

SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// SEPTEMBER 2008

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Growing SharePoint without grief

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THINKING OF UPGRADING or expanding your SharePoint installation? In our recent collaboration survey of Windows and Domino IT and messaging managers, we found out that roughly one-third of 1,500-plus respondents are either evaluating Microsoft Office SharePoint Services 2007 or planning to deploy new or additional sites.

So what's the best strategy for deploying SharePoint globally across the enterprise?

In this month's issue, SharePoint expert Joel Oleson says that cost is only one factor—and not necessarily the determining factor—when choosing a deployment model. Learn what the pros and cons are for a distributed deployment and which tools can help improve SharePoint usability.

For those not growing your SharePoint installation this year, we found out from our survey that a lack of governance policies is a major reason holding you back. Are your existing SharePoint sites a little unwieldy? Read this issue's "Top tips for harnessing Microsoft SharePoint governance" for pointers on how to regain control and establish Microsoft SharePoint governance within your organization before making any plans for a full-blown expansion.

Finally, we learned from our survey that enterprise search was an important technology for SharePoint users. In this month's article, "Create custom global search scopes in Microsoft SharePoint 2007," find out how to improve SharePoint 2007's native enterprise search functionality.

Got SharePoint challenges? Drop me a line at ccasatelli@techtarget.com. ■



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Planning global enterprise SharePoint deployments

Not all SharePoint deployments are created equal. Learn what the deployment options are and when to use them. **BY JOEL OLESON**

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TO DISTRIBUTE OR not to distribute?

The more centralized your SharePoint deployment is, the better it works—but your remote users might not be very happy.

Before making any decisions about deploying your enterprise SharePoint globally, consider the priorities and preferences of your stakeholders. And, as always, evaluate the cost versus usability for every deployment scenario.

One of the early challenges when planning a global SharePoint deployment is determining how many farms are needed and where they should be located. The next challenge is understanding what might be lost by providing regional or distributed farms.

Keep in mind that cost shouldn't always dictate the SharePoint deployment model you choose. Finding the right answer for your deployment may take some testing.

That said, the three main distribution models for deploying Microsoft Office SharePoint Server (MOSS)

2007 are the following:

- ▶ Centralized
- ▶ Regional
- ▶ Distributed

▶ **Centralized deployment.** The centralized model is the utopia of SharePoint Server deployments from an operations and usability perspective because it consists of a single location (See [Figure 1](#), page 4). Because there is just one site, users in a cen-

Keep in mind that cost shouldn't always dictate the SharePoint deployment model you choose.

tralized deployment have a common operations team, a common service-level agreement and a common site-provisioning model for collaboration sites. Users might also prefer going to

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a single place for enterprise search.

Remote users across the globe can make a centralized deployment a little less desirable, however, with slow or saturated WAN links. A poor WAN link has more than 150 milliseconds of latency, but it can vary as bandwidth is increased and usage is decreased. Although latency is the greatest challenge, bandwidth and utilization do have a significant impact on speed of downloads.

There are a number of tools available to overcome the effects of latency. The most popular tools—which

come from companies from Cisco to Citrix and even F5—are WAN accelerators and WAN acceleration devices. Common features found in these tools include compression, differencing and various proprietary network optimization techniques. IT managers will see these devices and their distinct network optimization advantages leveraged across platforms as they become more commonplace.

► **Regional deployment.** Some networks are designed with a hub-and-

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FIGURE 1

Centralized deployment In this deployment option, all Microsoft Office SharePoint Server components and portal site farm services are hosted at the central site. Users access all services across the WAN.



SOURCE: MICROSOFT

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spoke configuration (See [Figure 2](#)). Usually it's companies and organizations that drive IT shops to provide multiple data centers as network equipment becomes cheaper, leased lines become dedicated and fiber gets more common. Offices can't live without fast access to the Internet or without fast access to their Web applications. IT drives consolidation, but companies have to decide what to do with their data storage and consolidation strategies.

Companies that are distributed across the globe often find some

"regional hub" as the answer to providing a consolidated solution for Microsoft Exchange, Active Directory or even line-of-business applications. Looking at these other solutions can provide an example—if not a model—for how to lay out your regional SharePoint deployment.

