# SharePoint configuration guide

In this section, we provide details of the configuration of the CLIF system for SharePoint.

## Setting up the SharePoint site

### Creating the SharePoint web application

1. Click the Start button, point to All Programs, then point to Microsoft Office Server, and then click SharePoint 3.0 Central Administration.
2. On the Central Administration home page, click Application Management.
3. On the Application Management page, in the SharePoint Web Application Management section, click Create or extend Web application.
4. On the Create or Extend Web Application page, in the Adding a SharePoint Web Application section, click Create a new Web application.
5. On the Create New Web Application page, in the **IIS Web Site** section, you can configure the settings for your new Web application.
   1. On the Create New Web Application page, in the IIS Web Site section, you can configure the settings for your new Web application.
   2. To choose to create a new Web site, select Create a new IIS Web site, and type the name of the Web site in the Description box.
   3. In the Port box, type the port number you want to use to access the Web application. If you are creating a new Web site, this field is populated with a suggested port number. If you are using an existing Web site, this field is populated with the current port number.
   4. In the Host Header box, type the URL you wish to use to access the Web application. This is an optional field.
   5. In the Path box, type the path to the site directory on the server. If you are creating a new Web site, this field is populated with a suggested path. If you are using an existing Web site, this field is populated with the current path.
6. In the Security Configuration section, leave as it is.
7. In the Application Pool section, create a new application pool by selecting create a new application pool. In the Application pool name box, type the name of the new application pool.
8. In the Select a security account for this application pool section, select Predefined to use an existing application pool security account, and then select the security account from the drop-down menu.
9. Select Configurable to use an account that is not currently being used as a security account for an existing application pool. In the User name box, type the user name of the account you wish to use, and type the password for the account into the Password box.
10. In the Reset Internet Information Services section, choose whether to allow Windows SharePoint Services to restart IIS on other farm servers. The local server must be restarted manually for the process to finish. If this option is not selected and you have more than one server in the farm, you must wait until the IIS Web site is created on all servers and then run iisreset /noforce on each Web server. The new IIS site is not usable until that action is completed. The choices are unavailable if your farm only contains a single server.
11. Under **Database Name and Authentication**, choose the database server, database name, and authentication method for your new Web application.
12. Click **OK** to create the new Web application.

## Setting up MySite in SharePoint

**Assumption:** The SharePoint Portal is located at http://clif/.

1. First you have to make sure you have 2 managed paths set up in the http://clif web application. To do this jump into central admin, "Application Management" tab, "Define Managed Paths". Make sure you are working on the right web application once you are in that screen.
2. Create an Explicit inclusion for path "mysite".
3. Create a Wildcard inclusion for path "personal".
4. Go back to "Application Management" tab & choose "Create site collection"
5. Create a new site (call it MySiteHost if you like), pick "Create site that this URL" and choose "mysite", also pick the "My Site Host" template (important).
6. Once that site is created jump back into Central Admin, go into your Shared Services Provider configuration, go into the "My Site settings" page.
7. Set "Personal site provider" to "http:// clif /mysite/" and "Location" to "personal", click OK.

## Configuring SharePoint search settings

### Create content source

1. To add a new content source to your SharePoint server open the Central Administration of the server and enter the relevant Shared Services.
2. Open the Search Settings page and open the “Content sources and crawl schedules” link.
3. Click the “New Content Source” button and enter name as “CLIF”, Content Source Type as “SharePoint Sites” and Start Address URL as <http://clif/> in the “Add Content Source” page and click ok.

### Create search scope

1. Open the Search Settings page and open the “Scopes” link.
2. Click the “New Scope” button and enter name as “CLIF” and click ok.

### Create search scope rules

1. Click on the “CLIF” scope from the scopes list.
2. On “Scope Properties and Rules” page, click “new rule” link.

**Adding Scope Rule 1**

Select “Content Source” as “Scope Rule Type” and select “CLIF” as the Content Source from the dropdown list and choose “Require - Every item in the scope must match this rule” as the behaviour. Click on ok.

**Adding Scope Rule 2**

Select “Property Query (Author = John Doe)” as “Scope Rule Type” and under section Property Query, select “contentclass” as the “Add property restrictions” and “STS\_ListItem\_20007” from the dropdown list and choose “Include - Any item that matches this rule will be included, unless the item is excluded by another rule” as the behaviour. Click on ok.

**Adding Scope Rule 3**

Select “Property Query (Author = John Doe)” as “Scope Rule Type” and under section Property Query, select “contentclass” as the “Add property restrictions” and “STS\_ListItem\_20008” from the dropdown list and choose “Include - Any item that matches this rule will be included, unless the item is excluded by another rule” as the behaviour. Click on ok.

### Adding managed properties

1. Open the Search Settings page and open the “Metadata property mappings” link.

**Adding Managed Property 1**

* 1. On Metadata Property Mappings page, click “New Managed Property” button.
  2. Enter “PersistentID” as the Name and type.
  3. Add “ows\_Persistent\_x0020\_ID” as the Mappings to crawled properties and check “Allow this property to be used in scopes” and click ok.

**Adding Managed Property 2**

1. On Metadata Property Mappings page, click “New Managed Property” button.
2. Enter “ListId” as the Name and type.
3. Add “ows\_ListID” as the Mappings to crawled properties and check “Allow this property to be used in scopes” and click ok.

