

SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// APRIL 2009

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SHAREPOINT SEARCH CAN be a valuable feature of Microsoft's content management and collaboration platform. It allows users to pull useful data from indexed websites, public folders and external databases, among other content sources.

In this month's issue, learn why installing software and setting it to index everything is just not enough. SharePoint MVP Stephen Cummins shares his three magic words for better SharePoint search in "Rediscovery, Research and Prediction in SharePoint Search."

So you've put the final touches on your SharePoint governance document, and you're not interested in seeing it again any time soon? Well, think again. Keeping your governance document up to date ensures that it will remain relevant even as your SharePoint application grows and changes. Read "Scheduling Governance Reviews" by Microsoft MVP Brien M. Posey to find out how to build in some helpful reminders to keep the process alive.

Creating sites on SharePoint is relatively easy. But when sites spring up uncontrollably, they bring with them all sorts of problems, including security risks and bulging storage requirements. That's why every enterprise should have guidelines in place for site provisioning that keep its SharePoint environment in check. SharePoint guru Shawn Shell offers tips on how to set a framework for managing growth in "Effective Site Provisioning for SharePoint."

Are SharePoint sites popping up like spring flowers in your installation? How are you dealing with that? Send me an email at ccasatelli@techtarget.com, and let me know. ■



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Cathleen Gagne, Editorial Director, cgagne@techtarget.com

Christine Casatelli, Editor, ccasatelli@techtarget.com

Martha Moore, Copy Editor, mmoore@techtarget.com

Linda Koury, Art Director of Digital Content, lkoury@techtarget.com

Jonathan Brown, Publisher, jebrown@techtarget.com

Peter Larkin, Senior Director of Sales, plarkin@techtarget.com

TechTarget, 117 Kendrick Street, Needham, MA 02494; www.techtarget.com

Rediscovery, Research and Prediction in SharePoint Search

Create a search environment that gives users applicable information as needed by indexing content. **BY STEPHEN CUMMINS**

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TO GET THE most out of Microsoft Office SharePoint Server, you have to know the technology well and have a keen sense of your organization's business needs. Having the creative know-how to mesh the two is a big help too.

SharePoint search is a feature that allows users to index content, file shares, public folders, websites and even external databases. In order to go from business to benefit with search, organizations need to know these three ways to use SharePoint search: rediscovery, research and prediction.

USING SHAREPOINT SEARCH FOR REDISCOVERY

When users try to locate a document that they know is out there somewhere, they'll be using SharePoint search for rediscovery. To get the most out of rediscovery, businesses

must first define multiple search scopes that then show up for users in a dropdown menu when they put search terms into the search box.

Users can select the search scopes from the menu, and results appear in order of relevancy. To narrow down the search, multiple search scopes keep relevancy of the results high and make users more likely to find what they're looking for.

IT administrators who are defining search scopes must first determine what can and cannot be crawled, perhaps excluding some data for security reasons. After your index is crawled, you can define scopes for your users based on what's been indexed.

For example, you can configure a SharePoint search Web Part for a department and put it on that department's home page. With it, users can search for only their file shares, public folders and SharePoint sites within this scope. This kind of preemptive

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configuration makes it more likely that users will be able to find what they need.

USING SHAREPOINT SEARCH AS A RESEARCH TOOL

When using SharePoint search as a research tool, users search for information on a specific topic from multiple sources in the organization. Unlike rediscovery, anything related to the topic is searched.

This can be used for internal or ex-

ternal research. For example, a consultancy has a research department whose role is to gather information the consultants can use in, let's say, a presentation to attract customers. Because the consultants don't always share what they learn, the research department is often responsible for finding data on that topic that can be used by other consultants.

This wastes time for the research department, and it causes a delay for the consultants because they have to wait for the department to create

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Defining Scopes for SharePoint Searches

TO FOCUS A search on particular locations or content on [Microsoft Office SharePoint Server 2007](#), end users select scopes from the scope list next to the Search box. They can choose All Sites to search all available locations or select another scope to limit their searches to certain locations or to content marked with particular property values. For example, a query on the This Site scope—if available—will focus a search on the current site and its subsites.