Crawling and indexing becomes the challenge with multiple WAN locations. With limited bandwidth between locations, finding the utilization to do recurring indexing without saturation issues can be accomplished with careful planning and by

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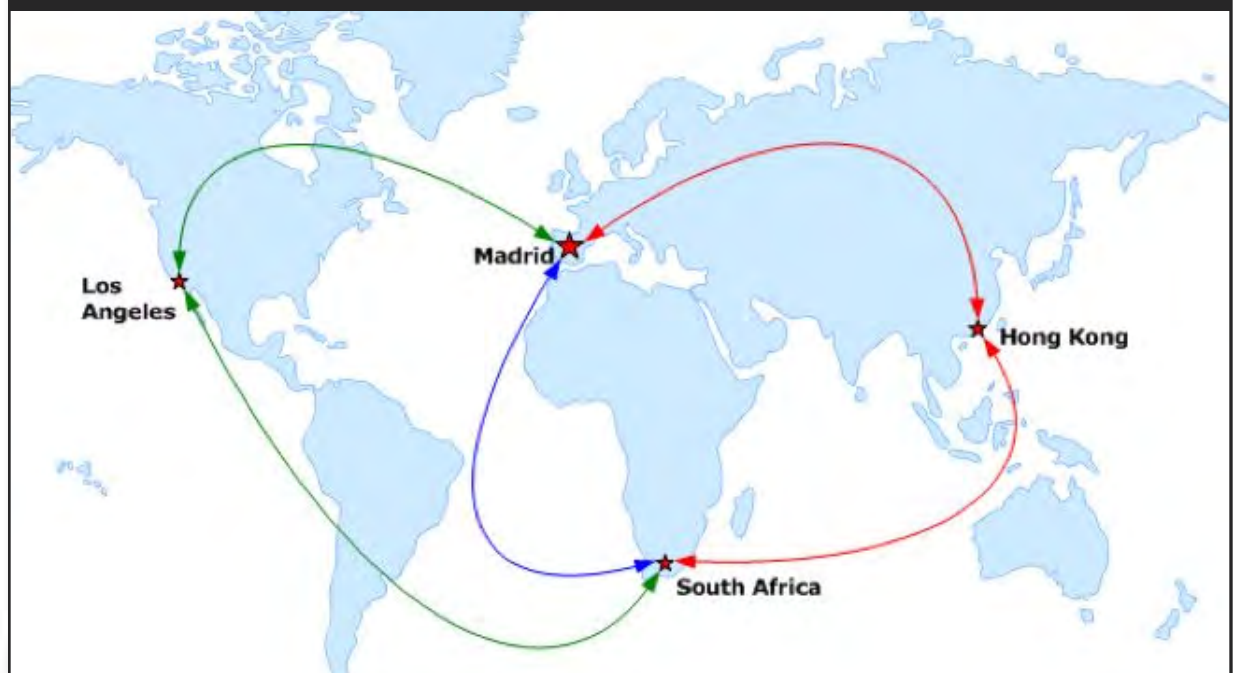
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FIGURE 2

Centralized deployment with regional sites This deployment model includes one centralized site plus regional sites that each run MOSS. Users collaborate with their local teams on the local server farm. Users access all enterprise-wide features across the WAN.



SOURCE: MICROSOFT

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working closely with the network team doing monitoring. But as the data increases on either side of the WAN, the time it takes to crawl continues to increase.

Even with the incremental crawl and the crawl based on the change log—both of which really help to minimize crawl time—the most recent answer is federated search. First introduced with search server, federated search is now available in the infrastructure update and is sure to be included in Service Pack 2 of SharePoint Server.

► **Distributed deployment.** If every office had a SharePoint deployment, then companies would have hundreds of SharePoint farms. Some businesses do dictate that each affiliate should have its own data that's separate from another. In businesses where speed is the key factor, replacing file servers with SharePoint servers is the first step to empowering the business. In reality, there may be a dozen reasons why businesses find it easier to simply provide SharePoint to each department or each affiliate (See [Figure 3](#)).

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FIGURE 3

Distributed deployment A number of regional sites are included in this deployment, and each of them operates independently from the other regional sites. This option also includes a centralized portal site, but it's not optimized for collaboration across regional sites.



SOURCE: MICROSOFT

It's easy to do a simple deployment in each location, but a distributed SharePoint deployment model is the most difficult to support. By far, a distributed model is the most difficult to operate from a backup, maintenance, and storage allocation and optimization perspective.

