to SEA-CL1 as **Paul** with a password of **Pa$$w0rd**.
1. Add a Links Web Part to the main portal page.	**a.** Click **Start**, point **All Programs**, and then click **Internet Explorer**. **b.** In the Address bar, type **http://sea-srv1**, and then press ENTER. **c.** Click **Site Actions**, and then click **Edit Page**. **d.** In the **Bottom Zone**, click **Add a Web Part**. **e.** In the **Add Web Parts Web Page Dialog** box, click the **Links** option, and then click **Add**.
2. Add a link to the Links Web Part.	**a.** In the bottom zone, in the **Links** list, click **Add a new link**. **b.** In the **Type the Web address** box, type **http://www.microsoft.com/support**. **c.** In the **Type the description** box, type **Microsoft Support**. **d.** Click **OK**.
3. Edit the Links Web Part, and then target the **IT** audience.	**a.** Click the down arrow to the right of the **Links Web Part**, and then click **Modify Shared Web Part**. **b.** On the right-hand pane, expand **Advanced**, and then scroll to the bottom of the list. **c.** In the **Target Audiences** box, click **Browse**. **d.** In the text box next to Global Audiences, type **IT**, and then click the **Execute Search** button. **e.** In the results list, click **IT** and then click **Add**. Click **OK**. **f.** Click **OK** to return to the Home page.

(*continued*)

Targeting Content	
Tasks	**Detailed Steps**
4. Approve the page.	**a.** At the top of the home page, click **Submit for Approval**. **b.** Click **Approve**.
5. Log on as **Susan** and **Anna** to test the targeting. Anna is not in the IT group.	**a.** At the top of the page, click **Welcome Paul Koch**, and then click **Sign in as Different User**. **b.** Log on as **Contoso\Susan** with a password of **Pa$$w0rd**. **c.** At the top of the page, click **Welcome Susan Burk**, and click **Sign in as Different User**. **d.** Log on as **Contoso\Anna** with a password of **Pa$$w0rd**. **e.** Click **Welcome Anna Lidman**, and click **Sign Out**. **f.** Click **Yes** to close the window. **g.** Log off of SEA-CL1.

Additional Tasks

If time permits, complete the following tasks to learn more about content targeting in Office SharePoint Server 2007:

- Create an additional audience based on an Active Directory group.
- Target a list item to a group.

Exercise 3: Building Personal SharePoint Sites

My Site is a personal SharePoint site that users can create and manage for themselves. It can act as a personal portal where users keep links and documents so that they are available from any computer. It also contains a personal home page where users can make their information available to others. In this exercise, you create My Site for a user, configure a user profile, and configure and test privacy settings.

Task 3-1: Creating My Site

You can control how My Site is created and which users are allowed to create My Site. In this task, you learn how to configure My Site creation and create My Site for a user.

Creating My Site	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ If necessary, log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open the shared services administration site.	**a.** Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**. **b.** Click **Application Management**. **c.** Under **Office SharePoint Server 2007 (Beta) Shared Services**, click **Create or Configure this Farm's Shared Services**. **d.** Click **SharedServices1 (Default)**.
2. View the service permissions for **NT AUTHORITY\Authenticated Users**.	**a.** Click **Personalization services permissions**. **b.** Click **NT AUTHORITY\Authenticated Users**. **c.** Click **Cancel**.
3. Change the naming format for personal sites to include the domain name.	**a.** Click **Personal sites settings**. **b.** In the **Site Naming Format** area, click **Domain and user name (will not have conflicts)**. **c.** Click **OK**. **d.** Close all open windows.
4. Log on as **Anna**, and then create a personal site.	**a.** Log on to SEA-CL1 as **Anna** with a password of **Pa$$w0rd**. **b.** Click **Start**, point to **All Programs**, and then click **Internet Explorer**. **c.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER. **d.** At the top of the page, click **My Site**. It may take several minutes to complete this task. **e.** At the **Configure My Site for Microsoft Office** message box, click **Yes**.

Task 3-2: Configuring a User Profile

User profiles allow users to define information about themselves. This ensures that user information is up to date and allows users to control which parts of their information are available to others. Profile information can also be used for building audiences to target portal content. In this task, you edit user profile properties.

Configuring a User Profile	
Tasks	**Detailed Steps**
1. View Anna's settings.	**a.** Click **Welcome Anna Lidman**, and then click **My Settings**. **b.** Click **Close**.
2. View Anna's user profile settings, and then add some information.	**a.** In the left pane, under **My Information**, click **Details**. **b.** In the **Skills** area, type **Visual Basic**. **c.** In the **Interests** area, type **Mountain Biking**.
3. Add a cell phone number for Anna.	**a.** In the **Cell phone** area, type **555-1234**. **b.** At the top of the page, click **Save and Close**.

Task 3-3: Configuring Privacy Settings

My Public Page is the information others can view about you. You can control which user properties are visible by editing your details. You can also target content on your public page by using privacy controls.

