Using SharePoint from a Mac: Terminal Server Instructions

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This manual provides information and instructions for Mac SharePoint Users at Fermilab.

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Fermilab Terminal Server Introduction

This document explains Mac virtualization options and has instructions for using the Fermilab Terminal Server to access Windows and Internet Explorer for SharePoint tasks that cannot be done on the Mac. We welcome feedback and corrections as each user's experience is different and we want this document to be as useful as possible.

Please refer to the **Fermilab SharePoint 2010 End-user Training Manual** for information about logging into SharePoint and the basics of using SharePoint. This guide does not replicate that information.

Please refer to **Using SharePoint from a Mac** for instructions and recommendations for making SharePoint easier to use from a Mac.

Getting Started with the Terminal Server

Prerequisites

The Fermilab Terminal Server that provides access to the Windows environment needed for SharePoint is "fermi-ts-farm". This has the needed Internet Explorer versions and other applications that may be needed for SharePoint work.

To start using fermi-ts-farm you need to:

1. Get a Fermilab Windows account (username@FERMI.WIN.FNAL.GOV) and password. If you have a Fermilab Services or Kerberos account, you probably already have a Windows account. If you don't know your password, you can make a service desk request to get your Windows password reset via http://servicedesk.fnal.gov/

2. Get on the list of users who are allowed to access the Fermilab terminal servers. You can request this by making a service desk request to access fermi-ts-farm and listing the applications you need to use on Windows via http://servicedesk.fnal.gov/

   If you need to use Office, include that in the ticket. If you do not have a Fermilab-purchased Mac (which gives you an Office license), then one may need to be purchased. If you need to use InfoPath or SharePoint Designer, mention those as well. But most users will not need to use these and additional permissions will be needed on your SharePoint site to use these.

3. Be on the on-site Fermilab network. If you are accessing the terminal server from off-site, you will need to get and use VPN (Virtual Private Network) Cisco AnyConnect VPN software on your Mac. You may already have this on your Mac. If not, you can submit a service desk ticket for assistance. More information about VPN is at:

http://computing.fnal.gov/xms/Services/Getting_Started/Getting_connected_to_Fermilab's_Network - remote

4. Download, install and configure the Mac "Remote Desktop Connection" client software for accessing and using the Fermilab terminal server. Instructions for doing this and for using the Fermilab terminal server are in the next sections. More information about the terminal server is also at:

   http://www-css.fnal.gov/csi/fermi-ts-farm/fermi-ts-farm.html

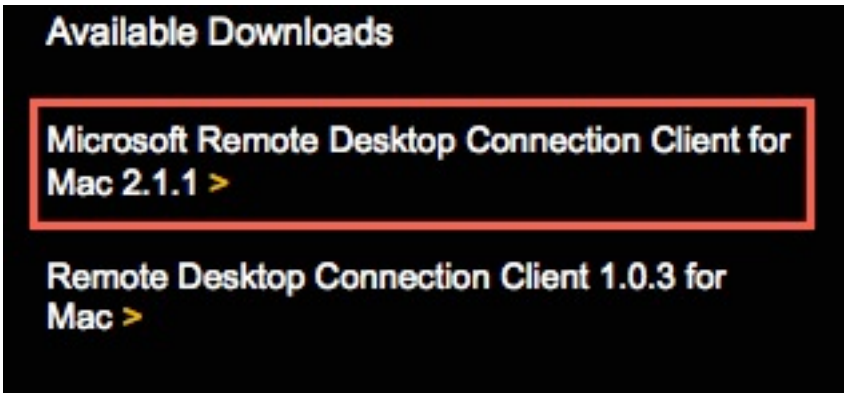
Downloading & Installing Connection Software (Remote Desktop Connection)

Before downloading Remote Desktop Connection software for Mac, check if you have it already. It could be in your Applications folder or in your Office 2011 folder. If you have it already and it is a recent version, you can skip this step and continue with the "Configuring Remote Desktop Connection" step. If you still need to get Remote Desktop Connection, follow the instructions below.

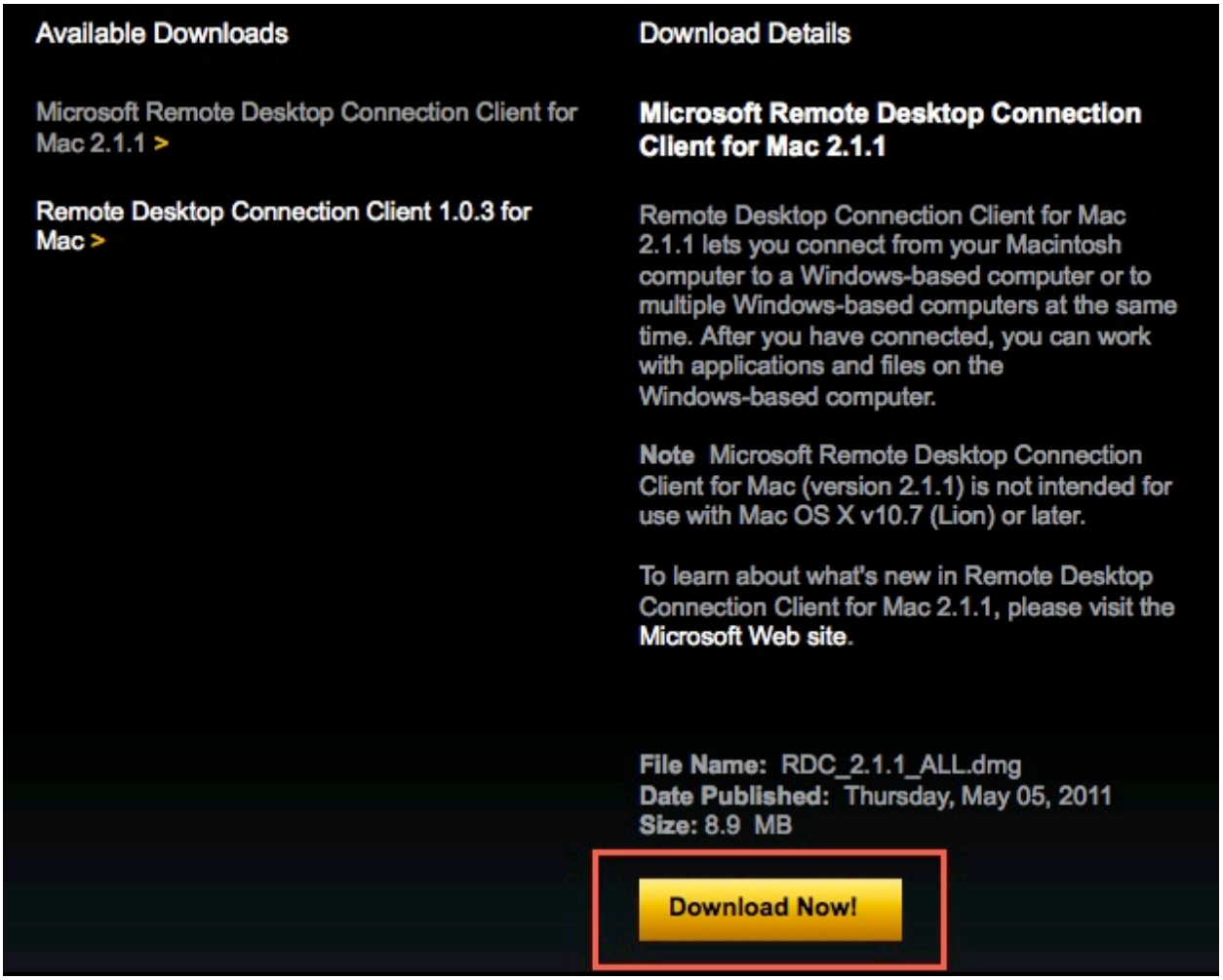
1. Go to http://www.microsoft.com/mac/remote-desktop-client
   and click on the **Download Now** button.

2. Then click on the **Remote Desktop** Icon on the left under Products.

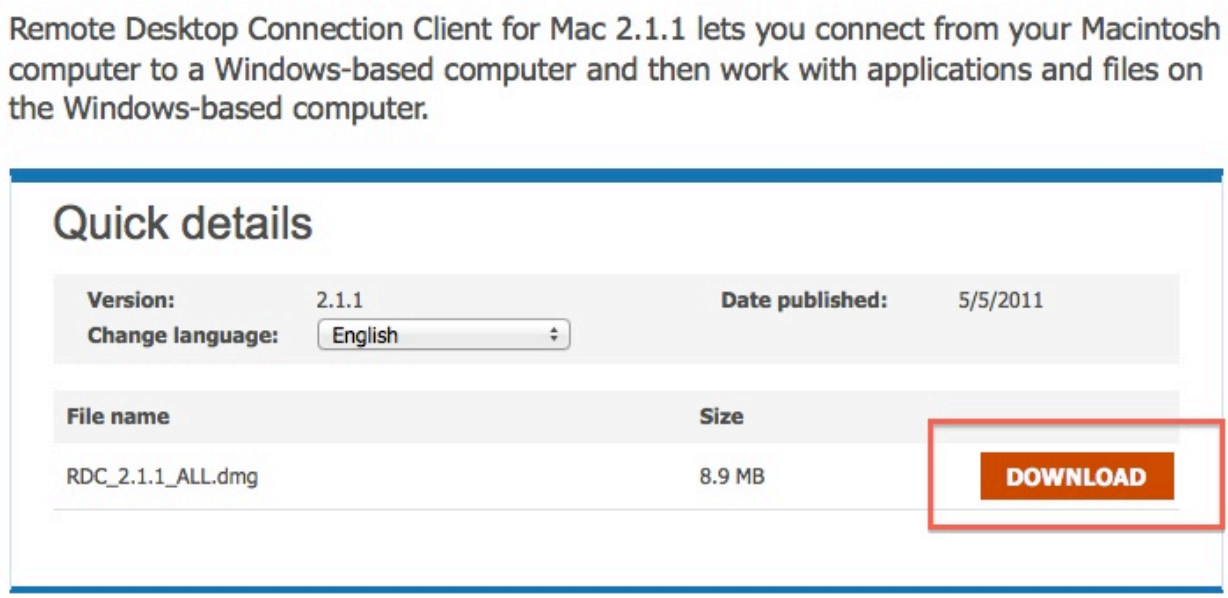
3. Then under **Available Downloads** in the middle column, click on the latest version of **Microsoft Remote Desktop Connection Client for Mac.**



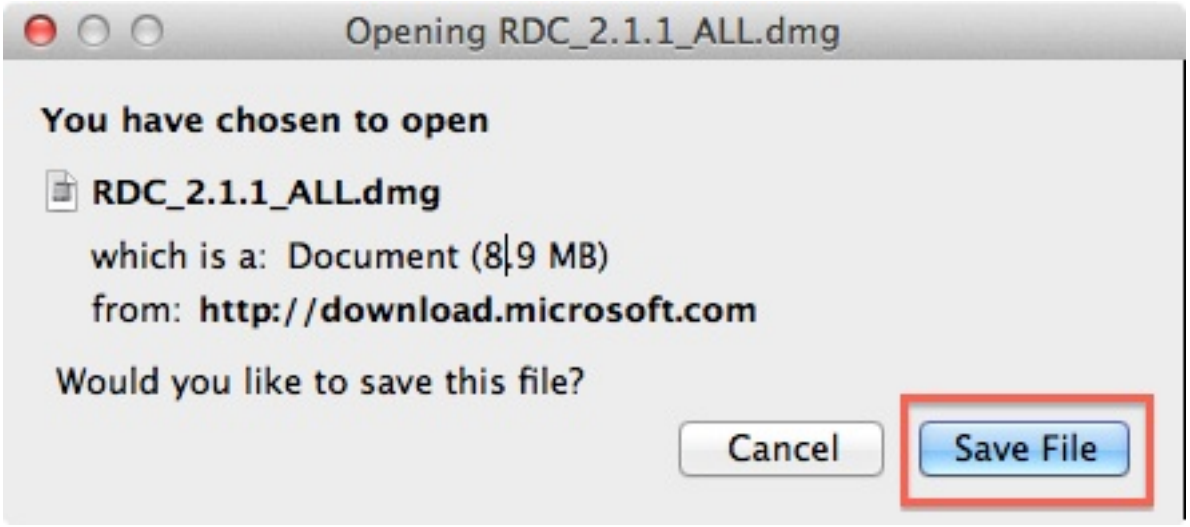
4. Then scroll down and click on the **Download Now** button in the bottom of the right hand column.