What are the most important considerations when deciding on a topology for any SharePoint deployment? Know your network—especially its bandwidth, latency and utilization. Keeping these in mind, even those that start with a centralized deployment by default and move onto a regional or distributed deployment will find that their hard work does pay off. ■

RESOURCES: *Need more help with your SharePoint deployment? Check out these downloadable SharePoint resources from TechNet:*

- [Globally deploying multiple farms](#)
- [Deployment for Office SharePoint Server 2007](#)
- [Planning and architecture for Office SharePoint Server 2007](#)

PROCESSING QUERIES

Microsoft Search Server 2008 provides two approaches for processing queries to return search results:

Content crawling: Results are returned from the search server's content index based on the user's query. The content index contains content that is crawled by the search server and includes text content and metadata for each content item. This is the same process described for enterprise search in Microsoft Office SharePoint Server.

Federated search: Users can display search results for additional content that is not crawled by the search server. With federation, the query can be performed over the local content index, or it can be forwarded to an external content repository where it is processed by that repository's search engine. It then returns the results to the search server. The search server formats and renders the results from the external repository within the same search results page as the results from search server's own content index.

SOURCE: MICROSOFT

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Create custom global search scopes in SharePoint

Find out how to customize global search scopes and target searches to specific SharePoint content for better enterprise search functionality. **BY NATALYA VOSKRESENSKAYA**

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COMPANIES OFTEN ACQUIRE Microsoft Office SharePoint Server 2007 (MOSS) for its enterprise search capabilities. The problem with SharePoint 2007's enterprise search feature is that it doesn't, by default, provide granular search results. It filters all possible SharePoint content sources, thereby returning a large number of search results.

If you want to isolate your query to a specific SharePoint document library or extranet site from within the portal, set boundaries to specify which portion of the SharePoint portal should serve as the search source to provide a more granular result set. In SharePoint vernacular, this is called Search Scopes.

Along with enterprise search, SharePoint is also known for its document management capability. Frequently, companies set one or more SharePoint sites to serve as a document repository and traditionally require that a search scope be limited to a specific document site or a document library.

To achieve this functionality, you will need to create custom search scopes. Because search in SharePoint is a shared service, the ability to create custom global search scopes is offered only through a Shared Services Provider (SSP) administrative site. The SSP administration site is available through Central Administration.

THE TYPE OF search scope described here is often referred to as a global search scope. Scopes created within Shared Services Provider, or SSP, are available for all SharePoint site collections.

Users can also create a custom search scope within a specific site collection. The steps for creating a site collection search scope are identical to those used to create a global scope at the SSP level.

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NOTE: You must have administrative rights to the Shared Services Provider administrative site to create a global custom search scope in SharePoint.

To do so:

1 Click **Search Settings** under the **Search** section. Then click on **View Scopes**. You will notice under the Shared group that two search scopes already exist: **All Sites** and **People**. These two search scopes are provided by default after creating the SSP administrative site.

2 Click on **New Scope** and enter a meaningful name for your custom search scope in the Title field. The name should indicate where the scope search results are set (e.g., "Document Libraries"). The default contact for the search scope is the person creating it, but a different

account can be specified as well. Click **OK**.

You will see the new search scope name appear in the list of search scopes. The search scope is empty and will remain this way until you specify a set of rules for the population of items for this scope.

Click on **Add Scope Rule**. Select **Web Address** as the rule type and set the URL to point to the SharePoint documents library or site to which you want to limit the search scope. You can also specify file folders in your file system by using UNC name with "file" prefix in the URL. In the Behavior section, the **Include** option is selected by default to include all items that match this rule (See **Figure 1**). Click **OK**.

The new search scope will be populated only after the scopes update

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FIGURE 1 Add a scope rule to the new custom search scope in SharePoint 2007.

Shared Services Administration | Shared Services Provider | Search Settings | Scopes | Scope Properties and Rules | Add Scope Rule

Add Scope Rule

Scope Rule Type
Scope rules define what is in or not in a scope. Use different types of rules to match items in various ways.

Web Address:
Web Address scope rules can be used to create search scopes that include content in web sites, the shares, exchange public folders, or any other content in the search index that has a URL.
Folder rules will include items in the folder and subfolders of the indicated path.
Domain or hostname rules include all items within the specified domain or hostname.

Behavior
Decide how this rule should be applied to the overall scope. The scope-wide filter is used when combining the items matching all rules to determine what is in the scopes overall.