Configuring Privacy Settings	
Tasks	**Detailed Steps**
1. Configure the **Cell phone** property so that only Anna's manager can view it.	**a.** In the left menu, under **My information**, click **Details**. **b.** In the **Mobile phone** area, change the privacy setting to **My Manager**. **c.** At the top of the page, click **Save and Close**.
2. View Anna's **My Public Page**.	▪ Click **My Profile**.
3. View Anna's **My Public Page** as Anna's manager would see it.	**a.** In the **As seen by** box, select **My Manager**. **b.** Click the **My Home** link at the top of the page

Additional Tasks

If time permits, complete the following tasks to learn more about personal SharePoint sites in Office SharePoint Server 2007:

- Create a personal blog in a personal SharePoint site.
- Test the My SharePoints Roll-Up Web Part by creating documents in several document libraries.

Exercise 4: Using the Colleagues Web Part

One of the components included in Office SharePoint Server 2007 to enhance social networking is the Colleagues Web Part. The Colleagues Web Part lets you see information about your colleagues, including sites they are a member of and documents they are working on.

Using the Colleagues Web Part

Tasks	**Detailed Steps**
SETUP STEPS ONLY	**a.** If necessary, log on to SEA-CL1 as **Anna** with a password of **Pa$$w0rd**. **b.** Click **Start**, point to **All Programs**, and then click **Internet Explorer**. **c.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER. **d.** Click **My Site** in the upper-right corner.
1. View the colleagues in your user profile.	**a.** In the left pane, under **My Information**, click **Colleagues**. **b.** Click **Add Colleagues**. **c.** In the **Type Name(s)** box, type **Jeff; Susan**, and then click the **Check Names** button.
2. Select colleagues to add to your workgroup.	▪ In the **Privacy and Grouping** section, under **Add Colleagues to My Work Group**, click **Yes**
3. Create an IT group in your Colleagues list.	**a.** Under **Grouping**, click **New Group**. **b.** In the **New Group** box, type **IT**. **c.** Click **OK**.
4. View My Site.	**a.** In the link above the **My Colleagues** heading, click **My Site**. **b.** Click **Show all colleagues**.
5. Remove the unnecessary alert settings from the Colleagues Web Part.	**a.** Click **Modify alert settings**. **b.** In the **Colleague Tracker** pane, expand **Alert Settings** and then clear the **Key Property Changes** check box. **c.** Clear the **Anniversaries** check box. **d.** Clear the **Out of Office** check box. **e.** Click **OK**.
6. View the My Site for **Susan**.	**a.** Click **Susan Burk**. **b.** Close all open windows. **c.** Log off of SEA-CL1.

Exercise 5: Managing Search

To make search effective for your organization, you must understand the options available for configuration. Content sources control which information is indexed. Crawl rules control which content within a source is indexed. Search scope lets you divide indexed content into logical units to make searching more effective. In this exercise, you will learn how to configure content sources, crawl content, and configure search scopes.

Task 5-1: Configuring Content Sources

A content source is information that is indexed for searching. Information in Office SharePoint Server 2007 is automatically included as a content source. However, you can include additional content sources such as file shares, business data, external Web sites, and Exchange Public folders.

Configuring Content Sources	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ If necessary, log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open shared services administration site.	**a.** Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**. **b.** Click **Application Management**. **c.** Under **Office SharePoint Server 2007 Shared Services**, click **Create or Configure this Farm's Shared Services**. **d.** Click **SharedServices1 (Default)**.
2. Begin adding a content source.	**a.** Under the **Search** heading, click **Search settings**. **b.** Click C**ontent sources**. **c.** Click **Add Content Source**.
3. Add **\\SEA-SRV1\SharePointDocs** as a content share.	**a.** In the **Name** box, type **SharePointDocs**. **b.** Click the **File Shares** content source type. **c.** In the **Type start addresses below** box, type **\\SEA-SRV1\SharePointDocs**. **d.** Click **OK**.
4. View the configuration of the **My Office SharePoint Servers** content source.	**a.** Click the drop-down menu next to **SharedServices1's Office Server**. **b.** Click **View Crawl Log**. **c.** In the left menu, click **Back to Search Settings**.

Task 5-2: Configuring Crawling

Crawling content sources produces an index that is used for searching. You can configure to include only the content that you want by using crawling rules. In addition, you control the schedule for when crawling happens. In this task, you will configure crawling.

Configuring Crawling

Tasks	**Detailed Steps**
1. View the crawl settings for **SharePointDocs**.	**a.** Click C**ontent sources**. **b.** Click **SharePointDocs**.
2. Configure an incremental crawl every 20 minutes.	■ Under the **Crawl Schedules** section, in the **Incremental Crawl** box, select **Every 20 minutes**.
3. Force a full crawl of **SharePointDocs**.	**a.** In the **Start Full Crawl** section, select the **Start full crawl of this content source** check box. **b.** Click **OK**. **c.** Click **Refresh**.
4. Use a crawl rule to exclude content from **SEA-SRV1\SharePointDocs\Working Files**.	**a.** Click **Back to Search Settings**. **b.** Click **Crawl rules**. **c.** Click **Add Crawl Rule**. **d.** In the **Path** box, type **SEA-SRV1\SharePointDocs\Working Files**. **e.** Ensure that **Exclude all items in this path** is selected. **f.** Click **OK**.
5. Force a new full crawl of **SharePointDocs**.	**a.** Click **Back to Search Settings**. **b.** Click C**ontent sources**. **c.** Position the mouse pointer over **SharePointDocs** until a drop-down arrow appears, click the arrow, and then click **Start Full Crawl**. (If a crawl is taking place, wait for it to complete, and then perform this step.)
6. Verify that crawling has completed properly.	**a.** Click **Back to Search Settings**. **b.** Click **Crawl logs**. **c.** Click **sea-srv1**. **d.** Click **Back to Search Settings**.

