

# Microsoft SharePoint 2007: Portals

## Table of Contents

INTRODUCTION .....	INTRO-1
Prerequisites .....	INTRO-2
Installing the Practice Files .....	INTRO-3
Software Requirements .....	INTRO-3
Setting Up the Server .....	INTRO-4
Configuring Environment Variables .....	INTRO-21
Installation .....	INTRO-21
Conventions in XML Samples .....	INTRO-22
About the Author .....	INTRO-23
INTRODUCTION TO COLLABORATION PORTALS .....	1-1
MOSS Collaboration Portals .....	1-2
Sharing Documents .....	1-2
Sharing Information .....	1-4
Organizing Meetings .....	1-4
Making Decisions .....	1-5
Site Collections and Sites .....	1-11
Terminology .....	1-12
Portal Site Definition and Provisioning .....	1-12
Collaboration Portal Hierarchy .....	1-13
Site Directory .....	1-15
Table of Contents Web Part .....	1-15
Features .....	1-30
The Publishing Infrastructure .....	1-30
Office SharePoint Server Publishing Infrastructure Feature .....	1-31
Publishing Infrastructure Site Collection Elements .....	1-31
Office SharePoint Server Publishing Feature .....	1-34
Publishing Site Elements .....	1-35
Office SharePoint Server Standard Features .....	1-36
Office SharePoint Server Enterprise Features .....	1-36
Collaboration Portal or Custom Site Definition .....	1-37
Shared Services .....	1-49
Excel Services and Trusted File Locations .....	1-49
LAB 1: INTRODUCTION TO COLLABORATION PORTALS .....	1-57
Lab 1 Overview .....	1-58

Create a Collaboration Portal .....	1-59
Configure Tabs in the Site Directory .....	1-64
USER PROFILES AND MY SITES .....	2-1
Collaboration in the Enterprise .....	2-2
Finding Collaborators .....	2-2
User Profiles .....	2-3
Profile Properties .....	2-3
Configuring a User Profile Import .....	2-4
User Profiles in the Object Model .....	2-15
My Sites .....	2-23
Configuring My Sites .....	2-23
Linking to Office 2007 Applications .....	2-24
Personalization Links .....	2-24
Using Profile Data .....	2-39
Search .....	2-47
LAB 2: USER PROFILES AND MY SITES .....	2-55
Lab 2 Overview .....	2-56
Configure User Profiles .....	2-57
Create and Use an Audience .....	2-69
Create a Custom People Search Page .....	2-76
BUSINESS DATA CATALOG .....	3-1
Business Data Catalog .....	3-2
BDC Terminology .....	3-2
Application Definitions .....	3-3
Creating Applications with Tools .....	3-3
Using BDC Data with Web Parts .....	3-16
Profile Pages .....	3-28
Profile Page Templates .....	3-34
Actions .....	3-35
Business Data Columns .....	3-40
Search .....	3-46
User Profiles .....	3-52
LAB 3: BUSINESS DATA CATALOG .....	3-57
Lab 3 Overview .....	3-58
Create an Application Definition with BDC Meta Man .....	3-59
Import the Application Definition .....	3-66

Use the Business Data in a Team Site .....	3-69
<b>INFOPATH FORMS SERVICES .....</b>	<b>4-1</b>
InfoPath and SharePoint.....	4-2
InfoPath Forms Services.....	4-2
Form Services Scenarios.....	4-3
Form Libraries.....	4-4
Handling Data .....	4-18
Reading Secondary Data.....	4-18
Data Connection Library .....	4-18
Publishing and Administering Forms .....	4-33
Publishing Options .....	4-33
SharePoint Central Administration Configuration Options .....	4-34
Document Information Panels .....	4-43
Creating Document Information Panels .....	4-43
Other Forms Services Scenarios.....	4-54
InfoPath Workflow Forms.....	4-54
InfoPath and ASP.NET .....	4-56
InfoPath Workflow Forms versus ASP.NET Workflow Forms.....	4-57
Web Part Pages.....	4-58
<b>LAB 4: INFOPATH FORMS SERVICES .....</b>	<b>4-63</b>
Lab 4 Overview.....	4-64
Prepare a Team Site for Use with an InfoPath Form Template.....	4-65
Create a Form Template in InfoPath 2007 .....	4-68
Publish and Use the Form Template .....	4-80
<b>EXCEL SERVICES AND REPORT CENTER .....</b>	<b>5-1</b>
Excel Services .....	5-2
Excel Services Scenarios .....	5-2
Shared Workbooks .....	5-4
Dashboards and KPIs.....	5-4
Trusted File Locations.....	5-5
Data Connections .....	5-5
Excel Services Components.....	5-21
Excel Web Access .....	5-21
Excel Calculation Services.....	5-21
Named Ranges and Named Items.....	5-22
Excel Web Services.....	5-28

Connecting.....	5-28
User-Defined Functions.....	5-37
Dashboards and Key Performance Indicators.....	5-46
Report Library.....	5-46
KPI List.....	5-47
LAB 5: EXCEL SERVICES.....	5-63
Lab 5 Overview.....	5-64
Prepare a New Site Collection.....	5-65
Configure the Shared Services.....	5-69
Use the Personal Monthly Budget Workbook with Excel Services.....	5-73
CUSTOMIZING SEARCH.....	6-1
Search Center.....	6-2
Search Center.....	6-2
Search Center with Tabs.....	6-3
Customizing Search Center with Tabs.....	6-15
Site Structure.....	6-15
Page Layouts.....	6-16
Search Web Parts.....	6-16
Federated Search.....	6-17
Narrowing Results.....	6-18
Search Optimization.....	6-33
Keywords.....	6-34
Controlling Visual Output.....	6-42
LAB 6: CUSTOMIZING SEARCH.....	6-57
Lab 6 Overview.....	6-58
Create Search Center Sites.....	6-59
Customize Search Center with Tabs.....	6-70
PROGRAMMING WITH THE SEARCH API.....	7-1
Search API.....	7-2
Connecting and Context.....	7-2
Search Administration Object Model.....	7-13
Content Sources.....	7-13
Search Scopes.....	7-21
Query Object Model.....	7-30
Keyword Queries.....	7-30
Keyword Syntax.....	7-31

Full-Text SQL Queries .....	7-37
Enterprise Search SQL Syntax .....	7-37
LAB 7: PROGRAMMING WITH THE SEARCH API.....	7-45
Lab 7 Overview .....	7-46
Create a Project Template and Prepare a Search Site .....	7-47
Use the Search API to Create a Content Source .....	7-56
Create Search Scopes.....	7-63
Use the KeywordQuery Class.....	7-71
DOCUMENT AND RECORDS MANAGEMENT .....	8-1
Managing Documents.....	8-2
Location and Relevance .....	8-2
Send To .....	8-3
Send To Gotchas! .....	8-4
Site Content Types .....	8-4
Records Center.....	8-16
Configuring Records Center .....	8-16
Web Service Interface.....	8-18
Information Management Policies .....	8-27
Built-in Policy Features .....	8-27
Auditing Policy .....	8-29
Expiration Policy Custom Actions .....	8-39
Custom Expiration Formulas.....	8-41
Debugging.....	8-42
LAB 8: DOCUMENT AND RECORDS MANAGEMENT.....	8-53
Lab 8 Overview .....	8-54
Configure and Use Send To .....	8-55
Create and Use Records Center .....	8-67
Use Information Management Policies .....	8-75
INDEX.....	INDEX-1

