

## Installing & Configuring SharePoint Server 2007-Step-by-Step Instructions

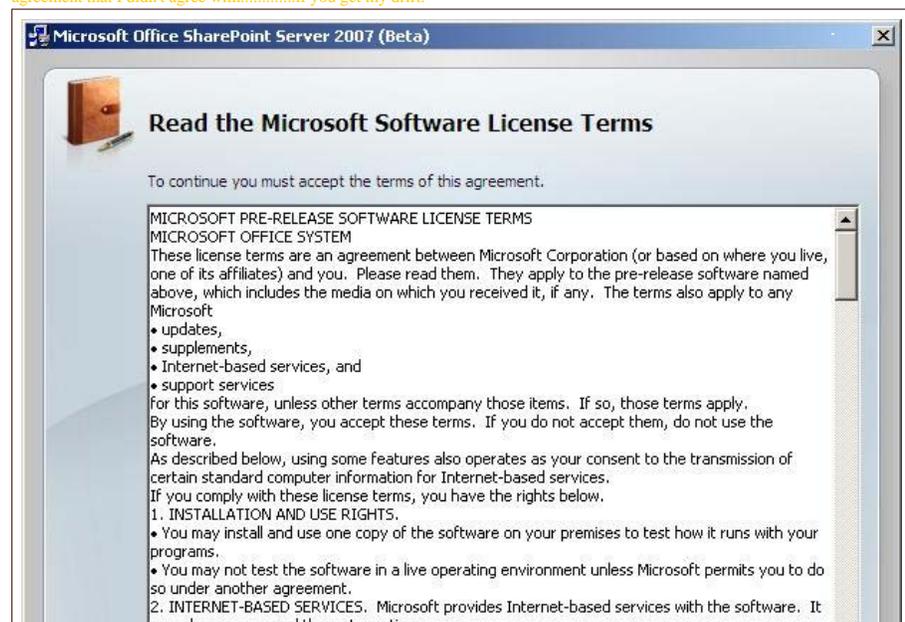
### Installing & Configuring SharePoint Server 2007

In this post, I'll demonstrate with words and screen shots how to install and get working a portal using Microsoft Office SharePoint Server 2007. Installing this product is not difficult, but it does require some forethought and planning. You can use this post as a reference for getting your version of MOSS 2007 installed. First, you'll need Windows 2003 Server, fully patched and ready to go. I believe I've seen blog postings recently that indicate that you can install MOSS07 on a Vista server. I'll leave that discussion for other threads and posts. Once you have the operating system ready to go, you'll want to start by running the setup.exe for MOSS 2007. Figure 1 illustrates that after you start the installation process, you'll need to enter a valid product identification key code. This key code can be found on the download site and should have been a part of what you did to get the software in the first place.



Figure 1: Product Identification Key Code Input Screen

After entering the product identification key code, click **Continue**. The next screen is the licensing agreement screen. Now, I always recommend that you read the licensing agreement since it is a legal document and you are bound by its' terms. But I also recognize that in the 10+ years I've been in this industry, I've never seen an agreement that I didn't agree with.....if you get my drift.



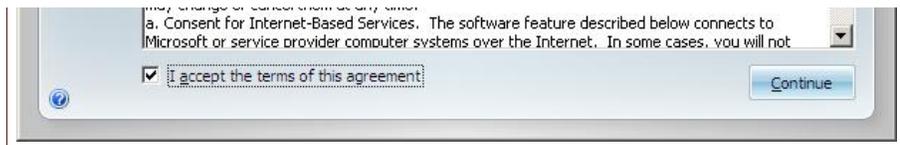


Figure 2: Licensing Agreement Screen.

Be sure to select the "I accept the terms of this agreement" check box and then click Continue.

The next screen will give you the chance to select which type of installation you wish to commit. The Basic installation is used for those who:

- o Need to install everything on a single server
- o Do not need to grow into a multi-server farm
- o Need a quick, easy deployment during installation with lead administrative effort

The Advanced option is selected by those who wish to install MOSS 2007 selecting some of the customizable features. In this illustration, we'll select the Advanced option and follow that route.

