



# **SharePoint 2003 Basic Concepts**

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## Overview of SharePoint Portal Server 2003

SharePoint Portal Server 2003 provides a powerful, unified portal solution for large organisations that need to use their existing information more effectively, help their employees collaborate efficiently, and deliver relevant content to employees, partners, and customers. SharePoint Portal Server 2003 is a scalable and reliable platform that helps organisations:

- Put information to work
- Connect people and workspaces
- Target and tailor information to users or groups

### Scalability and Reliability

SharePoint Portal Server 2003 provides tools that you can use to easily deploy and manage your portal solution. Administrators can use SharePoint Portal Server 2003 to connect to and manage content resources. Additionally, administrators can use the management interface in SharePoint Portal Server 2003 to manage, monitor, and deploy Windows SharePoint Services sites, so your organisation can work quickly and effectively.

SharePoint Portal Server 2003 can meet the demanding requirements of any size organisation by scaling to meet increasing demand and providing reliable, secure portal services to the organisation.

SharePoint Portal Server 2003 uses a distributed server architecture based on Windows Server 2003 and Microsoft SQL Server 2000. You can cluster servers that run SharePoint Portal Server 2003 to improve availability. If one server fails, users still have uninterrupted access to data, documents, and applications. Network Load Balancing distributes the processing load across multiple servers, which makes maintaining reliable services under peak load easier. SharePoint Portal Server 2003 uses Windows Server 2003 security to protect your documents and information from accidental or malicious harm.

### Putting Information to Work

SharePoint Portal Server 2003 helps you put information to work. Most organisations have a wealth of information that is stored in multiple formats and locations including file shares, Web sites, databases, and line-of-business applications. Tying this scattered information together, making it easier to find, and integrating it into the life of the business is a critical challenge. SharePoint Portal Server 2003 provides a unified portal to your data and information wherever it is located, and it helps you use that information effectively and productively.

SharePoint Portal Server 2003 provides powerful indexing and search engines to help you easily find the information you need in a wide variety of supported content sources. Additionally, you can organise information into topics and narrow searches for easy discovery.

You can also integrate your existing line-of-business applications with SharePoint Portal Server 2003 so that you can bring the enterprise and customer relationship applications that you rely on into the portal. Single sign-on further simplifies access to these applications, enabling your employees to get more out of the information that already exists within your organisation. Web Parts can provide customisable views of data as well as familiar analytical tools. By making information easy to find and putting it at your fingertips, SharePoint Portal Server 2003 gives you more time to concentrate on your work so that you can be more productive.

### Connecting People and Workspaces

Nobody works in a vacuum. Finding information and best practices is a good start, but you also need to share that information and work with other people to achieve your business goals. SharePoint Portal Server 2003 helps individuals and teams connect by facilitating collaboration and communication across the organisation. SharePoint Portal Server 2003 builds upon the foundation of Windows SharePoint Services by providing a Site Directory to aggregate, organise, and create SharePoint sites across your organisation, enabling you to build a true collaborative portal solution for your organisation. Teams are able to publish new content to the portal, helping to preserve knowledge and expertise for the future.

SharePoint Portal Server 2003 also leverages the easy-to-use document collaboration features and moderated publishing capabilities provided by Windows SharePoint Services, including the ability to quickly create document workspaces where teams can centrally edit and discuss documents and access previous versions. SharePoint Portal Server search enables users to connect with the experts in an organisation by quickly locating people and teams, as well as documents and Web sites. This architecture is extensible, so you can easily create solutions that match your organisation's needs.

### **Targeting and Tailoring Information**

With the flood of information people deal with every day, identifying and delivering information that is relevant to a particular user or group is a serious challenge. Frequently, important information is overlooked or sits unused in e-mail or line-of-business applications. SharePoint Portal Server 2003 puts data, information, and knowledge into context, enabling the portal to deliver to users everything they need to do their work. With SharePoint Portal Server 2003, you can customise the portal to deliver appropriate information, news, and applications to users based on who they are and what they do.

In addition, you can personalise your SharePoint Portal Server 2003 experience with My Sites. A "My Site" is your own personal portal with news, links, documents, applications, and other lists of information that are important to you. Your My Site also has a public view, enabling you to share these personalised lists with coworkers.

Organisations can also deliver relevant information, news, and applications to "audiences," which are groups of people with similar roles or interests. Audience targeting enables you to improve the overall level of communication and awareness within your organisation.

### **Connected collaboration**

Microsoft Office SharePoint Portal Server 2003 facilitates easy, connected collaboration across an enterprise organisation. It enables people to work together on documents, projects, and tasks and to leverage best practices by using the combined collaboration features of Microsoft SharePoint Products and Technologies. Index and search services, as well as newly introduced people services, allow you to increase efficiency by finding relevant people, teams, sites, and other information.

