

Microsoft Office SharePoint Server 2007

Evaluation Guide

February 2006



Abstract

This evaluation guide is designed to give you a solid understanding of the design goals and feature set for Microsoft® Office SharePoint® Server 2007 and a familiarity with the product implementation. It provides an overview of the solutions and benefits provided by Office SharePoint Server 2007 as well as descriptions of new and improved features in the areas of portal, search, content management, business processes, and business intelligence. It also provides a hands-on tour of the product's main feature areas and concludes with useful information for administrators and developers.

The ultimate goal of this guide is to aid the reader in performing a thorough and effective evaluation of Office SharePoint Server 2007. This guide is intended for anyone who is interested in learning more about Office SharePoint Server 2007 and wants hands-on experience.

For the latest information about Office SharePoint Server 2007, go to <http://www.microsoft.com/office/preview>. For other product information resources, refer to the "For More Information" section at the end of this guide.

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Introduction

Welcome to the evaluation guide for Microsoft Office SharePoint Server 2007. The goal of this guide is to help you gain sufficient knowledge and understanding of Office SharePoint Server 2007 to evaluate this product from Microsoft.

Office SharePoint Server 2007 helps organizations gain better control and insight over their content, streamline their business processes, and access and share information. In addition, Office SharePoint Server 2007 gives IT professionals the tools they need for server administration and application extensibility and interoperability. Office SharePoint Server 2007 helps you to:

- Get more out of your information.
- Streamline your business processes.
- Simplify the way people work together.
- Ease server administration, extensibility, and interoperability.

These benefits are further described in the Product Overview section of this guide. The Top 10 Benefits section highlights the most important ways Office SharePoint Server 2007 can help your organization make better use of its business information and processes.

Features at a Glance details the new and enhanced features for this release of Office SharePoint Server including:

- Portal
- Search
- Content Management, including Document, Records, and Web Content
- Business Processes
- Business Intelligence

With this knowledge, you will be able to properly evaluate these new features and readily describe their capabilities to your colleagues, clients, and business partners.

An evaluation guide is also available for Microsoft Windows® SharePoint Services (version 3). However, solution developers, IT professionals, technical business decision makers, journalists, and analysts can read the Office SharePoint Server 2007 Evaluation Guide without referring to the Windows SharePoint Services Evaluation Guide.

Resources Available for Evaluating Office SharePoint Server 2007

Many resources are available to help you evaluate Office SharePoint Server 2007, including the following:

- Documentation will help you install Office SharePoint Server 2007.
- The SharePoint Products and Technologies Web site at <http://www.microsoft.com/sharepoint> offers a variety of white papers and other resources.
- The Microsoft MSDN® Web site at <http://msdn.microsoft.com/sharepoint/> offers numerous technical resources from a developer's perspective about SharePoint Products and Technologies.
- The Microsoft TechNet Web site at <http://www.microsoft.com/technet/> provides a clearinghouse of resources to help you deploy, maintain, and support Office SharePoint Server 2007.

Microsoft encourages you to use these resources as aids in installing and evaluating Office SharePoint Server 2007.

How to Use This Guide

Overview of This Guide

This guide has the following sections. For best results, review them in order, as each section builds on concepts presented in preceding sections.

Product Overview

Highlights key features of Office SharePoint Server 2007 and describes how these features can benefit organizations that build and manage content-rich Web sites.

Top 10 Benefits

Identifies the top 10 business and technical benefits that Microsoft customers can realize through their deployment and use of Office SharePoint Server 2007.

Features at a Glance

Provides information to help you understand, describe, and evaluate the new and enhanced features of Office SharePoint Server 2007. This section will be of interest to anyone who plans, builds, deploys, or manages business solutions using Office SharePoint Server 2007.

Architectural Overview

Describes the logical architecture of Office SharePoint Server 2007.

Installing Your Evaluation Server

Provides step-by-step instructions for installing Office SharePoint Server 2007 in a single-server environment so that you can evaluate product features. More information will be available in a future release of this document.

Product Tour

Provides step-by-step instructions for configuring and demonstrating each new feature of Office SharePoint Server 2007. More information will be available in a future release of this document.

An Administrator's Perspective

Provides information needed to plan, build, deploy, and manage an Office SharePoint Server 2007 solution. More information will be available in a future release of this document.

A Developer's Perspective

Introduces the tools that developers use to design and develop custom solutions using Office SharePoint Server 2007. More information will be available in a future release of this document.

For More Information

Provides links to sources of further information about Office SharePoint Server 2007, such as white papers, community sites, and the Windows SharePoint Services Support Web site.

Product Overview

Office SharePoint Server 2007 is an integrated suite of server applications that improves organizational effectiveness by providing comprehensive control over electronic content; accelerating shared business processes; and facilitating better-informed decisions and information-sharing across boundaries.

Effectively Manage and Repurpose Your Information Assets

Get more value from your content by providing comprehensive control over the storage, security, distribution, reuse, and management of documents and other electronic content such as Web pages, PDF files, and e-mail messages.

Control documents through detailed, extensible policy management

Define customized document management policies to control item-level access rights, retention period, expiration actions, and document-auditing settings. Policy integration with familiar client applications makes compliance transparent and easy for employees. Extensible design helps organizations to modify product behavior to suit their unique business needs.

Centrally store, manage, and access documents across the enterprise

Organizations can store and organize all business documents and content in one central location, and users have a consistent mechanism to navigate and find relevant information. Default repository settings can be modified to add workflow, define retention policies, and add new templates and content types.

Simplify content reuse and information repurposing

Submit work from collaborative sites to portals using tools that simplify content reuse and publishing. Simplify management of multilingual content through document library templates designed to maintain a relationship between original and translated versions of documents. Use slide libraries as an easy way to share and reuse Microsoft Office PowerPoint® 2007 slides.

Accelerate Internal and External Shared Business Processes

Make business process initiation, participation, tracking, and reporting easy and flexible by providing a simple, consistent user experience through familiar client applications. Optimize the way people, content, and processes interact within and across organizations.

