

# SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION // DECEMBER 2008

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BY CHRISTINE CASATELLI

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**SharePoint search gets big boost from governance planning**

**WITH SHAREPOINT DOCUMENT** libraries, several versions of documents can be reviewed to see how each document has been changed over time.

The good news for end users is that versioning has gone through some big improvements since SharePoint 2003. In Microsoft Office SharePoint Server 2007, end users can for the first time distinguish between major and minor versions of a document.

The bad news for SharePoint administrators is that the new versioning settings can make SharePoint a bit more complicated.

In this month's cover story, "Document version control goes deeper in SharePoint 2007," Microsoft MVP Brien M. Posey walks readers through the process of controlling versions in MOSS 2007.

Any IBM shops out there? For enterprises that use only Lotus Notes/Domino and Lotus Quickr, sharing information is relatively straightforward. But what happens when SharePoint enters the picture?

In "Can Lotus Notes/Domino and Microsoft SharePoint play nice together?," you'll learn how some companies are choosing between a third-party tool or a developer to help bridge the gap between the collaboration platforms.

And finally, don't forget about governance. Read how end users, developers, analysts and administrators can work together on a governance committee to enhance search functionality in "SharePoint search gets boost from governance planning" by SharePoint MVP Paul Galvin.

What are your plans for SharePoint in 2009? I want to know. Send me an email at [ccasatelli@techtarget.com](mailto:ccasatelli@techtarget.com). ■



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# Document version control goes deeper in SharePoint 2007

*MOSS 2007 has the ability to differentiate between major and minor versions, but that adds to its complexity.* BY BRIEN M. POSEY

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**ONE OF THE** nice things about SharePoint document libraries is that they allow you to retain multiple versions of documents so that you can go back and review how a document has been modified over time.

Although SharePoint Portal Server 2003 supported versioning, Microsoft Office SharePoint Server (MOSS) 2007 goes a step further—offering the ability to differentiate between major and minor versions of a document. This new feature can make tracking down changes in earlier versions of a document a lot easier.

The process of controlling versions is relatively simple once it's set up in MOSS 2007.

Document version history is controlled through SharePoint's Document Library Versioning Settings page. You can access the page by going to your SharePoint site's default page.

Once there, click the Document Center tab. You'll see that the Docu-

ment Center page contains a list of the various document libraries and lists in the Site Hierarchy window on the left side of the window.

Click on your document library, and then choose the Site Settings option from the Site Actions menu. When you arrive at the Site Settings

***MOSS 2007 goes a step further—offering the ability to differentiate between major and minor versions of a document.***

page, click the Site Libraries and Lists link, followed by the Customize "your document library" link. Finally, click the Versioning Settings link. You will now be taken to the Document Library Versioning Settings page,

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shown in **FIGURE 1**.

The first part of the Document Library Versioning Settings page is the Content Approval section. This section asks you if documents should remain in draft form until they have been approved. SharePoint allows you to configure workflows through which documents can receive any number of approvals prior to being posted in a document library.

If you require approval for submitted items, then any new or modified items remain in draft form until the

approval process is complete. This usually means that the document is treated as a minor version until it has been approved.

The Document Version History section allows you to control how versioning is implemented and how many versions are retained from each document. Versioning is not enabled by default, but you have the option of creating a new major version of a document each time it is edited. Or you can create major and minor ver-

