

Microsoft SharePoint
Products and Technologies

**Implementing Rich Collaboration Infrastructure Using
Microsoft Windows SharePoint Services and Microsoft
Office SharePoint Portal Server 2003**

White Paper

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Deciding When to Deploy Microsoft Windows SharePoint Services and Microsoft Office SharePoint Portal Server 2003

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For the latest information, please see <http://www.microsoft.com/sharepoint/>

Introduction

This document describes the relationship and the differences between Microsoft® Windows® SharePoint™ Services and Microsoft Office SharePoint Portal Server 2003. You can use this information to decide if your organization should deploy Windows SharePoint Services alone or with SharePoint Portal Server 2003.

Relationship between Windows SharePoint Services and SharePoint Portal Server 2003

Microsoft SharePoint Products and Technologies facilitate collaboration within an organization and with partners and customers. Using the combined collaboration features of Windows SharePoint Services and SharePoint Portal Server 2003, users in your organization can easily create, manage, and build their own collaborative Web sites and make them available throughout the organization.

Windows SharePoint Services is a collection of services for Microsoft Windows Server™ 2003 that you can use to share information, collaborate with other users on documents, and create lists and Web Part pages. You can also use Windows SharePoint Services as a development platform for creating collaboration and information-sharing applications.

SharePoint Portal Server 2003 is a secure, scalable, enterprise portal server built upon Windows SharePoint Services that you can use to aggregate SharePoint sites, information, and applications in your organization into a single, easy-to-use portal. In addition to the features of Windows SharePoint Services, SharePoint Portal Server 2003 includes the following features:

- News and Topics
- My Site, with personal and public views
- Information targeted to specific audiences
- Powerful indexing and searching across file shares, Web servers, secure Web servers, Exchange Public Folders, Lotus Notes, and SharePoint sites
- Alerts that notify you when changes are made to relevant information, documents, or applications

- Single sign-on for enterprise application integration
- Integration with Microsoft BizTalk® Server

Because SharePoint Portal Server 2003 requires Windows SharePoint Services, all features of Windows SharePoint Services are available in SharePoint Portal Server 2003.

Requirements and Solutions

To decide whether your organization should deploy Windows SharePoint Services by itself or with SharePoint Portal Server 2003, review the following requirements and solutions.

I want to share contact lists, event calendars, and announcements with my team, my customers, and my partners

Windows SharePoint Services provides shared Web space for team members with core sharing tools and services, such as document collaboration and shared lists for contacts, announcements, and tasks. You can use SharePoint sites as the primary working space for your team or as an ad-hoc shared space organized around a particular task, meeting, or document. Additionally, you can use Windows SharePoint Services as a platform for creating customized shared solutions for your business needs.

Windows SharePoint Services is closely integrated with Microsoft Office 2003 Editions. You can use many of the menu commands and task panes in Office 2003 Editions applications to take advantage of the document storage and collaboration features of Windows SharePoint Services, create SharePoint sites, import and export lists on SharePoint sites, and link list data from SharePoint sites to your databases.

I want to easily share a document with my team members for review

A Document Workspace site in Windows SharePoint Services is an innovative tool for communication and collaboration. A Document Workspace is a SharePoint site that you can quickly create from an Office 2003 Editions application or browser to share a particular task, document, or project. This gives you easy access to Windows SharePoint Services features when and where you need them. Windows SharePoint Services also creates and stores lists that are relevant to Document Workspace sites, including tasks, contacts, links, and related documents.

Many organizations use e-mail and shared folders as their primary document sharing tools. When a user creates a document, they send the document or a link to the document to co-authors and reviewers in an e-mail message. This method can lead to confusion about who has the authoritative version of a document. If the document is stored on a shared folder, identifying the source of changes or rolling the document back to a previous version can be difficult. With Office 2003 Editions, you can automatically create a Document Workspace site and a shared attachment when you use e-mail to send a document to other users for review. A shared attachment is a document that is stored on a Windows SharePoint Services

site and linked to an e-mail message. When you create a shared attachment, Windows SharePoint Services stores the document, and you can configure the Document Workspace site to track document versions. When you turn on version tracking, users can view previous versions of the document, and you can roll back changes, if necessary.