Boost employee productivity by simplifying everyday business activities

Take advantage of workflows to automate and gain more visibility into common business activities like document review and approval, issue tracking, and signature collection. Integration with familiar client applications, e-mail, and Web browsers simplifies the user experience. End users can easily define and model their own processes using familiar Microsoft tools.

Extend business processes across the organization

Enhance your relationships with customers, partners, and suppliers by making forms-based business processes easily accessible to them, even if they haven't installed client software. Built-in validation rules and integration with Microsoft information rights management (IRM) help to ensure that critical business information can be collected with enhanced security and accuracy.

Focus on strategic, value-added tasks instead of redundant activities

Information gathered using electronic forms can be integrated easily into line-of-business (LOB) systems, stored in document libraries, used to start workflow processes, or submitted to Web services. This helps users avoid duplicate efforts and costly errors from manual data entry, and it helps ensure they have access to accurate, real-time data.

Make Better-Informed Decisions through Centralized Access to Information

Provide a single, integrated location where employees can efficiently find organizational resources, access corporate knowledge, and leverage business insight in order to make better-informed decisions.

Present business-critical information in one central location

Create live, interactive business intelligence (BI) portals that assemble and display business information from disparate sources, using integrated BI capabilities such as dashboards, Web Parts, key performance indicators (KPIs), and business data connectivity technologies. Centralized Report Center sites give users a single place to find the latest reports, spreadsheets, or KPIs.

Quickly connect people and information

SharePoint Enterprise Search incorporates business data and information about people with documents and Web pages to provide more comprehensive results. Tools for query hit highlighting, duplicate collapsing, “did you mean” spelling correction, and alerts help users locate what they want within search results.

Unlock business data

Out-of-the-box (OOB) connectors provide accessibility to data in SAP and Siebel systems. With the Business Data Catalog, IT can create a pool of connections to business systems, which can be reused easily by business users to create personalized, interactive views into back-end data from browsers—all without writing any code.

Leverage your unstructured business networks to drive better decisions

Employees can use new knowledge management tools to get the most from their powerful unstructured business networks, both inside and outside their organizations, by connecting with people more quickly and efficiently. By exploring these undocumented business relationships and finding subject matter experts, individuals can make better decisions more quickly.

Work when and where you want

With offline access to SharePoint lists and document libraries, you can free yourself from the limitations of corporate network connectivity.

Share Business Information Within and Outside Your Organization

Simplify and help boost the security and efficiency of collaboration and knowledge sharing within and across organizational boundaries.

Broadly share business data while helping to protect sensitive information

Excel Services running on Office SharePoint Server 2007 provides access to real-time, interactive Microsoft Office Excel® 2007 spreadsheets from a Web browser. Use these spreadsheets to maintain and efficiently share one central, up-to-date version, while helping to protect any proprietary information, such as financial models, embedded in documents.

Enhance customer and partner relationships

With smart, standards-based, electronic forms-driven solutions, you can collect business information from customers, partners, and suppliers through a Web browser. Lightweight Directory Access Protocol (LDAP) integration and support for other pluggable authentication providers makes it easier to implement extranet SharePoint environments, improving connectivity outside your organization.

Effectively manage and share business insight

Report Center provides a centralized location to access business-critical information. It simplifies control and sharing of reports, Office Excel spreadsheets, KPIs, and dashboards within organizations and teams. Users can define personalized reports and dashboards, browse reports by category, or view a calendar of upcoming reports and subscribe to ones that are relevant.

Use a Single, Integrated Platform to Manage Intranet, Extranet, and Internet Applications

Office SharePoint Server 2007 provides a scalable enterprise platform that can grow with your business without the need for costly add-ons. IT staff can spend more time on the strategic tasks only they can perform and help drive enhanced business value and positive change throughout your organization.

Boost employee productivity through innovative, enterprise-wide solutions

Make use of powerful development tools and an open, scalable architecture with support for Web services and interoperability standards, including XML and Simple Object Access Protocol (SOAP), to build and extend applications that incorporate business system information and integrated workflow.

Simplify site staging and content deployment

Use OOB site-starter templates for common Web sites, with Area and Page Layout templates and preconfigured navigation. Configure content deployment paths between different computers or the same computer. Schedule processes that define the scope of content and the frequency of recurring deployments.

Get the tools you need to ease deployment, management, and system administration

Robust system-monitoring and usage-tracking tools help to isolate and solve problems faster, and improve the operational efficiency of the system infrastructure.

Top 10 Benefits

Office SharePoint Server 2007 provides an integrated suite of easy-to-use server applications that boost organizational effectiveness and optimize the way that people, content, processes, and business applications interact. Here are the top 10 ways Office SharePoint Server 2007 can help your organization:

1. Provide a simple, familiar, and consistent user experience.

Office SharePoint Server 2007 is tightly integrated with familiar client applications, e-mail, and Web browsers to provide a consistent user experience that simplifies how people interact with content, processes, and business data. Employees can easily use services to accomplish business activities without having to depend on IT staff.

2. Boost employee productivity by simplifying everyday business activities.

Take advantage of OOB workflows for initiating, tracking, and reporting common business processes such as document review and approval, issue tracking, and signature collection—without any coding. Modifying and extending these OOB processes is made easy through tools like Microsoft Visual Studio® and Microsoft Office SharePoint Designer 2007 (the next release of Microsoft Office FrontPage® 2003).

3. Help meet regulatory requirements through comprehensive control over content.

Help ensure your sensitive business information can be controlled and managed effectively—and reduce litigation risk for your organization—by specifying retention and auditing policies for business records in accordance with compliance regulations. IRM and the content control mechanisms help protect proprietary and confidential information, even when users aren't connected to a server.

4. Effectively manage and repurpose content to gain increased business value.

Business users can easily author content for Web sites and submit it for approval and scheduled deployment to the Internet. Managing multilingual content is simplified in Office SharePoint Server 2007 through new document library templates specifically designed to maintain a relationship between the original and translated versions of a document.

