

# SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// OCTOBER 2009

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**SHAREPOINT IS A** pretty good platform, right? It has a lot of cool tools and capabilities that make collaboration and electronic content management much easier for employees in your enterprise. But nothing is perfect—including SharePoint. It has its share of bugs and glitches that can pop up and ruin your day.

SharePoint expert Shawn Shell picked his favorite SharePoint gotchas and shares the fixes with you in "[Top Five SharePoint Challenges and Solutions](#)."

Another thing that can definitely add stress to your workday is keeping tabs on users accessing SharePoint from outside the office. Although external access to SharePoint may complicate security, users may request it—or even demand it—because it gives them the freedom to do their jobs from anywhere.

Learn some tips from Microsoft MVP Brien M. Posey, including how to use Microsoft Exchange 2007 and Outlook Web Access to control access to SharePoint resources, in "[Managing External Data Access in SharePoint Governance](#)."

If you haven't done it already, seriously consider making SharePoint social computing tools part of your enterprise. Wikis, blogs and My Sites can be a boon to your organization because they make in-house expertise easily accessible and searchable. SharePoint MVP Paul Galvin describes the pluses of social computing—as well as the minuses—in "[A Case for Social Computing in the Enterprise](#)."

Has SharePoint social computing taken off in your organization? Send me an email at [ccasatelli@techtarget.com](mailto:ccasatelli@techtarget.com), and tell me all about it. ■



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# Top Five SharePoint Challenges and Solutions

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*Got some gripes with SharePoint? Learn what some of the biggest issues are and how to fix them.* BY SHAWN SHELL

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**SHAREPOINT IS GENERALLY** considered a robust platform for collaboration. However, like any complex tool, there can be challenges for those who work with it and manage it.

Below is a list of five common SharePoint challenges and various approaches to overcome them. Keep in mind that your top five may be different than what's been presented here.

1

## CONSUME SHAREPOINT RSS FEEDS INSIDE OF SHAREPOINT

Microsoft has provided SharePoint with an out-of-the-box RSS Reader Web part. This Web part natively allows you to include external RSS feeds, such as [Google News](#) in your SharePoint site. Unfortunately, because many SharePoint sites require authentication, the out-of-the-box RSS Web part is not compati-

ble with SharePoint RSS feeds unless you have [Kerberos](#) implemented in your organization.

To solve this problem, you can use one of the two methods listed below. Keep in mind that even though I am mentioning these tools, I am not necessarily endorsing them.

- Enable anonymous access for the lists you want to distribute via RSS. This may be an option for non-secure content within your intranet and will enable the out-of-the-box Web part to consume and display the feeds.

- If enabling anonymous access isn't an option, you can leverage one of a few open source or free Web parts. Here are some examples:

- ▶ [SharePoint Solution Data Zoom Web Part](#)—free for RSS feeds
- ▶ [RSS Web Part Reader on CodePlex](#)

► [Webcodia SharePoint RSS Rotator Web Part](#)

- Require all PCs participating in a SharePoint site to be on the same domain and all users in the same Active Directory domain as SharePoint.

- Ensure that there aren't any network devices, like firewalls or proxy servers, stripping off the authentication information from the network communications between your PC and the SharePoint server.

## 2 DOUBLE AUTHENTICATION PROMPTS IN OFFICE OR INTERNET EXPLORER

If you've ever been prompted more than once to enter your credentials when trying to download or update a document inside of SharePoint, you're familiar with this challenge. Interestingly, Microsoft states that this "problem" is "by design." In other words, the second authentication you might receive while retrieving a document in Microsoft Office—or any other application—even after you authenticated in Internet Explorer is on purpose.

The root of the problem is security context. When you authenticate in Internet Explorer, you are providing your credentials within the context of a single application—namely Internet Explorer.

When you click on a document and Word appears, you've just created another security context. When Word tries to open the document over WebDav, it needs credentials and will prompt you again.

To fix this problem, do one of the following:

- Implement Kerberos in your environment.

## 3 ENABLING FORMS-BASED AND WINDOWS AUTHENTICATION FOR THE SAME SITE

Often you need to allow two different communities of users to access your SharePoint. However, not all of the users will have identities in your Active Directory. The solution? Use forms-based authentication for external users and Windows authentication for your internal users. To enable both authentication types, follow these steps:

1. Create your primary SharePoint application in Central Administration using the Create option for applications. When creating your new application, enter a unique host header to differentiate this application like: *internal.companyname.com*.

2. Create your root site collection

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in the newly created SharePoint application.

supply a unique host header like:  
*external.companyname.com*.