### **About integrated enterprise**

Microsoft Office SharePoint Portal Server 2003 provides an architecture that addresses the most demanding performance needs. By using the latest technologies, SharePoint Portal Server provides a centralised, unified interface for enterprise users and highly flexible deployment options.

Microsoft .NET enterprise, scalable, distributed architecture SharePoint Portal Server is built on the .NET Framework, which is fast and scalable and uses ASP.NET, common language runtime, Web Forms and Web Part Pages, and a secure infrastructure to deliver better performance and greater integration.

Through its flexible deployment options — from single server to server farm configurations — SharePoint Portal Server is designed to have high availability and manageability.

**Business applications** SharePoint Portal Server can present specific applications and customised content based on the user's functional group and organisational role.

**Delegated administration** The portal site administrator can assign different managers for areas in the portal site. The content manager can then control what content appears in the area and who has access to the area.

**Single sign-on** The single sign-on service is an authentication process that permits a user to enter one name and password to access multiple applications.

**Index and search services** These services help users find people, sites, documents, and other types of information from different sources.

**Alerts** Alerts notify users of updates to relevant information.

## About the portal site

The portal site offers a centralised access point for finding and managing information. You can use a Web browser with the portal site to perform tasks and search the portal. The portal site provides access to information stored inside and outside your organisation, allowing users to find people, sites, documents, and other content regardless of location or format. It also facilitates people working together on documents, projects, and other efforts by using the combined collaboration features of Microsoft SharePoint Products and Technologies.

You can customise the home page of the portal site to display organisational news and other important information. From the portal site, users can perform tasks such as:

- Searching for information stored in many different places and in many different formats
- Browsing through content by areas, which divide content into sets of related information so it's easier for users to find what they want
- Creating a personal site, called My Site, that provides a personal view of the portal information that's relevant to the user and that lets the user share information with others in the organisation
- Asking to be alerted to new or changing information, such as new matches to a search query, changes to content in an area, or a new site added to the Site Directory
- Creating or linking to Web sites, including those based on Microsoft Windows SharePoint Services, with collaboration features that let you facilitate projects, document development, and meeting organisation

The portal site uses Web Part Page technology to organise and display information. A Web Part Page consists of reusable, customisable Web Parts such as Search, News, and Announcements. You can easily add or remove Web Parts to customise the portal site for your organisation.

## About Index and Search Services

With the powerful index and search services in Microsoft Office SharePoint Portal Server 2003, you can search for people, sites, documents, or other information stored in many different locations and in a variety of formats. SharePoint Portal Server makes searches faster and more successful by using these features:

- A single location to search for information stored in many different places and in many different formats
- Keyword searches that find people, sites, documents, images, or other types of information on the portal site
- Topic areas that make it easy for users who are unfamiliar with other areas of the portal site to find what they need
- Automatic categorisation of content
- Best Bet tagging for items that are highly relevant to a search
- Alerts that notify you of search results
- User profiles that can be searched to find people by title, location, and other details they publish

Whether you are searching for specific information or just want to browse through a group of related items, SharePoint Portal Server makes finding information easy.

**Note** Your search results contain only those items for which you have the appropriate rights. If you do not have rights to read an item, that item does not appear in search results.

## About people services

- **User profiles** User profiles allow you to search for and connect with people within your organisation based on information they publish about themselves. Index and search services use the profile information to improve search results.
- **My Site** My Site is a personal SharePoint site created in the portal site that provides personalised and customised information for you, including content targeted to you based on your membership in a particular audience.

- **Audiences** You can target content to a specific audience based on a user's job or task. For example, in an area called Human Resources, a site administrator or the manager of that area can choose to add a news item targeted to all new employees that directs them to the New Employee Benefits site.

## About sharing, collaboration, publishing and managing content

SharePoint Portal Server enables you to easily share information, leverage best practices, and work together with others on documents, projects, and other efforts. Some of the ways you can do that are by:

- **Creating Web sites based on Microsoft Windows SharePoint Services**  
Windows SharePoint Services allows you to create a Web site by selecting a template that best suits the project. SharePoint Portal Server includes a diverse collection of templates to meet business needs. You can create sites to facilitate meetings, organisation, teams, or projects. By default, each site template features a custom set of collaboration features from Windows SharePoint Services. If you work with external customers or partners, or if you have users who need to access data from outside of your organisation's firewall, SharePoint Portal Server allows both internal and external users to view and interact with the same content and data. After the sites are created, SharePoint Portal Server can search these sites the same way it searches other content on the portal.
- **Managing, publishing, and collaborating on documents**  
SharePoint Portal Server offers a number of features that make it easy to find, organise, and work together on documents. A document library offers a central place to store documents and track changes, My Site is a personal site where you can add links to documents you work with often, the Topics area lets you organise documents under different topic headings, and Microsoft Windows SharePoint Services Document Workspaces offer a place for collaborating on documents with others.