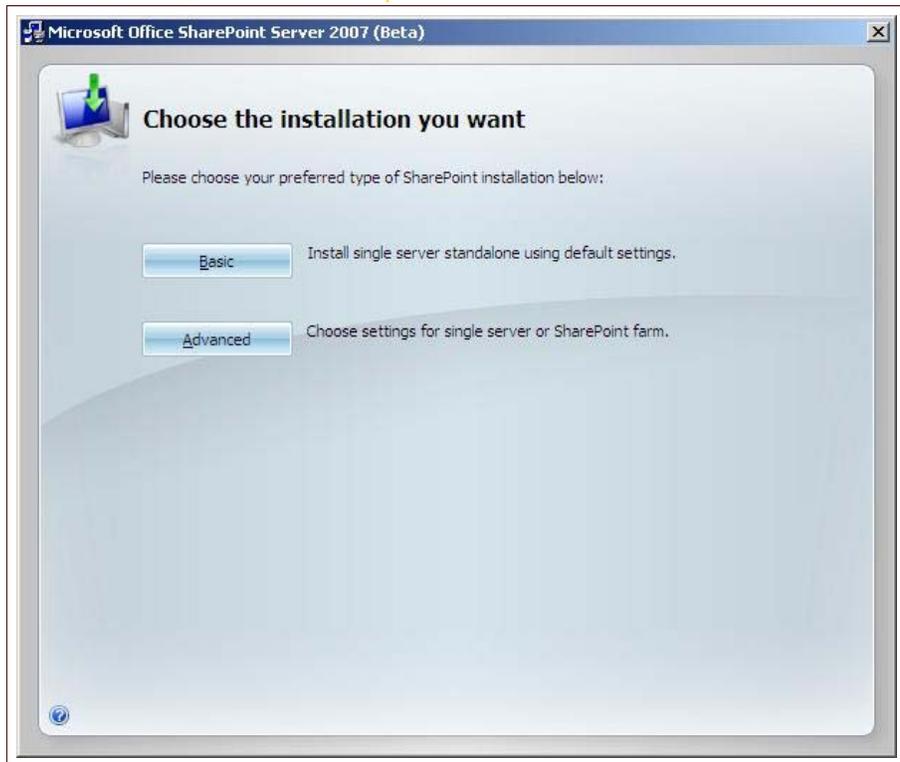


Figure 3: Installation Type Selection Screen

After clicking on the Advanced button, you'll find that the selections default to StandAlone (Figure 4).

However, we'll choose Complete. The meaning of the three options is as follows:

- o Complete: Enables all of the options for one server to offer the entire range of MOSS 2007 services and features to the network. You can scale out this deployment, start and stop services on this server and use a SQL server to host your databases.
- o Web Front End: Enables only those options that allows the server to run as a web front end server. What this means is that server is merely the entry and exit point (or one of them among the other WFE servers) for the farm. The actual servers that users will consume will be hosted on other servers (presumably). This cannot be the first choice of a farm unless you plan on installing other servers in the farm to offer the services and features that users will want to consume.
- o Stand-Alone: Similar to complete, this option enables all of the services and features for the MOSS 2007 farm, but assumes that there is no SQL server, so the MSDE engine is installed locally on this server. You cannot scale out this server into a larger MOSS 2007 farm.

Note that in reality, all of the MOSS 2007 binaries are installed in all three choices. All these choices really do is (pragmatically, not technically) turn on and off the code that is required for the server to fulfill the functions that have been assigned to it. Note also that you can select the location where the binaries should be installed in the File Location tab and then sign up to give feedback directly to Microsoft if you'd like to do this.

Make your selections, then click Install Now.



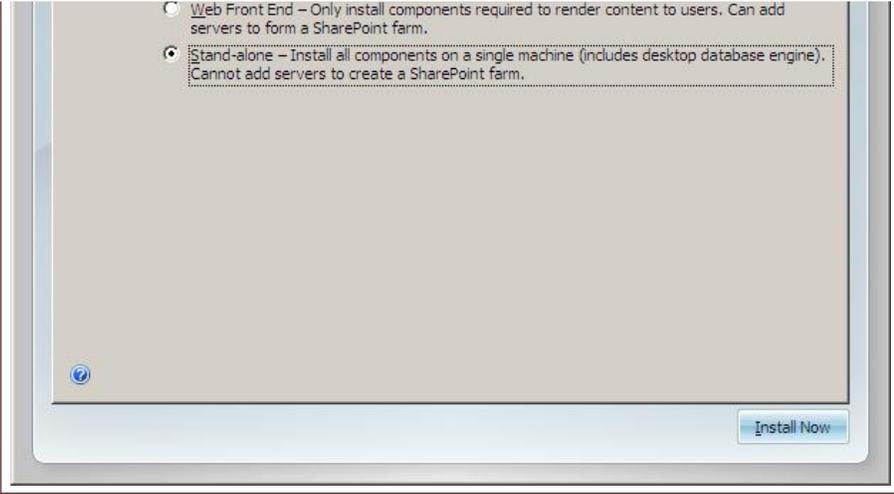


Figure 4: Server Type Selection Screen  
During the installation, you'll be presented with a status bar that is illustrated in Figure 5.