Default scopes such as All Sites and People are defined at the Shared Services Provider level. In addition, an administrator with shared services administration permissions can define custom scopes. Any scope defined at the Shared Services Provider level is shared among all site collections. A site collection administrator can copy a shared scope, modify that copy or use it as is and add custom scopes for use within the site collection. Scopes can include other scopes as needed. The site collection administrator also creates scope display groups and arranges scopes within them, so that site owners can apply them to modify instances of the scope list for the Search boxes on their pages.

NOTE: By default, the scopes picker on the Advanced Search page is hidden. However, an administrator with permission to edit the Advanced Search page can modify the Advanced Search Web Part to display its list of scopes, and assign a display group to populate it with scopes. —MICROSOFT

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the presentation. It also causes delays in the consultants getting data to the clients and puts pressure on the research team to reproduce reports only slightly different each time. The solution here is to crawl all previously produced research and ensure that whatever is found is collected and included in the search index.

In addition, search can be used to show the information that is most frequently searched for, things that aren't easy to find, as well as work patterns in an organization.

Always get the best benefits from SharePoint search in the enterprise by continually reevaluating the three search methods in order to find what the user knows is there, research and bring together data from multiple sources and spot trends in the index and report them to the business.

Simply installing the software and setting it to index everything is not enough. You must create custom scopes on the sites of the users that target their individual requirements and make sure the most valuable information is indexed and searchable while the irrelevant content is excluded.

Finally, you have to use SharePoint to automatically sift through the data and push information to those who need it whenever it appears. ■

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USING SHAREPOINT SEARCH FOR PREDICTION

Users can also look for information that may not appear in the index to identify patterns and predict trends. Let's say a veterinary college collects animal examination data using tablet PCs and InfoPath forms. Each time an animal comes in, its symptoms, location and diagnosis are collected. Using alerts in search, a researcher looking for data on a specific disease would automatically receive an alert if an animal comes in with certain symptoms or a similar diagnosis.



ABOUT THE AUTHOR

Stephen Cummins is founder of www.spsfaq.com and a SharePoint consultant. Cummins has been a SharePoint Most Valuable Professional for the past seven years. He lives in Kildare, Ireland, with his wife, daughter, two dogs and an ever-changing number of goldfish. Cummins is a globally known expert with experience delivering Microsoft enterprise technology into complex environments. His core technologies are SharePoint Server, Windows SharePoint Services, Search Server, IIS, SQL Server, Windows Server, Office, InfoPath and Microsoft Project Server.

Scheduling Governance Reviews

Maintain your SharePoint governance document and keep it current as your deployment evolves. **BY BRIEN M. POSEY**

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HAVE YOU EVER put a great deal of effort and expense into creating a document, only to have that document become outdated in a relatively short period of time?

I have seen this occur most frequently with network documentation. The people who are responsible for keeping the network documentation up to date decide that it is just too much work. And before long, the document doesn't even resemble the network that it's supposed to be documenting.

The same thing can happen just as easily with a SharePoint governance document. A lot of work goes into creating a SharePoint governance document, but if it isn't maintained as the SharePoint deployment progresses, then the document quickly becomes worthless. Fortunately, there are some things you can do to help prevent that from happening:

► **Set responsibility:** First thing, define who is going to be responsible

for keeping the SharePoint governance document up to date. Don't assign this responsibility to an individual person but rather to a position. That way, if the individual in that position quits, gets fired, gets promoted or whatever, then the next person who takes over will inherit the task of keeping the governance plan up to date.

► **Plan for governance plan maintenance:** The maintenance of your SharePoint governance plan shouldn't be an afterthought. You need to plan for the maintenance process as you develop the document. That way, the governance plan can specify who is responsible for its maintenance. In addition, specify which parts of the document can be changed as the organization's SharePoint deployment evolves and which parts of the document are set in stone.

► **Automation and accountability:**
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Defining Roles within the SharePoint Governance Team

THE TASK OF defining administrative roles seems trivial, but it can become a lot more difficult as the staff rotates. Because of this, you should define roles as task-oriented rather than focusing the roles on individual staff members.