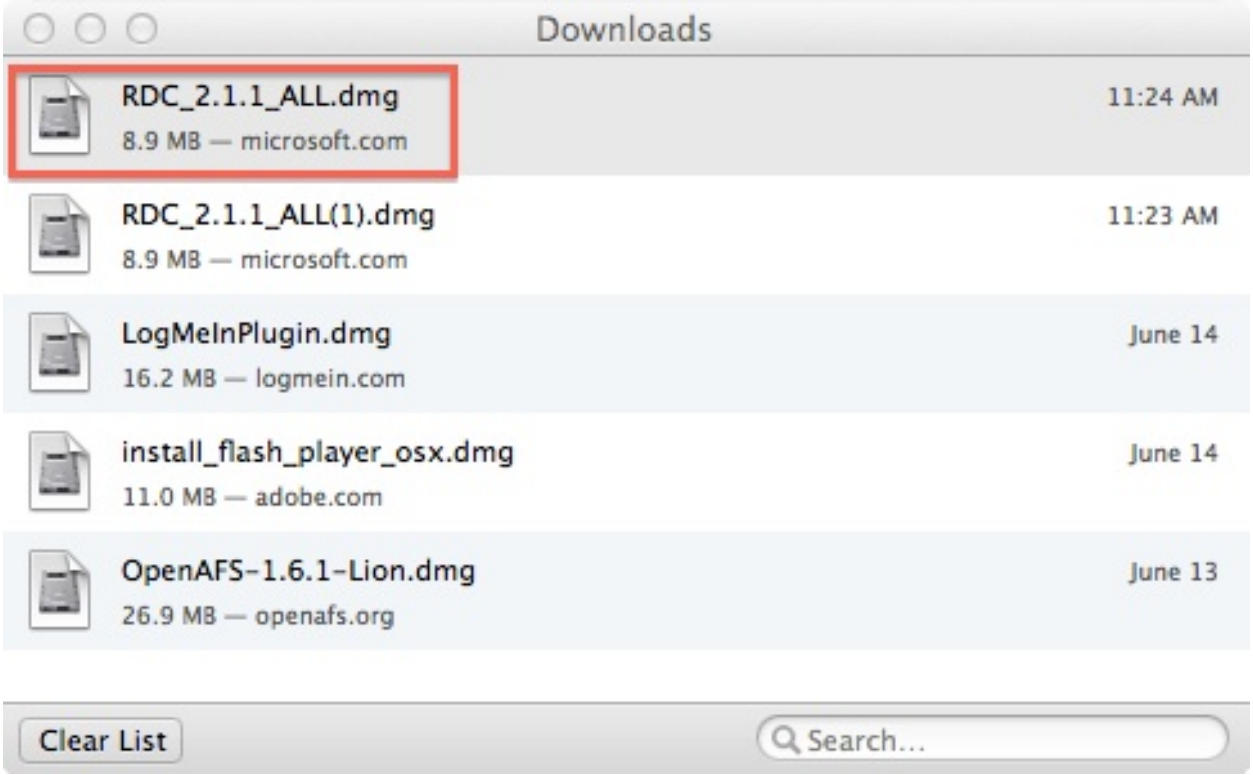
5. Then click on the **Download** button in the lower right corner and follow the download instructions on the **Thank you for Downloading** web page shown. Note that these instructions ask that you "**Quit any applications that are running** including all Office applications, Microsoft Messenger, and Office Notifications, because they might interfere with installation."



6. Click on **Save File** when it asks you if you would like to save the file.



7. Double-click on the RDC_<versionhere>.dmg file you downloaded. It could be on your Desktop or in your Downloads folder or wherever you have set your downloads to go in your web browser preferences.



8. Then click on the **RDC Installer**.

9. An **Install Microsoft RDC for Mac** Installer dialog box will pop up**.** Follow the installation steps presented. All the default settings are sufficient, so you can just click on the **Continue** or **Install** or **OK** button in each dialog box. Administrative privileges are needed for the installation and it will prompt you for the administrator username and password. When it is done it should show the message "**The Installation Was Successful**" and you can click on the **Close** button to finish.

10. A Remote Desktop Connection icon should now show in your dock and you can double-click on it to start it.

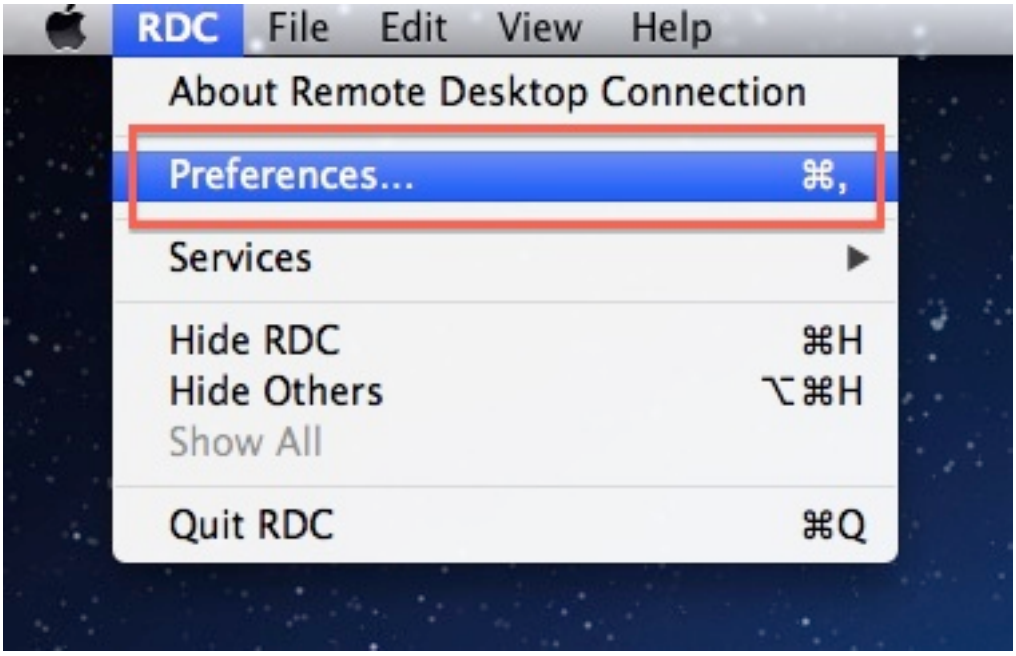
Configuring Remote Desktop Connection

Follow the instructions below to configure you Remote Desktop Connection for accessing the Fermilab Terminal server.

1. Double-click on the Remote Desktop Connection icon in your dock, if you have not already started it.

2. In the connection dialog box, type **fermi-ts-farm.fnal.gov** in the **Computer** text field. Don't click on **Connect** yet.

3. From the **RDC** menu, select **Preferences**.



4. In the configuration dialog box, select the **Login** tab if it is not already selected. Then type in your Windows domain **User name** and password and fill in a **Domain** of **FERMI.WIN.FNAL.GOV** Check **Add user information to your keychain** and **Reconnect automatically if disconnected** if desired.

5. Click on the **Drives** tab and select a drive of **Home Folder** from the menu.

6. Save your configuration changes using **File** -> **Save** from the Remote Desktop Connection (RDC) menus.

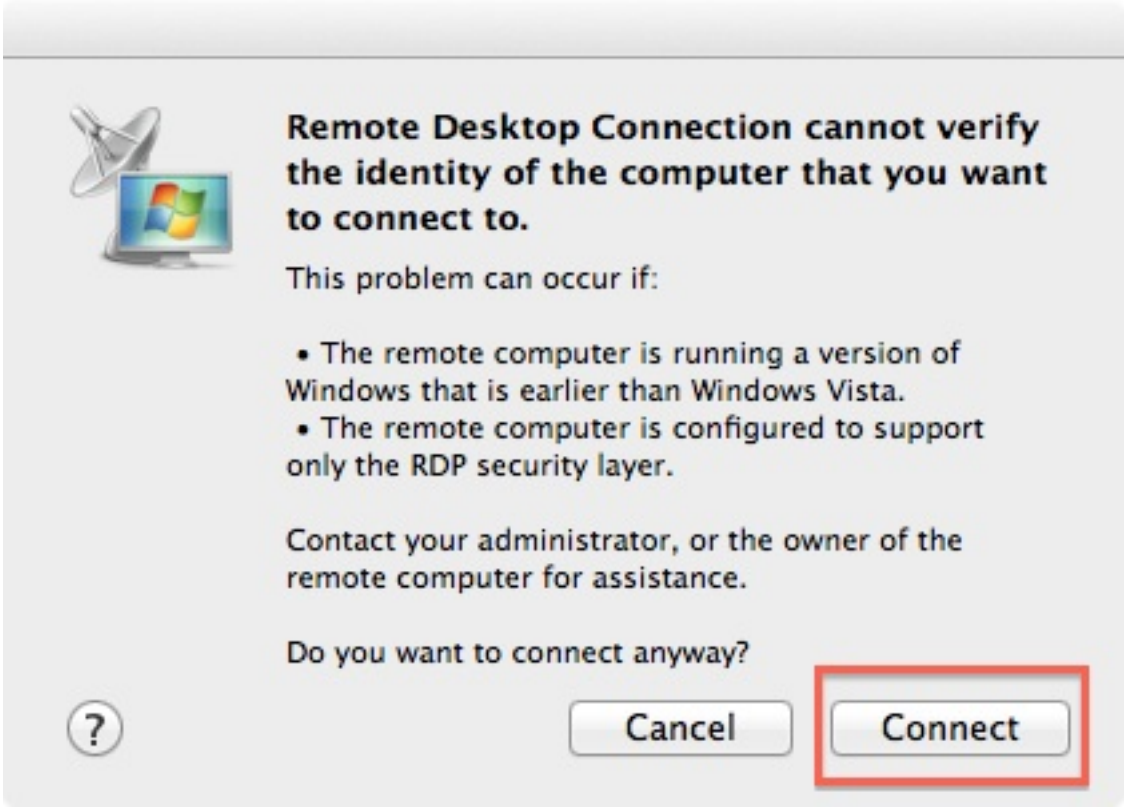
Connecting and Quitting Remote Desktop Connection

Follow these instructions to connect to the Fermilab Terminal Server.

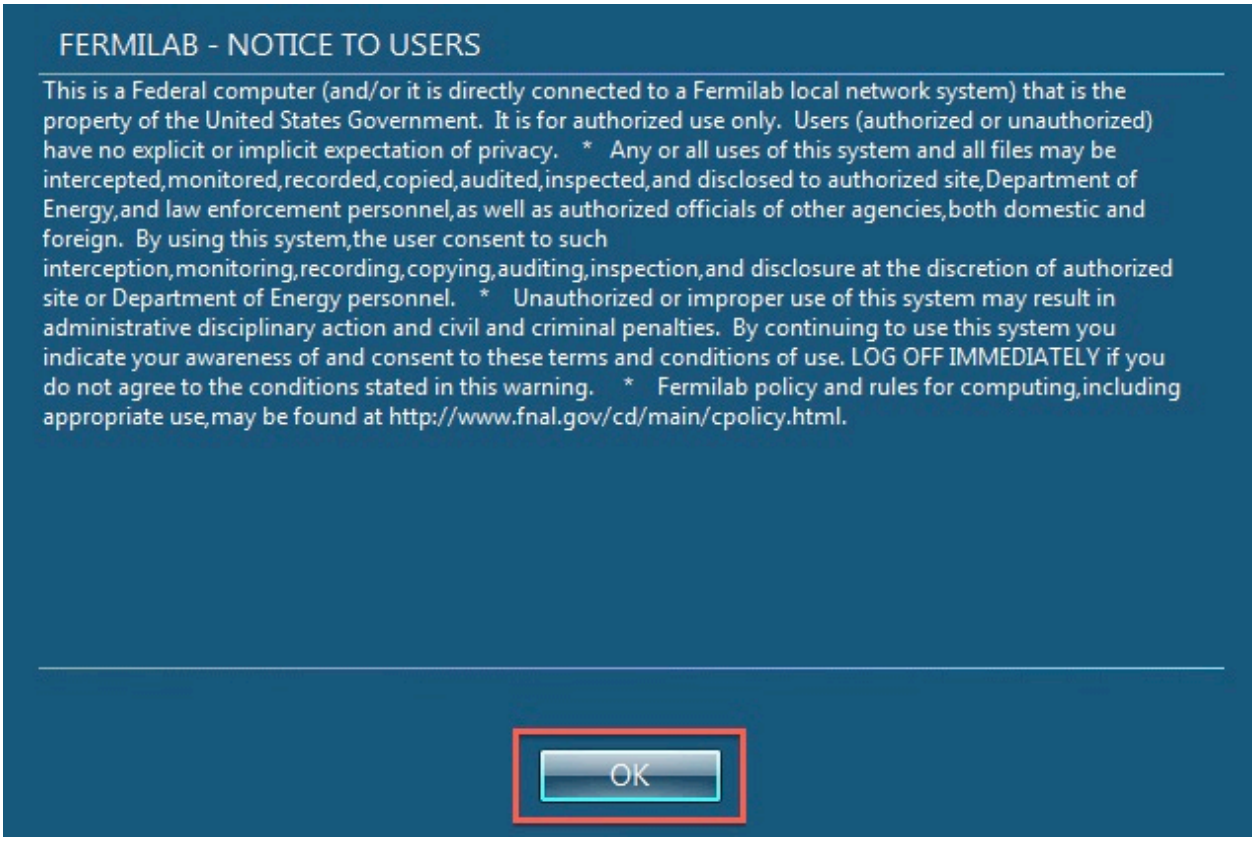
1. Start Remote Desktop Connection (RDC) if you have not started it already. In the connection dialog box, type **fermi-ts-farm.fnal.gov** in the **Computer** text field and click on **Connect**.

