

SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// OCTOBER 2008

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FOR ENTERPRISES STILL STRIVING for the "paperless office," Microsoft Office InfoPath might get you one step closer.

Office InfoPath is an application of Microsoft Office SharePoint Server 2007 that allows forms to be created and filled in using a Web browser. Users can publish these forms to a library and update them so everyone always uses the latest version of each form.

Web-based forms can save time and money, so why is InfoPath one of the most underused SharePoint features?

If the idea of writing custom code is a turn-off for IT folks, they needn't worry. SharePoint expert Nicola Young says that InfoPath uses a WYSIWYG forms designer, so no programming is required. Young walks readers through the process of using an InfoPath template to design an online form in this month's cover story "Using SharePoint's InfoPath feature to generate forms."

Is governance keeping you up at night? Then you've come to the right place. In "Creating a SharePoint governance document," Microsoft MVP Brien M. Posey spells out the critical governance areas in your SharePoint installation.

Still a SharePoint rookie? Beware of some common blunders. SharePoint guru Shawn Shell offers helpful advice in "Rookie mistakes to avoid during the SharePoint implementation process."

What SharePoint conundrum is bothering you? Let us know, and we'll write about it. Email me at ccasatelli@techtarget.com. ■



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ONE OF THE most underused features of Microsoft Office SharePoint Server (MOSS) Enterprise is its ability to create electronic forms that can be filled out using a Web browser.

Users don't need to have the SharePoint client installed on their computers to create the forms because it's an easy enough process with MOSS using a feature called InfoPath.

A WYSIWYG designer for electronic forms, SharePoint Server's InfoPath eliminates the need to write any code at all. Users don't have to create forms in Microsoft Word or Microsoft Excel and place them on a file share or email them around. With Forms Server—which is included with the Enterprise version of SharePoint—users can publish these forms to a library and update them so everyone is always using the latest version of each form.

The best thing about using InfoPath is the cost saving it offers for common business applications, like setting up new employees on

the network.

Typically when a new employee starts, the hiring manager sends an email to the IT department asking for the employee to be added to the system. After trading several email messages with the hiring manager, the IT shop figures out what type of phone and computer access is appropriate for the new employee and programs

The best thing about using InfoPath is the cost saving it offers for common business applications, like setting up new employees on the network.

the permissions. Most of the time, this process is completed the day before the new employee starts.

With SharePoint Server's InfoPath, the IT department could set up a form

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for the hiring manager to fill out with the exact programs needed to grant access to the appropriate type of computer and phone. After the hiring manager fills out the form, she would submit it to a library with a "new hire" notification sent to the IT staff. To track the status of this request, IT could add a column to the library to track the status of this request or even add a workflow to automate the process even further.

A conservative estimate of what is spent emailing the hiring manager and tracking down the appropriate equipment is an hour of IT time per new hire. If an organization hires 100

people per year and a member of the IT staff is paid \$30 an hour for managing this process, using the electronic forms feature in SharePoint could save \$3,000 per year for just that one application.

For the following example, use the Travel Request sample template included with Microsoft InfoPath 2007. Open InfoPath on your desktop. In the Getting Started dialog box, select **Customize a Sample**, as in **FIGURE 1**. Select **Sample-Travel Request** by double-clicking on it.

To allow users to fill out this form using the browser, the form needs to be browser-enabled. Click