5. Simplify organization-wide access to structured and unstructured information across disparate systems.

Give users access to business data in common LOB systems like SAP and Siebel through OOB connectors in Office SharePoint Server 2007. Users can also create personalized interactions with business systems by dragging predefined, configurable back-end connections. Managed

document repositories help organizations store and organize business documents in one central location.

6. Connect people with information and expertise.

SharePoint Enterprise Search incorporates business data with information about people, documents, and Web pages to produce comprehensive, relevant results. Rich search functionality like duplicate collapsing, spelling correction, and alerts improves the relevance of the results and helps users easily find what they need within the search results.

7. Accelerate business processes and maintain control of your electronic forms environment.

Use smart, electronic forms-driven solutions to collect critical business information from customers, partners, and suppliers through a Web browser without coding any custom applications. Built-in data validation rules help you accurately and consistently gather data that can be directly integrated into back-end systems, avoiding redundancy and errors resulting from manual data re-entry.

8. Share business data while preserving its consistency and helping to protect sensitive information.

Give employees access to real-time, interactive Office Excel spreadsheets from a Web browser through Excel Services running on Office SharePoint Server 2007. Use these spreadsheets to maintain and efficiently share one central, up-to-date version while helping to protect any proprietary information embedded in the documents.

9. Facilitate better-informed decisions by presenting business-critical information in one central location.

Make it easy to create live, interactive BI portals that assemble and display business-critical information from disparate sources, using integrated BI capabilities such as dashboards, Web Parts, scorecards, KPIs, and business data connectivity technologies. Centralized Report Center sites give users a single place for locating the latest reports, spreadsheets, or KPIs.

10. Provide a single, integrated platform to manage intranet, extranet, and Internet applications across the enterprise.

Office SharePoint Server 2007 has an open, scalable, services-oriented architecture that provides support for interoperability standards including XML and SOAP, which makes it easier to integrate with existing processes and applications. You also get powerful, IT-focused tools and templates for building and extending applications that incorporate business system information and integrated workflow.

Features at a Glance

Features at a Glance provides information that will help you understand, describe, and evaluate the new and enhanced features of Office SharePoint Server 2007. This section will be of interest to anyone who plans, builds, deploys, or manages business solutions using Office SharePoint Server 2007.

Portal

The portal components of Office SharePoint Server 2007 include features that are especially useful for designing, deploying, and managing enterprise intranet portals, corporate Internet presence Web sites, and divisional portal sites.

The portal components also make it easy to connect to people within the organization that have the right skills, knowledge, and project experience. Office SharePoint Server 2007 simplifies the way in which people work together.

Feature Area	Features
Portal Site Templates New	Preconfigured site templates are included for quickly creating, customizing, deploying, and managing divisional portals, organization-wide intranet portal sites, and corporate Internet presence Web sites.
Site Manager New	Site Manager, which replaces the Portal Site Map administration page, is a Web-based drag-and-drop tool for managing a SharePoint site's navigation, security access, and general look and feel. Site Manager unifies site management tasks for portal and Web sites, including management of areas, pages, listings, SharePoint site lists, and their component parts. Site Manager supports the bulk creation, editing, reorganization, and deletion of areas, as well as the viewing of relationships between pages.
My Site Personal Sites Enhanced	My Site personal sites has several significant enhancements including: <ul style="list-style-type: none">• Social networking• Privacy controls• SharePoint Sites and Documents roll-up Web Parts• Colleagues and Memberships Web Parts

Feature Area	Features
Social Networking New	<p>Office SharePoint Server 2007 has additional functionality that makes it easier to discover social networking connections between employees.</p> <p>Public My Site pages can include Social Networking Web Parts that use information about your organization, communities, and electronic communications. This can help you identify colleagues with common interests and produce better, more relevant search results.</p> <p>In addition, Social Networking helps establish personal connections by finding people you work or communicate with as well as people who have something in common with you, such as common distribution lists, group and SharePoint site memberships, or common responsibilities and skills.</p> <p>Social Networking gives you the option of using user profile information from Microsoft Active Directory®, LOB applications, or e-mail and other forms of electronic communication.</p>
Privacy Controls Enhanced	<p>Privacy Controls are used to control visibility of information in a My Site public view. Authorizations to view selected public content on a My Site personal site include "My Manager," "My Workgroup," "My Colleagues," and "Everyone."</p>
SharePoint Sites and Documents Roll-up Web Part New	<p>The new SharePoint Sites roll-up Web Part lists all the SharePoint sites that you are a member of.</p> <p>The new Documents roll-up Web Part lists the documents you have published across a collection of SharePoint sites. This Web Part also supports more general capabilities for querying and filtering the documents stored in a collection of SharePoint sites.</p>
Colleagues and Memberships Web Parts New	<p>The new Colleagues and Memberships Web Parts lists people you know, or who have interests in common with you, and people who belong to common distribution lists and groups.</p>
Site Directory Enhanced	<p>An important new Site Directory feature is the "Scan for Broken Links" button that locates changed or deleted links to external content.</p>

Feature Area	Features
Real-Time Presence and Communication Enhanced	<p>The Real-Time Presence Smart Tag icon, displayed virtually everywhere a person's name appears in Office SharePoint Server 2007, tells you in real time whether a person is online and available for a telephone or audio conference call, instant messaging, or two-way video conversation.</p>
Notification Service Enhanced	<p>Office SharePoint Server 2007 enhances several Notification Service features:</p> <ul style="list-style-type: none"> • Filtering conditions can trigger more relevant alerts to users. • An extensible platform sends customizable e-mail alerts to users. • Users participating in a workflow automatically receive e-mail alerts without subscribing in advance to workflow notifications. • Users can send content of a changed item in a SharePoint list or document library along with details of what was changed.
LDAP Pluggable Authentication Provider New	<p>Office SharePoint Server 2007 includes an LDAP pluggable provider for authenticating users of Office SharePoint Server 2007. This is in addition to the Active Directory provider included with Windows SharePoint Services.</p>
User Profiles Enhanced	<p>User profiles are significantly enhanced with these updated features:</p> <ul style="list-style-type: none"> • Profile Store • Profile Synchronization • Profile Directory Import <p>In addition to defining audiences using Active Directory-based properties, audiences can now be defined using properties imported from LOB applications such as human resources (HR) or professional services automation (PSA) solutions.</p> <p>User profile information is also used by the Notification Service to target alerts, by Social Networking to deduce common interests and other properties, and by the Memberships Web Part to display distribution list and group membership information.</p>