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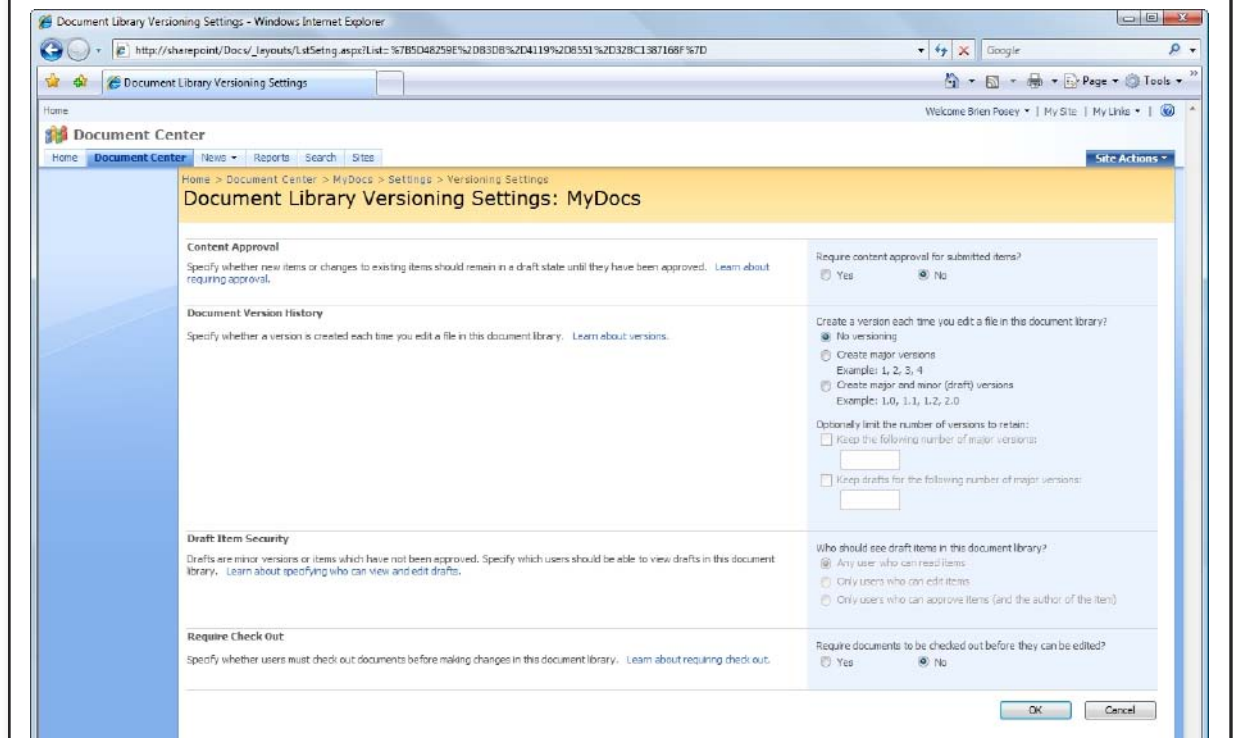
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FIGURE 1

The Document Library Versioning Settings page allows you to customize document versioning for the selected library.



# Five tips to improve SharePoint doc management

**THE FOLLOWING IS** an excerpt from a SearchWinIT.com interview with SharePoint expert **Bill English**, founder and an instructor at Mindsharp, the SharePoint event host and Minneapolis-based company that specializes in SharePoint training.

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**Document version control goes deeper in SharePoint 2007**



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► **Define a document's lifecycle.** This includes determining where a document will be incubated, what metadata will be in the document, who owns the document and when it should expire.

► **Be cautious of how you bestow access permissions to individual site administrators.** Not every site administrator should be privy to all corporate information. With that in mind, when there is a different relationship between a document's security, security nodes and site collection ownership, you need a different site collection. A site collection is a group of sites built on SharePoint that exist under a top-level site. Individuals have permission rights for sites and content within a site collection, among a number of other important details.

► **Match the findability architecture with the metadata that is applied to the document.** If people are going to find a document using the Advanced Search Web Part tool, the document's metadata needs to be exposed to that tool. If you know that a document is in a particular department, with a particular security clearance and the author's name and the topic, it's more easily found in the Advanced Search Web Part than in simple search. Other methods of finding the document can help too. Pairing up how a document is described with the findability tools is imperative to helping achieve a fully functioning collaboration system.

► **Make sure IT managers set the document library security settings before the document is put into the library.** Some document library security settings are applied to the document when it is created and uploaded. The settings can't be changed on documents that exist in the library.

► **If you are doing bulk imports of documents, turn versioning off.** Turn versioning on after documents are in the library. Otherwise, you will have to go through each document and check it in manually. —SEARCHWINIT.COM

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sions of the document throughout the editing process. Creating a new major version is the MOSS 2007 equivalent to the versioning option implemented in SharePoint 2003.