3. Create a new SharePoint application using the EXTEND option for creating new applications. For this new collection, select your previously created application, but

4. Open up Windows Explorer and navigate to the directory for the new application and edit the web.config.

Add the updates (**FIGURE 1**) from

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FIGURE 1:

### Add the updates to the <system.web> section.

```
<membership defaultProvider="AspNetSqlMembership-Provider">

  <providers>
    <remove name="AspNetSqlMembershipProvider" />
    <add connectionStringName="AspNetSqlProvider" passwordAt-
temptWindow="10" enablePasswordRetrieval="false" enablePasswor-
dReset="true" requiresQuestionAndAnswer="true" applica-
tion-Name="/" requiresUniqueEmail="false" passwordFormat="Hashed"
description="Stores and retrieves membership data from the
Microsoft SQL Server database"
name="AspNetSqlMembershipProvider"
type="System.Web.Security.SqlMembershipProvider, System.Web,
Version=2.0.3600.0, Culture=neutral,
PublicKeyToken=b03f5f7f11d50a3a" />
  </providers>
</membership>

<roleManager enabled="true" defaultProvider="AspNetSql-
RoleProvider">
  <providers>
    <remove name="AspNetSqlRoleProvider" />
    <add connectionStringName="AspNetSqlProvider" applica-
tion-Name="/" description="Stores and retrieves roles data from the
local Microsoft SQL Server database"
name="AspNetSqlRoleProvider" type="System.Web.Security.Sql-
RoleProvider, System.Web, Version=2.0.3600.0, Culture=neutral,
PublicKeyToken=b03f5f7f11d50a3a" />
  </providers>
</roleManager>
```

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the [Microsoft SharePoint Team Blog](#) to the <system.web> section.

5. Go to the Application Management section of Central Administration and click on Authentication Providers.

6. Select the primary SharePoint application you created in Step One.

7. Click on the secondary application from the list of applications.

8. Select Forms authentication.

9. Provide the name of the Membership provider and Role provider you configured in Step Four.

10. Navigate to Alternate Access Mappings in the Operations tab of Central Administration.

11. Ensure that there are two entries for the new application you created in Step One:

a. Default Zone:  
*internal.companyname.com*

b. Extranet Zone:  
*external.companyname.com*

Remember, you must create a .NET membership database in your SQL Server using the .NET utility on your

SQL Server: **aspnet\_regsql.exe -E -S localhost -A m**. For more information, go to the [MSDN Patterns and Practices](#) page.



### ACCESS DENIED FOR PORTIONS OF CENTRAL ADMINISTRATION

Many SharePoint administrators have navigated to their SharePoint environment's Central Administration site and then have only been able to access certain portions of the site. Interestingly, global Central Administration rights are not automatically granted to all users, let alone administrators of the SharePoint servers.

To ensure you don't receive an "access denied" message, check out the following:

- Central Administration, along with Shared Services, are separate site collections and potentially separate applications from your main applications. You must have both permissions to the application and be a Site Collection Administrator for all collections to access the functionality.

- Even if you have access to Shared Services, portions of Shared Services require additional permissions. Click on the Personalization Services Permissions in the User Profiles and

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Properties section to ensure the user ID has all permissions listed.

- Change permissions in Central Administration through the Application Management tab (SharePoint Site Management).

Following those steps should eliminate most permission challenges in accessing Central Administration.

### **5** ENABLING SSL CERTIFICATES ON SHAREPOINT

Enabling SSL on SharePoint does not really take much more than enabling SSL on any other ordinary website on IIS. If you need to enable SSL, just follow these simple steps:

1. Generate the certificate request with your preferred certificate authority (CA).
2. Follow the CA's instructions for downloading your new certificate.

3. Complete the certificate installation on your IIS server for the website where you want to apply the certificate.

4. Ensure the site is set up to accept traffic over the 443 port by modifying the website settings through the IIS MMC.

5. Navigate to your SharePoint farm's Central Administration.

6. Choose the Operations tab.

7. Click on Alternate Access Mappings from the list of options in the Global Configuration section.

8. Click EDIT PUBLIC URLs.

9. Type in the fully qualified URL to your site, being sure to specify HTTPS:// before the address in the CUSTOM zone text box, although you could also use any open zone.

10. Click OK. ■

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#### ABOUT THE AUTHOR

**Shawn Shell** is the founder of Consejo Inc., a consultancy based in Chicago that specializes in Web-based applications, employee and partner portals as well as enterprise content management solutions. He has spent more than 20 years in IT, with the last 10 focused on content technologies. Shell is a co-author of *Microsoft Content Management Server 2002: A Complete Guide* (Addison-Wesley), and he is the lead analyst/author on the CMSWatch SharePoint Report.