Task 5-3: Configuring a Search Scope

Search scopes let you control which part of the crawled content is being searched. In this task, you will configure a search scope.

Configuring a Search Scope	
Tasks	**Detailed Steps**
1. Begin creating a shared search scope.	**a.** Under Global Scopes, click **view scopes**. **b.** Click **New Scope**.
2. Configure the scope to be displayed in the **Search** list and in **Advanced Search**.	**a.** In the Title box, type SharePoint Docs. **b.** In the **Description** box, type **SharePoint information**. **c.** Click **OK**.
3. Add a rule to limit the scope to documents contained in the **SharePointDocs** source.	**a.** Position the mouse pointer over **SharePoint Docs** until a down arrow appears, click the arrow, and then click **View Properties and Rules**. **b.** Under the **Rules** heading, click **New rule**. **c.** Click the **Content Source** option. **d.** Configure the **Content Source** for **SharePointDocs**. **e.** Click **OK**.
4. Force the scope to compile.	**a.** Click **Back to View Scopes**. **b.** Click **Back to Search Settings**. **c.** Under **Global Scopes**, click **Start update now**.
5. Go to Search Center, and then test the **SharePoint Docs** scope.	**a.** Log on to SEA-CL1 as **Administrator** with the password of **Pa$$w0rd**. **b.** Open Internet Explorer and go to **http://SEA-SRV1**. **c.** Click **Search Center**. **d.** In the drop-down list, click **SharePoint Docs**. **e.** Click **Advanced Search**. **f.** In the **All of these words** box, type **document**. **g.** Click the **SharePoint Docs** option. **h.** Click **Search**.

Additional Tasks

If time permits, complete the following tasks to learn more about content targeting in Office SharePoint Server 2007:

- Create a file share and configure it to be crawled.
- Create a schedule for crawling content.
- Use crawl rules to exclude all .txt files.
- Configure and view the query reports for your server.

Exercise 6: Search Relevance

Office SharePoint Server 2007 includes a variety of mechanisms for enhancing search relevance. Two of the most important are results collapsing and keywords. In this exercise, you see results collapsing and how to configure keywords.

Task 6-1: Results Collapsing

Results collapsing combines duplicated or similar results into a single item in your search results. This helps ensure that the results you need to see make it to the top of the results list. In this task, you will see how results collapsing works.

Results Collapsing	
Tasks	**Detailed Steps**
1. Search for **crawl** in Search Center.	**a.** Click **Search Center**. **b.** Type **crawl** in the **Search** box, and click the **Search** arrow to begin the search.
2. View the duplicates.	▪ Under the first item, click **View duplicates**.

Task 6-2: Configuring Keywords

Keywords are a mechanism that you can use to control search results. For each keyword, you can include a definition and a best bet. Both of these help you return useful information to your users. In this task, you will learn how to configure keywords.

Configuring Keywords	
Tasks	**Detailed Steps**
1. Search for **crawll** in Search Center.	**a.** Click **Search Center**. **b.** Type **crawll** in the **Search** box, and then click the **Search** arrow to begin the search.
2. Search for **index** in Search Center.	▪ Type **index** in the **Search** box, and then click the arrow to begin the search.
3. Open the search keyword configuration.	**a.** Click the **Home** page. **b.** Click **Site Actions**, point to **Site Settings**, and then click **Modify All Site Settings**. **c.** Under Site Collection Administration, click **Search keywords**.
4. Add **index** as a keyword, with the synonym **indexing**.	**a.** Click **Add Keyword**. **b.** In the **Keyword Phrase** box, type **index**. **c.** In the **Synonyms** box, type **indexing**.

(***continued***)

Configuring Keywords	
Tasks	**Detailed Steps**
5. Add a best bet that points to the crawl search results.	**a.** Click **Add Best Bet**. **b.** In the **URL** box, type **http://sea-srv1/SearchCenter/Pages/results.aspx?k=crawl&s=All%20Content**. **c.** In the **Title** box, type **Crawl Search Results**. **d.** In the **Description** box, type **Use this link to see search results using the term crawl**. **e.** Click **OK**.
6. Add a definition that states that **Crawl is another term used instead of index**.	▪ In the definition box, type **Crawl is a commonly used term instead of index.**
7. Save the new keyword.	▪ Click **OK**.
8. Test the new keyword by searching for **index** in Search Center.	**a.** Click **Search Center**. **b.** Type **index** in the **Search** box, and then click the arrow to begin the search. **c.** Click **http://sea-srv1/SearchCenter/Pages/results.aspx?k=crawl&s=All Content**. **d.** Shut down all virtual machines without saving changes.

