

SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// JULY 2009

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HOW IMPORTANT IS your SharePoint taxonomy? Did you put plenty of thought into building it out?

If not, you may be in for a heap of trouble. Without careful planning, you could end up with a convoluted site map that confuses users and search functions. That's just not good for business.

In "[SharePoint Taxonomies That Stand the Test of Time](#)," SharePoint MVP Paul Galvin describes how to build your SharePoint site taxonomy around core business functions using techniques that allow for controllable growth. Galvin also offers tips on creating ad hoc collaboration sites for projects and other temporary needs that don't fall neatly within the business functions taxonomy.

Governance documents can help to insert some structure into an unwieldy SharePoint installation. But for small companies, the process of creating a governance document can be daunting.

Microsoft MVP Brien M. Posey breaks down the process for smaller SharePoint users in "[Governance as a Resource Control Tool](#)." Learn how to start small and create governance policies make sense for your organization.

Are you wondering how many people in your company are actually using SharePoint? The information is easy enough to track down. All you need to do is dig into SharePoint's analytics functionality to get a closer look at usage statistics and search queries. SharePoint guru Shawn Shell shows how to do it in "[Drilling Down with SharePoint Analytics](#)."

What else do you want to know about SharePoint? [Send me an email](#), and we'll cover it in an upcoming issue. ■



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Cathleen Gagne, Editorial Director, cgagne@techtargget.com

Christine Casatelli, Editor, ccasatelli@techtargget.com

Martha Moore, Copy Editor, mmoore@techtargget.com

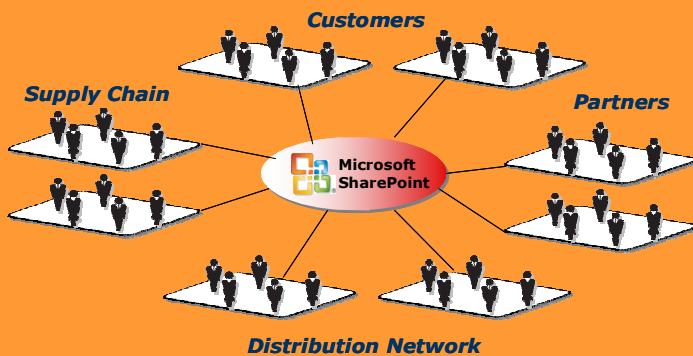
Linda Koury, Art Director of Digital Content, lkoury@techtargget.com

Jonathan Brown, Publisher, jbrown@techtargget.com

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

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

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SharePoint Taxonomies That Stand the Test of Time

Editor's Note

Build a SharePoint site taxonomy that will last with core business functions as the foundation. **BY PAUL GALVIN**

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TAXONOMY, FREQUENTLY REFERRED to as the information architecture of your site, is often the most visible and most important method for SharePoint users to locate information. But SharePoint implementers often rebel against that fact because SharePoint is considered to be a top-notch search platform.

Why should users rely on a site map and menus to locate data when search is faster and more reliable?

The reality is that many users do focus on the site taxonomy first and use the search capability second—if at all. Because of that, taxonomy plays more than one distinct role in SharePoint governance. In particular, taxonomy addresses site taxonomy (navigation) and content types (data). Your governance plan needs to cover both.

A SharePoint governance plan should treat taxonomy very seriously. When building out your taxonomy,

consider that site taxonomies typically serve the needs of these two core business principles:

1. Permanent departments and business functions

2. Ad hoc collaboration

Of course, there's no such thing as "permanent" business these days, but there are core business functions in every organization. If your company doesn't know its core business, focus on that before jumping into SharePoint.

Ad hoc collaboration taxonomies provide a site map for a wide range of project types. Some projects are short in scope and duration, lasting a month or two. Others are long-term projects that run a year or longer and involve multiple departments. Let's consider when and how to use each in a SharePoint installation.

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PERMANENT DEPARTMENTS AND ENTERPRISE BUSINESS FUNCTIONS

Many companies begin designing their site taxonomies by printing out the current organizational chart and then proceeding to create a SharePoint site taxonomy based on that chart, mapping each box on the org chart to a SharePoint site. This is a mistake.

There is a lot of useful business intelligence in an organizational chart, and some of it will help you create a good taxonomy for your SharePoint environment. However, there is also a good deal of misleading information in the company org chart.

Org charts are frequently out of date, sometimes political in nature and change quickly. How can a SharePoint administrator tell the difference between a permanent department or business function and a transitory superficial department?

You know your own company best, but consider these general rules and examples:

- **Human resources.** Every company has an HR department. This is a clear choice for a permanent department and a first-class member in the site taxonomy.