Feature Area	Features
Profile Store Enhanced	The Profile Store is enhanced with: <ul style="list-style-type: none"> • Multi-valued properties bound to a taxonomy or a list of values from Office SharePoint Server 2007. • Property-level security controls by person or group. • Open and closed vocabularies. • Per-site property extensions (federated property store).
Profile Synchronization Enhanced	Profile Synchronization supports the extended capabilities of the Profile Store with enhanced scalability and performance.
Profile Directory Import Enhanced	Profile Directory Import supports the extended capabilities of the Profile Store with enhanced scalability and performance.
Audience Targeting Enhanced	Web Part pages, Web Parts, and content can be targeted to distribution lists and groups in addition to SharePoint audiences. Audiences in Office SharePoint Server 2007 benefit from the richer collections of properties available in the Profile Store.
Mobile Device Support New	By default, all Office SharePoint portal, team site, and list pages render on both International and North American mobile devices (including Web-enabled mobile phones) using a simplified text-only format.

Content Management

The new and enhanced content management features in Office SharePoint Server 2007 fall within three areas:

- Document management
- Records management
- Web content management

Windows SharePoint Services provides core document management functionality: major and minor versioning, check-in/check-out document locking, rich descriptive metadata, workflow, content type-based policies, auditing, and role-based-access controls at the document library, folder, and individual document levels.

Office SharePoint Server 2007 builds on these capabilities to deliver enhanced authoring, business document processing, Web content management and publishing, records management, policy management, and support for multilingual publishing.

Document Management

With the new document management components of Office SharePoint Server 2007, SharePoint Products and Technologies no longer simply provide a platform for document collaboration. Office SharePoint Server 2007 becomes a full-featured solution for managing business documents.

Enhanced document libraries in Windows SharePoint Services provide the foundation for the new document management features described below.

Feature Area	Features
Business Document Workflow Enhanced	Business document processing is a series of workflow applications included with Office SharePoint Server 2007: <ul style="list-style-type: none"> • Document review • Document approval • Signature collection • East Asian document approval • Issue tracking • Custom routing for review and approval
Document Management Site Templates New	Office SharePoint Server 2007 includes enhanced document management site templates that can be used right away without further customization: <ul style="list-style-type: none"> • Managed Document Library site template • Divisional Library site template • Translation Library site template
Managed Document Library Site Template New	Managed document libraries are large-scale document management sites capable of storing the documents for an entire organization. With managed document libraries, all business units can organize and categorize information consistently.
Divisional Library Site Template New	The key features of the Divisional Library site template include: <ul style="list-style-type: none"> • Managed document libraries • Dashboards, KPIs, and other reporting
Translation Library Site Template New	The Translation Library site template is valuable for multinational and public-sector organizations that need to translate documents into multiple languages. The translation library integrates customizable

Feature Area	Features
	workflow processes with the document management features of Office SharePoint Server 2007 to help translators manage multiple translations of a document.
2007 Microsoft Office system Client Application Integration Enhanced	Office SharePoint Server 2007 has significantly enhanced document management and related workflow features, including: <ul style="list-style-type: none"> • Document Information Panel • Document Action Bar
Document Information Panel New	The Document Information Panel makes editing document properties an integral part of the Microsoft Office system document authoring experience. InfoPanel encourages users to enter and update the properties associated with each type of business document.
Document Action Bar New	The Document Action Bar in the 2007 Microsoft Office system client applications tells users that the current document is governed by a business policy or workflow and what action they are expected to take. For example, "Not for distribution outside the company" or "You have a task assigned to you."

Records Management

Every organization, whether privately held, publicly traded, or not-for-profit, needs a disciplined approach to record keeping. Proper records management is vital to an organization's knowledge management, legal defense, and regulatory compliance.

Records management is the process of collecting, managing, and disposing of corporate records (information deemed important for the history, knowledge, or legal defense of a company) in a consistent and uniform manner based on the company's policies. These policies are shaped by the type of work the organization does, the kinds of legal risks it faces, and the laws and regulations that govern it.

Office SharePoint Server 2007 introduces a new set of features for creating and supporting formal records management capabilities in your organization.

Feature Area	Features
Policy and Auditing New	<p>The Policy and Auditing features of Office SharePoint Server 2007 include:</p> <ul style="list-style-type: none"> • Content-type and policy-based document retention and expiration schedules. • Auditing and reporting of policy-based actions. • Support for labeling and barcoding without physically modifying a document. • Integrated Windows Rights Management Services (RMS).
Records Repository New	<p>The core of the records management implementation in Office SharePoint Server 2007 is a stable, scalable, and efficient repository built on Windows SharePoint Services.</p> <p>The Records Repository in Office SharePoint Server 2007 includes several important features:</p> <ul style="list-style-type: none"> • Specialized Records Repository site template • A records vault with capabilities that help ensure the integrity of the files stored in the repository • Information management policies that consistently and uniformly enforce the labeling, auditing, and expiration of records • Hold capabilities that make it possible for IT, lawyers, and records managers to apply one or more holds that suspend the records management policies on items to help ensure that they remain unchanged during litigation, audits, or other investigations • Records Collection Interface that helps people and automated systems easily submit content to a records repository—supporting “write only” access without requiring direct access to the records in the repository • Record routing that enables automated routing of content to its proper location within the records management system, based on its content type • Extensibility for solutions requiring additional capabilities beyond those available in Office SharePoint Server 2007