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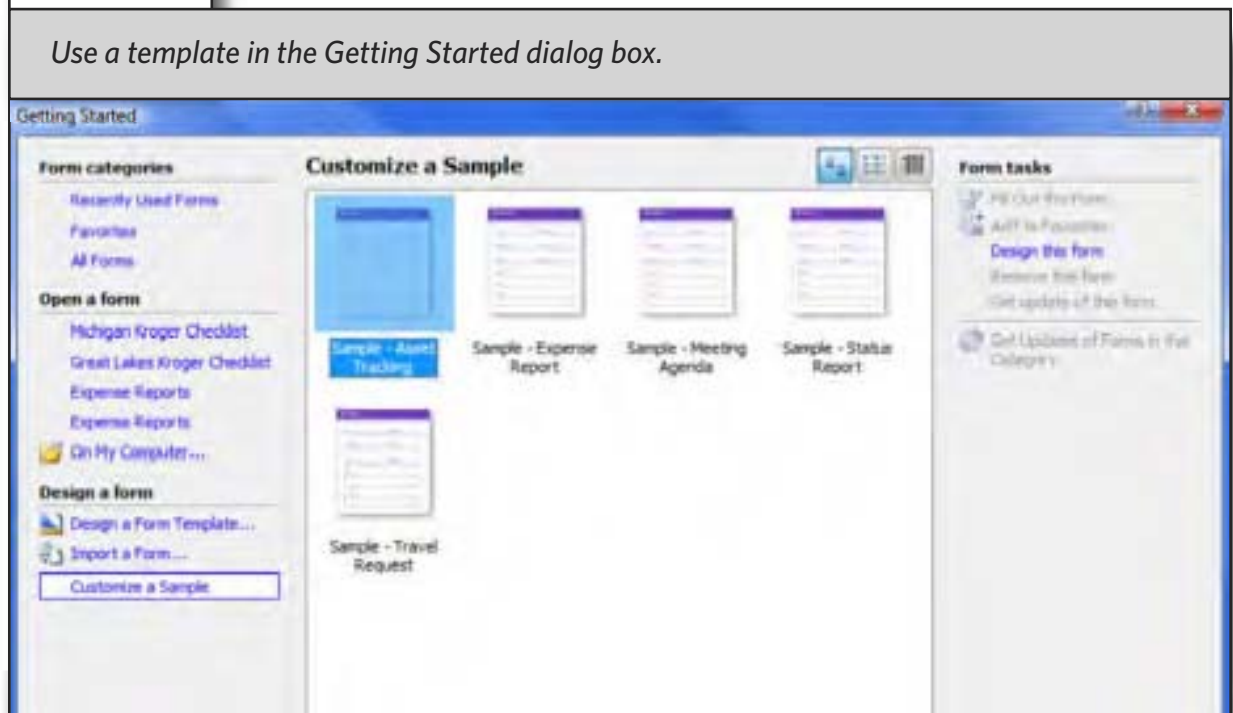
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FIGURE 1

Use a template in the Getting Started dialog box.



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Tools → Form Options (FIGURE 2).

Under Category, select **Compatibility**. Make sure the box is checked next to **Design a form template that can be opened in a browser or InfoPath**. Click **OK**.

On the Design Tasks pane, select **Publish Form Template**. A warning box will appear stating the form must be saved first. Click **OK**. Give the template a name and click **Save**. The Publish Wizard will now open.

Select **To a SharePoint server with or without InfoPath Forms Services**.

Click **Next**. Enter the URL to the SharePoint site you would like to create the form library on to store these forms. You will want to enter the URL in <http://sharepointsite.com/>. Be sure to remove the default.aspx from the URL. Click **Next**. See that the box next to **Enable this form to be filled out by using a Browser** is checked (FIGURE 3).

NOTE: If this box is grayed out, you will want to check to different items. Be sure this form is browser-enabled by following the previous steps above,