2. A warning dialog box will pop up about sharing your Mac hard disk. Check **Don't show this message again when connecting to fermi-ts-farm.fnal.gov** and click on **Connect**.

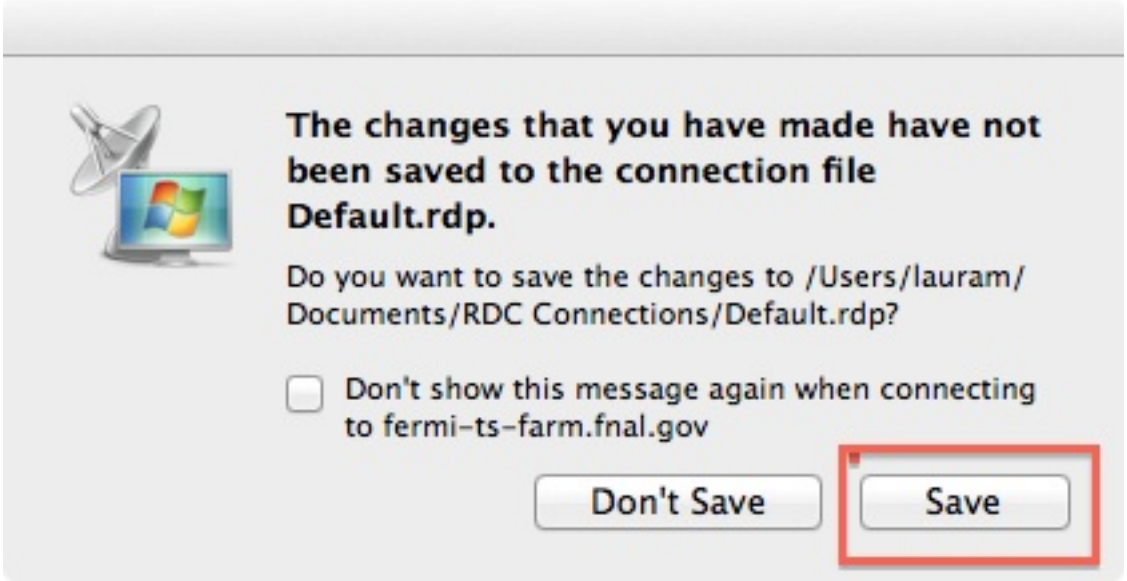
3. A warning dialog box will pop up saying **Remote Desktop Connection cannot verify the identity of the computer that you want to connect to.** Click on **Connect** to connect.



4. Then you will see the usual **Fermilab – Notice to Users** banner. Click **OK** to continue. After that, you will be logged in to the terminal server and a Windows window will pop up.



5. When you are ready to quit RDC, from the **RDC** menu, select **Quit RDC.** If you did not save your RDC configuration changes before, a dialog box will pop up asking you if you want to save your changes. Select **Save** and then RDC will exit.



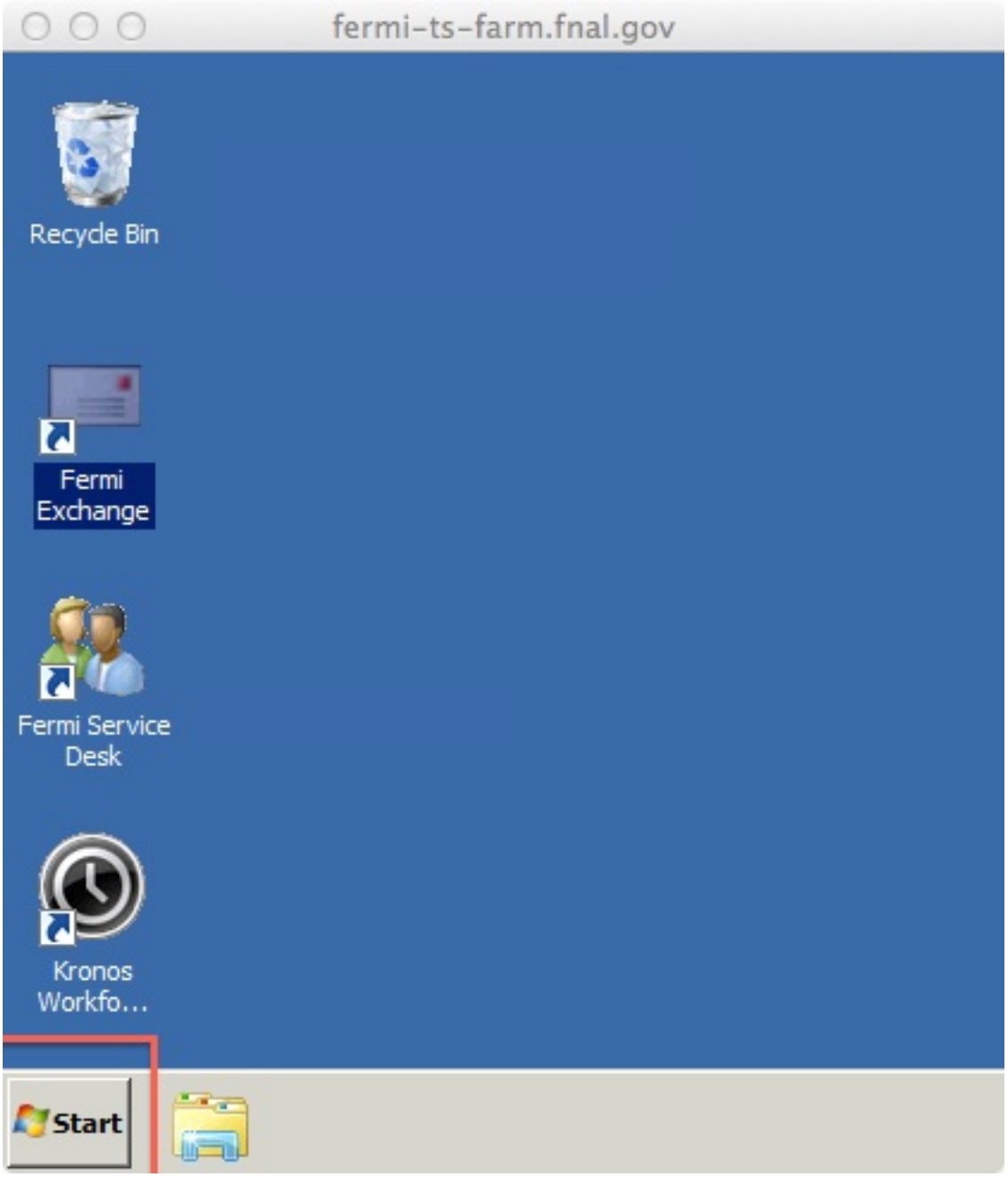
Using the Terminal Server

Once you are logged in to the terminal server's Windows environment, you can use Internet Explorer to access the full feature set of SharePoint the same as other Windows users do. Below are instructions for bringing up Internet Explorer and transferring files back and forth between the terminal server and various file systems at Fermilab where you might have your files.

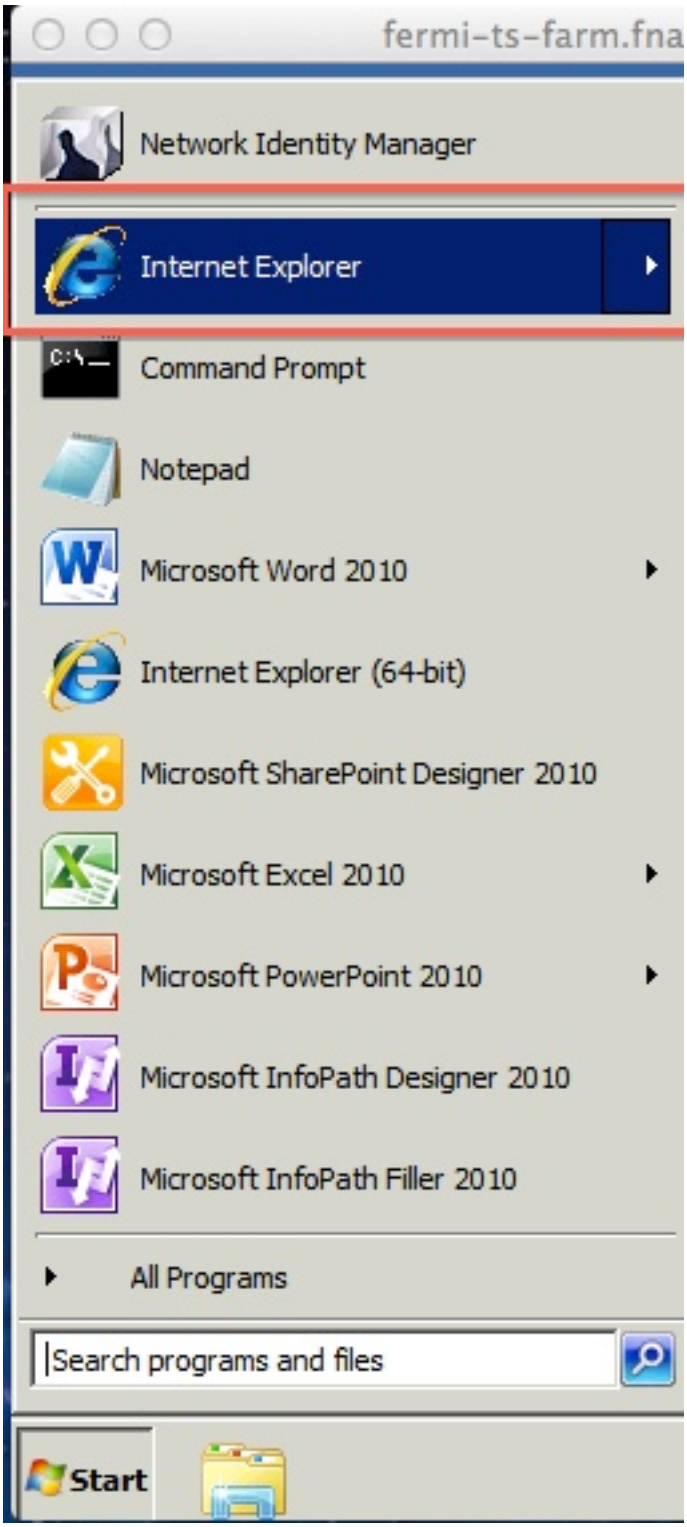
One thing to be aware of when doing tasks on the terminal server is that your RDC window on the terminal server may not be as large as the full screen of your Windows environment. So you may need to scroll your RDC window to see a needed part of the Windows screen. If you are doing a task and cannot find a needed menu or button, remember to consider scrolling your RDC window to see if that item is there (but was just scrolled off the screen).

Running Internet Explorer

1. Click on the Start menu in the lower left corner of your Windows screen. If you don't see a **Start** menu at the bottom of your screen, scroll your RDC window down until you do see it.