► **Service owner:** The service owner role should be assigned to the team that will be taking ownership of the SharePoint governance document. This team's job is to determine how governance will evolve over the long term and plan accordingly. This team may also be responsible for keeping the governance document up to date.

Because the types of tasks handled by service owners are often considered to be a low priority compared to day-to-day tasks, it is a good idea to formally define what the team's responsibilities are and how often it should meet to focus on these responsibilities.

► **Development:** SharePoint offers out-of-the box functionality, so not every organization is going to need a development team. Even if an organization is not doing any SharePoint development per se, there are other tasks that may be appropriate for a development team. For example, the development team may take on more of a deployment team role.

► **Project management:** As the name implies, the project management team's job is to see a project through to completion and to manage timelines and deliverables for the project. That being the case, you may end up needing several project management teams at a time, or there may be periods when you don't need a project management team at all.

► **Operational management:** If your organization uses SharePoint, then you already have an operational management team, although this team may be defined informally. The operational management team is responsible for the day-to-day support and maintenance of the organization's SharePoint servers, including backup and restore operations, capacity planning and server monitoring.

Although it's clear that people are performing these tasks already, it is usually a good idea to formalize the operational management role. That way, the team will know exactly what it's expected to do.

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Assigning a position to manage the governance document is a good start, but experience has shown that this alone is rarely enough. People get busy, and the maintenance of a bureaucratic document is generally a low priority. The only practical way of making sure that the document is kept up to date is to use automation and accountability.

Your SharePoint governance document should specify how frequently the document is to be updated. Set up a recurring appointment on the Outlook calendar of the employee who is responsible for updating the document. That way, there are no excuses for the update process to slip between the cracks.

To build accountability into the process, assign someone to check on the revised versions of the SharePoint governance document. This could be the immediate supervisor of the person who is going to be updating the document, or it might be the head of the IT department. It doesn't really matter who is responsible for over-

seeing the update, as long as someone has been appointed. You could even place a recurring appointment on this person's Outlook calendar reminding him or her to review the revised governance document.

Remember to keep the governance document in a SharePoint document library. That way, you can build a workflow into the library so that when the document is updated, the person reviewing the changes will automatically be notified that it's ready for review. Another nice thing about using this approach is that it allows you to retain all of the older versions of the document, so you can keep track of how it has evolved over time.

There is no right or wrong way of scheduling a governance document for review. The important thing is that the review process actually happens. Otherwise, the document will quickly become useless. The techniques here help ensure that your governance document is kept relevant as your SharePoint application changes over time. ■

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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.

Effective Site Provisioning for SharePoint

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Setting guidelines for site provisioning can provide flexibility to users and ensure an appropriate framework to help manage growth. **BY SHAWN SHELL**

ONE OF THE criticisms lodged against SharePoint is that you install it one day and the next day you end up with thousands of sites. Each site brings with it potential security risks from improper security settings and massive storage consumption resulting from, among other reasons, content dumping.

Even assuming you don't have either problem, it's always better to have a well managed SharePoint environment than one without appropriate controls on usage. That's where site provisioning comes in.

To be honest, there's no magic formula for managing the site-provisioning process on SharePoint. Different companies will have success with different approaches. But there are some guidelines that enable every organization to both provide flexibility to its end users and ensure an appropriate framework to help manage

growth, security and usage.

WORKFLOW FOR SITE PROVISIONING APPROVAL

The use of workflow for controlling the provisioning process is one of the most underused tools available to every SharePoint administrator. Designing a workflow to govern site creations for certain users and sites will ensure SharePoint won't get out of control. In addition, administrators can monitor the site creation process

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and gather valuable statistics on usage.

The challenge is that SharePoint does not have any native site creation actions within the workflow framework. But there are vendors that sell some terrific workflow add-ons for SharePoint. Nintex, Skelta Software and K2 are just a few companies that produce workflow bolt-ons with site creation action within their products.

If you don't have the budget to buy a workflow tool, consider creating a workflow action in Visual Studio or hiring a developer to do it for you. Then, you can create your own workflow process in SharePoint Designer.

CUSTOM SITE DEFINITIONS OF TEMPLATES

Although the act of provisioning is generally just the creation of a site, make sure that these sites also conform to your organization's standards—whether that's structure, content or metadata. Site definitions and site templates allow users to create sites that conform to a specific structure and enable particular SharePoint features.