I want a Web site where I can manage my meetings

A Meeting Workspace site in Windows SharePoint Services is an innovative tool for managing meetings. A Meeting Workspace is similar to a Document Workspace. However, whereas a Document Workspace site uses Web Parts, lists, and document libraries relevant to shared documents, a Meeting Workspace site uses Web Parts, lists, and document libraries relevant to meetings. You can use Microsoft Office Outlook® 2003 to create a Meeting Workspace site automatically as part of scheduling a meeting. This way, you can share work effectively without having to take the time to manually create a Web site or request a Web site from the IT department. You can also create Meeting Workspace sites for recurring meetings so team members can track progress for ongoing tasks or projects.

I want my employees to create their own Web sites without any help from the IT department

When an administrator turns on Windows SharePoint Services Self-Service Site Creation, users can create their own top-level Web sites without needing administrator permissions on the server or virtual server. Users need administrator permissions only on the Web site that hosts Self-Service Site Creation. A user simply enters some basic information on a Web form, and Windows SharePoint Services creates the new top-level Web site with the user as the owner and administrator. When you turn on Self-Service Site Creation, you free yourself from having to create top-level Web sites on demand for your users — they can do it themselves.

When you turn on Self-Service Site Creation on a virtual server, an announcement with a link to the signup page appears on the home page of the top-level Web site for that virtual server. Users can click the link to go to the signup page and create their sites.

I want support for managing unused Web sites

Web sites based on Windows SharePoint Services may become inactive for many reasons: perhaps a site was set up for documents relating to a project that is finished, or perhaps a user was trying out Windows SharePoint Services and created a site that they no longer need. Because inactive sites take up space on the servers, you need to check with site owners to see if they still need their inactive sites. You can use one of the new administrative options in Windows SharePoint Services to send notices automatically to site owners requesting that they confirm that their sites are in use. You can also delete unconfirmed sites automatically. These features give you a way to control the number of unused Web sites on your server.

Site use confirmation works like alerts do for users' sites. When a user creates a site, the site is added to the database and logged as an active site. If the site is inactive for a specified time defined by the administrator, Windows SharePoint Services sends an e-mail message to the site owner asking the owner to click the appropriate link to either reactivate or delete their unused Web site. After Windows SharePoint Services sends the notification, there are three possible outcomes:

- If a site is in use, the site owner clicks the link to confirm that the site is active and to preserve the site. When the owner clicks the confirmation link, Windows SharePoint Services restarts the timer. If the site remains inactive, the owner is notified again after the time period expires.
- If a site is not in use, the site owner can follow the instructions in the notification e-mail to delete the site, or the owner can do nothing. If the site owner does nothing, Windows SharePoint Services continues to send periodic e-mail notifications (the period is defined by the administrator) until the site owner confirms or deletes the site.
- If a site is not in use and the automatic deletion feature is turned on, Windows SharePoint Services automatically deletes the site if the site owner does not respond after receiving a specified number of notification messages. The administrator can configure how many messages are sent before the site is deleted.

I want documents attached to incoming e-mail messages to be added to a document library automatically

With Windows SharePoint Services, you can link a document library to a public folder in Microsoft Exchange 2000 Server or later. Windows SharePoint Services can automatically insert any document attached to a message into a document library. The document library then displays the document, the From address, the Subject, and the date and time that the attachment was inserted into the document library. The body text of the e-mail message remains in the public folder, but it is not transferred to the document library.

When a user sends an e-mail message to the public folder with an attached document, the document is automatically added to the correct document library on the associated SharePoint site. For example, if you use an XML template to store invoice information, a user could fill out the XML invoice and e-mail it to the public folder. The XML file is then added to the document library and is available for easy retrieval or for roll up into an invoice report.

I want version control for specific documents

Windows SharePoint Services can also track versions for documents stored on a SharePoint site. Windows SharePoint Services keeps a copy of all previous versions of each document, so that you can go back and view the changes that were made to a document at any time. This is especially useful if you must roll back a document to a previous version, or if you must

retrieve data that was deleted from an earlier version of a document. Version tracking in Windows SharePoint Services can help your team quickly and efficiently track and manage document creation and editing.