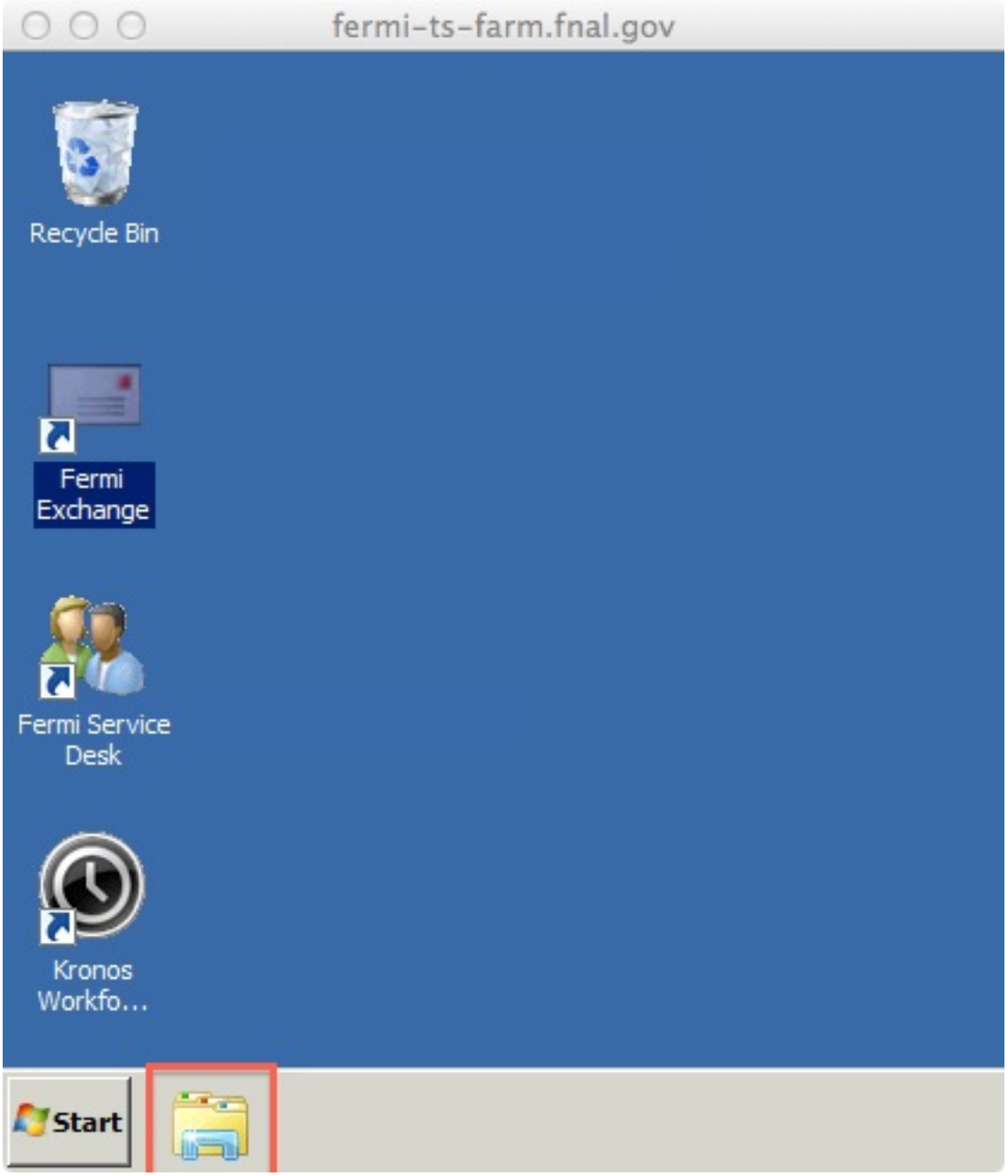
2. From the **Star**t menu, choose **Internet Explorer**. If you don't already see it in the **Start** menu, you can select it from the **All Programs** menu. Once Internet Explorer is running, you can use it to browse web sites (including SharePoint sites) as you would with the browser on your Mac



Transferring Files

The terminal server has a convenient way to transfer files for files on your local Mac and the major file servers used at Fermilab (cdserver, AFS and BlueArc). This section has instructions for accessing your files while using the terminal server.

1. To get to any files, first bring up the Windows Explorer file browser (which is different than the Internet Explorer web browser) by clicking on the folder icon at the bottom of the screen. If you don't see a folder icon at the bottom of your screen, scroll your RDC window down until you do.

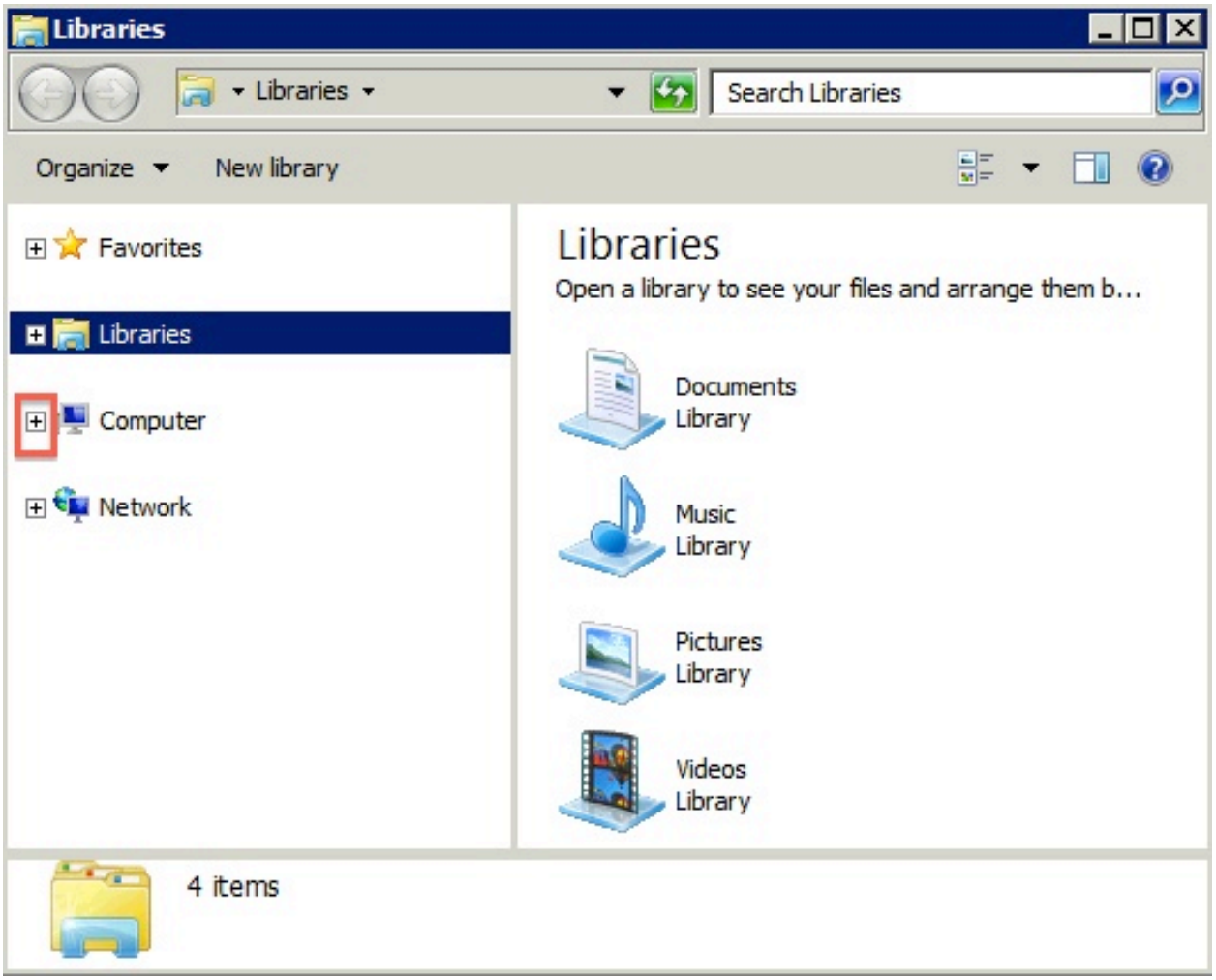


Transferring Files to and from Your Local Home Folder

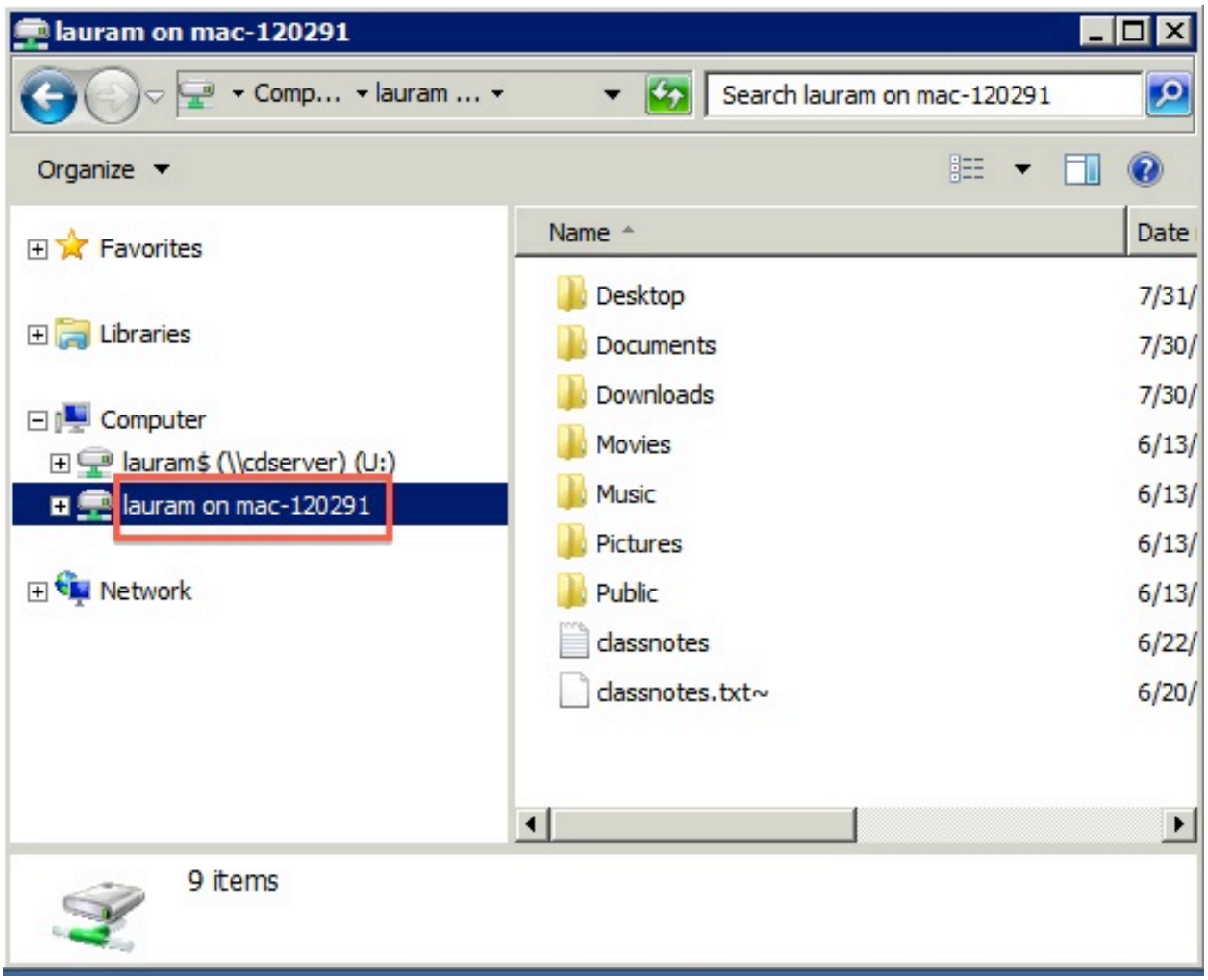
These instructions assume you have already completed the Remote Desktop configuration instructions to select your Mac's Home Folder as a drive to share so it will show up in the Windows environment.

1. Click on the folder icon to the right of the **Start** menu, to bring up the Windows Explorer file browser. (See step #1 from Transferring Files for a picture.)

2. Hover over the **Computer** item in the left section of the file browser and click on the **+** sign that appears to the left of **Computer** item to expand that list.



3. In the expanded **Computer** list, click on the **<yourusername> on mac** item. Now the file browser window will show the contents of your local Mac's home folder in the right column and you can drag and drop files between the terminal server and your Mac folders as needed.