Feature Area	Features
E-mail Content as Records New	<p>Office SharePoint Server 2007 records management features include the ability for providing consistent, policy-based solutions for managing e-mail content across Microsoft Office Outlook® 2007, Microsoft Exchange Server 2007, and Office SharePoint Server 2007. This is accomplished through two new features:</p> <ul style="list-style-type: none"> • Managed mail folders • Mail management policies
Managed Mail Folders New	<p>Working in conjunction with Exchange Server 2007, managed mail folders help records managers and compliance officers manage the e-mail in individual mailboxes more effectively by defining a set of standard folders, each with an explicit business purpose, in which individual employees can file their e-mail.</p> <p>These folders can be deployed to individual information workers based on their roles within the organization, so people who fill equivalent roles across a company can have similar top-level filing structures in their mailboxes.</p>
Mail Management Policies New	<p>Behind each managed mail folder is a set of rules and mail management policies, in addition to a written policy statement. Policies can be applied to any e-mail folder—such as Inbox, Drafts, and Sent Items—and a default policy can be applied to other folders that are not explicitly named.</p> <p>Policy statements appear at the top of each folder view in Office Outlook 2007 and Microsoft Outlook Web Access. These statements help records managers, compliance officers, and IT to communicate the policies associated with folders in a way that makes sense to employees and that no one can claim they never saw.</p>

Web Content Management

A key goal for Office SharePoint Server 2007 is the complete integration of Microsoft Content Management Server 2002 functionality, and further significant enhancement of the Web content management functionality, with the collaboration, portal, search, document management, and records management features of the new Office SharePoint Server 2007.

Feature Area	Features
Site Modeling Enhanced	Building on the Site Model platform services in Windows SharePoint Services, Office SharePoint Server 2007 includes support for several new enterprise site templates: <ul style="list-style-type: none">• Enterprise portal• Corporate Internet presence site• Application portal• Roll-up portal
Enterprise Portal Site Template New	Enterprise portals provide a means for a business unit to create and share content that is relevant to the ongoing operation of an enterprise, division, or business unit. This content usually consists of a relatively small amount of static content on the operations of the division and a large amount of internally created content that is a byproduct of the ongoing operations of the business unit. The key features of the enterprise portal or divisional portal site templates include: <ul style="list-style-type: none">• Managed document libraries• Dashboards, KPIs, and reports• Team and project collaboration sites

Feature Area	Features
Corporate Internet Presence Site Template New	<p>Having a high-quality corporate presence Web site has become a business imperative. It provides a means of communicating important company information to customers, partners, investors, and potential employees.</p> <p>Some of the key features of the corporate Internet presence site template are tools and workflow to create and manage Web content for:</p> <ul style="list-style-type: none"> • Products and services descriptions • Company news • Annual reports and public filings • Career information
Application Portal Site Template New	<p>Application portals are SharePoint sites that bring together all of the tools and information related to a particular LOB application such as HR, enterprise resource planning (ERP), customer relationship management (CRM), or professional services automation (PSA).</p> <p>The application portal site template includes features for:</p> <ul style="list-style-type: none"> • Searching and finding information in LOB applications. • Security-enhanced, authenticated access to data and content stored in these systems. • The ability to quickly and easily analyze, report, and summarize data from LOB applications.
Roll-up Portal Site Template New	<p>Roll-up portals are used to consolidate data and content from several applications or locations and present it in an integrated format that's easy to understand.</p> <p>The Roll-up portal site template includes a feature that consolidates information from:</p> <ul style="list-style-type: none"> • Search • Global site directory • Personalization and My Site personal sites • Knowledge and expertise found anywhere in the organization

Feature Area	Features
Authoring and Approval Enhanced	<p>Web content management includes tools, workflows, and services for the end-to-end content management of content authoring and approval processes. These include:</p> <ul style="list-style-type: none"> • Check-in/checkout • Content moderation • Content routing, review, and approval workflows • Publishing schedules
Web Publishing and Deployment Enhanced	<p>The goal of the Web content publishing and deployment features of Office SharePoint Server 2007 is to support environments where distinct authoring, staging, and production workflows are part of the formal Web publishing processes.</p>
WYSIWYG Web Content Editor Enhanced	<p>The Web-based authoring experience extends the SharePoint user interface with additional commands and status indicators for in-context Web page authoring.</p> <p>Rather than entering content in an edit form, the author remains in the context of the Web page and enters new content using a feature-rich no-install Web content editor.</p> <p>The editor supports cascading style sheets (CSS) extended with custom styles, tables, and spelling checker with automatic language detection. The editor also integrates with the built-in pickers for images and links.</p>

Search

The search component of Office SharePoint Server 2007 has been significantly enhanced by this release of SharePoint Products and Technologies. The new features provide a consistent and familiar search experience, increased relevance of search results, new functions to search for people and expertise, ability to index and search data in LOB applications, and improved manageability and extensibility.

Feature Area	Features
Consistent Search Experience New	<p>While Windows SharePoint Services 2.0 and Microsoft Office SharePoint Portal Server 2003 used common Microsoft Search technology, users found the two search environments to be quite different from one another. In addition, administrators needed to use different tools to configure and manage each environment.</p> <p>Office SharePoint Server 2007 and Windows SharePoint Services now use a common implementation of Microsoft Search. Both users and administrators use a common set of tools to configure and use Microsoft Search.</p>
Relevance Enhanced	<p>Microsoft Search includes a revamped ranking engine developed in collaboration with Microsoft Research and MSN Internet Search. It is specifically tuned for the unique requirements of searching enterprise content and LOB application data. These requirements include:</p> <ul style="list-style-type: none">• Searching document content and LOB application data in addition to Web content.• Producing high-relevance search results despite the lack of rich linking information available in document content and LOB application data.• High security and content access controls. <p>Specific new content relevance algorithms include:</p> <ul style="list-style-type: none">• Click distance• Hyperlink anchor text• URL surf depth• URL text matching• Automated metadata extraction• Automatic language detection• File type relevancy biasing• Enhanced text analysis