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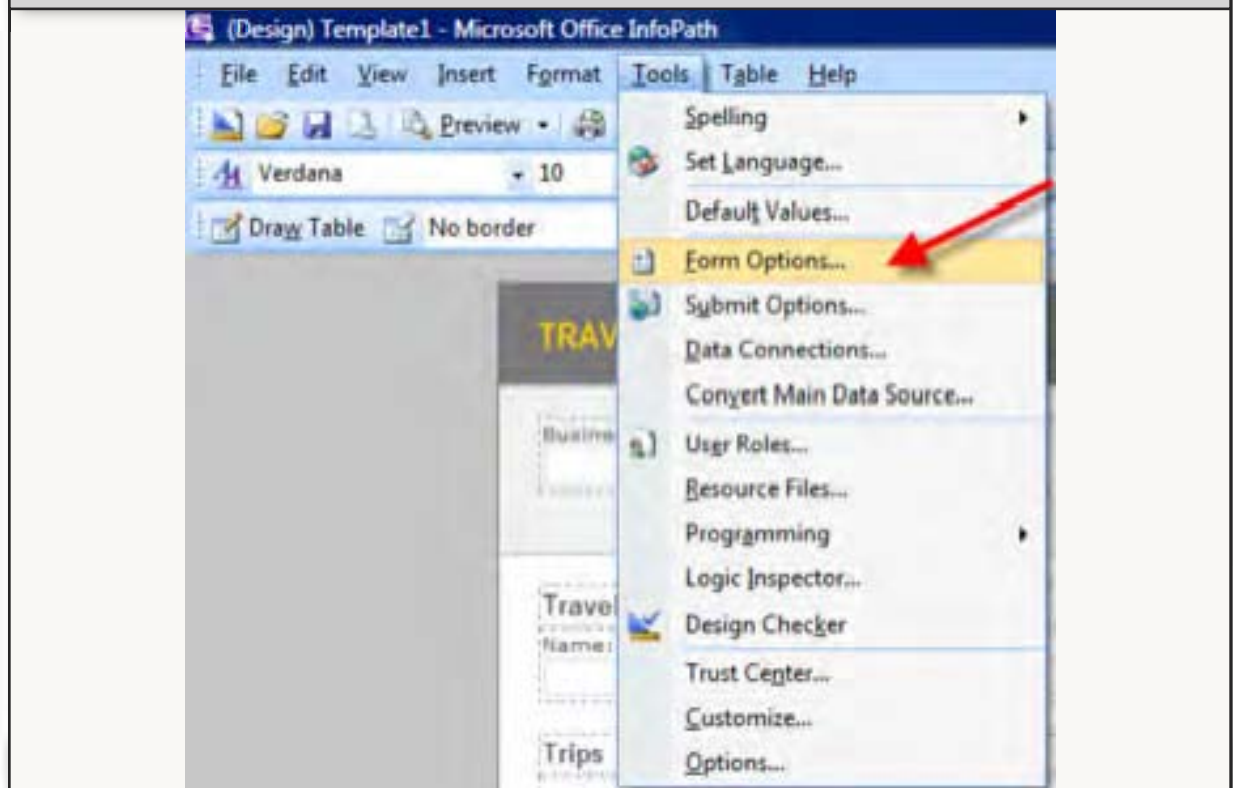
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FIGURE 2

Browser-enable the form so users can fill it out.



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and be sure the site you are attempting to publish this form to has the Office SharePoint Server Enterprise Site features activated.

For this example, use the Document Library in **FIGURE 3**. It is important to note, however, that you can create a Site Content Type that could be used in multiple document libraries and managed in one central spot. Or you could create an administrator-approved form template, which is needed if you have any code in the form. Click **Next**.

Select **Create a new document library**. Even though it says “Create a new document library,” you are

actually creating a new form library that has added functionality, such as enabling the browser view, merging forms and relinking documents to their template. Click **Next**. Give the library a name—“Travel Requests” is fitting for this demo. At this point, you can also give a description. Click **Next**.

The column option is allowing you to select the fields on the form that will become columns on the form library. To select another column, click **Add**. From the Travel Requests group select **email**. Notice you can give the column a different name than the field and you can determine if it is just going to be a column on