# Managing External Data Access in SharePoint Governance

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*Offer remote access to SharePoint resources using methods that jibe with your governance plan.* **BY BRIEN M. POSEY**

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**AS YOU DEVELOP** your SharePoint governance plan, it is only a matter of time before you lock horns with the subject of external SharePoint access.

At first, the question of whether you want to allow users to access SharePoint resources from across the Internet probably seems really simple. Either you do want to allow external access or you don't. But, it's much more complicated than that. Learn what to consider when designing your external access policy for SharePoint.

If you decide that you don't want users accessing SharePoint data from outside of your network, then you probably don't have to worry about any additional planning in this area. The primary advantage to allowing external access to SharePoint data is that doing so enables employees to do their jobs, even when they are working outside of the office.

On the other hand, allowing external access to SharePoint data increas-

es the risks of accidental data disclosure. It is important to remember that unless users are accessing SharePoint data from company-issued computers, then you have to assume that their computers do not comply with your normal corporate security policy.

If you do want to allow external access, though, there are a number of issues related to the level of access you must address. The first of these issues is what type of external access you want to allow. For example, is it acceptable for users to access SharePoint from a public Internet kiosk, or do you want to limit access to those users who have company-issued laptops?

There is a trade-off between freer access and better security. Generally, the best way to achieve a balance is to determine if the risks of providing external access outweigh the benefits. Some companies may find it essential for remote users to access



SharePoint data, while for others it may be little more than a convenience factor.

Another important issue to consider is whether users should be able to access the same SharePoint content that they could if they were sitting in the office or if you want to limit their external access to a subset of the data. Some organizations find that they are comfortable allowing users to externally access SharePoint calendars and some SharePoint lists and document libraries but that other document libraries may contain data that is especially sensitive, such as financial statements or business plans.

In these types of situations, it may make sense to allow users to access some SharePoint data but not to give them external access to everything. There are many different techniques for accomplishing this. For example, you might create a special SharePoint site that has access only to resources that are approved for external access. Exchange Server and Outlook can also be especially effective mechanisms for controlling external access to SharePoint data.

If you decide that there are some types of SharePoint data that should not be externally accessible, then you will have to figure out how to segment the data based on your security requirements. If that's your approach, there are at least two options available to you.

■ **Create a dedicated SharePoint site for external users, and design that site in such a way that only the acceptable data is available.** For example, the site might provide users with some document libraries but not others. Likewise, you could create a SharePoint site where users have access to calendars and contacts but nothing else. Depending on how your SharePoint deployment is configured, though, this solution might be impractical, especially if the documents that users need external access to are included in the same document library as the documents that you want to protect.

■ **Configure SharePoint to provide access to SharePoint resources through Outlook or through Outlook Web Access (OWA).** What is nice about using OWA is that you can avoid exposing your SharePoint servers to the outside world. Instead, Exchange Server acts as a proxy and retrieves the requested data on the user's behalf.

The Exchange 2007 version of OWA contains a mechanism called Direct File Access that allows users to browse SharePoint document libraries directly through the OWA interface. Because all users' requests are proxied through Exchange, Microsoft designed Exchange 2007 so that you can specify which SharePoint servers'

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users should be able to access through OWA.

Another nice thing about Direct File Access is that Exchange maintains two separate profiles—one for private computers and one for public computers. Because users access OWA through a standard Web browser, Exchange has no way of knowing whether users are actually using a public or a private computer, but the OWA sign-on screen does ask users which type of computer they are using. If the user does not explicitly tell OWA that they are using a private computer, OWA will assume that the user is working from a public computer.

From a governance standpoint, providing access to SharePoint document libraries through OWA may be just what the doctor ordered. After all, OWA allows you to control which SharePoint servers users can access externally. It even allows you to control external access to resources based on whether a user is using a public or a private computer.

Unfortunately, OWA does not offer a comprehensive solution for those who want to give external access to SharePoint resources in a controlled manner. You can allow access to

SharePoint document libraries through OWA, but OWA does not allow you to connect to SharePoint lists, calendars or other resources.

The good news is that you can configure Outlook 2007 to connect to SharePoint lists, document libraries and calendars. Access to these resources can also be controlled through Group Policy settings. What this means is that you can provide external users with specific SharePoint resources in a controlled manner. Because Outlook must be physically installed on the user's computer for this to work, using Outlook as the sole means for providing external access to SharePoint guarantees that users will not access the program from public Internet kiosks.