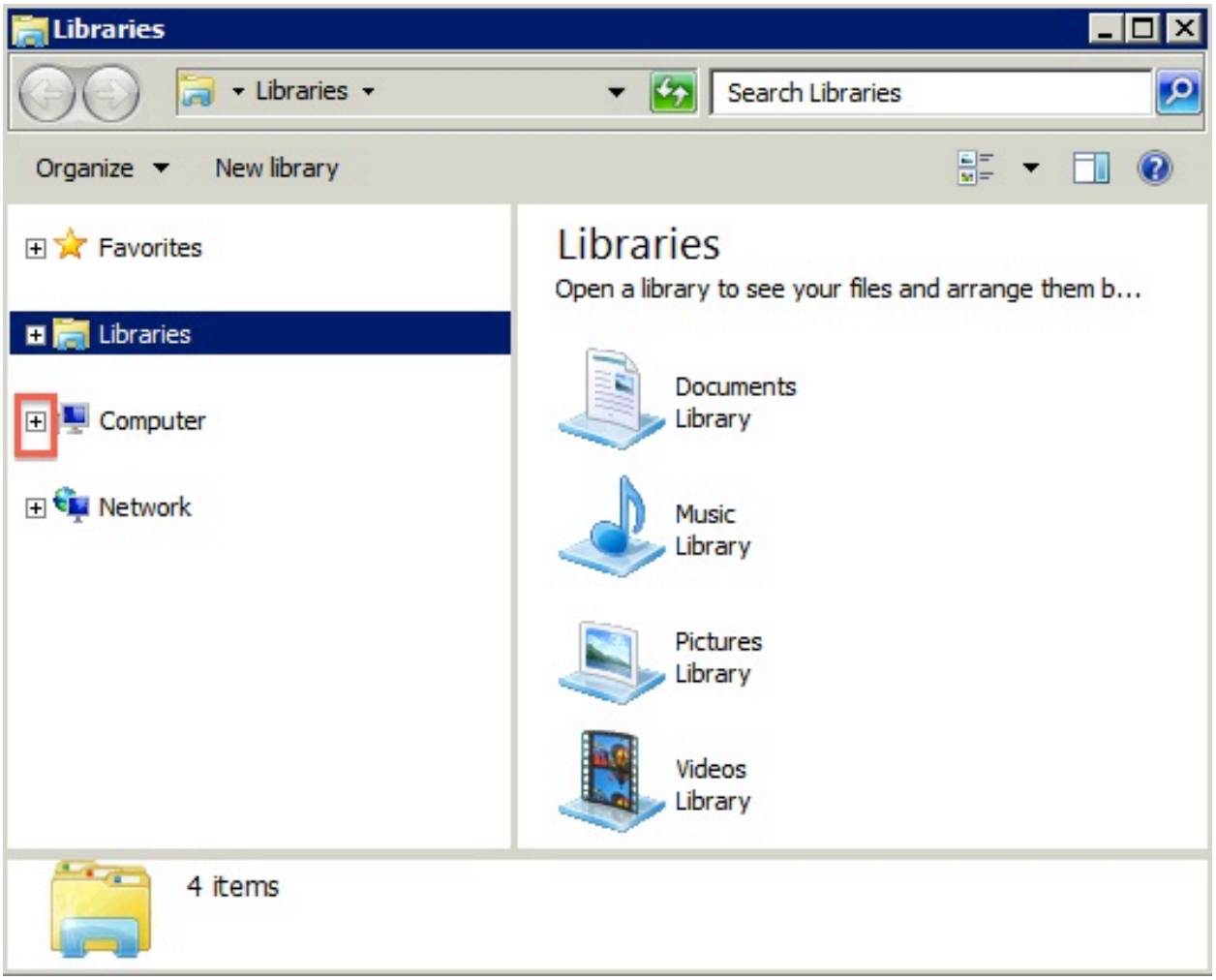


Transferring Files to and from cdserver

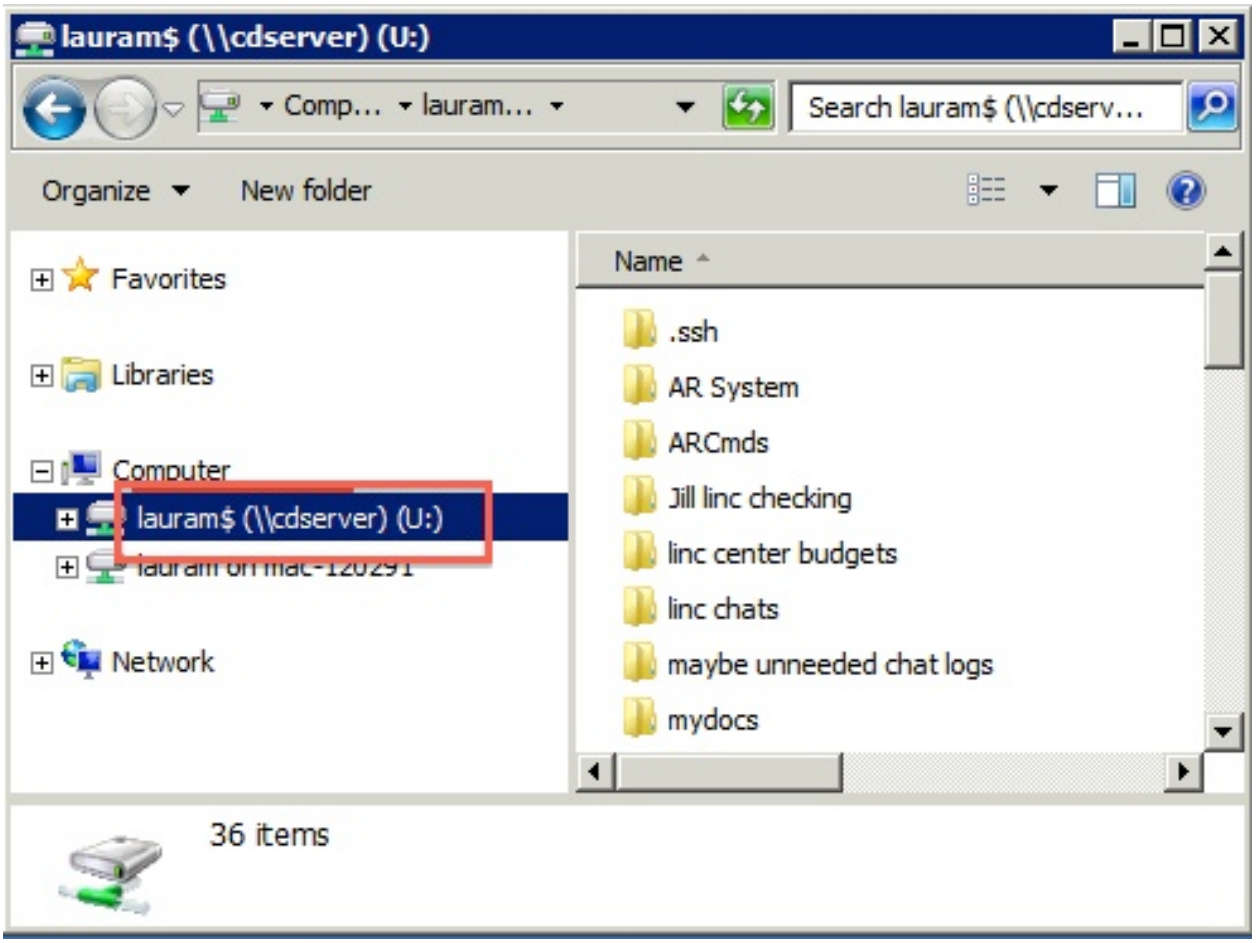
These instructions assume you already have a home directory on cdserver.

1. Click on the folder icon to the right of the **Start** menu, to bring up the Windows Explorer file browser. (See step #1 from Transferring Files for a picture.)

2. Hover over the **Computer** item in the left section of the file browser and click on the **+** sign that appears to the left of **Computer** item to expand that list if it is not expanded already.



3. In the expanded **Computer** list, click on the **<yourusername>$(\\cdserver)(U:))** item. Now the file browser window will show the contents of your cdserver home folder in the right column and you can drag and drop files between the terminal server and your cdserver folders as needed.

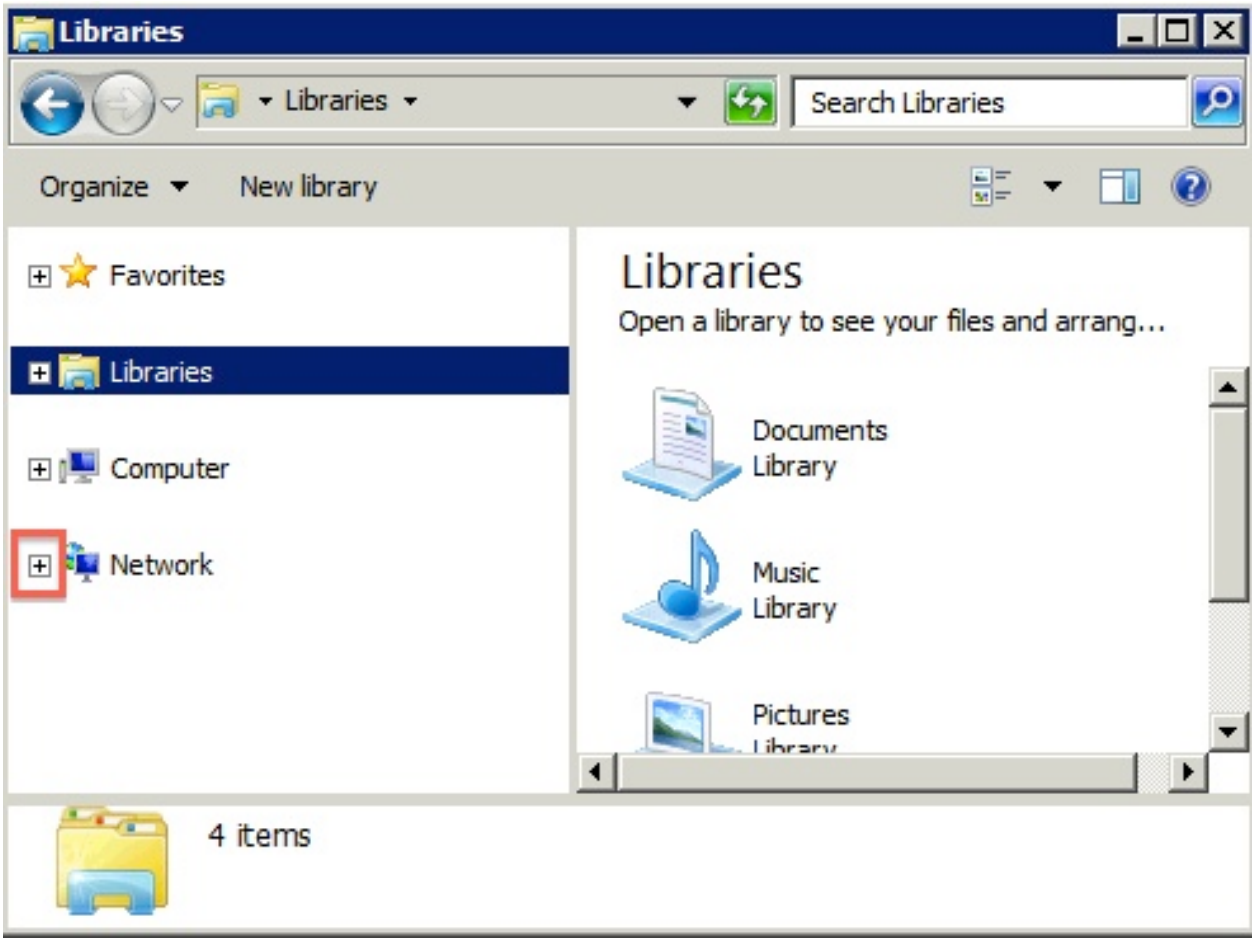


Transferring Files to and from AFS

These instructions assume you already have a home directory or permissions to another directory in AFS.

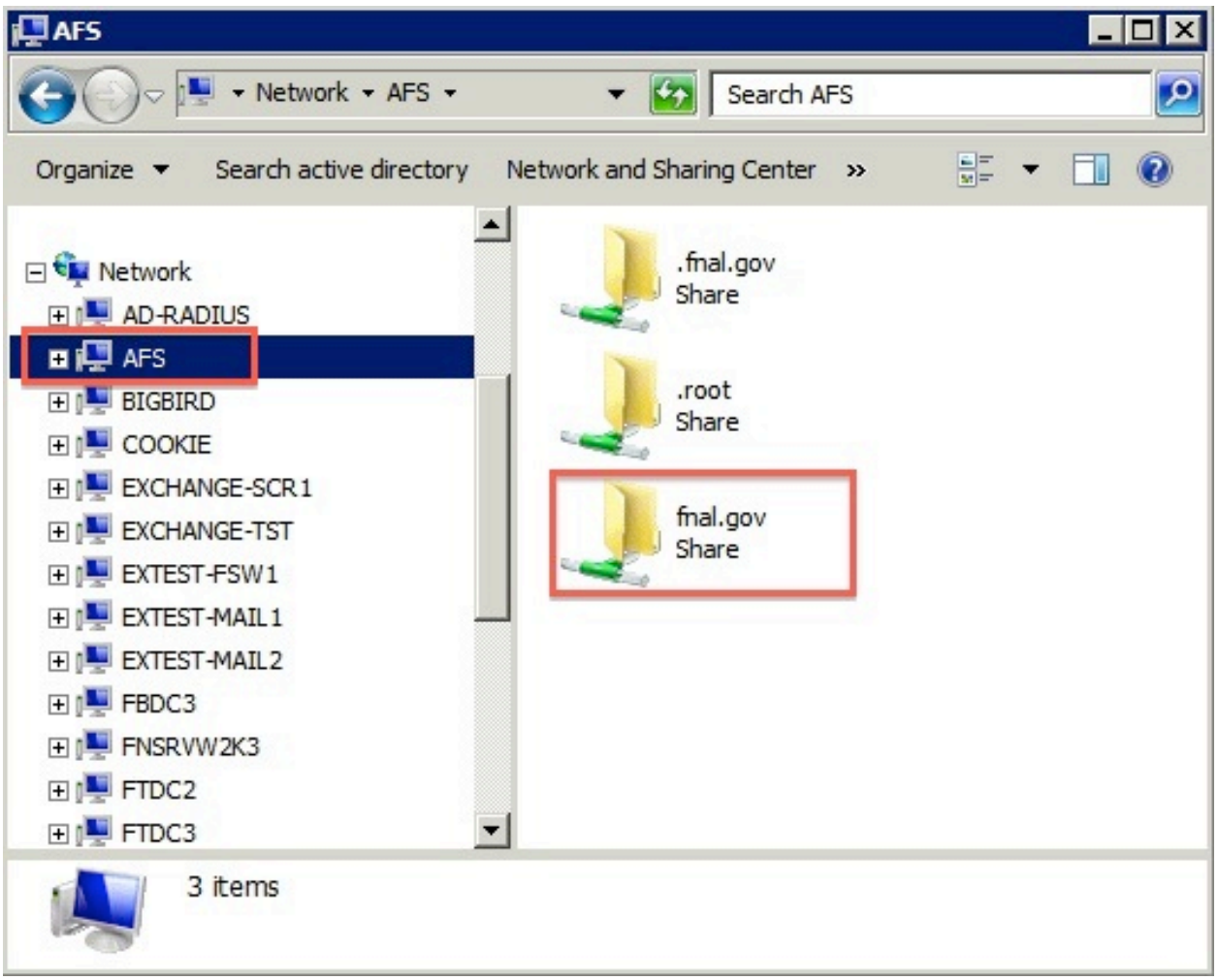
1. Click on the folder icon to the right of the **Start** menu, to bring up the Windows Explorer file browser. (See step #1 from Transferring Files for a picture.)