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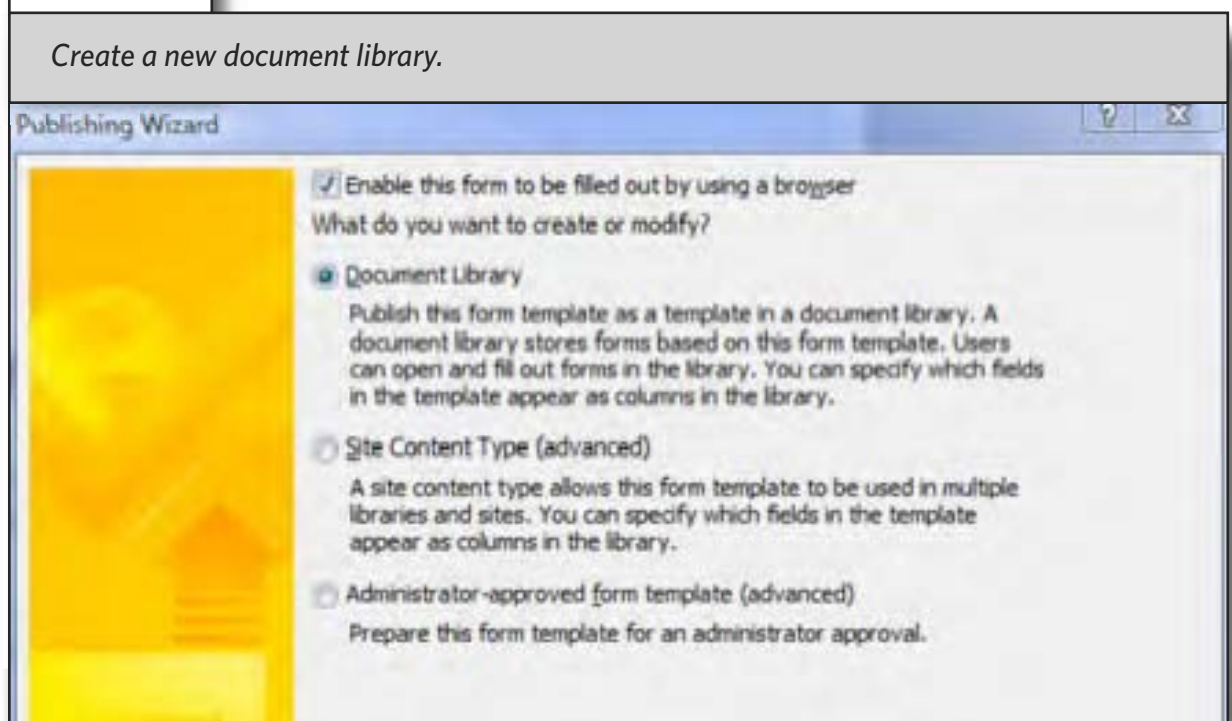
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FIGURE 3

Create a new document library.



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this list or a site column. Click **OK**.

Promoting the fields in the form to columns allows users to see information quickly from the form without needing to open the entire form. It will also allow you to use other SharePoint functionality, such as using the column to create a view or using the information in a workflow. Click **Next**. Click **Publish**. Click **Open this form in the Browser** to view how the form

will look for your users.

Fill in the form. Click **Save**. Give the form a name and click **Save**.

Close the form and navigate to the new library by entering the URL to the site. On the Quick Launch Bar you should see a link to the new library. When you click on it, your form has been saved as well as the extra columns created from fields that were promoted (FIGURE 4). ■