Additional Tasks

If time permits, complete the following tasks to learn more about search relevance in Office SharePoint Server 2007:

- Create an additional keyword, and then test it.
- Add an expiration date to a keyword.
- Configure an authoritative source.

Lab 4: Business Solutions Using Office SharePoint Server 2007

Objectives

After completing this lab, you will be able to:

- Describe Business Data Catalog in Microsoft® Office SharePoint® Server 2007.
- Describe Forms Server in Office SharePoint Server 2007.
- Describe Excel Services in Office SharePoint Server 2007.
- Describe Report Center in Office SharePoint Server 2007.

Scenario

You are the network administrator for Contoso, Ltd. The company uses SharePoint Portal Server 2003, but it is planning on deploying Office SharePoint Server 2007 to use enhanced features for enterprise content management, search, business intelligence, and business process management. In preparation for the migration, you need to understand the business solutions features of Office SharePoint Server 2007.

Lab Components

This lab includes two components:

- Exercises—The exercises include detailed step-by-step instructions and are required. The exercises cover the core information needed to meet the lab objectives.
- Additional Tasks—The additional tasks are listed at the end of an exercise and provide tasks that you can perform to extend your learning about the product. The additional tasks do not provide step-by-step instructions, but they are similar to the steps that you performed in the exercises. The additional tasks are optional, but it is recommended that you complete them to gain a fuller understanding of the product.

Computers

This lab uses three virtual machines performing the following roles:

- 3370A-3374A-SEA-DC1
  - Domain controller
  - Exchange server
- 3370A-3374A-SEA-SRV1
  - Microsoft Office SharePoint Server 2007 Web front-end and application server
  - Database server
- 3370A-3374A-SEA-CL1
  - 2007 Microsoft Office system client

Estimated time to complete this lab: 90 minutes

Before You Begin

Virtual PC

This lab makes use of Microsoft Virtual PC 2004, an application that allows you to run multiple virtual machines on one physical computer. During the lab, you will switch between different windows, each containing a separate virtual machine running Microsoft Windows Server™ 2003 or Microsoft Windows® XP.

Before you start the lab, familiarize yourself with the following basics of Virtual PC:

- To switch the focus for your mouse and keyboard to the virtual machine, click inside the virtual machine window.
- To remove the focus from a virtual machine, move the mouse pointer outside the virtual machine window.
- To issue the CTRL+ALT+DELETE keyboard combination inside a virtual machine, use RIGHT-ALT+DELETE instead. Virtual PC designates the RIGHT-ALT key as the Host key.
- To enlarge the size of the virtual machine window, drag the lower-right corner of the window.
- To switch to and from full-screen mode, press RIGHT-ALT+ENTER.

To Start the Lab

Before you can perform any of the lab exercises, you must start the virtual machines and then log on to the computer. If an error message warns you that the disk's parent appears to have been modified, click OK to continue. This error message appears when you move Virtual PC images between computers with different time-zone settings.

Important If a service startup error appears on SEA-SRV1 during the startup process, check to ensure that all Automatic services have started as expected. If you attempt to start all three virtual machines at one time, it is common for the Exchange Information Store to time out.

You should fully start SEA-DC1 first before starting any other virtual machines.

Note These demonstrations have been developed using beta software. If a specific task results in an error message or a time-out screen, try performing the task again. The task will most likely be completed successfully at the second attempt.

Exercise 1: Using Business Data Catalog

Office SharePoint Server 2007 includes Business Data Catalog to integrate business data into SharePoint sites. After you configure the connection to your application, you can display and interact with business data from line-of-business applications. In this exercise, you configure an application, use Web Parts to view business data, and learn how to search business data.

Task 1-1: Configuring an Application

Business Data Catalog applications define how Business Data Catalog connects to the business data and how the business data is structured. In this task, you will learn how to configure the application.

Configuring an Application	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-SRV1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open **BDCAW.xml** in Notepad.	**a.** Click **Start**, point to **All Programs**, point to **Accessories**, and then click **Notepad**. **b.** Click the **File** menu, and then click **Open**. **c.** In the **Files of type** list, click **All Files**. **d.** Browse to **D:\Labfiles\Search**, and then double-click **BDCAW.xml**.
2. Configure the database server and instance in the XML file.	▪ In the **RdbConnection Data Source** property, replace the value **SERVER\INSTANCE** with **SEA-SRV1\OFFICESERVERS**.
3. Configure the name of the database that you are connecting to.	**a.** In the **RdbConnection Initial Catalog** property, replace the value **DBNAME** with **AdventureWorks2000**. **b.** Close Notepad, and then click **Yes** to save the changes.
4. Open shared services administration site.	**a.** Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**. **b.** Click **Application Management**. **c.** Under **Office SharePoint Server 2007 (Beta) Shared Services**, click **Create or Configure this Farm's Shared Services**. **d.** Click **SharedServices1 (Default)**.
5. Create a Business Data Catalog application by importing **BDCAW.xml**.	**a.** Under **Business Data Catalog**, click **Add application**. **b.** Click the **Browse** button. **c.** Browse to **D:\Labfiles\Search**, and then double-click **BDCAW.xml**. **d.** Click **Import**. This will take several minutes to complete. **e.** On the **Import successful** page, click **OK**.