2. Hover over the **Network** item in the left section of the file browser and click on the **+** sign that appears to the left of **Network** item to expand that list.

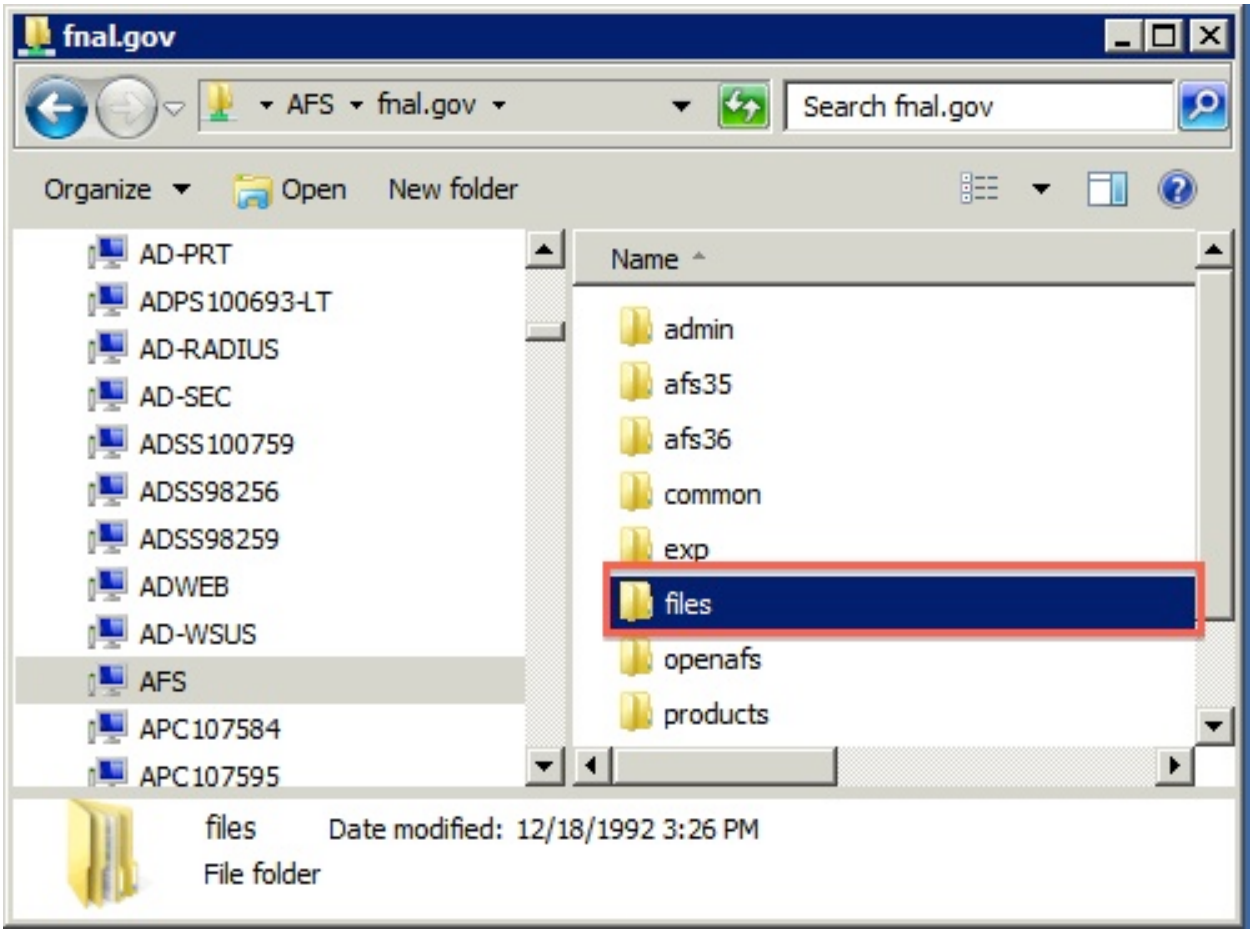


3. Click on **AFS** in the left section of the file browser and then double-click on **fnal.gov Share** in the right section. Note that although there are two icons that appear to say the same things (fnal.gov), they are different. The top one starts with a dot before the fnal.gov (.fnal.gov) and the bottom one has no leading dot. Most people can choose the bottom one: fnal.gov with no dot.

   This makes a difference only if you have a replicated AFS volume. Then **.fnal.gov** (with the leading dot) is a read/write version and **fnal.gov** (without the leading dot) is a read-only version. (So you can pick the desired item based on that.)



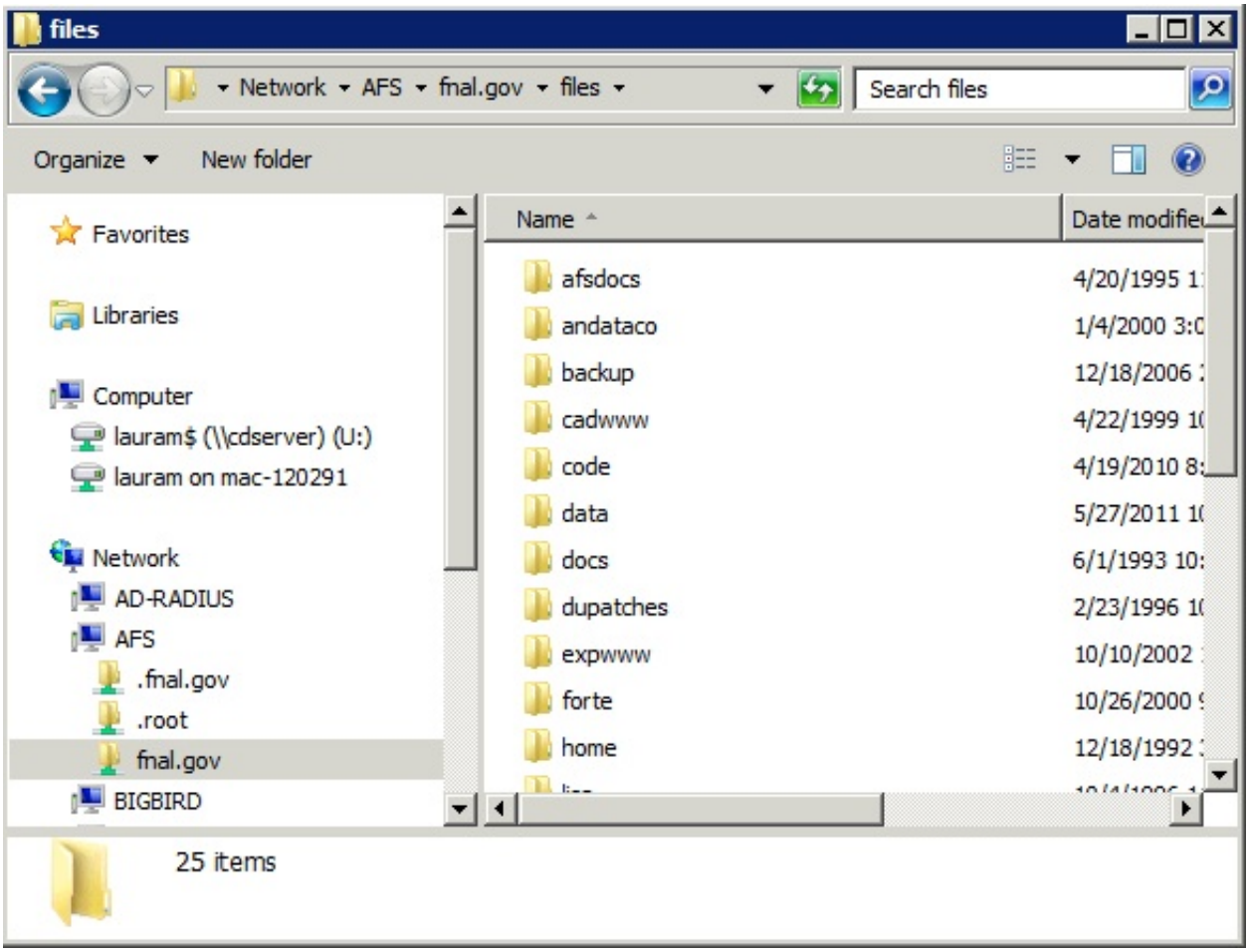
4. Then double-click on **Files** in the right section.



5. Then you will see a directory listing of the files under that. Navigate to the directory where your AFS files are and then you can drag and drop files between the terminal server and your AFS directories as needed. (If you get a permission denied error for an AFS directory where you do have permissions, from the **Start** menu, select **Run** and type in the command **aklog** and press **OK**. Then try your drag and drop file transfer again.)

   If you are looking for your home directory in AFS, double-click on **home**. Then double-click on one of **room1**, **room2** or **room**3 (wherever your home directory is). Then double-click on your username. This will show a listing of your AFS home directory.

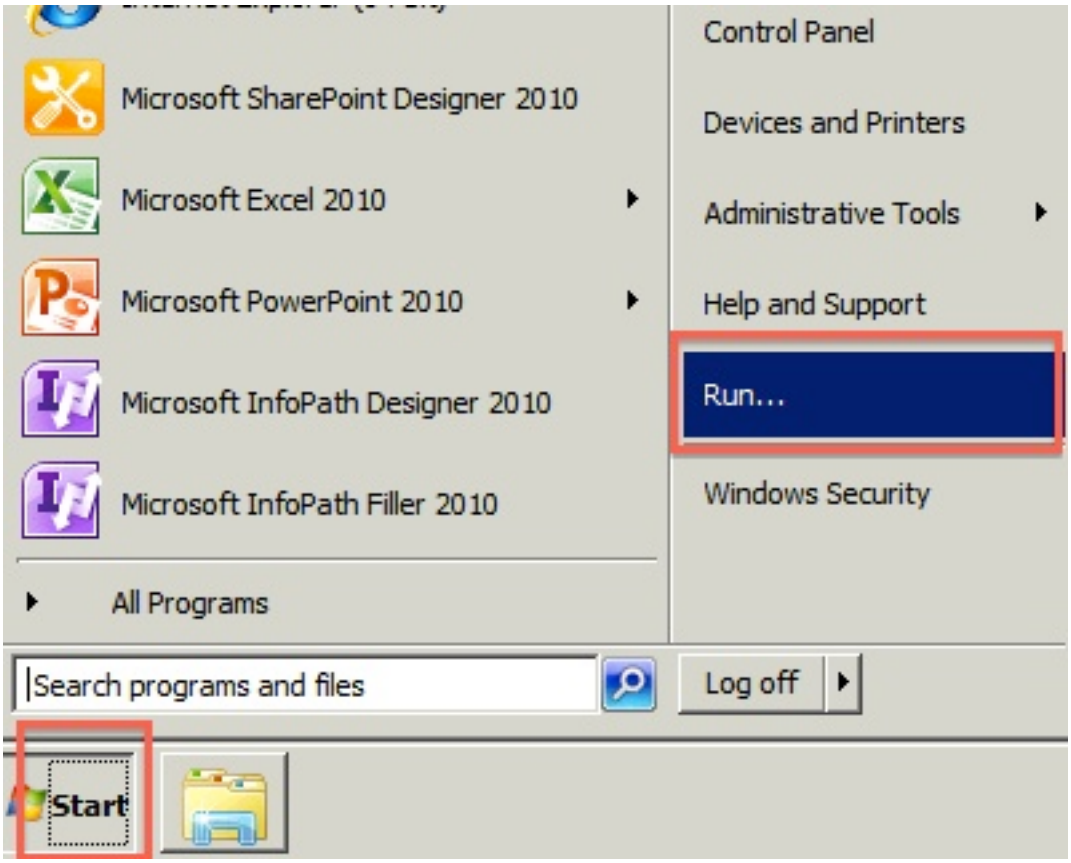
   If you're looking for your AFS web server directory, double-click on **expwww** -> **webservername** -> **html** (where **webservername** is the abbreviation for your web server such as projectx or uscms or decam) to get to the html directory.