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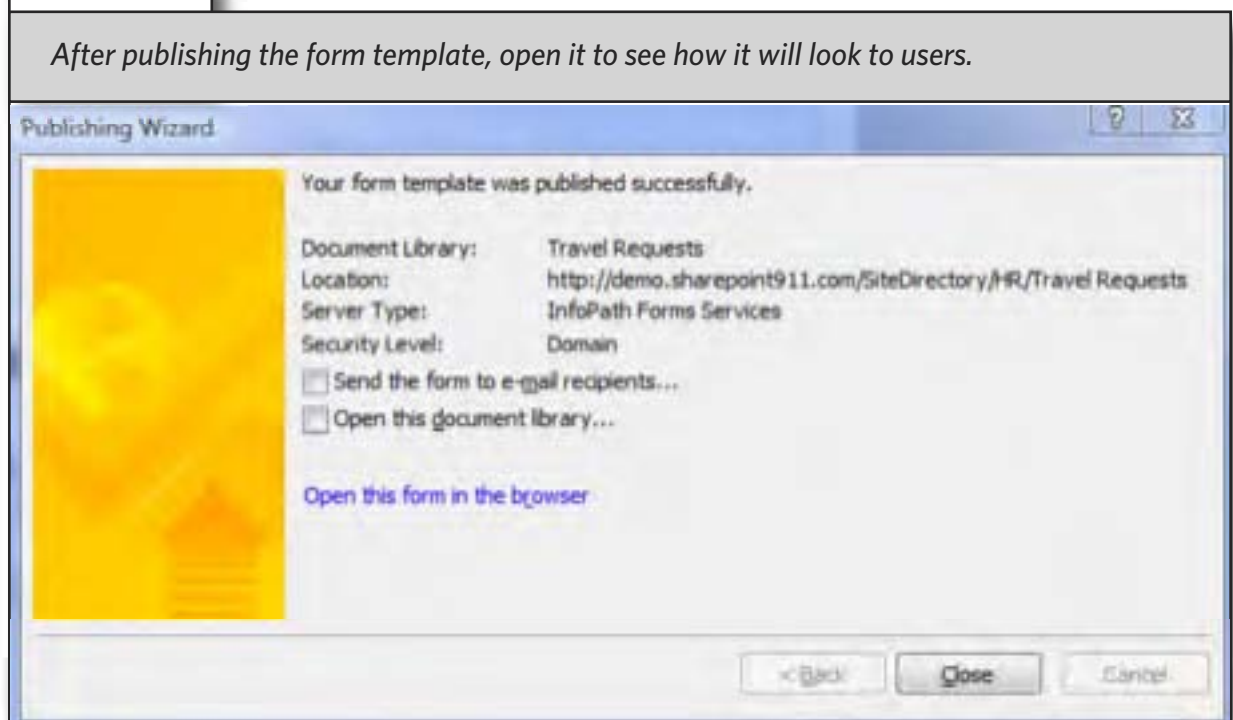
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FIGURE 4

After publishing the form template, open it to see how it will look to users.



ABOUT THE AUTHOR

Nicola Young is SharePoint planning and design consultant for SharePoint911, a consultancy specializing in SharePoint services and administration. Young focuses on information usability and organization as well as SharePoint business applications. She is the lead author of the Ted Pattison Group's course *SBU201: Business Users Guide to SharePoint Server 2007* and co-author of *SAB301: Building Enterprise Solutions with SharePoint Server 2007* and *SPG301: SharePoint Planning and Governance*.

Creating a SharePoint governance document

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WHAT IS A SharePoint governance document? Do you really need one?

A SharePoint governance document outlines policies and procedures regarding the way SharePoint is to be used and maintained within an organization. This document often addresses things like backup procedures and security settings and typically provides an acceptable use policy for the end users.

Why is it important to have a SharePoint governance document? One of my clients went through a situation a few days ago that underscores the need for such a document. This client's primary SharePoint site contained a discussion board where users collaborate with each other. Most of the discussion areas are business related, but some are intended to be fun.

One of the discussion areas on the site was titled "Anything Goes." One of the employees posted a redneck joke in this area. Although the joke was intended to be harmless, another

employee got angry and claimed that it was an insult to his Southern heritage. What started out as an innocent joke escalated into a discrimination case and resulted in several employees leaving the company. Had this client created a SharePoint governance policy, this may never have happened.

Incidentally, the company has a

A SharePoint governance document outlines policies and procedures regarding the way SharePoint is to be used and maintained within an organization.

SharePoint governance policy in place now. It still has its "Anything Goes" area, but it's open only to employees who sign away their right to be offended by anything posted in that area.

ANATOMY OF A SHAREPOINT GOVERNANCE DOCUMENT

Unfortunately, there is no universal template for creating a SharePoint governance document. Every company's SharePoint deployment is different, so every company requires a different type of SharePoint governance document.

The list below contains some important governance issues, but depending on the size and complexity of an organization, other issues may need to be addressed. Microsoft has created a much more [comprehensive SharePoint governance checklist](#) that you can access for help in developing your document.