### Crawl SharePoint site content

1. Go to the central administration of your SharePoint Server
2. On the left side under ‘Shared Services Administration’, click on ‘SharedServices1′ or an equivalent of it
3. In the area ‘Search’, click ‘Search Settings’
4. There, click ‘Content sources and crawl schedules’
5. Finally, find the arrow on the right end of the name of ‘CLIF’, click it and start the crawling. Attention: If you start a Full Crawl, it may be that you have to wait a really long time.

## Configure Excel web services is the SharePoint site

### Overview

Excel Web Access (EWA) is a Web Part that allows a user to open an Excel workbook in a browser and allows users to interact with the workbook in the browser with the familiarity of the Excel client. It displays and enables interaction with the Microsoft Office Excel workbook in a browser by using Dynamic Hierarchical Tag Markup Language (DHTML) and JavaScript without the need for downloading ActiveX controls or additional software on the client computer. This component can also be connected to other Web Parts on dashboards and other Web Part Pages to provide more advanced capability. Excel Web Services (EWS) is a service used to programmatically access Excel workbooks stored in MOSS 2007. This Web service is hosted in MOSS and provides an application programming interface (API) to build custom applications based on the Excel workbook.

### Configure Excel calculation services

1. On the Start menu, click All Programs.
2. Point to Microsoft Office Server and click SharePoint Central Administration.
3. Go to the Shared Services Provider (SSP) Administration site for the Web application that’s hosting the Web site.
4. Under Excel Services Settings click trusted file locations.
5. Click Add Trusted File Location. Unless Trusted File Location is configured in SharePoint, Excel Services will not work.
6. In the Address box type the URL to the trusted file location, e.g. [http://clif/Project Documents/Forms/AllItems.aspx](http://clif/Project%20Documents/Forms/AllItems.aspx).

### Enable user defined functions

1. On the Start menu, click All Programs.
2. Point to Microsoft Office Server and click SharePoint Central Administration.
3. On the Quick Launch, click your Shared Services Provider (SSP) link—for example, "SharedServices1"—to view the Shared Services home page for that particular SSP.
4. Under Excel Services Settings, click User-defined functions.
5. On the Excel Services User-Defined Functions page, click Add User-Defined Function to open the Excel Services Add User-Defined Function Assembly page.
6. In the Assembly box, type the path to the UDF assembly. For example, C:\MyUdfFolder\MyUdf.dll.
7. Under Assembly Location, click Local file.

*Note: -- The Local file option will be replaced with File path in future releases of Excel Services. If you see File path, select that instead.*

1. Under Enable Assembly, the Assembly enabled check box should be selected by default.
2. Click OK.

## Configuring Fedora

### Creating root folder

Create a “CLIF:Root” content object that acts as a root container object for the SharePoint Site.

### Create publishable locations folder

Create a publishable locations root content object where documents can be published from any SharePoint MySite.

## Configuring root SharePoint MySite site

**Projects List:**

Add new projects in the “Projects” List in the MySite which provides lookup values for the “Project Documents” Content Type.

**Content Sources List:**

Add all available content sources in the “Content Sources” List in the MySite which provides lookup values for “Project Documents” Content Type.

**Content Languages List:**

Add all available content languages in the “Content Languages” List in the MySite which provides lookup values for “Project Documents” Content Type

## Deploy SharePoint solution

### Adding CLIF.Solutions.wsp to the server

STSADM command to add the solution:

stsadm -o addsolution -filename <Solution Path>.

### Deploying CLIF.Solutions.wsp to a SharePoint site

STSADM commands to deploy the solution:

stsadm -o deploysolution -name “CLIF.Solutions.wsp” -immediate -url “http://clif/” -allowGacDeployment -allowCasPolicies -force

stsadm -o execadmsvcjobs

## Configuring root SharePoint site

### Activating features

**Assumption:** SharePoint Portal at http://clif/

**Attention:** All features must be activated in the same order as listed below:

1. CLIF.XSL

stsadm -o activatefeature -id “9394c71-006d-4594-85b6-6c1006785a46" –url “http://clif”

1. CLIF.Scripts

stsadm -o activatefeature -id “B0A0A13D-FC80-408e-8F61-E36FEFC29F98" –url “http://clif”

1. CLIF.Styles

stsadm -o activatefeature -id “b80cce94-386b-4124-812a-f9c4565afd01" –url “http://clif”

1. CLIF.Images

stsadm -o activatefeature -id “b65e6fd8-4874-4eaa-93c3-c16447343aae" –url “http://clif”

1. CLIF.MasterPage

stsadm -o activatefeature -id “7306b8a0-7490-4bfc-9756-9b0a31d5065c" –url “http://clif”

1. CLIF.Search

stsadm -o activatefeature -id “c683eef0-a0d9-479d-886c-bf6ae02817ee" –url “http://clif”

1. CLIF.Fields

stsadm -o activatefeature -id “8fcd6181-9fbd-49ad-9983-a6f483ceb4c6" –url “http://clif”

1. CLIF.ContentTypes

stsadm -o activatefeature -id “7d7aefc4-8494-4ce7-875a-ff08212dd403" –url “http://clif”

1. CLIF.LookUpList

stsadm -o activatefeature -id “52fb0409-3619-4b04-a7dc-477bfff63367" –url “http://clif”

1. CLIF.LookUpWithPicker

stsadm -o activatefeature -id “10c19a31-9710-42d9-a1f2-4ac3f4aabb2d" –url “http://clif”

1. CLIF.Lists

stsadm -o activatefeature -id “59d73371-02cb-4b45-a203-cd7e4904f27b" –url “http://clif”

### Setting up lookup list

**Publishable Location List:**

Add entries in the “Publishable Locations” List in the root site that points to a “Content Object” in Fedora by specifying a Persistent ID.