I want to be notified automatically whenever documents are changed

Windows SharePoint Services uses alerts to notify you about important events and changes to the SharePoint site. For example, you can choose to receive an e-mail message when a document is published to your team document library. Users can elect to receive immediate, daily, or weekly alert results for content included in the portal site index.

SharePoint Portal Server 2003 extends this service with additional alerts about people, news, lists, list items, the Site Directory, categories, search queries, and backward-compatible document libraries. Each user can also view a summary of their alerts in the My Alerts Web Part in their instance of their My Site.

Alert messages use an easily readable HTML format, and they now specify whether you received the alert because content changed or because new content was added. The e-mail format is specified by a customizable .xsl file.

I want to search and find only the documents that are on my team site

With Windows SharePoint Services, users can search all Web site content on a server or server farm. Because all site information (including documents) is now stored in a database, Windows SharePoint Services can search all site content.

Additionally, if you are running Microsoft SQL Server™ 2000, Windows SharePoint Services uses the SQL Server 2000 full-text search engine to search for Web site content. These enhanced search features are only available for Windows SharePoint Services if SQL Server 2000 is installed. If you are running Microsoft SQL Server 2000 Desktop Engine (Windows) (WMSDE), no enhanced search features are available.

The search engine in Windows SharePoint Services can query most lists and all document libraries on your SharePoint site. You can search the entire site or a single list within the site. For example, you can search for a particular contact in the Contacts list. However, you cannot use the search engine to query lists of lists, such as the Quick Launch bar or surveys.

You can use the search features in SharePoint Portal Server 2003 to search your Web sites and more from a single portal site. The search engine in SharePoint Portal Server 2003 includes the following features:

- Searches file servers, Web servers, secure Web servers, Exchange Public Folders, Lotus Notes, and databases for relevant information.
- Shows people, teams, documents, Web sites, lists, and list items in search results.
- Uses search scopes to narrow your searches based on topics or content sources.

- Uses Secure Sockets Layers (SSL) to index and crawl secured Web sites.
- Switches to Advanced Search from the Search Results page for more control over search results. Use Advanced Search to search by properties, sort results by methods other than relevance, choose content sources, or set other advanced search options.
- From the Search Results page, you can add a specific search to the My Links Web Part on your My Site. You may also share the search on the Shared Links Web Part on your public view of your My Site.

I want to target content to users based on job roles or interests

With SharePoint Portal Server 2003, your organization can target content to users based on their job role. You can target Web Parts, news, lists, and list items to one or more specific audiences. You can target content based on the properties in user profiles, the reporting structure of your organization, or membership in Microsoft Active Directory® service groups. You can use user profile properties, security groups, or distribution lists that match audience rules to determine membership in audiences.

I want permanent portals for my organization and divisions

Users need to track news and events that are relevant to their division in their organization. They also need to review relevant content generated by other teams. You can use SharePoint Portal Server 2003 to create a division portal that provides a secure site that includes news and announcements from the entire division, so that all teams and team members can learn about events that affect the parent organization. Additionally, the portal provides document management, search, and subscription features that you can use to find the information you need or receive alerts about your subscribed information. Divisions of an organization may also need to provide applications to their users. SharePoint Portal Server 2003 includes a catalog of Web Parts that you can use to assemble and deliver high-quality, focused solutions quickly.

You can use the Site Directory in SharePoint Portal Server 2003 to aggregate all the SharePoint sites in your division into the division portal. You can also use the powerful search capabilities in SharePoint Portal Server 2003 to find the information you need.

I want to integrate enterprise applications with a portal

With the Single Sign-On service in SharePoint Portal Server 2003, you can use a single set of credentials to access multiple enterprise applications (such as PeopleSoft, SAP, and Siebel) through the portal, even if the applications have separate authentication systems. Each Web Part can automatically sign you on to its associated enterprise application without prompting you to provide credentials each time.

You can use the built-in integration with BizTalk Server for secured enterprise application integration. Because the Web Part architecture provides a standard set of connection interfaces, multiple developers or organizations can develop connectable Web Parts that can communicate with one another. Additionally, a user with either Microsoft Office FrontPage® 2003 or a Web browser can connect a Web Part that supports connection interfaces to build sophisticated combinations of Web Parts through a simple menu-driven user interface.