Just beneath the options to enable versioning are options that allow you to specify how many major versions of a document you want to retain and how many drafts you want to keep for each major document version.

Although it might be tempting to shoot for the moon and use really high numbers, keep in mind when deciding how many versions of a document to retain that the documents are stored within a SQL Server database. Any time you create a new version of a document, an entirely new copy of the document is stored in the database. In other words, SharePoint does not just store the deltas from one version to the next. You'll consume a lot of disk space in a hurry if you get carried away with the number of document versions you retain.

MOSS 2007 can also define drafts as either minor versions of documents or documents that are await-

ing approval. The Draft Item Security section allows you to decide who can view draft documents. The default setting makes drafts visible to anyone with permission to read them. You do, however, have the option of making drafts visible only to those who have permission to edit them. If a document requires approval, you have the option of making the document draft visible only to the person who created it and to people who have the authority to approve the document.

The last decision on the Document Library Versioning Settings screen is the Require Check Out option. As the name implies, this option simply asks you if you want to require users to check out a document before they are allowed to edit it. Requiring a document to be checked out prevents two different users from making contradictory modifications to a document at the same time.

Versioning has come a long way since SharePoint 2003. Although the new versioning settings in MOSS 2007 add to SharePoint's complexity, it is really nice to be able to distinguish between major and minor document revisions. ■

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**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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# Can Lotus Notes/Domino and Microsoft SharePoint play nice together?

*There are a few ways to integrate Lotus Notes/Domino with Microsoft Office SharePoint Services 2007. Here are some ideas for successful coexistence.* **BY MICHELLE BOISVERT**

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**AS COMPANIES TRANSITION** from employing Generation X workers to employing Generation Y workers, use of collaboration software such as Lotus Quickr and Microsoft SharePoint is beginning to gain steam for project and document management.

For enterprises that rely solely on Lotus Notes/Domino and Lotus Quickr, the ability for individuals to share information is relatively straightforward and seamless. But even in Domino shops, new applications are cropping up virally that administrators must deal with.

Windows SharePoint Server (WSS) 2003 is one such example.

Because Microsoft Office 2003 has WSS built in, a department or group often creates a SharePoint site because they had access to the technology. When this occurs, Notes/Domino administrators must decide

which is more important: maintaining a single platform enterprise or finding a coexistence strategy.

"The coexistence strategy comes into play if, for whatever reason, it's too difficult to rebuild or there's a heavy-duty influencer who has some political swing and insists on using SharePoint," said Bill Pray, an analyst for the Burton Group. There also might be some value to the SharePoint implementation that makes it difficult for an organization to standardize on a single platform.

## **LOTUS NOTES/DOMINO AND MOSS 2007**

Bringing Microsoft Office SharePoint Server 2007 (MOSS 2007) into a Notes organization is a conscious decision, rather than one that happens virally via Microsoft Office. In



fact, some organizations have chosen to implement MOSS 2007 instead of Quickr. From a collaboration standpoint, "SharePoint architecture and functionality is better," said Adwait Ullal, an enterprise architect with AumSoft Consultants. AumSoft is working with a client in the financial market that uses Lotus Notes for its email and MOSS 2007 for enterprise collaboration.

Although some companies run both Lotus Notes and MOSS 2007 peacefully within their environments without integration, AumSoft's client is currently using Notes and SharePoint separately. "There were no use cases or scenarios where integration between email and collaboration was necessary," said Ullal.

In other instances, integrating Lotus Notes and Microsoft SharePoint can help create a seamless flow for file-sharing and document repository/

management. Conversely, organizations using both without integrating can struggle with several incompatibility issues related to document sharing and calendars, contacts and paths.

Because there's no way to easily share documents from SharePoint to Notes or Sametime, users must copy and paste documents from one to the other. Another issue is that calendars, contacts and paths in Lotus Notes have no relation to a user's calendars, contacts and paths in the SharePoint workspace. Not only do these issues create additional steps for users, but they also diminish the effectiveness and ultimate reason for using any document management solution.