Feature Area	Features
<p>Uniform, Scalable User Experience Enhanced</p>	<p>Microsoft Search provides a significantly enhanced user experience including the following:</p> <ul style="list-style-type: none"> • Improved rendering of search results • Hit highlighting • Duplicate and near-duplicate collapsing • Improved Best Bets keyword searching (including support for keyword definitions) • Automatic generation of “Do you mean” synonym search keywords • New Search Center for initiating queries and browsing search results • Enhanced query syntax including support for implicit industry standards for full text and property-based searching • Ability to subscribe to a search query and receive e-mail alerts when changes occur in the results of a persisted search query • Ability to reuse and adapt the query and search results Web Parts to more easily create customized search solutions for your organization
<p>Content Sources Enhanced</p>	<p>Microsoft Search permits many additional types of enterprise content and LOB application data to be searched, including:</p> <ul style="list-style-type: none"> • LOB application data and reports indexed and retrieved through the Business Data Catalog. • Enhanced user profile or people-based search. • People-based searching for colleagues and other people who share a set of common interests. • Improved threaded-discussion searching. • Continued support for third-party repositories using custom protocol handlers and IFilters. <p>More information about Business Data Catalog can be found in the BI functions in the Features at a Glance section.</p>

Feature Area	Features
People and Expertise Searching Enhanced	<p>Support for searching for people and what they know has been significantly enhanced. These features include:</p> <ul style="list-style-type: none"> • Support for indexing and searching any LDAP directory. • Dedicated Search Center tab for searching for people. • Returning SharePoint groups and Active Directory distribution lists in search results. • People search results grouped by “social distance” from you and your common interests. • Search result refinement by properties such as department.
Business Data Search New	<p>The Business Data Search feature of Office SharePoint Server 2007 makes it easy to index and search any relational database or other information store accessible by ADO.NET or a Web service; for example, data in a CRM system.</p> <p>There is no need to write custom protocol handlers or IFilters or create searchable HTML representations of information in a database.</p> <p>Search results from Business Data Search can be highly customized and fully integrated with search scopes and other Search Center features.</p>
Search Manageability Enhanced	<p>Microsoft Search includes an expanded and improved administration user interface that makes the following possible:</p> <ul style="list-style-type: none"> • Broad support for all search and indexing scenarios • Central control of resource-intensive operations • SharePoint sites that subscribe to a central search service • Easy configuration and management of indexing and search by corporate IT operations staff • Office SharePoint Server 2007 supports the centralized management of distributed indexing and search services within a SharePoint server farm. This makes it possible for very large collections of business data and document content to be indexed and searched without significantly increasing operations overhead.

Feature Area	Features
Indexing Management Enhanced	<p>Improved Indexing Management controls provide better control over what is to be indexed, how it is to be indexed, and when. These features include:</p> <ul style="list-style-type: none"> • Improved crawl rules and crawl log. • One index per shared indexing service, removing the need to worry about managing discrete indexes. • Multiple start addresses per content source. • An entirely new browsable, filterable index log. • Explicit SharePoint content source type. • Decoupling of content sources from scopes. • From a performance perspective, Microsoft Search indexes Windows SharePoint Services sites more efficiently using the change log feature in Windows SharePoint Services platform services.
Content Scopes New	<p>Content Scopes help users broaden or narrow the scope of their content search. Office SharePoint Server 2007 search scopes are now decoupled from content sources and can be based on arbitrary content properties such as URL, type, and author. Search scopes can be based in simple or multiple rules such as "All Marketing Plans on the North American Sales Web Site."</p> <p>In addition, search scopes can be defined globally over the entire SharePoint environment, or on an individual SharePoint site basis.</p>
Extensibility and Programmability Enhanced	<p>Microsoft Search includes three categories of application programming interfaces (APIs):</p> <ul style="list-style-type: none"> • Data access: protocol handlers and IFilters • Query object model, APIs, Web services, and reusable Search Center Web Parts • Administration object model and APIs <p>These APIs provide coherent, comprehensive, and backward-compatible programmable access to the Microsoft Search features.</p>
Common Search Technology and Infrastructure: Desktop to Server Enhanced	<p>Microsoft Search provides a single indexing and search infrastructure that effectively scales from the desktop, through team sites and divisional portal sites, to the largest corporate intranets, extranets, and Internet presence Web sites.</p>

Business Processes

Microsoft Office Forms Server 2007 helps organizations streamline forms-driven business processes with easy-to-use, intelligent, XML-based electronic forms that integrate smoothly with existing systems. This security-enhanced, client/server platform provides rapid-solution creation and deployment, centralizes form management and maintenance, and helps to extend business processes to customers, partners, and suppliers.

Feature Area	Feature Description
Built on the XML Industry Standards Enhanced	Forms created with Microsoft Office InfoPath® 2007 are based on XML schemas that you define to control the structure of the data captured by the form. A completed form is an XML file that complies with that structure, making it highly actionable.
Browser-based Forms New	Microsoft Office Forms Server 2007 makes it possible to design Web-capable forms in Office InfoPath 2007 and distribute them on corporate intranets, extranets, or the Internet. Users can fill out forms in a browser with no download or client components needed.
"Design Once" Development Model New	Forms designers can design their forms once and deploy them for use both within the rich Office InfoPath 2007 client program and through a Web browser. Office Forms Server 2007 automatically converts the form into ASP.NET Web forms, with no additional work from the designer.
Form Import Wizard New	The designer in Office InfoPath 2007 provides an easy way to convert forms designed in Microsoft Office Excel and Microsoft Office Word into rich Office InfoPath 2007 forms. The Form Import Wizard handles the conversion of form fields, repeating tables, rich text boxes, and other elements, dynamically generating the underlying XML structure for the new form.
Advanced "No-code" Form Features Enhanced	The designer in Office InfoPath 2007 helps forms designers define validation, calculations, conditional formatting, and rules declaratively, without having to write any code.