- **Finance.** Every company sends invoices to its customers and pays bills to its vendors. So it almost

always makes sense to create accounts receivable and accounts payable sites and promote them to first-class status in the site taxonomy. Many times, the top tier in the taxonomy would be "Finance" with accounts payable, accounts receivable and possibly other sites underneath.

- **Products.** Just about every company deals in some sort of product, so that, too, is a great example of a core business function. Yet there is rarely a product department. Instead, *Product* in the taxonomy would be a high-level container for the company's efforts at product development, production, support and the like. The details will vary from company to company, but the core concept remains the same.

A transitory or superficial department doesn't have the staying power of a permanent department like human resources or a business function such as finance. They are often obvious from the org chart, and common sense will weed them out.

However, like weeds, they can reappear over time. Often, the members of a sub-department, such as product marketing for a specific product, feel their role in the company is so important that their organization should be accorded the same first-class treatment and location in the taxonomy as

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the finance and HR departments.

Personalities can drive this more than real business need. A well crafted governance plan that explains and justifies the taxonomy goes a long way toward preventing this kind of hijacking attempt.

The core objective of this part of the SharePoint site taxonomy is to provide an intuitive, clear path for employees to follow when they are seeking information. Aligning your taxonomy with core business functions and permanent departments will go a long way in achieving this objective.

In the scheme of SharePoint governance around site taxonomies, defining and managing the permanent parts of the taxonomy are fairly straightforward and represent, for the most part, a one-time effort. Core business function taxonomies require relatively little care and feeding over time and provide a regular real-world aspect to the taxonomy. Long-time employees will know exactly where to go for information, and new hires will quickly learn the ropes of your organization by navigating around your SharePoint environment.

USING AD HOC SITE TAXONOMIES

Ad hoc collaboration is another matter. Assuming you've determined your core business functions and aligned

your site taxonomy in support of those functions, answer this: Where would you add a project in SharePoint that focuses on streamlining sales expenses for a new product that

Core business function taxonomies require relatively little care and feeding over time and provide a regular real-world aspect to the taxonomy.

requires a great deal of support from the technical services department?

This is just one example of projects that vary from day to day, department to department and that cross business boundaries. As a result, they don't fit well within the core business functions taxonomy.

The answer is to embrace these kinds of projects in the site taxonomy and to make "Projects" a first-class member of site taxonomy.

This addresses certain real world issues:

- **Security.** Projects that span departments require unusual security in the sense that it's specific to any particular project. A project whose

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members come from finance and manufacturing can't use finance's security model or manufacturing's security model. By separating projects out from either finance or manufacturing, you create a clear separation of security that is unique and easily managed for that project.

- **Turf wars.** Using the above example, one could ask: "Who owns the site? Finance or manufacturing?" This could lead to a clash of personalities. Avoid that problem by creating a separate tree in the taxonomy just for projects. That way, no department owns the project in "its turf."

It's difficult to go much further than separating projects from core business functions. However, you will almost certainly want to refine this part of the tree. Consider refining it down into short-term and long-term projects.

Don't be one of those companies that builds out a SharePoint environment, then gets the user community

on the hook and then finds itself a year later with a creaky, inefficient and frustrating site map that doesn't make sense to anyone except the SharePoint implementation team.

Build your site taxonomy around core business functions, but prepare yourself to welcome inevitable growth.

Build your site taxonomy around core business functions, but prepare yourself to welcome inevitable growth. Core business functions serve as the foundation for your SharePoint site taxonomy. Ad hoc collaboration sites for projects and other temporary needs allow the system to let off steam and grow in a controlled manner without being overly controlling. ■



ABOUT THE AUTHOR

Paul Galvin is a Microsoft SharePoint MVP and a SharePoint solutions architect at EMC Corp. He has worked in the IT industry for more than 15 years in areas such as software development, consulting and SharePoint solutions design, where he works with clients to create business solutions using the SharePoint platform. Galvin contributes to the SharePoint community through MSDN forums and his blog at <http://paulgalvin.spaces.live.com>.

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Governance as a Resource Control Tool

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Use your governance document to create structure and prevent sprawl in your SharePoint installation. **BY BRIEN M. POSEY**

ALTHOUGH YOU CAN often get away with winging the deployment of a server application, there are some exceptions. One of the most notable exceptions is SharePoint.

There is nothing inherently difficult about the setup wizard, but deploying SharePoint by trial and error can have consequences far greater than what you might encounter with other applications.

The reason is that SharePoint is architecturally different from most other server applications. As network administrators, we are used to simply installing and then configuring and maintaining applications. Although SharePoint is technically an application, it can also be thought of as a development platform. Any user with the appropriate permissions can create document libraries, lists, Web parts and even entire portal sites.