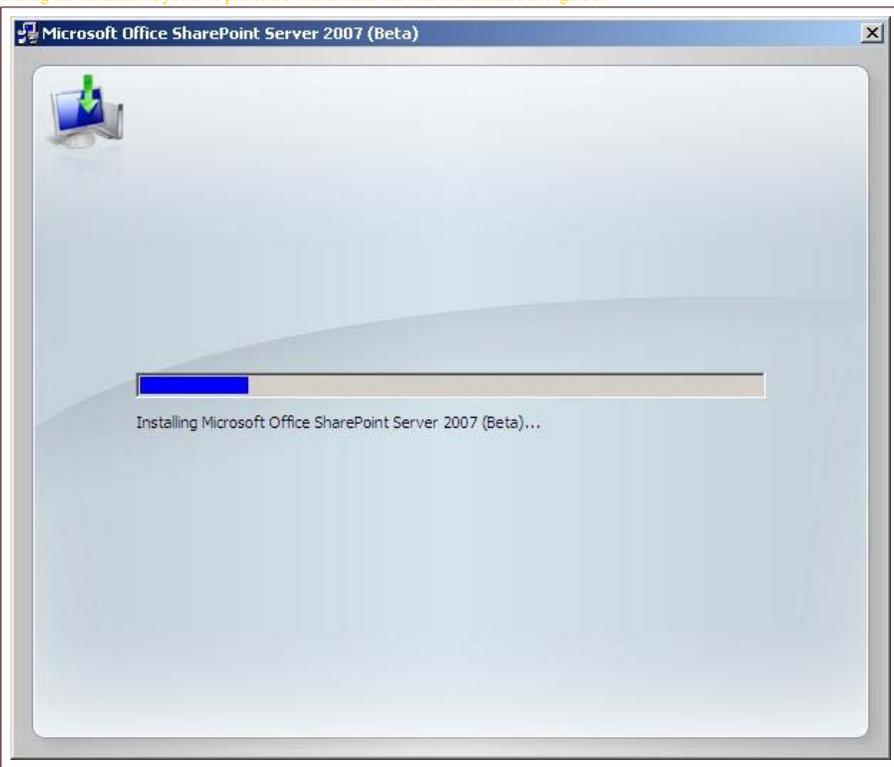


Figure 5: Installation Status Screen  
After installation has completed, you'll be given the chance to run through the SharePoint Products and Technologies Configuration Wizard (Figure 6). You'll use this wizard to commit the initial configuration options for your new SharePoint farm.



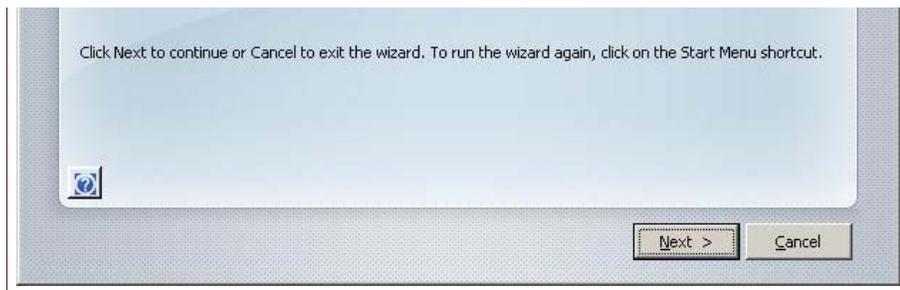


Figure 6: Entry screen to the SPPT Configuration Wizard. Note that you can come back to this screen using the Administration menus that automatically install with the SharePoint Server binaries

Once you start the SPPT wizard, you'll receive a pop-up box (Figure 7) that will inform you that certain services are going to be stopped. Be sure it is a good time to stop these services before moving on with the configuration options for your farm.



Figure 7: Informational Pop-Up Box

The following set of screens in the SPPT Configuration Wizard are design to help you setup the farm. In Figure 8, you'll be able to create a new farm or join an existing farm. Farm membership, at the server level, is determined by which servers are using the same configuration database in SQL and which servers are not. In my illustration, I want to create a new farm, so I select the "No, I want to create a new server farm" radio button. If I had wanted to connect to an existing farm, I would have selected the other radio button.