Feature Area	Feature Description
Integrated Deployment Model for “No-code” Forms New	The Publish Wizard in Office InfoPath 2007 makes it easy to publish forms that do not have any managed code components to a Windows SharePoint Services library, while making the form available as a browser-based form at the same time.
Native Support for Web Services and Customer-defined Schemas Enhanced	Native support for Web services and customer-defined XML schemas in Office Forms Server 2007 makes it easy to integrate form data with many back-end systems using Web services. This is true for forms filled out in both Office InfoPath 2007 and the browser.
Multiple Form Views Enhanced	Forms designed with Office InfoPath 2007 support multiple views, which can be made available selectively in either the browser or Office InfoPath 2007. For example, a loan application form might include a main view for an applicant to fill in data using a browser, and another view visible only to the loan officer, who uses the rich Office InfoPath 2007 client to review and approve the application.
Compatibility Checker New	The Compatibility Checker helps forms designers validate those features that need to work across the broadest range of Web browsers.
Rich Administrative Tool for Forms Deployment and Management New	For forms that have managed code, Office Forms Server 2007 provides a centralized administrative tool for deploying and managing forms for use in the browser.
Single Sign-On (SSO) Enhanced	<p>The single sign-on feature permits a person to enter one name and password to use a variety of back-end applications. It is used for integrating back-office systems and LOB applications that require separate credentials database.</p> <p>Office SharePoint Server 2007 single sign-on services support the use of custom as well as third-party pluggable credential providers.</p> <p>Note: Office SharePoint Server 2007 offers an additional pluggable authentication provider model for authenticating user access to Office SharePoint Server 2007 features.</p>

Business Intelligence

Office SharePoint Server 2007 helps organizations provide business intelligence (BI) capabilities to every employee, so they can share, control, and reuse business information in order to make better business decisions. The BI features in Office SharePoint Server 2007 provide Web and programmatic access to published Office Excel spreadsheets, programmatic reuse of critical LOB data, and easy development of Web-based BI dashboards that can incorporate rich, data-bound KPIs, Web Parts, and published spreadsheets.

Feature Area	Feature Description
Web Access to Published Spreadsheets New	Office Excel 2007 Services help information workers publish spreadsheets to SharePoint sites, including spreadsheets that incorporate powerful new client capabilities such as data visualization and richer PivotTable views and PivotChart views. Users require no additional software to access these interactive spreadsheets in a Web browser, and all calculations are performed on the server.
Integrated, Flexible Publishing New	Office Excel 2007 provides an integrated publishing experience that helps information workers easily choose what they want to show and how users can interact with their published spreadsheets.
Programmatic Access to Published Spreadsheets New	Excel Services provide a Web services model for programmatically accessing published spreadsheets. Custom applications can send data to Excel Services for server-side calculation, and the results are returned to the custom application without exposing the spreadsheet's business logic.
Data Connection Libraries New	Data Connection Libraries are new SharePoint document libraries in which organizations can centrally publish connection files to make it easy for users to find and use the data sources they need. Data connection files are easy to create and update, and solution designers can easily reuse them from within the 2007 Microsoft Office system client applications, such as forms in Office InfoPath 2007.

<p>Business Data Catalog New</p>	<p>The Business Data Catalog makes it possible to include data from back-end systems in SharePoint lists, Web Parts, pages, and search results.</p> <p>The Business Data Catalog deeply integrates external data into the Office SharePoint Server 2007 user experience, gives access to external data exposed by ADO.NET and Web services, and permits the display and analysis of external data through Business Data Web Parts and Business Data SharePoint lists.</p> <p>External data was formerly used to enhance the information available in user profiles, for example, information from a human resources application or employee skills database. External data added to User Profiles can be automatically indexed and searched in the same manner as user directory information.</p> <p>External data can also be used in custom applications using the Business Data Catalog runtime and administration APIs.</p>
<p>Business Data SharePoint Lists and Web Parts New</p>	<p>Business Data SharePoint Lists and Web Parts store, analyze, and display LOB application data retrieved through the Business Data Catalog.</p>
<p>Business Data Actions New</p>	<p>Business Data Actions are links that appear beside business objects from the Business Data Catalog. These links can, for example, open Web pages, display the user interfaces of LOB applications, or launch Office InfoPath 2007 forms. These actions are easy to create with no custom coding.</p> <p>Business Data Actions menus also appear in SharePoint lists and search results.</p>
<p>Data Connection Libraries New</p>	<p>Data Connection Libraries centralize storage of Business Data Catalog connections to external data making it easy to discover new sources of data.</p>
<p>Dashboards New</p>	<p>Office SharePoint Server 2007 makes it easy to create rich BI dashboards that incorporate dynamic KPIs, Office Excel 2007 workbooks, and Microsoft SQL™ Server Reporting Services reports.</p>

<p>Report Center Web Sites New</p>	<p>Office SharePoint Server 2007 includes out-of-the-box Web sites optimized for report access and management. These sites, hosted by the new Report Center, provide consistent management of reports, spreadsheets, and data connections.</p>
<p>Excel Services Management New</p>	<p>Excel Services Management is a centralized management service for configuring and managing Excel Services used by other components of Office SharePoint Server 2007.</p> <p>Office SharePoint Server 2007 can refresh external data, recalculate a workbook, and render it with a high-fidelity, Web-based user interface in an Excel Services Web Part. Based on publishing parameters, it will render a complete Office Excel 2007 workbook, selected worksheets, or a region within a worksheet.</p> <p>Developers can leverage Excel Services Web services to calculate a complex model built in Office Excel 2007 and display the results to a user working on a Web-based user interface or custom desktop application.</p>

Architectural Overview

This section describes the key components of Office SharePoint Server 2007, how they relate to each other and to the platform, and collaboration services provided by Windows SharePoint Services (version3).

The high-level architecture is illustrated in Figure 1.