(*continued*)

Configuring an Application	
Tasks	**Detailed Steps**
6. Configure the application to run as a server process account.	**a.** On the **View Application** page, under **Application Settings**, click **Change Settings**. **b.** In the **Access Account** section, select **Server process account**. **c.** Click **OK**.
7. Assign users view permissions to the **Customer** entity.	**a.** In the **Entities** section, position the mouse pointer over **Customer** until a down arrow appears, click the down arrow, and then click **Manage Permissions**. **b.** Click **Add Users/Groups**. **c.** In the **Users/Groups** box, type **NT authority\authenticated users**, and then click the **Check Names** button. **d.** In the **Choose Permissions** section, click the **View Items** option. **e.** Click **Save**. **f.** On the links above the **Manage Permissions: Customer** heading, click **AdventureWorksSample**.
8. Assign users view permissions to the **Product** entity.	**a.** In the **Entities** section, position the mouse pointer over **Product** until a down arrow appears, click the down arrow, and then click **Manage Permissions**. **b.** Click **Add Users/Groups**. **c.** In the **Users/Groups** box, type **NT authority\authenticated users**, and then click the **Check Names** button. **d.** Check the **View Items** option. **e.** Click **Save**. **f.** On the links above the **Manage Permissions: Product** heading, click **AdventureWorksSample**.
9. Assign users view permissions to the **SalesOrder** entity.	**a.** In the **Entities** section, position the mouse pointer over **SalesOrder** until a down arrow appears, click the down arrow, and then click **Manage Permissions**. **b.** Click **Add Users/Groups**. **c.** In the **Users/Groups** box, type **NT authority\authenticated users**, and then click the **Check Names** button. **d.** Check the **View Items** option. **e.** Click **Save**. **f.** On the links above the **Manage Permissions: Sales Order** heading, click **AdventureWorksSample**.

Task 1-2: Using Web Parts to Access Business Data

Several Web Parts are included in Office SharePoint Server 2007 specifically for accessing business data through Business Data Catalog. In this task, you will see how to build a product explorer application for Adventure Works without writing any code.

Configuring an Application	
Tasks	**Detailed Steps**
SETUP STEPS ONLY	▪ Log on to SEA-CL1 as **Administrator** with a password of **Pa$$w0rd**.
1. Open http://sea-srv1.	**a.** Click **Start**, point **All Programs**, and then click **Internet Explorer**. **b.** In the **Address** bar, type **http://sea-srv1**, and then press ENTER.
2. Create a new **Product Explorer** site using the **Blank Site** template.	**a.** Click **Site Actions**, and then click **Create Site**. **b.** In the **Title** box, type **Product Explorer**. **c.** In the **URL name** box, type **productexplorer**. **d.** In the **Select a template** box, select **Blank Site**. **e.** Click **Create**.
3. Add the Business Data List Web Part.	**a.** On the **Product Explorer** page, click **Site Actions**, and then click **Edit Page**. **b.** In the **Left** zone, click **Add a Web Part**. **c.** Click the **Business Data List** option, and then click **Add**.
4. Configure that Business Data List Web Part to retrieve the product list from the business data.	**a.** In the **Business Data List** Web part, click **Open the tool pane**. **b.** On the **Business Data List** pane, under **Type**, click the **Browse** button. **c.** In the **Business Data Type Picker**, select **AdventureWorksSample: Product**. Click **OK**. **d.** Expand **Appearance**. **e.** In the **Title** box, type **Products from AdventureWorks**. **f.** Click **OK**. **g.** Click Exit Edit Mode.

Exercise 2: Using Forms Server

Collecting and processing paper-based forms is difficult and time consuming. Forms Server lets you collect form information electronically. This makes data collection faster, easier, and more accurate. Browser-enabled forms extend the reach of your electronic data collection beyond the wall of your organization and out onto the Internet. In this exercise, you create, deploy, and access a Web-enabled form.

Task 2-1: Creating a Form

All forms are created in the Microsoft Office InfoPath® client. In this task, you create a form and ensure that it is compatible with browser formatting.