☒ Web Address (http://server/site)
☐ Property Query (Author = John.Doe)
☐ Content Source
☐ All Content

Folder:

Example: http://site/subsite/folder

Hostnames:

Example: servername

Domain or subdomain:

Example: office.examp01.com

☒ Include - Any item that matches this rule will be included, unless the item is excluded by another rule.
☐ Require - Every item in the scope must match the rule.
☐ Exclude - Items matching this rule will be excluded from the scope.

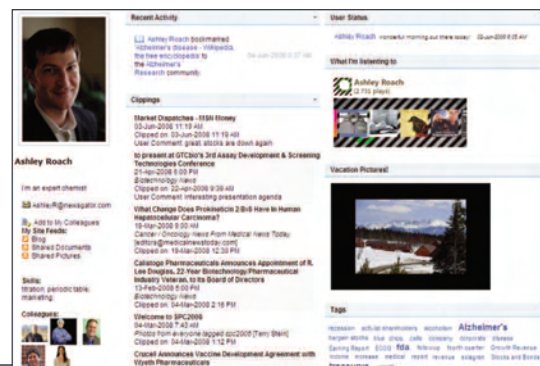
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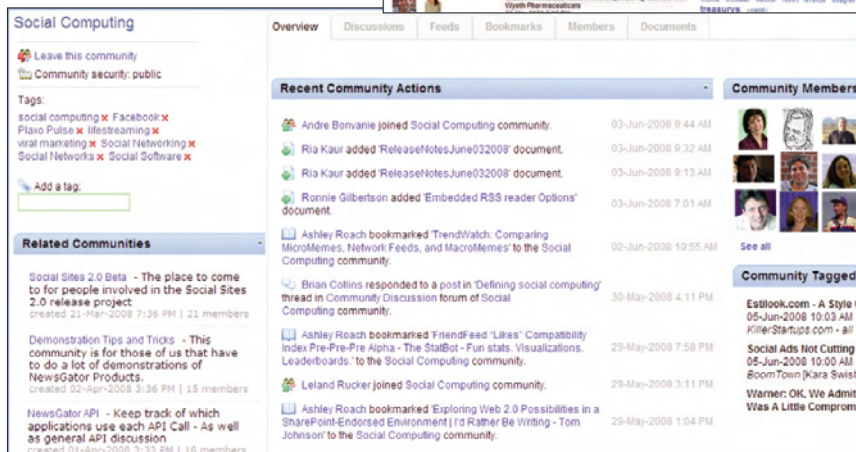


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process completes. To trigger an update manually without waiting for it to run on its schedule, click **Start Update Now** under **Scopes** on the search settings page.

Custom scopes are not available within site collections until the site collection administrator adds them manually. This gives administrators control over which scopes are available for use within search Web parts in sites within the site collection.

To add a search scope to a SharePoint site collection:

- 1 Go to **Site Collection -> Site Settings**.
- 2 Under **Site Collection Administration**, click on **Search Scopes**. You can now add your custom search scope to this site collection and make it available to any SharePoint sites as well as in the global search box. Grouping scopes is another way to organize them.

Search scopes can also be set to specific content sources such as SharePoint websites, managed properties, system file folders and Exchange public folders. ■

WHAT IS... A SEARCH SCOPE?

A search scope in SharePoint Server 2007 is used to narrow the search results returned to users executing a search query. Search scopes can be shared or locally defined. Different rules can be used in the definition of a search scope. Microsoft Office SharePoint Server 2007 introduces new types of rules to guide the search scopes exposed by different types in the object model:

AllContentScopeRule class: to represent a scope rule that includes all items in the index.

PropertyQueryScopeRule class: to create a scope rule that matches content items based on a property-to-value comparison.

The UrlScopeRule class: to represent a scope rule that matches content items based on the display URL of the item.

Search scopes must be compiled before they can be used. To compile search scopes, flag each item in the index that matches the rules as they are defined for the search scope.

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Top tips for harnessing Microsoft SharePoint governance

When planning a SharePoint implementation from scratch isn't possible, experts say that setting up rules for usage is a step toward better governance. **BY MICHELLE BOISVERT**

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AS MICROSOFT SHAREPOINT becomes increasingly popular, IT managers struggle to get a handle on existing user sites. Once people begin doing their own thing with SharePoint, the outcome can be bleak—from losing centralized administration and information redundancy to increased bandwidth and serious security risks.