Because SharePoint is so flexible, it is easy to unintentionally grow your

SharePoint deployment in a completely unstructured manner. As you can imagine, the lack of structure can lead to problems.

One of the most common problems is sprawl. If users are allowed to create new SharePoint sites at will, you can end up with hundreds or even thousands of SharePoint sites. As the number of sites increases, it becomes easy to lose track of who created each site and why. You may also run into problems related to server resource consumption. In other words, your server may not have enough memory, hard disk space or processing power to support the ever-expanding load that is being placed on it.

Fortunately, SharePoint governance can help with those types of issues. A SharePoint governance document is designed to create structure. If your goal is to avoid a completely unstructured SharePoint deployment that could quickly become out of control,

then a document that mandates structure is just what the doctor ordered.

Traditionally SharePoint governance

documents have been used primarily in large corporations or in regulated industries. As such, smaller, unregulated companies may be a bit appre-

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Creating a Governance Document

A SHAREPOINT GOVERNANCE document outlines policies and procedures about the way SharePoint should be used and maintained in an enterprise. Consider including some of the following in your governance document:

- A policy outlining the criteria for creating additional SharePoint sites or for making substantial changes to the sites that are already in use.
- A site map for your SharePoint structure.
- A policy about who is allowed to request new SharePoint sites or changes to existing sites.
- A change management process for SharePoint sites.
- A policy for archiving older versions of the site that outlines how long those archives should be maintained.
- A policy for how the help desk staff should help users resolve problems.
- A backup policy.
- A template for all SharePoint pages with rules on what can be modified.
- A policy on the types of content that are acceptable on SharePoint.
- A list with the contact information for people who are responsible for supporting and maintaining the SharePoint site.
- A policy on the types of documents that should be stored in document libraries.
- The roles that members of the IT staff will take in supporting SharePoint.
- A policy on document archival and retention.
- An acceptable use policy for end users. —SEARCHWINIT.COM

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hensive about creating a SharePoint governance document, especially given the document's reputation for being oppressive.

One thing to keep in mind, though, is that if you work for a smaller, unregulated company, then there is no reason why you have to have a huge, monolithic governance document filled with hundreds of pages of legal mumbo-jumbo. Instead, start small by figuring out what types of governance policies make sense for your organization. For example, one of the first issues to consider is who should be allowed to create new SharePoint sites and under what circumstances.

Once you have addressed that issue, then the next logical decision involves the types of mechanisms you will put in place to ensure that unauthorized SharePoint sites are not created.

But even authorized SharePoint sites can become obsolete over time, so you might also want to create a policy for periodically performing a site review. That way, you can get rid of SharePoint sites that are no longer being used and reclaim the server resources that were being consumed by the obsolete sites.

Once you get past some of these initial planning issues, you should address the types of content that will be stored within any SharePoint document libraries that you are planning on creating. Deciding ahead of time what types of data will be stored in document libraries is essential to effective capacity planning.

A SharePoint governance document that is created in a smaller organization can be completely different from the governance document that a larger organization might use. Although SharePoint governance documents in larger organizations are typically designed to keep the lawyers happy, it makes a lot more sense for smaller organizations to use a governance document as a planning tool. You could use such a document to outline the initial SharePoint deployment and to create a plan for how the SharePoint server should be used.

Even though a governance document helps prevent uncontrolled SharePoint sprawl, it is inevitable that your SharePoint deployment will grow over time. So plan for that growth early on by using a governance document to address issues such as server expansion. ■

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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.

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Drilling Down with SharePoint Analytics

Editor's Note

Mine usage data with SharePoint's in-the-box analytics tool to collect statistics on search queries and more. **BY SHAWN SHELL**

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WHAT'S HAPPENING IN your SharePoint environment? Do you know how many users visited your corporate HR site? Have people seen the latest holiday schedule? Did that change in your computer security policy get viewed by enough employees? Will searching for "vacation policy" yield any search results?

These are some of the issues I've heard from clients. Few of them realized that the answers were already in their hands. SharePoint natively keeps track of all of these statistics and more. But not many organizations take advantage of the data.

If you're interested in what's happening in your SharePoint environment, you can take a look at usage statistics to get an immediate handle on what your users are seeing and what they're not seeing.