I want users to have personal sites where they can manage and share information with other users

My Site is a personalized SharePoint site included with SharePoint Portal Server 2003. For each user, My Site contains targeted content based on audience membership, quick access to their documents, contacts, or Web sites, and personal user-created alerts to track changes to portal content. Users can add lists, document libraries, and Web Parts to their personal site. SharePoint Portal Server 2003 also provides a public view of My Site, where users can share profile information, documents, and links with other portal users.

I want to easily create, manage, and organize SharePoint sites

With the Site Directory in SharePoint Portal Server 2003, you can easily create a SharePoint site from the portal. You also can add the new site to the directory or mark the content of the new site for indexing. You can also add links to existing SharePoint sites, manage the current list of sites, and identify sites that need to be crawled so that their content is included in search results.

You can organize the Site Directory into views based on metadata and use Web Parts included with SharePoint Portal Server 2003, such as the Newest Sites Web Part, the Sites I Added Web Part, and the Best Bets Web Part in order to share SharePoint site information with the rest of your organization.

I want to browse for information by topic

Topics can contain lists, discussion boards, document libraries, and other features that people can use to work together. With the Topics feature in SharePoint Portal Server 2003, users can view information organized under different topic areas. Additionally, subject matter experts can use Topics to organize and publish information about a particular subject.

Portal site topics and areas in SharePoint Portal Server 2003 provide intuitive navigation for finding and browsing all types of content, such as documents, contacts, or SharePoint sites. You can use areas to group content and organize information in the portal site, so users can easily browse through information. Users who are unfamiliar with other areas of the portal site can browse the areas under Topics to find the information they need. A document can appear in several different areas. Areas can include documents stored in SharePoint Portal Server 2003, and they can include links to information from additional content sources, such as Web sites or file shares.

In SharePoint Portal Server 2003, areas provide a navigational structure or map for the portal site and related content. You can add, move, or delete areas to change the view of the portal site for your users. Areas also provide a centralized structure for information browsing by directing readers through an organized hierarchy of topics to the information they seek. Areas provide a flexible way to describe and find documents.

I want to have multiple portals that use the same index

The portal services in SharePoint Portal Server 2003 can be shared across server farms. You can manage the services for one or more server farms from a single portal site. All of the following services can be shared:

- **User profiles** The parent portal site shares information from the user profile database with the child server farm.
- **Audiences** The parent portal site shares audience information with the child server farm. Audiences are custom groups that you can use to target content.
- **Search** The parent portal site provides search services to the child server farm.
- **Alerts** The parent portal site shares alerts for search queries, areas, files, and folders with the child server farm.
- **Single Sign-On service** The parent portal site shares the Single Sign-On service with the child server farm. With the Single Sign-On service, you can use a single set of user credentials to sign on to multiple enterprise applications, even if each application uses a different authentication system.
- **Personal sites** The parent portal site shares My Site personal sites with the child server farm. Users can create personal and public views of relevant information, documents, and enterprise applications on My Site.

Feature Matrix

The following table shows the features that are included in Windows SharePoint Services and SharePoint Portal Server 2003.

Feature	Windows SharePoint Services	SharePoint Portal Server 2003
Alerts	Yes	Yes
Browser-based customization	Yes	Yes
Discussion boards	Yes	Yes
Document libraries	Yes	Yes
Document Workspace	Yes	Yes
Meeting Workspace	Yes	Yes
Lists	Yes	Yes

Feature	Windows SharePoint Services	SharePoint Portal Server 2003
BizTalk integration	No	Yes
Microsoft FrontPage integration	Yes	Yes
Microsoft InfoPath™ integration	Yes	Yes
Surveys	Yes	Yes
Templates	Yes	Yes
Web Part pages	Yes	Yes
Automatic categorization	No	Yes
Audiences	No	Yes
Topic areas	No	Yes
News	No	Yes
Personal sites	No	Yes
Shared services	No	Yes
Single sign-on	No	Yes
Site Directory	No	Yes
User profiles	No	Yes

For more information: <http://www.microsoft.com/sharepoint/>



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