## About Personal Context

Microsoft Office SharePoint Portal Server 2003 creates a portal site that remembers who you are and what information you care about and work with. Based on Web Part Pages technology, SharePoint Portal Server delivers customisation and personalisation that is flexible, secure, and reliable. SharePoint Portal Server provides a rich set of features focused on ensuring that users have easy access to relevant information from a variety of entry points.

**Web Part Pages and Web Parts** SharePoint Portal Server provides site managers with a flexible policy for personalisation and customisation. Site managers can customise the portal site to users based on specific criteria. Portal site users can personalise the site to facilitate collaboration or to provide custom views of their projects, including by using Web sites based on Microsoft Windows SharePoint Services to facilitate team collaboration.

**Audiences** SharePoint Portal Server allows you to target content to people according to their membership in a particular audience. By default, SharePoint Portal Server includes an audience called "All portal users." In addition to this audience, you can create other audiences, such as by department or security group. These audiences can span one or more portal sites in a deployment. After you create audiences, you can target content in the portal site for viewing by one or more specific audiences. By default, you can display targeted content on the home page and on My Site.

**User profiles** User profiles allow you to search for and connect with people within your organisation based on information people publish about themselves. Index and search services use the profile information to improve search results. You can import user profile information directly from Microsoft Active Directory directory service or enter it manually. You can also customise the default user profile page by adding properties according to the needs of your organisation or to map to Active Directory data, such as Territory or Geography.

**My Site** My Site is a personal SharePoint site created in the portal site that provides personalised and customised information for you, including content targeted to you based on your membership in a particular audience. User profile information is used to generate personal sites.

**Alerts** SharePoint Portal Server can alert you about new or updated information on topics that match your interests. You can choose to be alerted to content you find useful, such as documents, news or other areas, or a set of search results. After you create an alert, SharePoint Portal Server notifies you when content is modified or new content matching your criteria is available. In the case of documents, alerts can notify you when Web discussion comments are added. You can view your alerts and alert results directly from My Site. You can also choose to receive alert results by e-mail.

## About Audiences

Audiences allow organisations to target content to users based on their job or task, as defined by their membership in a Windows 2003 security group, distribution list, organisational reporting structure, or the public properties in their user profiles.

You can target content in two ways. You can target Web Parts so that members of different audiences see different Web Parts on a page. By using Web Parts that recognise audience membership, you can also target items or links in an area to one or more audiences, so that only members of those audiences view the targeted items within the Web Parts. For example, in a default area called Human Resources, a site administrator or the manager of that area may choose to add a news item within the News Web Part targeted to all new employees directing them to the New Employee Benefits site.

Audiences are managed centrally across one or more server farms hosting Microsoft Office SharePoint Portal Server 2003. They apply across one or more portals in a deployment, not to individual areas, sites, or items. You must have the "Manage Audiences" right to manage audiences. As an audience manager, you can view all members of a specific audience, as well as manage the rules defining audiences and compile audiences as the rules and members of an audience change.

To use audiences effectively, you must first create an audience and the rules that determine which users are members of that audience. You must then target an item such as a document or news item to one or more audiences. Finally, you need to store the targeted item in an area that uses a Targeted Content Web Part to display items to users of the portal site.

**Note** Audiences are not used to assign rights and permissions. SharePoint Portal Server uses site groups to assign rights and permissions to users within the portal. Audiences are used to manage how content is distributed, not to enforce security. They push information to a user, not restrict or permit access to information.

## About document management and publishing

Employees may find large and complex information sources, such as multiple file shares, difficult to organise and use because there is little or no organisational framework in place. The difficulty increases with the addition of information sources such as Web sites, e-mail servers, and databases.

Employees might also have difficulty collaborating with others on documents. Important documents can be lost, overwritten, or hard to find. To help streamline your document development and avoid these common problems, Microsoft Office SharePoint Portal Server 2003 includes a document library.

The document library for the portal site is compatible with the SharePoint Portal Server 2001 document library and is based on a document store. The backward-compatible document library includes the following features:

- Version tracking to record the history of documents
- Searchable information to identify a document
- Document publishing control, including publishing to specific audiences
- Document approval routing

To make it easier to find, organise, and work together on documents, you can also use the following portal site features:

**Topics** To make it easier for others to find documents, you can add the documents to relevant subareas in the Topics area.