Properly planning an implementation for Windows SharePoint Services (WSS) or Microsoft Office SharePoint Server (MOSS) 2007 from scratch is the best way to manage the collaboration platform's growth. When that's not possible, experts say that setting up rules for usage is a step toward better governance.

But when developing any type of rules involving governance, remember to think ahead. "The idea is to anticipate the kind of arguments people are going to get into and pre-decide who is going to win them," said Craig Roth, vice president and service director, collaboration and content strategies

at the Burton Group, an IT research and consulting firm in Midvale, Utah.

Here are some tips to help regain control and establish SharePoint governance within your organization:

► **Determine how many SharePoint sites already exist.** Do you really know how many individual or group SharePoint instances exist within your company? If not, Matt Passannante, director of implementation services at SharePoint Experts Inc. in Denver, said that using a third-party tool might be the solution. "There are third-party tools out there that will scour your WSS network and tell you that there are these other portals and WSS site instances within your organization," said Passannante.

One such tool from Aliso Viejo, Calif.-based Quest Software is Site Administrator for SharePoint, which identifies all SharePoint servers, sites and site collections within a network. Quest Software also has a free tool

called Discovery Wizard for SharePoint that automates the search for all SharePoint servers on a network.

Based in Jersey City, N.J., AvePoint Inc. also has a free SharePoint Discovery Tool that gives administrators a blueprint of their SharePoint farms and servers as well as real-time data on components and services hosted on each server and the status of those services. The tool's search feature helps locate SharePoint sites.

nents, such as a usage policy that outlines how to use SharePoint and a design policy that outlines your company's standard SharePoint navigation look and feel.

Other components might include a technology policy that determines what SharePoint features, such as wikis, blogs or workspaces, should be used for and by whom. "SharePoint can do a zillion different things, but that doesn't mean you want it to do all those things," Roth said. Although most policy-making decisions fall on management, you may want to get users involved in some usage and design policy planning, he added.

► **Appoint a SharePoint champion.**

After uncovering all SharePoint sites within your organization, designate a leader for the entire implementation. "The issue of governance always becomes a political one instead of a technical one," said Roth. Although IT managers can easily look at these sites and figure out how to combine them, getting buy-in from the different departments that created them might be tricky.

Often it's the CIO who has the authority to make the decision for all sites or can delegate authority to a point person. After designating a lead, involve others within the company.

► **Create a corporate SharePoint policy.** Stakeholders must collectively create a high-level statement of direction for SharePoint, which can take the form of a corporate SharePoint policy. That all-encompassing policy should include specific compo-

► **Outline the processes needed to implement the policy.** Develop SharePoint processes as if they were how-to documents on setting up specific sites. Create pointers to technical manuals on how to do things, where policies exist on the intranet and what they are.

Each process may have a different lifecycle, requiring updates at different times. Having pointers to documentation means that technical manuals can be maintained without any impact on usage or design policies.

► **Develop a technical SharePoint manual.** Much of the information out there tends to treat SharePoint governance as maintenance. However, that's just one link in the chain of

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command. IT managers should get involved in formulating a technical manual to answer questions on how to combine SharePoint directories, set delegated administration levels, grant user permissions, add and delete users, lock down SharePoint and create and manage a single content repository.

When dealing with content repositories, SharePoint user content shouldn't be treated any differently than other mission-critical content, according to Carl Frappaolo, vice president of market intelligence at AllIM, a nonprofit market research and consultancy group. After establishing all of these guidelines and roles, be sure to point to the technical manual online so that users have access to them when needed.

► **Measure your SharePoint success.** To gauge success, it's important to understand how SharePoint is helping your company to advance.

For example, if you anticipated that your SharePoint implementation would decrease company travel expenditures, Roth said, then you

must compare travel expenses before and after deployment. Measure business outcomes, he said, as opposed to the number of hits a particular site gets. Statistics that attempt to measure site-use frequency, for example, don't necessarily give the whole story.

Establishing SharePoint governance doesn't have to be a tedious task that IT managers must tackle alone. Creating a solid governance plan that pulls upper management into the process early is key and can give companies that are new to content management the upper hand. Often these companies seem more likely to address governance up front, said Dan Keldsen, director of market intelligence at AllIM.

On the contrary, companies trying to fit SharePoint content into an existing governance infrastructure may experience challenges. "For companies that have implemented any sort of content management, once usage patterns are established, and in the absence of any formal governance, it can be much more difficult to think about how to stick the genie back in the bottle," Keldsen added. ■

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