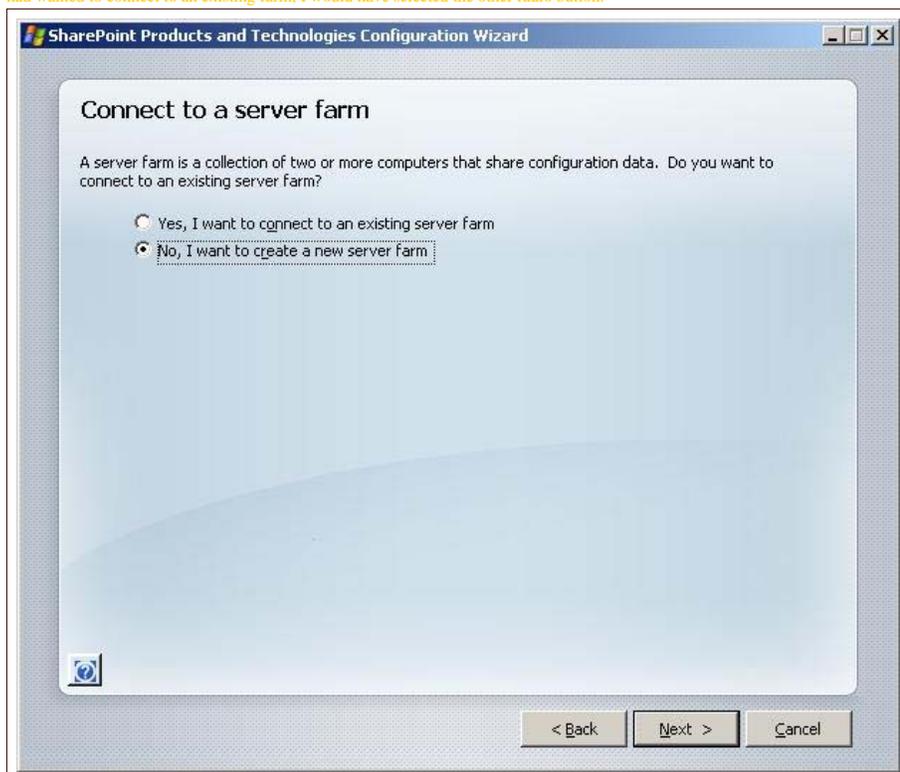


Figure 8: Connect to a server farm configuration screen in the SPPT Wizard

After making our selection in Figure 8 and then clicking Next, I'm taken to the next screen illustrated in Figure 9. On this screen, I can enter the following configuration values:

- o The SQL database server name. I'm not clear if this is the host name or netbios name, but I suspect this is the host name. However, you don't need the FQDN here, but you do need name resolution to this server or SQL Instance.
- o The farm configuration database name is needed in the next input box. Note that the screen just asks for a name, but you need to understand you're entering the most persistent database name for the entire farm - the farm configuration database name. Be sure this name supports your database naming convention. You should decide the name of this database in advance of getting to this screen
- o The database server account will need to be a member of the local admins group on each SharePoint

- The database access account will need to be a member of the local admins group on each SharePoint server along with having db\_creator and db\_security permissions in SQL. I would suggest you have an account setup just for this purpose in your Active Directory and that you have a strong password associated with this account.

**Specify Configuration Database Settings**

All servers in a server farm must share a configuration database. Type the database server and database name. If the database does not exist, it will be created. To reuse an existing database, the database must be empty. For additional information regarding database server security configuration and network access please see [help](#).

Database server:

Database name:

**Specify Database Access Account**

Select an existing Windows account that this machine will always use to connect to the configuration database. If your configuration database is hosted on another server, you must specify a domain account. Type the username in the form DOMAIN\User\_Name and password for the account.

Username:

Password:

< Back   Next >   Cancel

Figure 9: Configuration Database Settings Screen in the SPPT Wizard

in Figure 10, you'll be asked to decide which type of security settings you want to use for your farm. First, you can specify a pre-selected port number for central administration to run on or you can allow the wizard to randomly assign a port number. As you can see, this instance of the wizard randomly selected 17386 as the port number for Central Administration (CA). If you want CA to run on a different port, then select the check box and enter the desired port number.

The issue of NTLM vs. Kerberos is one that you may at some point wish to consider. Do you want the CA application to run using NTLM (NT Lan Manager) for security authentication or Kerberos? If the latter, there are some special configurations you'll need to complete for your Active Directory (AD) before Kerberos will work. I'm finding that most administrators are happy with NTLM, though those in a larger and more secure implementations are increasingly using Kerberos. For purposes of my illustration here, I'm selecting NTLM.