### CHOOSING BETWEEN A THIRD-PARTY TOOL OR DEVELOPMENT

There are basically two ways to get Lotus Notes/Domino and Microsoft

## IBM's offerings for collaboration

FOR ORGANIZATIONS COMPARING communication and collaboration platforms, IBM's offerings include Lotus Quickr, Connections and Sametime instant messaging, with Lotus Notes/Domino serving primarily as an optional underlying collaboration platform and email infrastructure. Quickr, Connections and Sametime can also be used in conjunction with the IBM WebSphere platform, which supplements the enterprise messaging features not available with Notes/Domino.

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SharePoint to play nice in order to reap the full benefits of collaboration: Use a third-party tool or turn to your developer. "If you do it on your own, you're going to invest significant development time," said Pray. "If you have good developers that are skilled in .NET, you can do it."

Third-party integration tools, such as Mainsoft Corp.'s SharePoint Integrator for Lotus Notes/Domino, Quest Software Inc.'s Notes Integrator for SharePoint and the Longitude Notes Connector from BA-Insight.net connect MOSS 2007 with Lotus Notes/Domino.

Boca Raton, Fla.-based Champion Software Group tested both MOSS 2007 and Quickr before deciding on MOSS 2007 for its collaboration software. But because the company was already heavily invested in Sametime, it needed something that could integrate Lotus Notes and Sametime with MOSS, said Bill Phelps, Champion Solution Group's chief technology officer.

The company said it plans to deploy

Mainsoft's SharePoint Integrator for Lotus Notes to take advantage of functionality that lets users initiate a Sametime chat with a SharePoint document creator or other people listed in SharePoint document fields. Users can also drag and drop document links into Sametime instant messaging windows. In addition, the tool allows users to open SharePoint document libraries via a Notes sidebar.

If your Lotus Notes/Domino shop has just a few WSS 2003 sites that have cropped up virally, then full-on integration may not make sense, Pray said. Small SharePoint implementations can remain in existence or easily be rebuilt in Lotus Quickr if it's selected as the collaboration software of choice. But it's difficult to move data and recreate spaces for several users from SharePoint to Quickr, he added, so be sure you know what collaboration software you need before you decide that a full Lotus Notes/MOSS 2007 integration strategy is the best for you. ■

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# Continuous Availability

## 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.

## KEEPING SHAREPOINT AVAILABLE

Neverfail is an award winning solution to keep users connected to MOSS. Disaster recovery, high availability and data protection comes as standard. Out-of-the box your entire SharePoint farm is protected. Predictive monitoring ensures best practice. Replication ensures data is always protected. Automated failover keeps SharePoint available when things go wrong.

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# SharePoint search gets boost from governance planning

*Enterprise search can be improved with help from a knowledgeable SharePoint governance committee.* **BY PAUL GALVIN**

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**ALTHOUGH NEARLY EVERY** aspect of SharePoint can benefit from a strong governance plan, SharePoint's search functionality benefits most of all.

Like all parts of SharePoint, there is good news and bad news about governance. For many organizations, the bad news is that it's extremely difficult to incorporate a governance plan where none existed.

But here's the good news: You can quickly configure and improve on enterprise search at almost any time. And when you implement a governance plan for enterprise search, you can see immediate results.

No successful governance plan is written in stone. However, as it relates to search, governance is especially fluid. Live SharePoint implementations change a great deal over time, and this can have a positive impact on search.

Don't have a governance plan yet? What are you waiting for? Here are some of the criteria that a SharePoint

governance plan needs to address:

- ▶ Managing scopes
- ▶ Defining content sources
- ▶ Defining and managing content types
- ▶ Identifying best bets and keywords
- ▶ Using third-party tools or custom functionality to extend search, such as a wildcard search
- ▶ Training end users

A successful search governance plan should call for the formation of a search committee to help identify, analyze and properly respond to governance issues, such as enterprise search.

When forming a search committee, it is important to understand that

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most people who define and configure search in SharePoint are light-weight users at best. Almost all search administration is managed by SharePoint administrators, who do not represent the primary audience of the product.