SharePoint ships with several site definitions, including a team site, document workspace and a meeting site. You can also download a few of Microsoft's "Fabulous 40," which is a collection of additional site definitions. If none of those provides the

right structure, consider creating one of your own.

SharePoint has a feature in every site that allows you to save an existing site as a "site template," which is similar to a site definition in that it allows you to create new sites based on the template. You can even preserve content in the template. Alternatively, you can use a free site definition generator tool in the Microsoft Office SharePoint Server (MOSS) Software Development Kit.

CREATE SPECIALIZED SITE COLLECTIONS

Site collections are a special construct within SharePoint. As their name suggests, they represent a collection of sites within SharePoint. In a collaborative environment, where one site represents collaboration among a number of parties, the site collection contains multiple collaboration spaces for various "projects."

What makes site collections somewhat unique is that there is a whole set of site collection-specific management functions. This means you can enable features, control certain aspects of security and set quotas for individual sites from a centralized location.

Creating different site collections for different categories of collaboration or project work allows SharePoint administrators to make subtle adjust-

ments to each site collection that are appropriate for the category of collaboration within that collection.

USE SITE COLLECTION QUOTES TO CONTROL STORAGE CONSUMPTION

SharePoint is often criticized for massive storage consumption. To be fair, storage consumption is more often the result of poor storage manage-

ment or unfettered site creation than a fault of SharePoint as a product. In fact, SharePoint has a built-in storage quota feature to enable administrators to limit storage consumption.

SharePoint administrators can create quota profiles that set the maximum site storage consumption and then apply different profiles to different site collections. This translates to limiting every site in the collection to the maximum storage size set in

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What is the “Fabulous 40”?

MICROSOFT MADE THE “Fabulous 40” [Application Templates for Windows SharePoint Services \(WSS\) 3.0](#) available on the Web as free downloads in early 2007.

The application templates are out of the box and tailored to address the requirements of specific business processes or sets of tasks in organizations of any size. The templates are compatible with Microsoft Office SharePoint Designer 2007 and incorporate many of the newer features in WSS 3.0, including wikis, enhanced document management and improved synchronization of calendars and tasks with Outlook 2007.

Application Templates for Windows SharePoint Services 3.0 are separated into two groups: site admin templates and server admin templates. Site admin templates are custom templates that SharePoint site administrators can install into the template gallery without requiring server administration access. They include Competitive Analysis Site, Product and Marketing Requirements Planning, Discussion Database, Request for Proposal and Employee Training Scheduling and Materials.

Server admin templates are site definitions enabling tighter integration and enhanced functionality within the Windows SharePoint Services platform. They include Help Desk, Budgeting and Tracking Multiple Projects, Inventory Tracking, Bug Database and IT Team Workspace. Server admin templates require a server administrator to install. —MICROSOFT

the quota.

Quotas are especially effective for constructs like My Sites in MOSS, but they are also very useful for more collaborative environments in purely WSS environments.

for that work.

Now, when the project or process ends, another automated process can back up any relevant data in the WSS site and dispose of it. In this way, the

Quotas are especially effective for constructs like My Sites in MOSS, but they are also very useful for more collaborative environments in purely WSS environments.

TIE SITES TO BUSINESS PROCESSES

Whether or not you have implemented MOSS in the enterprise, it's likely that you have WSS. And you probably have at least one use of WSS related to project work. As such, it makes sense to take the next step: Tie WSS sites to other business processes or applications.

This might mean integrating a project initiation process that begins by filling out an InfoPath form and results in the automated creation of a WSS site, along with adding the URL of the WSS site in a line-of-business application. When business users interact with either the line-of-business application or SharePoint, there will be an obvious link between the use of the tools and the purpose

process that began with filling out the InfoPath form, which resulted in the creation of the project site, also cleans up the site once the project or process ends.

Site provisioning in SharePoint is easy, but it's often uncontrolled. By following a few of these recommendations, you can keep your SharePoint environment in check. ■

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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 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 the lead analyst/author on the CMSWatch SharePoint Report 2009.