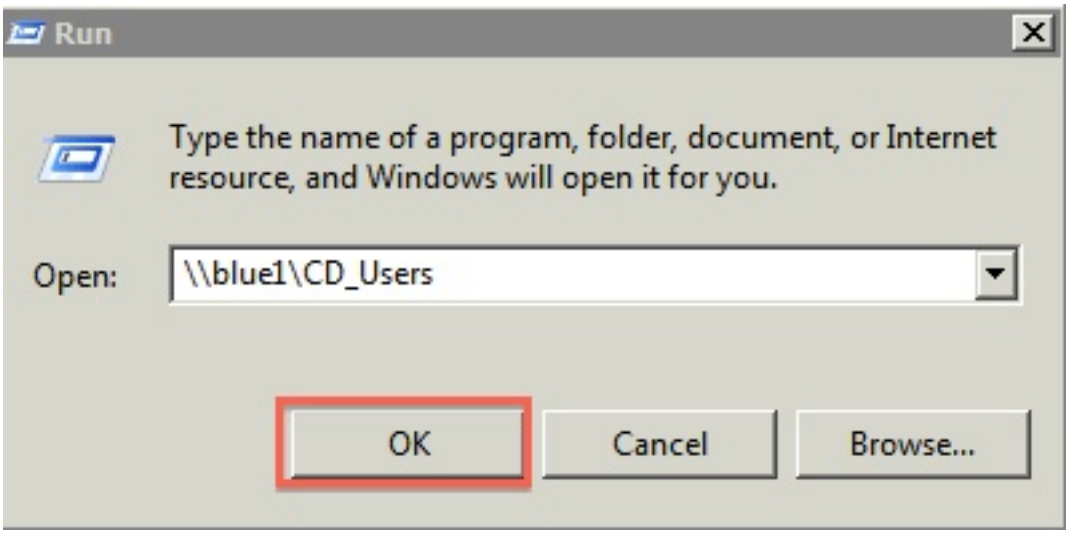
Transferring Files to and from the BlueArc

These instructions assume you already have permissions for some BlueArc directory.

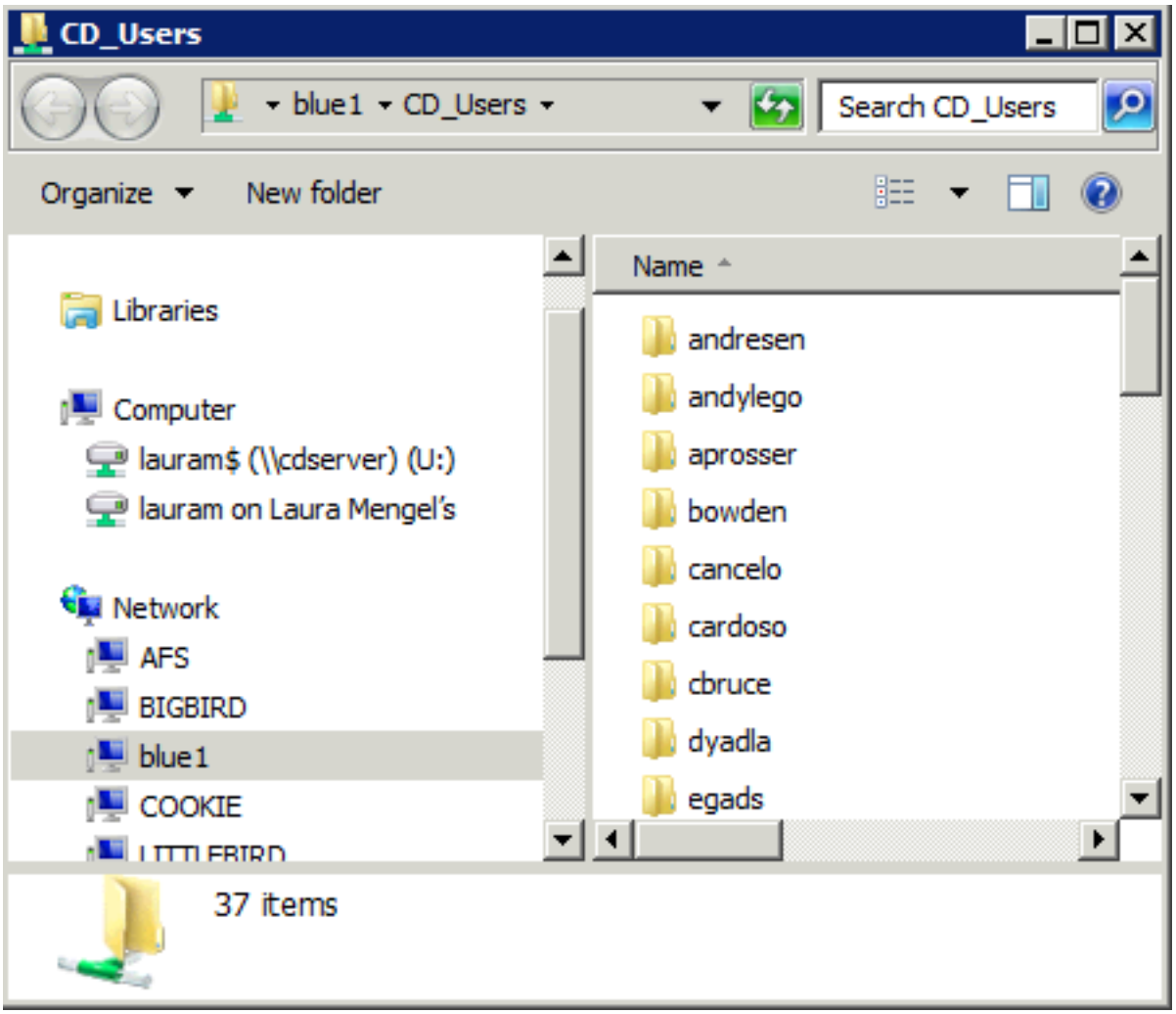
1. From the **Start** menu, select **Run** to run a command.



2. In the **Run** dialog box, type in the BlueArc path you want to open such as "\\blue1\CD_Users" and then click **OK**.

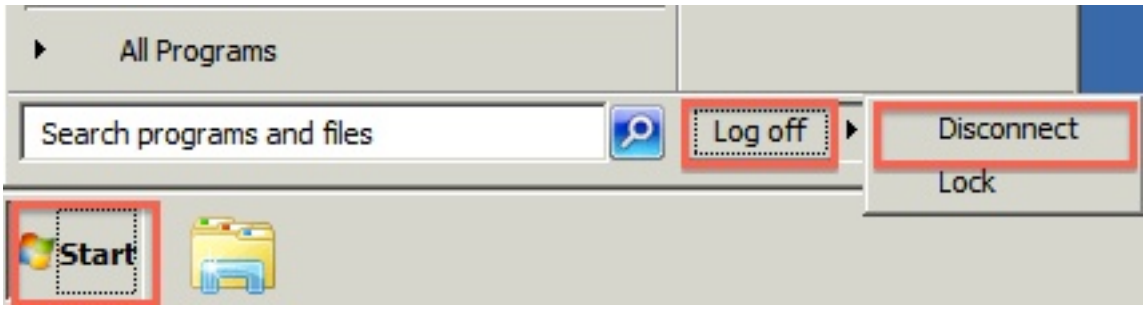


3. A file browser window will pop up showing a listing of the specified BlueArc directory. Navigate to the desired directory and then you can drag and drop files between the terminal server and your BlueArc directories as needed.



Logging Off the Terminal Server

1. When finished, you can log off by using the **Start** menu -> **Log Off** -> **Disconnect**.



Using SharePoint through the Terminal Server

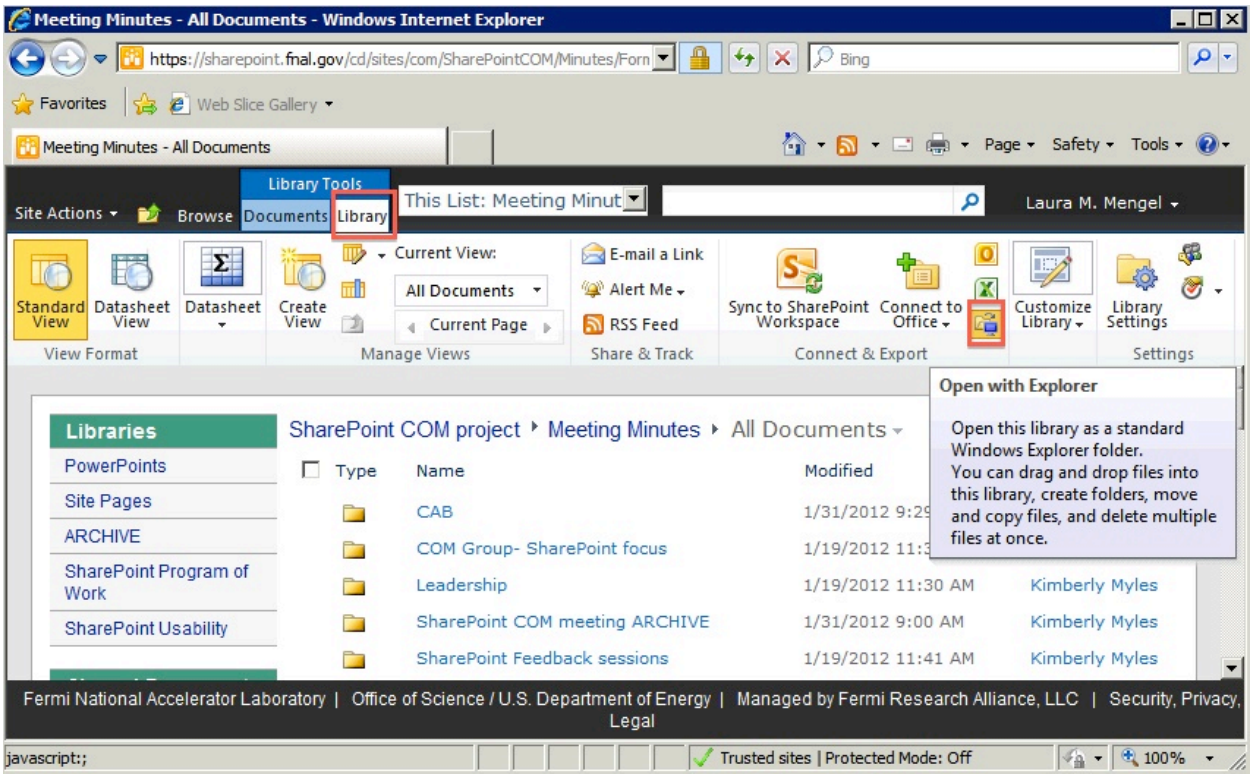
Now that you have access to Windows and Internet Explorer via the terminal server, you can access the SharePoint features that were not available from your Mac. Below are instructions for getting to them.

Windows Explorer View

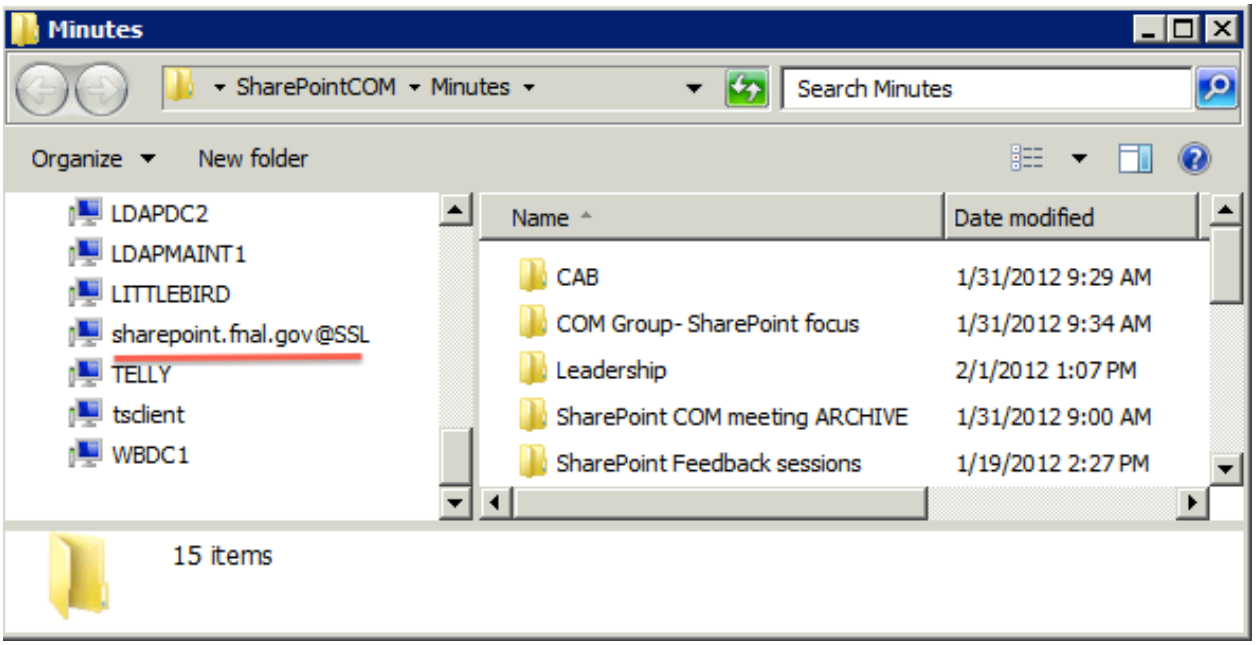
1. Navigate to the desired SharePoint library using Internet Explorer.