Creating a Form

Tasks	Detailed Steps
1. Open **StatusReport** in Office InfoPath 2007.	**a.** Log on to SEA-CL1 as **Paul** with a password of **Pa$$w0rd**. **b.** Click **Start**, point to **All Programs**, point to **Microsoft Office**, and then click **Microsoft Office InfoPath 12**. **c.** Under **Design a form**, click **Design a Form**. **d.** Under **Open a form template**, click **On My Computer**. **e.** Browse to **D:\Labfiles\Paul**, and then click **StatusReport**. Click **Open**. **f.** Click **OK** to close the warning message.
2. Use Design Checker to ensure that this form is compatible as a browser-enabled form.	**a.** At the top of the **Design Tasks** pane, click the drop-down arrow, and then click **Design Checker**. **b.** Click **Change compatibility settings**. **c.** Under **Browser compatibility**, click the check box next to **Design a form which can run in a Web browser or in InfoPath**. **d.** Click **OK**.
3. Fix the compatibility issues on the form by replacing the bulleted lists.	**a.** Right-click the **Last Period Bulleted List**, point to **Change To**, and then click **Repeating Section**. **b.** Right-click the **This Period Bulleted List**, point to **Change To**, and then click **Repeating Section**. **c.** Right-click the **Issues Bulleted List**, point to **Change To**, and then click **Repeating Section**. **d.** In **Design Checker**, click **Refresh**.
4. Save the form template.	**a.** Click **File**, and then click **Save**. **b.** Click **OK** to close the message box containing information about publishing the template. **c.** In the **File name** box, type **StatusReport2**. **d.** Click **Save**.

Task 2-2: Publishing a Form

You can publish forms directly from the Office InfoPath client if they do not contain additional code. If forms do contain additional code, you must publish them through the SharePoint site.

Publishing a Form	
Tasks	**Detailed Steps**
1. Publish the form template to the **Labs** share on SEA-SRV1.	**a.** On SEA-CL1, click **File**, and then click **Publish**. **b.** Click **To a network location**, and then click **Next**. **c.** In the **Form template path and file name** box, type **\\SEA-SRV1\ Labs\StatusReport.xsn**, and then click **Next**. **d.** Clear the location, and then click **Next**. Click **Publish**. **e.** Click **Close**. **f.** Log off of SEA-CL1.
2. Verify the form in Central Administration.	**a.** Log on to SEA-SRV1 as **Administrator** with the password of **Pa$$w0rd**. **b.** Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**. **c.** Click **Application Management**. **d.** Under **Office Forms Server 2007 (Beta)**, click **Upload form template**. **e.** In the **Deploy Form Template** section, click **Browse**. **f.** Browse to **D:\Labfiles**, and then double-click **StatusReport.xsn**. **g.** Click **Verify**. **h.** Click **OK**.
3. Upload the form.	**a.** In the **Deploy Form Template** section, click **Browse**, browse to **D:\Labfiles**, and then double-click **StatusReport.xsn**. **b.** Click **Upload** and then click **OK**.

(*continued*)

Publishing a Form	
Tasks	**Detailed Steps**
4. Activated the form to a site collection so that it is available to users.	**a.** In the Manage Form Templates page, position the mouse pointer over **StatusReport.xsn** until a down arrow appears, click the down arrow, and then click **Active to a Site Collection**. **b.** In the **Activation Location** section, next to **Site Collection**, click the site link. **c.** Click **Change Site Collection**. **d.** In the **Select Site Collection** dialog box, click the site link next to **Web Application**. **e.** Click **Change Web application**. **f.** From the **Select Web Application** dialog box, select **SharePoint (80)**. **g.** At the **Select Site Collection** dialog box, click **OK**. **h.** The **Site Collection** box should now read **http://sea-srv1**. **i.** Click **Activate**. **j.** Close all open windows.

Task 2-3: Accessing a Form

Forms that are published to a SharePoint library open in the Office InfoPath 2007 client automatically if it is available. However, you can force users to open a form in a browser. In this task, you access a browser-enabled form.

Accessing a Form

Tasks	Detailed Steps
1. Open the form template library for **Home**.	**a.** Log on to SEA-CL1 as **Administrator** with the password of **Pa$$w0rd**. **b.** On SEA-CL1, click **Start** and then click **Internet**. **c.** In the Address bar, type **http://SEA-SRV1**. **d.** On the left menu, click **View All Site Content**. **e.** Under **Document Libraries**, click **Form Templates**. **f.** On the left menu, click **View All Site Content**.
2. Force a form to be viewed in a browser instead of in the Office InfoPath 2007 client.	**a.** Click **Create**. **b.** Under **Libraries**, click **Form Library**. **c.** In the **Name** box, type **Status Reports**. **d.** Click **Create**. **e.** Click **Settings**, and then click **Form Library Settings**. **f.** Under **General Settings**, click **Advanced settings**. **g.** In the **Content Types** area, click **Yes**. **h.** In the **Browser-enabled Documents** area, select **Display as Web page**. **i.** Click **OK**.
3. Add **StatusReport** to the new forms library as a content type.	**a.** Under **Content Types**, click **add from existing site content types**. **b.** In the **Available Site Content Types** box, click **StatusReport**, click **Add**, and then click **OK**. **c.** In the Web links above the **Customize Status Reports** heading, click **Status Reports**.
4. Create a new **StatusReport**.	**a.** Click **New**, and then click **StatusReport**. **b.** Close Internet Explorer.