If you decide to give external users remote access to SharePoint resources, then you have to tackle what types of data you will allow users to access and which access methods you'll allow. In situations in which your governance plan mandates that only a subset of the SharePoint data be externally accessible, you may have to get a bit creative in providing users with the appropriate access. ■

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**ABOUT THE AUTHOR**

**Brien M. Posey** has received Microsoft's Most Valuable Professional award six times for his work with Windows Server, IIS, file systems/storage and Exchange Server. He has served as CIO for a nationwide chain of hospitals and healthcare facilities and was once a network administrator for Fort Knox.

# A Case for Social Computing in the Enterprise

*Step outside your comfort zone, and take advantage of SharePoint's blog, wiki and My Site features to unlock your users' potential.*

BY PAUL GALVIN

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**LIKE IT OR** not, social computing in the enterprise is here to stay. And, you should like it. Few technologies have the power to unleash otherwise hidden employee potential than SharePoint's blog, wiki and My Site features.

Like many new technology-driven concepts, *social computing* can be a little confusing as a term. Definitions run the gamut, but many people will agree that social computing is both a process and supporting tool set that enable individuals within an enterprise to contribute their knowledge and insight about the business. Social computing makes business knowledge easily searchable and accessible to everyone in the enterprise at any time through a number of search avenues.

It really boils down to this: Employees know a lot of stuff. Social computing systems make it easy for everyone else to share and ultimately benefit from that knowledge.

Companies that successfully integrate social computing into their bread-and-butter information systems stand to gain advantages that few people understood even a few years ago. We're surrounded by the obvious success of publicly available social computing efforts ranging from the simple blog up to fully featured social networking systems like MySpace, Facebook and LinkedIn, to name a few. It might not be entirely accurate to draw parallels from Facebook to your enterprise, but one thing is certain: If you build it, they will come.

People love to share their knowledge and will do so willingly if given the opportunity. When employees have that chance to share knowledge through a wiki or a blog, they become invested in the enterprise in a way that an order-entry system simply can't bring about.

To make this more concrete, here

are some real examples of returns on investment that companies I have worked with have realized by engaging their users in social networking:

- A content-rating system improved perceived reliability and accuracy of a knowledge base at a pharmaceutical company.

- A blogger's series of "how-to" articles relating to approval processes at a manufacturing company brought company-wide recognition to that blogger and cemented his role as a business leader within his group. Perhaps more important, the article series helped uncover several inefficiencies in business processes that the organization was able to solve, resulting in both faster and more efficient business processing for years to come.

- A large multinational company's strong and consistent initiative to create a personnel directory that included skills and interests helped everyone at any time locate experts as needed. Anecdotally, this led to a reduced need to hire subcontractors because the talent was often available in-house, but it wasn't easy to locate.

Social computing tends to make traditional IT managers at traditional organizations very uncomfortable because it makes them feel like they

are losing control. IT people invest a lot of time and energy defining business processes, building computing systems to support those processes and then rolling them out across the enterprise. At the end, they continue to maintain control.

But social computing often injects disorder into the system. Suddenly, people are commenting on processes via blogs or even rating content using their own value judgments. It certainly turns the whole idea of control on its head.

These traditional IT managers might reasonably ask, "Why social computing at all?" The answer is that there is a natural urge to participate in "What's going on?" that traditional back-office systems simply don't allow.

When have you ever heard of a CRM system that includes a blogging engine as a core component or an ERP system that allows users to share their expertise and knowledge about product management via a community encyclopedia just like a wiki? Those systems don't provide an outlet for that kind of creative energy. As a result, creative energy is left bottled up inside people's heads. SharePoint allows your organization to uncork that energy in a controlled manner.

How does it do that? SharePoint is an excellent platform for initiating a social aspect to your company's computing systems. Out-of-the-box features like wikis, blogs, My Sites and

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others speak directly to classic social computing features. The SharePoint community, a vibrant collection of individuals literally across the globe, has extended the SharePoint platform and improved out-of-the-box features like blogs and added new features, such as tag clouds, that are not present in the core platform at all. To top it off, a variety of third-party companies have created products whose entire focus is social computing, making it pervasive throughout the product.

Lastly, SharePoint 2010 is poised to extend SharePoint's social computing infrastructure in new and interesting ways that is sure to cement its role as a top-tier social computing solution for the next several years.

Blogs allow users to become authors, and SharePoint provides an outlet for authors that is appropriate and useful in a corporate enterprise. A built-in blog feature of Microsoft Windows SharePoint Services and Microsoft Office SharePoint Server (MOSS) 2007 allows users to write on any subject they want. Bloggers have full editorial control over their content. They can control who views their blog, what they want to write and when and how their writing shows up in search.