**Configure SharePoint Central Administration Web Application**

A SharePoint Central Administration Web Application allows you to manage configuration settings for a server farm. The first server added to a server farm must host this web site. To specify a port number for the web site hosted on this machine, check the box below and type a number between 1 and 65535. If you do not specify a port number, a random one will be chosen.

Specify port number:

**Configure Security Settings**

Kerberos is the recommended security configuration to use with Integrated Windows authentication. Kerberos requires special configuration by the domain administrator. NTLM authentication will work with any application pool account and the default domain configuration. [Show me more information](#).

Choose an authentication provider for this Web Application.

NTLM  
 Negotiate (Kerberos)

< Back   Next >   Cancel

Figure 10: Configure SharePoint Web Application configuration screen in SPPT Wizard

After you click Next, you'll be given a status bar that indicates how the SharePoint configuration is going. Depending on the type of server you're installing and the options you're installing, you could have as few as seven tasks or as many as eleven. Figure 11 illustrates the progress screen. Note that the caption below the status bar will inform you about the configuration actions that are being executed during this process.



Figure 11: Configuration status bar screen in the SPPT Wizard

After the configurations have been executed and committed to the SQL Server database, we finally get to CA where we can further configure our farm. We can start and stop services (Figure 12) on this server and then create web applications. In order to have portal, you'll first need to start the Office SharePoint Server Search service and then create a Shared Services Provider (SSP). I'll start the search service.

Service	Description	Status	Action
Central Administration		Started	Stop
Document Conversions Launcher Service		Stopped	Start
Document Conversions Load Balancer Service		Stopped	Start
Excel Calculation Services		Stopped	Start
Office SharePoint Server Search	Index content and/or serve search queries	Stopped	Start
Windows SharePoint Services Help Search	Serve search queries over help content	Stopped	Start
Windows SharePoint Services Incoming E-Mail		Started	Stop
Windows SharePoint Services Web Application		Stopped	Start

Indicates required service which is not yet enabled on any server in the farm.  
 Indicates the required service has been started on one or more servers in the farm.

Figure 12: Services configuration screen in CA

When the search service is started, you're presented with another web page for search configuration administration that needs to be completed before the search service can start. The configuration options are pretty clear. Out of the shoot, you'll use this server for both indexing and servicing queries from users until you can get enough servers in your farm to quarantine those options in your farm. Select a location that has enough disk space for your indexes. You should plan on a space allotment of 20% relative to the amount of information you wish to index. You'll also need to input an email address, a service account and whether or not there is a dedicated WFE for all crawling activities. For now, in my illustration, since this is the first server in the farm, I'll accept the defaults and click OK.