First, form a committee whose job it will be to determine the needs of the SharePoint governance document, and then create the document. Here are some of the more important issues for the committee to include in the governance document:

- ▶ Create a site map for your SharePoint structure.
- ▶ Create a policy outlining the criteria for creating additional SharePoint sites or for making substantial changes to the sites that are already in use.
- ▶ Document which people are responsible for supporting and maintaining the site, and create a contact list.
- ▶ Clearly define which roles members of the IT staff will take in sup-

porting the SharePoint environment.

- ▶ Decide who is allowed to request new SharePoint sites or changes to existing sites and under what circumstances.
- ▶ Develop a change management process for SharePoint sites.
- ▶ Design a policy for archiving older versions of the site, and stipu-

Every company's SharePoint deployment is different, so every company requires a different type of SharePoint governance document.

late how long those archives should be maintained.

- ▶ Determine whether or not your company is going to charge individual departments for their use of the SharePoint site.
- ▶ Provide training to your help desk staff, and create a policy for how the help desk staff should help users resolve problems.
- ▶ Create a backup policy.
- ▶ Determine upfront which tools will be allowed for developing and maintaining SharePoint sites.
- ▶ Create a template from which all future pages of the site will be based.
- ▶ Decide which parts of the

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template site owners are allowed to modify.

- ▶ Determine which types of content are acceptable on your SharePoint site.
- ▶ Specify the types of documents that should be stored in document libraries.
- ▶ Establish document library workflow settings.
- ▶ Create a document archival and retention policy.
- ▶ Develop an acceptable use policy for the end users.

users will follow the procedures just because it is part of the company policy.

One last thing: Schedule an annual review to make sure that the SharePoint site still complies with the governance document and to see if the document needs to be updated.

Over the 15 or so years that I have worked in IT, I have seen a lot of well-intentioned companies take on various network- or security-related documentation projects, vowing that those documents will always be kept up to date. It has only been in the rarest of circumstances, though, that I have seen the company keep these types of documents up to date over the long term.

Creating a SharePoint governance document is a lot of work. All of this work will be in vain if you simply draft a document and then take no further action. So make sure you keep your governance document up to date. I guarantee it'll help you avoid more than a few problems down the road. ■

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WHAT TO DO WITH YOUR SHAREPOINT GOVERNANCE DOCUMENT?

Once a SharePoint governance document has been written, the first thing is to apply specifications from the document to your SharePoint site wherever possible. For example, if the governance document outlines workflow procedures, then you should build those workflow procedures into SharePoint rather than assuming that



ABOUT THE AUTHOR

Brien M. Posey has received Microsoft's Most Valuable Professional award five 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.

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WHAT HAPPENS WHEN SHAREPOINT GOES DOWN?

You rely on MOSS to communicate, to action immediate service and to collaborate across the organization.

Without MOSS everything stops. Productivity dies, employees are isolated and information flow ends.

KEEP LINES OF COMMUNICATION OPEN

The ability to collaborate within teams across geographic dispersion is vital. There is no acceptable downtime window for SharePoint, it must be available 24x7.

Planned maintenance, storage failures, power outages and user errors are all reasons for downtime. Factor these into service continuity plans. Service continuity plans should have protection of MOSS as a high priority. Projects and information sharing may depend on it.

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From choosing the wrong installation to ignoring disaster recovery, beware of these SharePoint implementation blunders. BY SHAWN SHELL

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DESPITE WHAT MAY seem like a virtual explosion of SharePoint in the enterprise, it has been around since 2001. However, because of the various architectural changes in the recent version, SharePoint's popularity has taken off. The challenge now is to ensure that it is implemented properly in your environment.

Almost to a fault, SharePoint is easy to install and configure. Using it is pretty easy too. However, because it's so easy, many organizations make "rookie mistakes" when implementing SharePoint. Here is a list of the top mistakes and ways to avoid them.