Since SharePoint 2003, usage statistics have been a standard part of the SharePoint functionality. Although

the 2003 version didn't provide a ton of useful data, it did offer some of the basics. In the 2007 version, usage statistics got a major upgrade, which provides a good deal of flexibility. Here is a sampling of the specific statistics you can get straight out of the box:

- Overall site usage statistics
- Overall site collection usage statistics
- Search query statistics
- Queries that return zero results
- Most searched best bets

Search is a much maligned feature of SharePoint. Many organizations feel as if SharePoint's search capabilities aren't sufficient for their enterprise. But in many cases, search success—or lack thereof—is the result of planning, data review and constant adjustment. If you want to get the most out of SharePoint search, focus on understanding what the Share-

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Point search analytics are telling you about keywords, best bets and result sizes. Once you have real data, you can begin to make adjustments like improving content positioning and titles, leveraging best bets for common searches and expanding your thesaurus.

One thing to remember is that SharePoint does not automatically gather usage statistics. When you set up your SharePoint environment you must enable this service. Regardless of what version of SharePoint you use, basic usage analysis is enabled within Central Administration. To enable data collection and analysis, go to Central Administration and:

1. Click on Operations
2. Choose Usage Analysis Processing under the Logging and Reporting section
3. Ensure that you've enabled both logging and processing. If either of these options is disabled (see [FIGURE 1](#)), you won't get statistics for your SharePoint sites
4. Click OK.

When you're all set up for gathering the data and you have enabled analysis, you can begin using this data to make better decisions about your

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FIGURE 1

Enabling Logging and Analysis

Central Administration > Operations > Usage Analysis Processing

Usage Analysis Processing

Use this page to enable and configure usage analysis processing.

Logging Settings

Special log files are used to run usage analysis processing efficiently. Use these settings to enable logging, identify the location to store log files, and set the number of log files per web application.

Enter a number between 1 and 30 for the number of log files to create.

Important: Before changing the log file location, click **Show me more information** to review security requirements.

☒ Enable logging

Log file location:

Number of log files to create:

Processing Settings

Specify whether to enable usage processing on Web server computers, and set the time of day to run usage processing.

☒ Enable usage analysis processing

Run processing between these times daily:

Start:

End:

OK Cancel

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SharePoint environment. Keep in mind that data won't show up immediately because SharePoint will have to gather sufficient data in order to present something meaningful. Also, this data is just half the story. If you have Microsoft Office SharePoint Server (MOSS), you also have the ability to gather valuable data about user search behavior.

To enable search statistics, go to your Shared Services provider. From the Office SharePoint Usage Reporting category, click on Usage Reporting. You must enable at least the search query logging shown in [FIGURE 2](#).

VUEWING THE SHAREPOINT DATA

Once you have sufficient data from the logs, you can begin to dig into user behavior. Although the data that appears is not as wide or deep as commercial analytics packages, you can get the following basic statistics on users:

- Hits by user
- Hits by browser
- Hits by page
- Hits by referring URL

Depending on the version of SharePoint you have, the data available to

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FIGURE 2

Configuring Advanced Usage Analysis

Configure Advanced Usage Analysis Processing

Processing Settings

Advanced usage analysis processing allows content owners of site collections and sites to understand how their site is being used, and provides information to help them improve the effectiveness of their site. When advanced usage analysis processing is enabled a daily schedule will process usage logs and provide the results to reports available from the site settings page of every site.

☒ Enable advanced usage analysis processing.

Search Query Logging

When you enable search query logging, records of queries will be stored in the Shared Services Provider database. You can view search query data in usage reports available from the top-level site in a site collection or from the Shared Services Administration page.

☒ Enable search query logging.

OK

Cancel

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you will be different. What is represented here is the basic Microsoft Windows SharePoint Services data available to all SharePoint implementations.

You can get to all reports through the Site Settings menu. Under either Site Administration or Site Collection Administration, you'll find a Site

Usage option. Depending on whether you enter Site Settings at the Site Collection or Site level, one or both of these options will be available to you if you have permissions.

After clicking on the link, you'll be presented with a menu similar to the one in [FIGURE 3](#). You can then filter the data based on what you'd like to see.

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FIGURE 3

Viewing the data in the Site Usage Report

Client Extranet > Site Settings > Site Usage Report

Site Usage Report

Use this page to view a detailed usage report for this Web site. The report does not include data for sites under all sites in this site collection see the Web site collection usage summary.