Of course, the ones who are actually searching for content on SharePoint are the end users. This is not to say that the search committee should exclude SharePoint administrators. It does mean that the SharePoint search committee should include a variety of other user types.

End users speak with the authentic voice of real world experience, but they don't have a technical understanding of search. As a result, their

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### WHO IS ON THE GOVERNANCE COMMITTEE?

Governance committee membership for SharePoint search will vary from company to company. However, consider the following guidelines:

- ▶ One or two rotating positions filled with a knowledgeable end user—or power user
- ▶ One or more business analysts
- ▶ Server farm administrator
- ▶ Developer familiar with SharePoint's programming options—specifically, the search API

**End users** give feedback that is vital, but it tends to be anecdotal.

experience—negative or positive—must be carefully interpreted by the other committee members.

**Business analysts** are trained to interpret end user business requirements and map those requirements to existing functionality or new functionality. Analysts may recommend changes to search from an administrative perspective—such as creating new scopes—or even recommend custom solutions such as developing new search Web parts.

**SharePoint administrators** are masters of the current environment. If they don't know the details of a particular configuration—such as how many records are included in a particular search scope—they can quickly find out. Administrators provide the empirical evidence. They run Share-

Point's search reports and distribute them to the committee. Administrators typically implement the search committee's search configuration decisions.

**SharePoint developers** absorb all of this information and work with the business analysts to implement custom tools as needed. For example, many organizations want some kind of wildcard search tool. Although some vendors offer these types of products, a company may decide instead to develop its own internally. Developers should participate in search governance committee meetings so that they can offer advice on best practices for meeting end user search requirements. However, governance meetings do not take the place of standard systems development lifecycle practices. They simply enhance those practices.

Committees should meet at least monthly. A company that is just beginning with SharePoint may want its committee to meet more often during the initial rollout.

## WHAT HAPPENS AT A GOVERNANCE MEETING?

After covering a previous meeting's action items, the meeting would continue with end user feedback. Keep in mind that in most cases, this would be anecdotal in nature. The end users answer open-ended questions such

as: Is search working overall? Has it improved, gotten worse or is it just about the same? Does it work better for some groups than others?

*Developers should participate in search governance committee meetings so that they can offer advice on best practices for meeting end user search requirements.*

This discussion is peppered with specific examples. The end-user members should execute some searches for the committee, demonstrating a set of successful and failed searches. The rest of the committee discusses these results, each from his or her own perspective.

Next, the systems administrator provides search reports. The committee reviews these results.

Depending on the details, some of the following specific action items will result:

- ▶ Define, modify or delete search scopes.
- ▶ Identify commonly misused keywords and consider using Share-

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Point's thesaurus to automatically correct those searches for end users behind the scenes.

- ▶ In line with common keywords, configure SharePoint's "best bets" functionality to give users guidance at search time on more business-appropriate terms.
- ▶ Identify opportunities to improve end user training. SharePoint search provides a certain obvious Google-like keyword search, which end users find intuitive. But SharePoint search also presents a more comprehensive solution above and beyond simple keyword searches.
- ▶ Identify weaknesses in informa-

tion architecture. For example, assume users search for a term, "invoice number." At the same time, content type defines that column. This kind of search points to a need for that content.

The committee will find a number of opportunities to improve search through this process.

SharePoint search can work reasonably well out of the box, although it works best with a carefully defined information architecture and a well considered site taxonomy. True—it is best to address search from the very beginning. But if it was missed in the beginning—and this happens frequently—it's never too late to start. A properly functioning search committee will lead the way. ■

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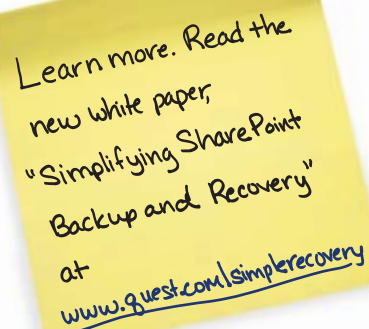
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