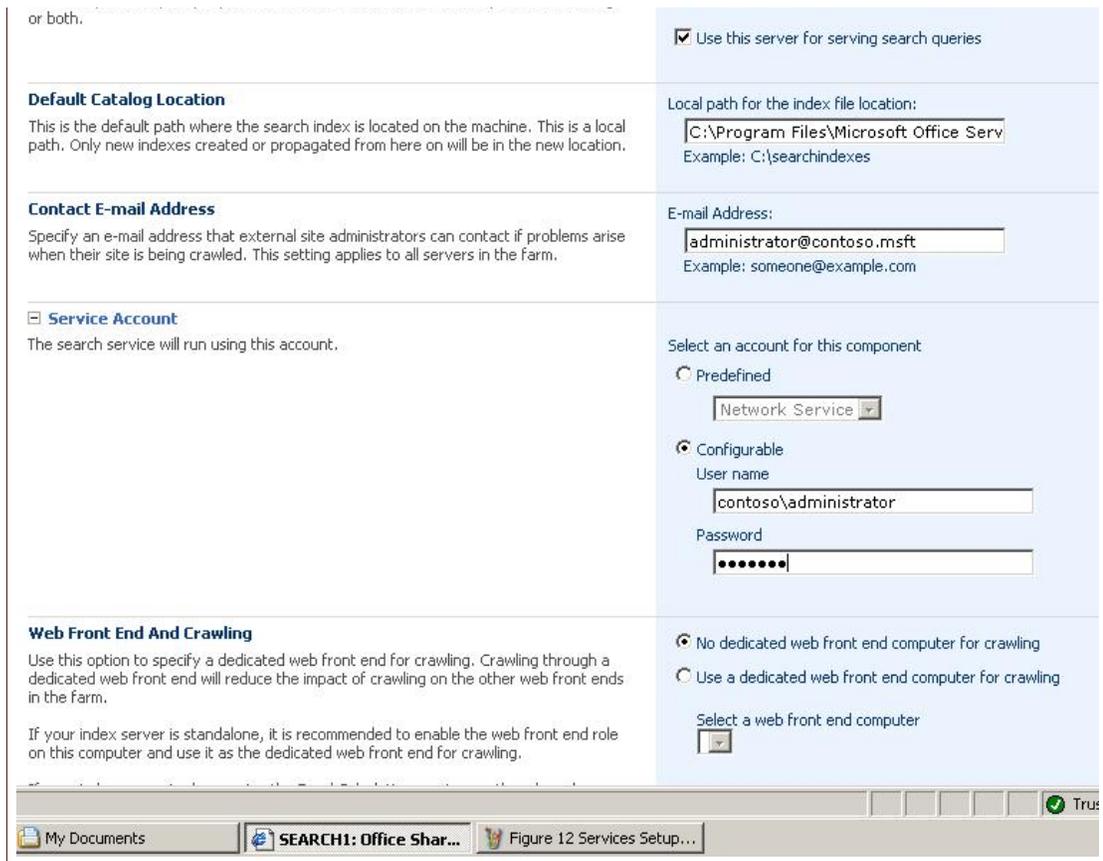


Figure 13: Search configuration screen

After starting the search service, the next thing I need to do is create a SSP. In order to do this, I'll navigate to the Application tab in CA, click Create or Extend a Web Application, then click Create a New Web Application, then make the configurations necessary that you see in Figure 14. Most of this is pretty self-explanatory, so I won't go through each input in detail. Suffice to say that I've done two things not illustrated here. First, after creating this web application, I then web back into CA, selected the Create or Configure Core Farm Services, then selected New SSP (Figure 15) and then filled in the configuration information for the new SSP. All of the options on that page are self-explanatory, except that you must select an Index server for the SSP to operate.

Backtracking just a bit, you can't have an Index server unless the Search services is started. So, that's why I illustrated starting the search services first, then creating an SSP, then creating a portal.