Additional Tasks

If time permits, complete the following tasks to learn more about Forms Server in Office SharePoint Server 2007:

- Create a new form from scratch.
- Publish a form directly from Office InfoPath to the Forms Server.
- Configure a universal data connection for a form that points to a SharePoint library.

Exercise 3: Publishing an Excel Spreadsheet

Excel Services allows you to perform spreadsheet calculations on a server and interact with spreadsheets through a Web browser. This lets users remotely access spreadsheets from anywhere they have Internet access. In addition, you can secure spreadsheets used by Office Excel 2007 clients. In this exercise, you configure a file-trusted location, publish a spreadsheet, and view that spreadsheet in a Web browser.

Task 3-1: Configuring a Trusted Location

Excel Services requires files to be published in a file-trusted location. By default, no locations are trusted locations. You must configure trusted locations. In this task, you create a file-trusted location.

Configuring a Trusted Location	
Tasks	**Detailed Steps**
1. Open shared services administration, and then manage the file-trusted locations.	**a.** If necessary, log on to SEA-SRV1 as **Administrator** with the password of **Pa$$w0rd**. **b.** Click **Start**, point to **All Programs**, point to **Microsoft Office Server**, and then click **SharePoint 3.0 Central Administration**. **c.** Click **Application Management**. **d.** Under **Office SharePoint Server 2007 (Beta) Shared Services**, click **Create or Configure this Farm's Shared Services**. **e.** Click **SharedServices1 (Default)**. **f.** Under **Excel Services Settings**, click **Trusted file locations**.
2. Add **http://sea-srv1/Reports/ Documents** as a file-trusted location.	**a.** Click **Add Trusted File Location**. **b.** In the **Address** bar, type **http://sea-srv1/Reports/ Documents**. **c.** Click the **Children trusted** option. **d.** In the **Description** box, type **Report Library**. **e.** Click **OK**. **f.** Click **Home**.

Task 3-2: Publishing a Spreadsheet

Spreadsheets for Excel Services cannot be simply copied to the file-trusted location. Spreadsheets for Excel Services must be published to a file-trusted location. Publishing a spreadsheet allows you to specify which cells can be modified. In this task, you publish and view a spreadsheet.

Publishing a Spreadsheet	
Tasks	**Detailed Steps**
1. Assign cell names to variables in the spreadsheet.	**a.** On SEA-CL1, click **Start**, point to **All Programs**, point to **Microsoft Office**, and then click **Microsoft Office Excel 12**. **b.** Click the File button in the upper-left corner, and then click **Open**. **c.** Browse to **D:\Labfiles\Paul**, and then double-click **Sales**. **d.** Select cell **B1**, and then type **Year1** in the label box. (The box above Cell A.) **e.** Select cell **B2**, and then type **Year2** in the label box. **f.** Select cell **B3**, and then type **Year3** in the label box.
2. Publish the spreadsheet, and then specify that the named cells can be edited.	**a.** Click the File button in the upper-left corner, point to **Save As**, and click **Excel Services**. **b.** In the **Save As** box, click **Excel Services Options**. **c.** On the **Show** tab, select **Sheets** in the drop-down list. **d.** Clear all options except **Sheet 1**. **e.** On the **Parameters** tab, click **Add**. **f.** Click the **Year1**, **Year2**, and **Year3** options. **g.** Click **OK**. **h.** Click **OK**.
3. Select the reports document library for the spreadsheet.	**a.** In the **File name** box, type **http://sea-srv1/Reports/Documents/sales**. **b.** Click **Save**. **c.** Click **OK** to check the document in. Click **OK** again at the **Edit Offline** message. **d.** If you get an error stating that you cannot view the published workbook, repeat step 2. Overwrite the file when prompted.

(*continued*)

Publishing a Spreadsheet	
Tasks	**Detailed Steps**
4. Test the spreadsheet.	**a.** In the **Year 1** box, type **10000**. **b.** In the Year 2 box, type **2500**. **c.** In the Year 3 box, type **3500**. **d.** Click **Apply**. **e.** Close all open windows.

Additional Tasks

If time permits, complete the following tasks to learn more about Excel Services in Office SharePoint Server 2007:

- Configure a file share as a file-trusted location.
- Publish a spreadsheet in a file share through Excel Services.
- Add a spreadsheet to a Web page by using the Excel Web Access Web Part.

Exercise 4: Using Report Center

Office SharePoint Server 2007 uses Report Center as a hub for business intelligence. You can build reports that display the status of key performance indicators (KPIs). You can also filter Web Parts to vary the data displayed based on a wide variety of criteria such as regional statistics. In this exercise, you create a report and filter a Web Part.

Task 4-1: Creating a Report

Reports allow you to create a list of key performance indicators and track them over time. You can also view the status of those key performance indicators. In this task, you build a report.