Select Report:	User	Month Summary		Go!
User	Total Hits	Recent Month	Most Recent Day	Most Recent Day Hits
...	767	767	6/25/2009	1
...	19	7	6/5/2009	5
...	6	6	6/15/2009	6
...	6	6	6/11/2009	6
...	241	241	6/25/2009	1
...	7	7	5/27/2009	7
...	1	1	6/18/2009	1
...	99	99	6/25/2009	2
...	12	3	6/5/2009	3
...	4	4	6/15/2009	4
...	4	4	6/11/2009	4
...	4	4	6/24/2009	4
...	2	2	6/5/2009	2
...	5	5	6/16/2009	5
...	4	4	6/16/2009	4
...	16	16	6/15/2009	1
...	2	2	5/27/2009	2
...	7	7	6/25/2009	1
...	26	26	6/22/2009	1
...	4	4	6/23/2009	2

SHAREPOINT SEARCH

Beyond basic page and user statistics, SharePoint also gathers search data if you have MOSS. Search data is particularly useful when trying to solve search challenges or ensuring that search is working as expected. SharePoint gathers data such as:

- Queries executed
- Queries that return zero results
- Most Clicked Best Bets
- Top keywords
- Originating Site Collection
- Top Search Scopes

To get to the search reports, follow these steps:

1. Navigate to your SharePoint environment's Central Administration site
2. Click on your Shared Services provider
3. Choose Search Usage Reports
4. You'll be shown the Queries reports, and you have option to view the results reports.

In **FIGURE 4**, you can see a sample queries dashboard in MOSS:

FIGURE 4

Search Queries Dashboard

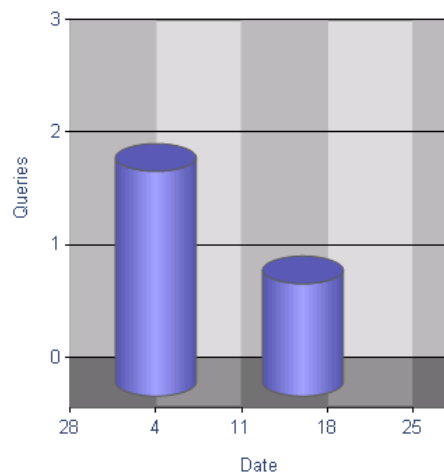
Shared Services Administration: SharedServices > Search Queries Report

Search Queries Report

Tip: On the graphical reports, click on the arrow to go to page two to see a tabular view of the same data.

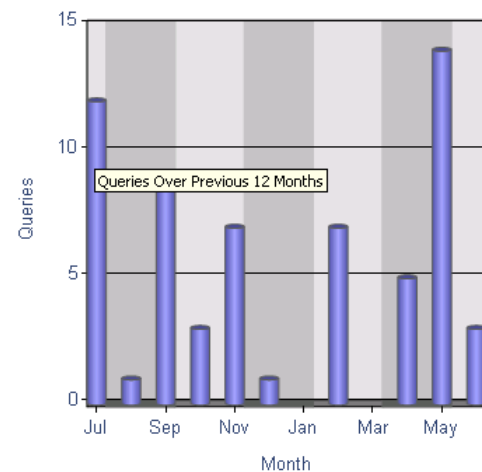
Queries Over Previous 30 Days

1 of 2 Select a format Export



Queries Over Previous 12 Months

1 of 2 Select a format Export



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Most organizations guess at whether their SharePoint implementations are successful. They tend to ignore the data freely available to them within the product. If you truly want to understand whether users can find content, how frequently that

new HR policy is downloaded or what best bets are the most popular, leverage the reporting built into SharePoint. Even though the data collected and presented is basic, it can help enterprises get more value from their SharePoint investment. ■

Using Data to Improve Results

SITE ADMINISTRATORS CAN make several improvements to the usability and relevance of portal sites by analyzing both the search queries and the top search results pages. A few examples of actions that can result from understanding usage patterns include:

- **Learning which terms are being used to search your portal site.** This analysis can be the basis for adding new keywords that may not be in your search index.
- **Creating keyword Best Bets, which match popular keywords with the most relevant portal site pages, documents or external Web sites.**
- **Reviewing the destination pages for the top search results and adding them to the Top Sites section of the Site Directory to make it easier for end users to find them.**
- **Analyzing the reports on no-result queries and low-clickthrough queries to identify content that is being sought by users but is not being crawled.**

—MICROSOFT



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 he is the lead analyst/author on the CMS Watch SharePoint Report 2009.

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- ▶ Managed Secure File Transfer Directly Into SharePoint... on a Schedule Automatically

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Automated Secure Data and Document Delivery into SharePoint.

Pickup and Move Documents and Data Files Directly into SharePoint on a schedule. Move tens, hundreds, even thousands of data files and application reports into SharePoint on an Hourly, Daily, Weekly, or Monthly basis. File names and report content determine how documents are placed in your SharePoint folder structure. Easily connect SharePoint directly to older legacy Mainframes and Minicomputer applications. Redirect any batch report stream into SharePoint.