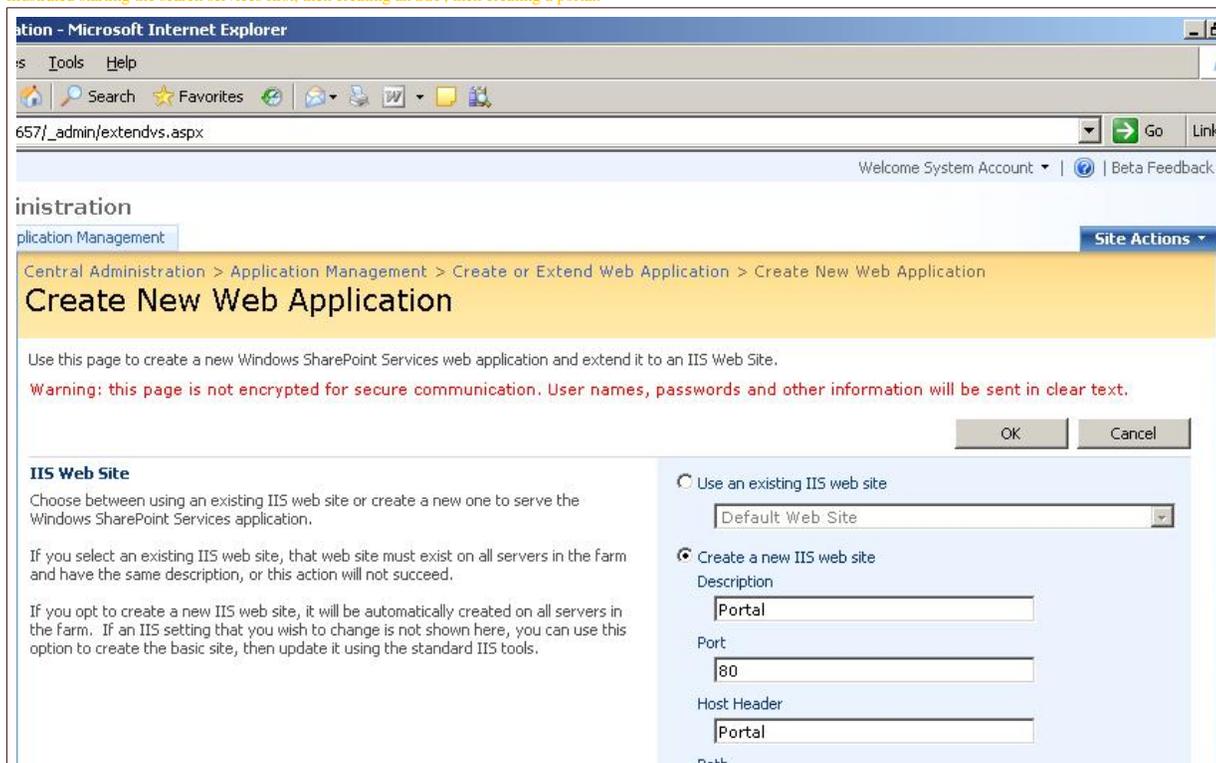




Figure 14: Configuring the new web application to host the portal

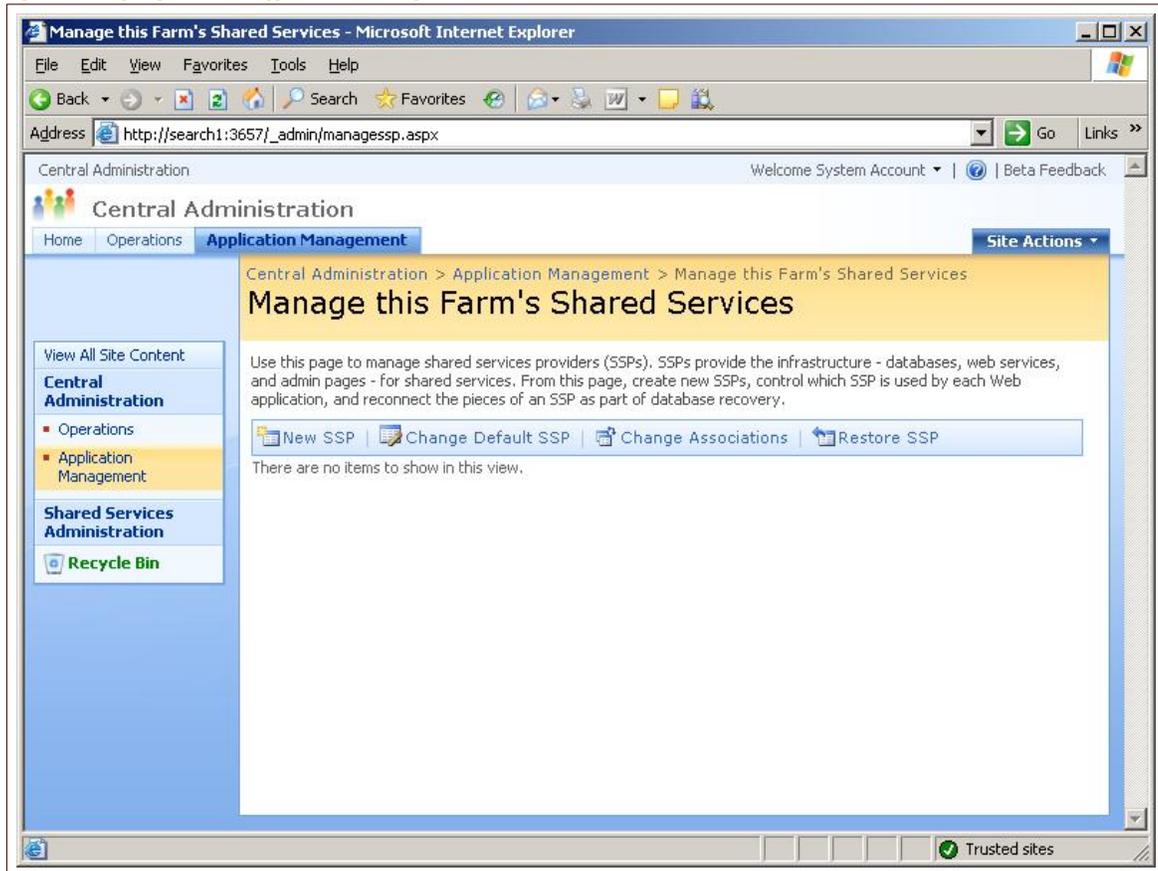
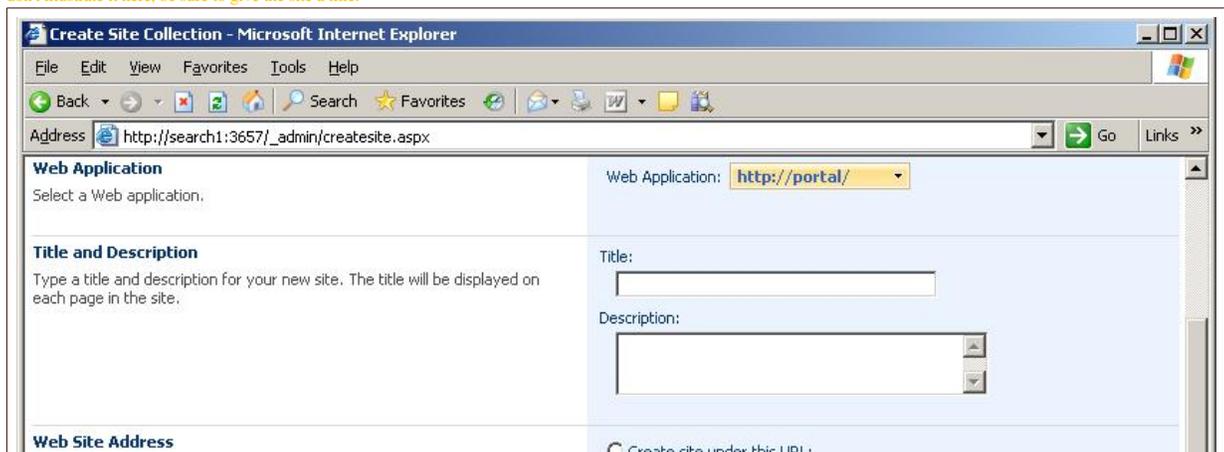