**My Site** To make it easier to manage your own documents and other items that you are interested in, the portal site can create a personal site for you. This site, called My Site, makes this information available from one place that you can customise to suit your needs.

**Document Workspace sites** A Document Workspace site is a Web site based on Microsoft Windows SharePoint Services with features that enable a group to share files, participate in discussions, and work together on a document.

**Note** SharePoint Portal Server also integrates with the document library features available with Windows SharePoint Services.

## About the backward-compatible document library

Employees may have difficulty collaborating with others on documents, controlling access to those documents, and publishing documents in their organisation. Important documents can also be lost, overwritten, or hard to find. Microsoft Office SharePoint Portal Server 2003 offers a number of features to help streamline your document development and avoid these common problems.

In addition to SharePoint lists and libraries, SharePoint Portal Server offers an optional backward-compatible document library to help you manage documents. Features include:

- Version tracking to record the history of documents
- Application of descriptive, searchable information to identify a document
- Document publishing control
- Automated routing of documents to reviewers
- Control of document access based on user roles

SharePoint Portal Server helps you collaborate with others, receive feedback from reviewers, identify the document with descriptive information such as keywords, and publish the document to a wide audience.

## About areas

In Microsoft Office SharePoint Portal Server 2003, areas provide a flexible way to both describe and find information on the portal site. Areas define the structure of the portal site as a hierarchy that can be used to intuitively organise and browse the content on the portal site.

Documents, lists, and other items on the portal site and in other Web sites or file shares can be associated with one or more areas by using listings. Users can find information by browsing or searching the relevant areas for those items.

## Using areas to navigate the portal site

You can browse areas from links on the navigation bar of the portal site. By default, all top-level areas appear on the navigation bar, although users with the correct permissions can exclude specific areas from portal site navigation. Top-level areas on the navigation bar tend to be broadly relevant to all users. The default top-level areas are Home, Topics, News, and Sites.

## Managing areas

Users with the correct permissions can view the entire area structure of the site in the portal site map, available from the Portal Site Content section of the Site Settings page, including areas that have been excluded from portal site navigation. Users with the correct permissions can also add, edit, move, or delete areas to change the view of the portal site for all users.

As a site administrator, you can add a user to the content manager site group. By default, content managers can approve or reject content requests and manage area settings. In addition, as a site administrator or content manager, you can target areas for viewing by one or more audiences. Creating an effective portal site structure requires planning and some understanding of how others might organise the content.

### Using areas in search

Areas are also used during search to more accurately return search results for search terms related to various areas. You can scope searches by the current topic or area, or by any area from within the advanced Search Results page.

### Topics

Topics are a subset of areas used to organise content on the portal site. Topics is also the name of the top-level area that by default contains all the topics.

### Topic Assistant

If your portal site contains a large amount of content, dividing it into areas can be a time-consuming task. To simplify the process, SharePoint Portal Server 2003 provides an automated tool called the Topic Assistant. After you have assigned a few representative items to each area, the Topic Assistant compares those sample items to the items that haven't been assigned and then automatically selects the best area matches.

Despite its name, the Topic Assistant is used to automate and simplify the organisation of all areas on your portal site, not just topics.

### About templates

Microsoft Office SharePoint Portal Server 2003 offers a variety of site templates based on Microsoft SharePoint Products and Technologies and integration with Microsoft Office 2003. You can use these templates to create Web sites that take advantage of different sets of features, allowing you to facilitate end-to-end collaboration across your organisation.

By default, SharePoint Portal Server includes the following sites:

**Portal sites** Find, centralise, and categorise Web-based SharePoint sites from across the enterprise and integrate information from various systems into one solution.

**Team sites** Create team sites to facilitate team collaboration on projects and other efforts.

**Meeting Workspace sites** Help meeting organisers plan meetings, share information with other attendees, track tasks, and more.

**Document Workspace sites** Facilitate ad-hoc collaboration among Office users by providing a central location to share and work on documents, to track document status, and to take advantage of Office integration with Microsoft Windows SharePoint Services.

**Personal sites** Provide personalised and customised information for you. On this site, called My Site, you will find content targeted to you based on membership in a particular audience. In addition, My Site provides quick access to things you need to do your work. This may include links to documents, people, or Web sites as well as personal alerts that you create to track changes to content within the portal and your organisation. From My Site, you can also update your public profile and share collections of links with other portal users.

In addition to these sites, you can create custom Web sites by using a Web page editor compatible with Windows SharePoint Services such as Microsoft Office FrontPage 2003.