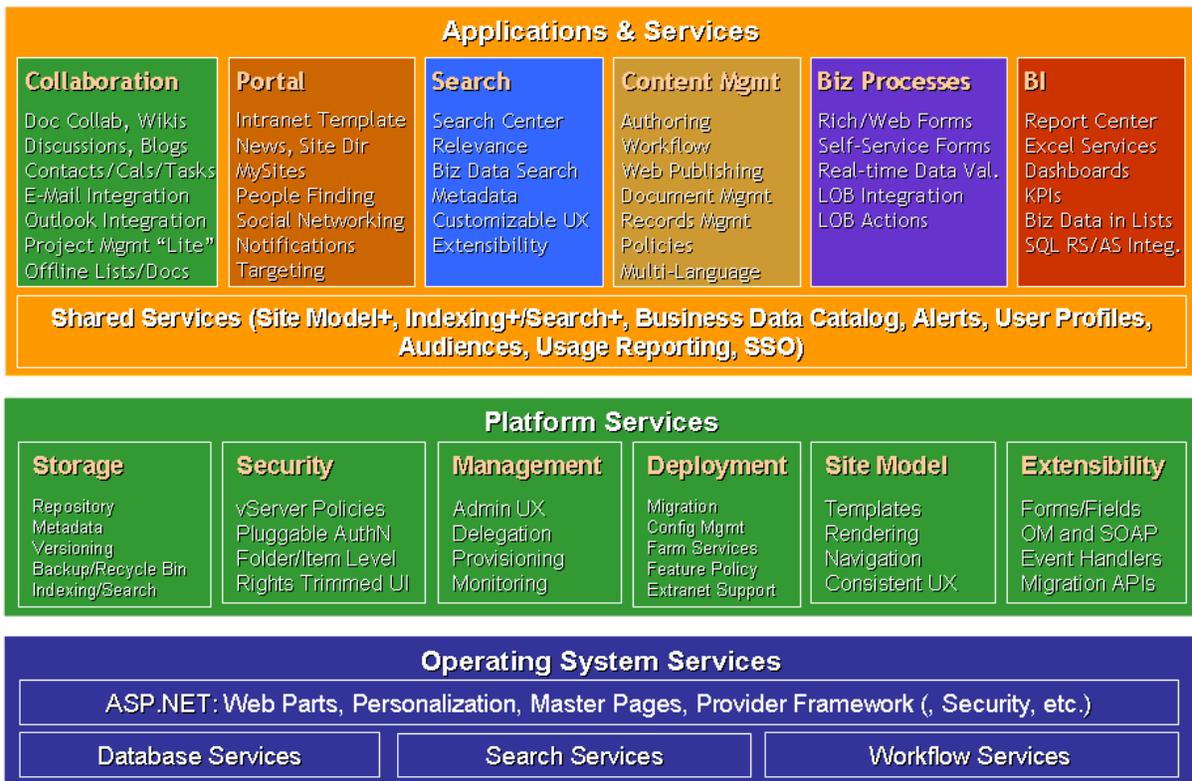


Figure 1. Office SharePoint Server 2007 Architecture

Operating System and Database Services

Office SharePoint Server 2007 is built on the technologies and services provided by Microsoft Windows Server™ 2003 Service Pack 1 (SP1) and SQL Server 2005 (as well as SQL Server 2000).

The core and development-platform operating system services include:

- Microsoft .NET 2.0 Framework which comprises:
 - ASP.NET 2.0 master pages, content pages, and Web Parts
 - Pluggable service-provider models for personalization, membership, navigation, and enhanced security
 - Database access services
 - Internet Information Services
 - Windows Workflow Foundation
 - Windows desktop indexing and search services

SQL Server is the relational database used for storing all content, data and configuration information used by Office SharePoint Server 2007. SQL Server 2005 is recommended; SQL Server 2005 Express is included as a default part of the installation. SQL Server 2000 can be used as an alternative.

Windows SharePoint Services

Windows SharePoint Services (version 3) builds on the operating system and database services to support requirements ranging from a team site for a workgroup, to large enterprise portal solutions serving over 100,000 employees and staff (such as Office SharePoint Server 2007), to a corporate Internet portal supporting millions of users.

Windows SharePoint Services platform services provide the following security-enhanced, scalable, reliable, high-performance capabilities:

- Storage
- Management
- Deployment
- Site Model
- Extensibility

In addition, Windows SharePoint Services, a feature of Windows Server 2003, implements the collaboration features of the 2007 release of Office SharePoint Products and Technologies:

- Document collaboration
- Wikis and Blogs
- Really Simple Syndication (RSS) support
- Discussions
- Project task management
- Contacts, Calendars, and Tasks
- E-mail integration
- Integration with the 2007 Microsoft Office system client applications
- Offline support for SharePoint lists and document libraries, using Office Outlook 2007 as the offline client application.

Office SharePoint Server 2007: Applications and Services

Architecturally, Office SharePoint Server 2007 consists of a common set of Shared Services that support five server application components.

Server Applications

Office SharePoint Server 2007 comprises five application components:

- Portal
- Search
- Content management
- Business process
- Business intelligence

Each of these is built upon the platform services and collaboration components of Windows SharePoint Services and the Shared Services components of Office SharePoint Server 2007.

Shared Services

Conceptually similar to Shared Services in SharePoint Portal Server 2003, the Shared Services component has been completely restructured and redesigned in the Office SharePoint Server 2007 using a new services provider model.

Shared Services include virtually all of the services that are used by multiple applications in Office SharePoint Server 2007:

- Full-text and property indexing and search services
- Business Data Catalog
- Notification service for generating alerts
- User profile store
- Audiences
- Usage reporting
- Single sign-on services

Installing Your Evaluation Server

Consult the readme file included with Office SharePoint Server 2007 for information about installing your evaluation server.

More information will be available in a future release of this document.

Product Tour

More information will be available in a future release of this document.

An Administrator's Perspective

More information will be available in a future release of this document.

A Developer's Perspective

Consult the Software Developer Kit (SDK) included with Office SharePoint Server 2007 for information about developing solutions with Office SharePoint Server 2007.

More information will be available in a future release of this document.

For More Information

Visit the Microsoft Office 2007 Preview Center at

<http://www.microsoft.com/office/preview/default.mspx>. This Web site features the latest news and information about the 2007 Microsoft Office system, including product information, case studies, white papers, information about related technologies, and more.

Hardware and Software Requirements

For complete system requirements, visit

www.microsoft.com/office/preview/beta/sysreq.mspx.

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