Figure 15: Illustration of the SSP management interface where you can select to create a New SSP.

Once the SSP is created and the web application for the portal has been created, you can then create the portal. The way to do this is to navigate to CA and then click Create Site Collection. Be sure the `http://portal/` is selected in the drop down list in the upper right-hand portion of the screen (Figure 16). Note that on this screen, you'll need to ensure that you are creating the site collection at the root by selecting the "Create Site at this URL" where the URL path is "root", not in the Sites managed path. Also, if you scroll down, you'll need to select the Corporate Intranet Site under the Publishing tab. Microsoft has renamed the Portal to Corporate Intranet Site and placed it under the Publishing tab for web content publishing purposes. BTW, even though I don't illustrate it here, be sure to give the site a title.



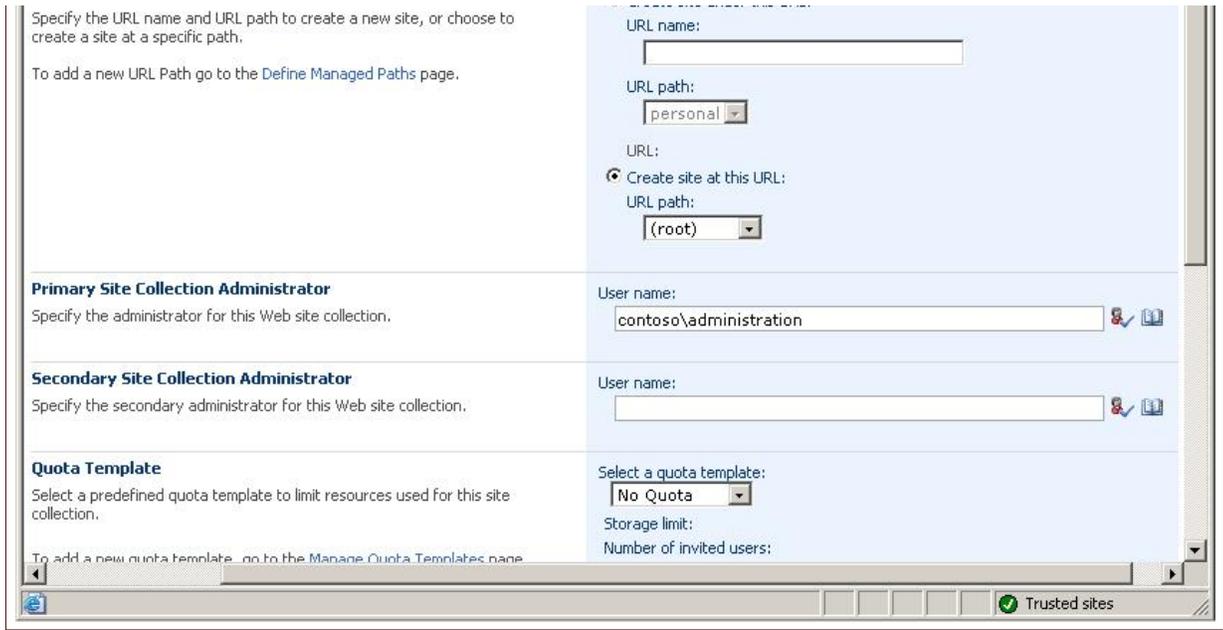


Figure 16: Create Site Collection Screen

At this point, you should now have a new portal, ready to aggregate, organize and present content for your enterprise, division or department.