PICKING BASIC VS. ADVANCED INSTALLATION

When installing SharePoint, many organizations mistakenly take the basic install option because it sounds logical. And it's quite easy—you can install it with a few mouse clicks. For more enterprises, however, the

advanced option is better.

Always choose the advanced option if:

▶ **You don't want to install everything on the same server.** In most cases, the enterprise should have at least a separate SQL Server—the basic installation doesn't allow you to specify the database server. Further, you must also choose the advanced option if you want a load-balanced set of Web Front End (WFE) servers.

▶ **You want to use full SQL Server—either new or existing.** SharePoint is heavily dependent on SQL Server to store content and configuration. The basic install will install SQL Express, which works for development or very small installations—like a workgroup—but it's not suited for departmental or enterprise deployments.

▶ **Fault tolerance is required.** Many

enterprises wrongly assume that load balancing or highly available environments are for performance. In fact, most often fault tolerance is a higher priority and the real reason to leverage load balancing, RAID or other high-availability solutions. The basic installation does not allow you to configure a highly available environment.

at minimum, that should be created:

► **Primary SharePoint service account.** This is used for Central Administration and “talking” to SQL Server.

► **Search account.** There are a few places where search needs a service account. It’s acceptable to use one account for all three, but because the search account needs administrative privileges on the Index and WFE servers, you may want to use separate accounts for the different search services. Be aware that the crawling account is also used to access the membership directory, in addition to your content. So you’ll want to make sure it has the rights to access that content.

► **Application accounts.** For each Web application—think website—in your environment, you should create a separate identity. This helps create security boundaries between applications and has the added benefit of helping identify which worker process is servicing a given application. For example, in Task Manager, the identity of a process is listed next to the process.

► **Shared services account.** If installing Microsoft Office SharePoint Server (MOSS), shared services is what controls enterprise search, My

2 IMPROPER USE OF SERVICE ACCOUNTS AND PERMISSIONS

SharePoint, like many server-based tools, needs to interact both with the server it’s installed on and with services that surround it. As such, it requires “service accounts.” These are special identities used by SharePoint to communicate with SQL Server, crawl content, add index information on the file system and create worker processes, among other functions.

When installing SharePoint, many organizations incorrectly use generic server accounts like NETWORK SERVICE or SYSTEM. Alternatively, they may use an administrator or equivalent. Neither approach is recommended. Instead, consider using a separate domain account for each primary SharePoint service. Each account should be configured with the fewest privileges possible.

Here’s a quick list of the accounts,

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Sites and the BDC. It is a separate application like your other SharePoint sites.

3 INCORRECT DRIVE SPACE ALLOCATION

The SharePoint installation process puts everything—software, indexes, location of custom solutions, logs—on the primary system drive, and it's often the C drive. In many organizations, however, the C drive is partitioned smaller for just the OS files. As a result, space can run out quickly.

Depending on the role the SharePoint server is playing—either Web Front End (WFE), search, index or database—it will have different space requirements. If the server is a search or index server, you'll need at least 25% of your total content storage available for the indexes. On a small C partition, space runs out quickly if you crawl a lot of content. And, keep in mind: If a machine is running SQL Server, everything goes into the database. Every bit of content will be stored as a binary, and the database

files and transaction logs will grow rapidly. If versioning is enabled, this expansion will be rapid. In short, be sure to place data files, indexes and other assets related to your SharePoint site on a drive with plenty of space.

4 IGNORING DISASTER RECOVERY SITUATIONS

Many organizations disregard or dismiss the special nature of SharePoint when developing disaster recovery business continuity plans. SharePoint is more complicated than your average database-driven portal. As such, you need to understand its architecture and make plans for reconstituting your environment.

Although a rookie mistake list could be much longer, this checklist highlights the ones that are made most often. Using this checklist can help Windows managers avoid these common SharePoint implementation errors, which will save time and future headaches. Your situation and needs will vary. Just plan accordingly. ■

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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, employees and partner portals, as well as enterprise content management. He has spent more than 19 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*, published by Addison-Wesley, and the lead analyst/author on the [CMS Watch SharePoint Report 2008](#).

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