Creating a Report

Tasks	Detailed Steps
1. View the reports library.	**a.** If necessary, log on to SEA-CL1 as **Administrator** with the password of **Pa$$w0rd**. **b.** Open Internet Explorer and in the **Address** bar, type **http://SEA-SRV1**. Press ENTER. **c.** Click **Reports**. **d.** On the left menu, click **Current Reports**.
2. Create a new report named **RegionalSales**.	**a.** Click **New**, and then click **Dashboard Page**. **b.** In the **File Name** box, type **RegionalSales**. **c.** In the **Page Title** box, type **Regional Sales**. **d.** Click **OK**.
3. Add a manual KPI named **Western Sales** to **RegionalSales**.	**a.** Click **Publish and Check In**. **b.** In the **KPI List** Web Part, click **New**, and then click **Indicator using manually entered information**. **c.** In the **Name** box, type **Western Sales**. **d.** In the **Value** box, type **100**. **e.** In the **when has met or exceeded goal** box, type **90**. **f.** In the **when has met or exceeded warning** box, type **50**. **g.** Click **OK**.
4. Change the value for **Western Sales**.	**a.** Click **Western Sales**. **b.** Click **Edit Indicator**. **c.** In the **Value** box, type **70**. **d.** Click **OK**.
5. View the previous versions of **RegionalSales**.	**a.** On the left menu, click **Current Reports**. **b.** Click **RegionalSales**. **c.** Close all open windows.

Task 4-2: Filtering a Web Part

Filtering a Web Part varies the data that is displayed. In many cases, this is useful for modifying the view of a Web Part to match your audience—for example, limiting displayed data to only relevant customers for a salesperson. In this task, you filter a Web Part.

Filtering a Web Part	
Tasks	**Detailed Steps**
1. Open the **MyModel** spreadsheet.	**a.** On SEA-CL1, click **Start**, point to **All Programs**, point to **Microsoft Office**, and then click **Microsoft Office Excel 12**. **b.** Click the **File** button, and then click **Open**. **c.** Browse to **D:\Labfiles\Paul**, and then double-click **MyModel2**.
2. Publish the spreadsheet so that it can be included in a Web page.	**a.** Click the File button in the upper-left corner, point to **Save As**, and then click **Excel Services**. **b.** On the **Save As** dialog box, click the **Excel Services Options** button. **c.** On the **Show** tab, select **Sheets** in the drop-down list. **d.** Clear all options except **Sheet1** and **Sheet2**. **e.** Click the **Parameters** tab, and then click **Add**. **f.** Click the **MyParam** option. **g.** Click **OK**.
3. Save the spreadsheet in the **Reports** document library so that it can be used easily for business intelligence.	**a.** In the **File name** box, type **http://sea-srv1/Reports/ Documents/MyModel**2. **b.** Click **Save**. **c.** Click **OK** to check the document in. Click **OK** again at the **Edit Offline** message. **d.** If you get an error stating that you cannot view the published workbook, repeat steps 2 and 3. Overwrite the file when prompted.
4. Click with **Sheet2** of the spreadsheet and filter to numbers to display **Above Average**.	**a.** Click **Sheet2**. **b.** Click the down arrow for **Quantity**, point to **Number Filters**, and then click **Above Average**.
5. Create a new **Multi Report Summary Page**.	**a.** In the upper left, click **Reports**. **b.** On the left menu, click **KPI Lists and Summary Pages**. **c.** Click the drop-down arrow next to **New**, and then click **New Multi Report Summary Page**. **d.** In the **File name** box, type **ExcelDemo**. **e.** Click **OK**.

(*continued*)

Filering a Web Part

Tasks	Detailed Steps
6. Insert **MyModel** into the Excel Web Access Web Part.	**a.** In the **Excel Web Access [1]** Web Part, click **Open the tool pane**. **b.** In the **Workbook to display** box, type **http://sea-srv1/Reports/Documents/MyModel.xlsx**. **c.** Expand **Appearance**. **d.** In the **Frame Style** box, select **None**. **e.** Click **OK**.
7. Add an **Authored List Filter** with the values **5**, **6**, and **7**.	**a.** In the **Filter Zone**, click **Add a Filter**. **b.** Click the **Authored Filter List** option, and then click **Add**. **c.** In the **Authored List Filter**, click **Open the tool pane**. **d.** In the **Filter Name** box, type **Excel Filter**. **e.** In the **Values** box, type **5; 6; 7;**, with each value on a separate line. **f.** Click **OK**.
8. Configure the connection between the **Authored Filter List** and the Excel Web Access Web Part.	**a.** Click the down arrow next to **Filter: Excel Filter**, point to **Connections**, point to **Send Filter Values To**, and then click **Excel Web Access – MyModel**. **b.** In the **Connection Type** box, select **Get Filter Values From**, and then click **Configure Connection**. **c.** In the **Filtered Parameter** box, select **MyParam**. **d.** Click **Finish**. **e.** In the upper right, click **Exit Design Mode**.
9. Test the filter.	**a.** In the **Excel Filter**, click **Browse**. **b.** Select **5**, and then click **OK**. **c.** Click **Apply Filters**. **d.** Shut down all virtual machines and do not save changes.

Additional Task

If time permits, complete the following task to learn more about Report Center in Office SharePoint Server 2007:

- Configure a KPI that pulls data from an Office Excel spreadsheet.