Blogging won't appeal to everyone, but you'll be surprised at how many people will be happy to share their professional experiences with their peers and enjoy the recognition that

comes with it. Without blogging to provide an outlet, this information would remain largely hidden and passed around in a much less efficient manner.

Of course, that "full editorial control" can be scary. In fact, blogging is a big responsibility for both bloggers and their employers. To an extent, a SharePoint governance plan can and should address some of the concerns that arise. For example, where should blogs be located in the site taxonomy? And who has control over what tags can be used?

One word of caution: Blogging can veer into the irrelevant—describing a kid's birthday party or discussing politics—to the outright inappropriate or even illegal, such as sharing trade secrets. In the end, common sense must prevail, and including parameters of social computing in the governance plan is a good start.

But SharePoint's social computing features have their pros and cons. Here are a few:

■ **Blogs:** Out of the box, blogs have some weaknesses. Blogs allow you to assign a category, such as "workflow," to a particular blog entry describing how to implement a particular kind of workflow solution. Unfortunately, SharePoint allows only one tag per blog entry. This limits the author's ability to properly describe the entry.

It is not as easy to personalize the

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layout of a SharePoint blog as users would like. Despite these drawbacks, the core blogging engine in SharePoint is solid and sufficient for most organizations.

However, the SharePoint community has stepped up to the plate and provides free extensions to the platform that address these two shortcomings and enhance it even further for advanced needs.

■ **Wikis:** Much like blogs, wikis turn everyone in an organization into a potential author. In contrast to the individuality of blogs, wikis are distinctly community-driven and managed. SharePoint provides a solid wiki tool. Anyone with permission can create a new entry in a wiki or directly edit an existing wiki page. SharePoint tracks changes to wikis over time so that they can be managed by one or more content czars or in accordance with your SharePoint governance plan.

Companies use wikis for a variety of purposes. IT departments may use wikis to make a note of important system changes over time that becomes a running and long-living record of important system events. Business analysts set up a wiki to work with a team of end users to define business requirements. The analysts conduct interviews and document requirements in a wiki. End users view and directly update those requirements.

This provides a tight but open feed-

back loop that reduces the risk of error and generally improves quality across the board. Upon completion, the wiki can be turned over to the development team for reference and comments, extending the feedback loop from end user directly to programmer and vice versa.

Wikis have their weaknesses too. Whereas a blog has one author, wikis have a multitude of authors who may not always agree on the SharePoint templates used. As a result, it could be difficult to create a consistent look and feel for a knowledge base-type wiki without investing a lot of effort on an on-going basis.

Blogs and wikis allow the community to express itself, and that's powerful stuff. However, MOSS Enterprise goes further and provides a great deal of social information at everyone's fingertips via people search and My Site functionality. SharePoint holds a lot of information about individuals in an organization. It understands reporting structures via Active Directory. It knows my manager and my manager's manager.

Using that same information, it can figure out who my colleagues are. And when that's not good enough, SharePoint allows users to adjust and expand inferred relationships with their own concrete data. For instance, I have a colleague I work with on a regular basis who is not part of my org chart. Even though we have a work

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relationship, it may not be captured in Active Directory. I can explicitly define that relationship in SharePoint by defining my own colleagues.

SharePoint uses these social connections to provide an enhanced search experience by taking social relationships into account when determining relevancy. If I execute a search and the search returns 10 items, SharePoint will rank my colleague's results higher than other results, although search relevancy is complicated and may not be as simplistic as I imply.

■ **My Site:** SharePoint gives people control over their own social profile within the organization through My Site functionality. My Site is a SharePoint site—actually a site collection—set aside for each user in the organization. My Site allows users to define their social profile by specifying their picture as well as their responsibilities, skills and more. From a governance perspective, SharePoint allows managers to define which profile properties cannot be modified by end users, such as their direct managers,

and those that can be controlled by end users, such as their personal interests.

*My Site is a SharePoint site—actually a site collection—set aside for each user in the organization.*

The SharePoint platform enables other classic social computing features, such as tagging content, rating content and more. SharePoint 2010 promises to take these features to entirely new levels and make social computing as pervasive—yet controlled—as your organization may need. If you haven't done it already, seriously consider defining a plan to roll out social computing tools for your enterprise. No one likes to leave money on the table in a sales situation. Likewise, no one wants to leave employee talent bottled up for lack of a proper bottle opener. SharePoint is your opener. ■

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