2. In the SharePoint task ribbon, under **Library Tools**, click on **Library.**

3. In the **Connect & Export** section of the ribbon, click on the **Open with Explorer** icon.



4. A Windows Explorer (file browser) window will pop up for the document library. Then you can drag and drop files *and folders* between the terminal server and your SharePoint document library as needed. Note that a link for this library becomes available on the left side of your Windows Explorer file browser window under **Network**.

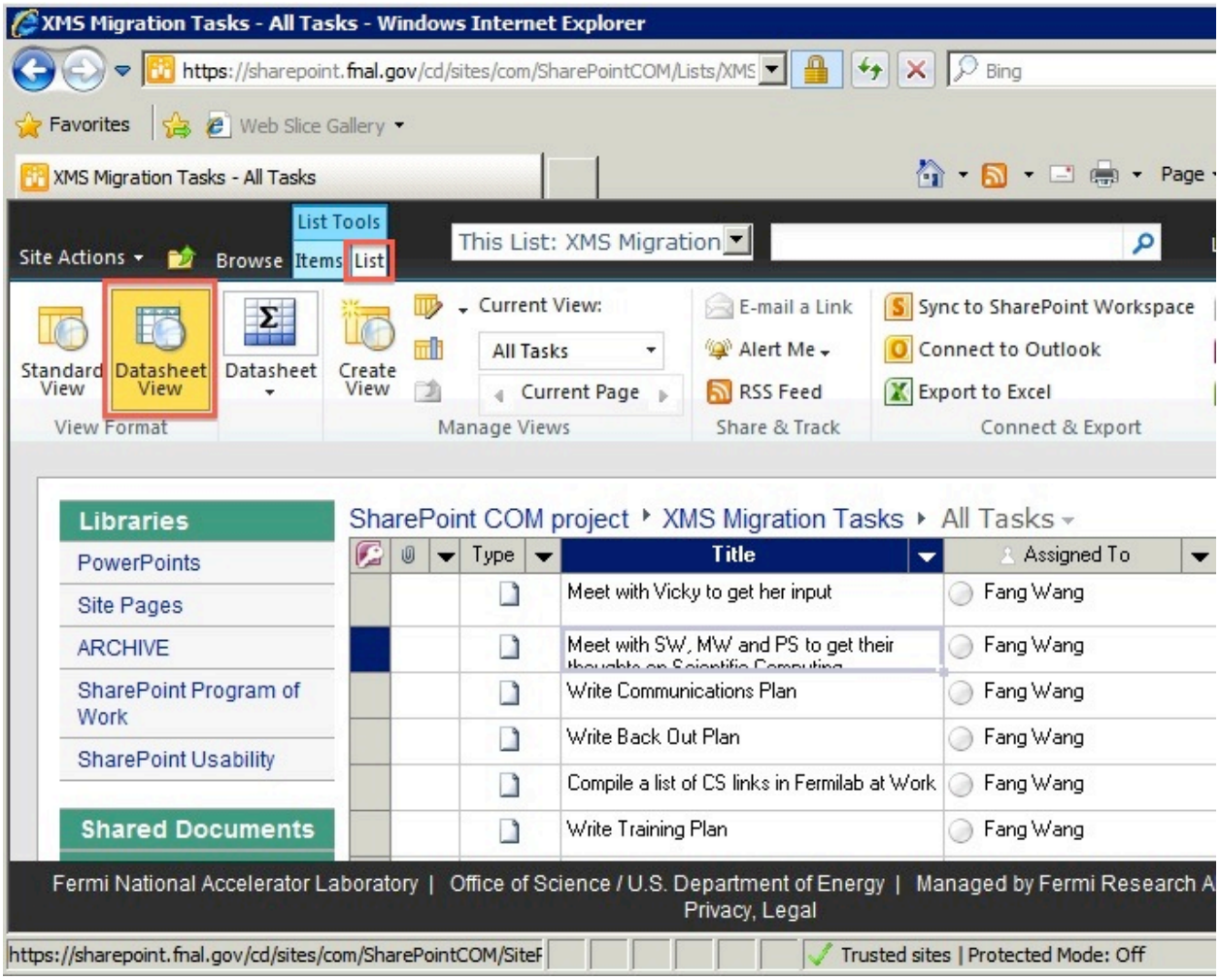


Datasheet View

1. Navigate to the desired SharePoint list using Internet Explorer.

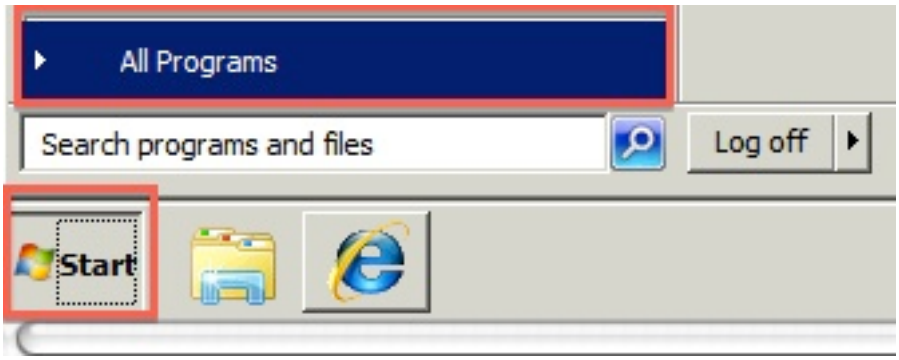
2. In the SharePoint task ribbon, under **List Tools**, click on **List.**

3. In the **View Format** section of the ribbon, click on the **Datasheet View** icon.
   Your web page will now show a Datasheet view of the list so you can do bulk editing.

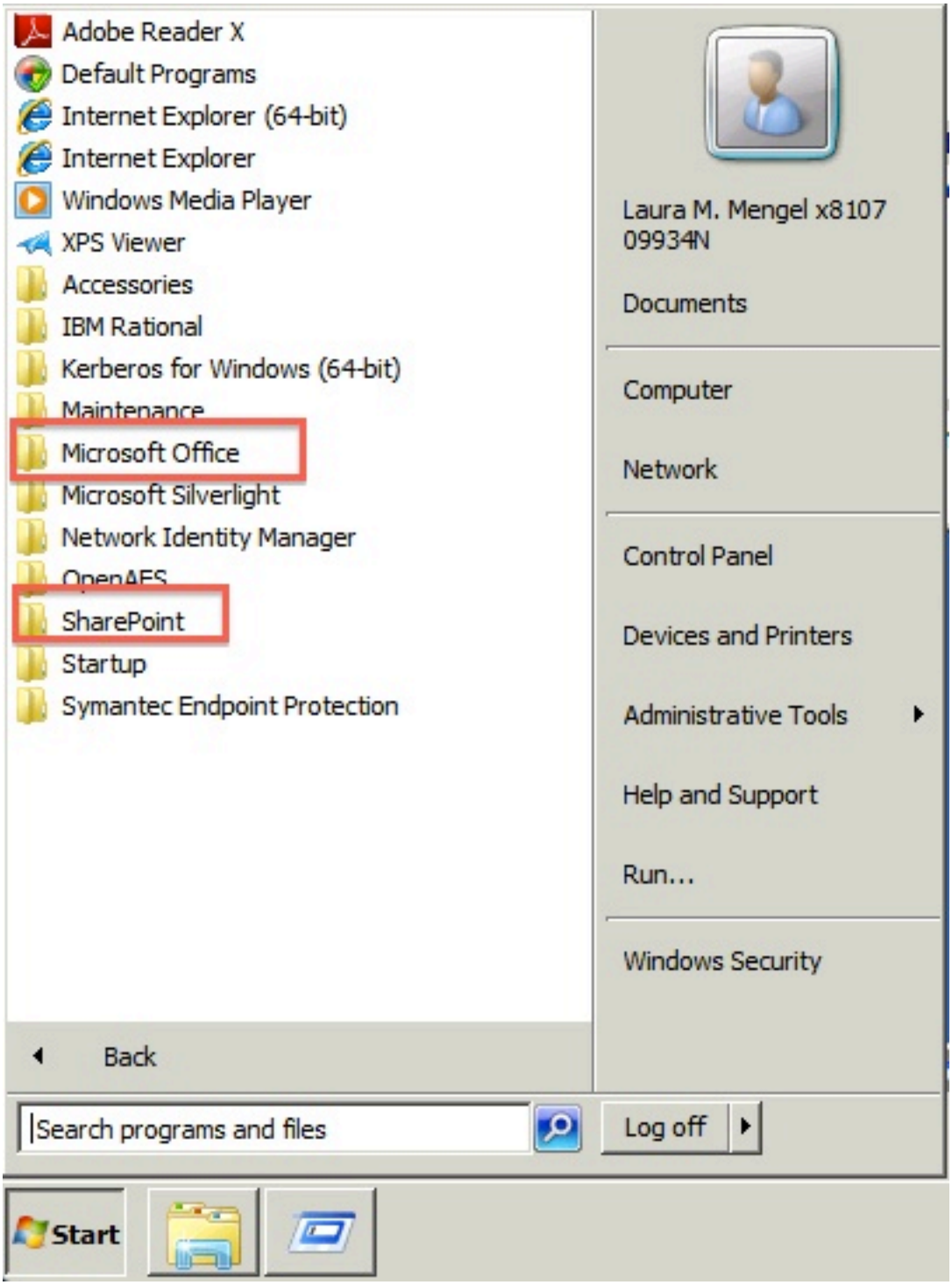
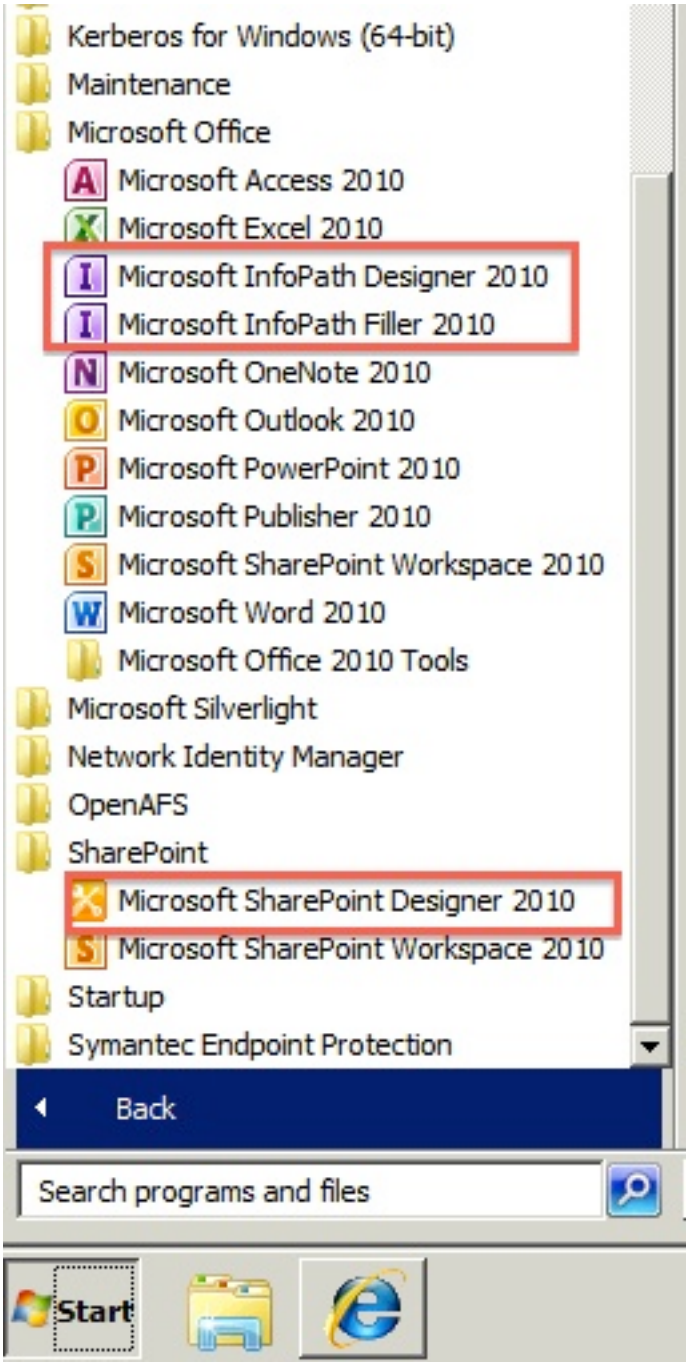


InfoPath Designer, InfoPath Filler and SharePoint Designer

1. Click on the Windows **Start** menu and select **All Programs**.



2. From the **All Programs** menu, click on **Microsoft Office** to expand it and click on **SharePoint** to expand that.



3. **InfoPath Designer** and **InfoPath Filler** are under the **Microsoft Office** program list.
   SharePoint Designer is under the **SharePoint** program list.
   Click once on the desired application to open it.
   Note that permissions must be enabled for you to use SharePoint Designer on the terminal server and on your site collection before you will be able to use it.