

# SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION // AUGUST 2009

G

## GOVERNANCE

### **Nailing Down SharePoint Service-Level Agreements**

*Define the terms in your governance document and commit only to services you can deliver.* BY BRIEN M. POSEY

M

## MANAGEMENT

### **How to Get the Most Out of Hosted Services**

*Thinking of using a hosting provider for SharePoint? Ask three important questions before sealing the deal.* BY PAUL WEST

I

## IMPLEMENTATION

### **Best Kept Secrets: Underutilized Features of SharePoint**

*Data connection library, wikis and blogs, and enterprise social networking are just a few of the unsung heroes in SharePoint.* BY SHAWN SHELL

# Making Promises You Can Keep

BY CHRISTINE CASATELLI

Editor's Note



[Nailing Down SharePoint Service-Level Agreements](#)



[How to Get the Most out of Hosted Services](#)



[Best Kept Secrets: Underutilized Features of SharePoint](#)

**IF YOU ARE** the brave soul responsible for keeping SharePoint up and running in your organization, then you understand the importance of keeping your word.

SharePoint has become more than a content management platform. For some companies, SharePoint is how they keep their businesses humming. So when you have many people depending on SharePoint to do their jobs, it makes sense to set the terms—and their expectations—for SharePoint operation.

That's where your service-level agreement, or SLA, comes in. It's critical to put down in writing—for you as well as for your users—realistic requirements for server or application uptime. Although it might seem virtuous to guarantee high availability, don't promise more than you can deliver. Learn how to define terms and set metrics for your own SLA in "[Nailing Down SharePoint Service-Level Agreements](#)" by Brien M. Posey.

What if availability demands make hosting your SharePoint installation challenging? Then it might be time to shop around for a hosting provider. Before you sign on the dotted line, read "[How to Get the Most out of Hosted Services](#)" by Paul West to find out what questions to ask to get the best deal.

Here's another question for you: Which features in SharePoint are getting the short shrift in your organization? Take a closer look at all the functionality that's available in Shawn Shell's "[Best Kept Secrets: Underutilized Features of SharePoint.](#)"

What lesser-known SharePoint features are big hits with your users? Tell us all about it at [ccasatelli@techtarget.com](mailto:ccasatelli@techtarget.com). ■



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# Nailing Down SharePoint Service-Level Agreements

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G

Nailing Down SharePoint Service-Level Agreements

M

How to Get the Most out of Hosted Services

I

Best Kept Secrets: Underutilized Features of SharePoint

**IF YOUR ORGANIZATION** has drafted a SharePoint governance document, then it's only a matter of time before the subject of service-level agreements, known as SLAs, comes up. Simply put, an SLA is a written agreement that specifies the requirements for server or application uptime and the penalties for not meeting those requirements. Your governance document outlines all of the rules and guidelines about how SharePoint should be used in your organization, so it's the perfect place to include an SLA.

By far the biggest mistake that administrators make in setting up SLAs is coming up with some arbitrary availability number. That's just taking the easy way out.

For some reason, it seems to have become popular for organizations to claim that they can deliver five nines of availability—that's availability 99.999% of the time. Although it's

really easy to jump on the bandwagon and include this number in your SLA, it's unrealistic for most small and medium-sized organizations to be

*By far the biggest mistake that administrators make in setting up SLAs is coming up with some arbitrary availability number.*

able to deliver this type of availability. If you do the math, five nines of availability translates into roughly five minutes of downtime a year.

Although it's easy to give in to the pressure of committing to high availability, doing it isn't always smart. Many times annual performance

## » GOVERNANCE

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reviews for IT staff members take into account whether or not a person has met his or her SLA obligations. In other words, if you aren't able to meet the metrics that you have agreed to, then you may not get your next raise.

pen. Occasionally you might even be able to get higher-ups to throw in incentives for meeting availability goals.

So let's pretend that you get your senior managers to agree to give you everything you need to achieve their availability goals for your SharePoint servers. Even in that situation, it's not a good idea to add just one sentence to the governance document stating your goals. You need to take some additional steps to protect yourself and the rest of the IT staff in case you fail to meet those goals.

*(Continued on page 7)*

### Editor's Note

G

Nailing Down  
SharePoint  
Service-Level  
Agreements

M

How to Get the  
Most out of  
Hosted Services

I

Best Kept  
Secrets:  
Underutilized  
Features of  
SharePoint



## WHAT IS... a Service-Level Agreement?

**IT DEPARTMENTS IN major enterprises have adopted the idea of writing service-level agreements, or SLAs, so that services for their customers—meaning users in other departments within the enterprise—can be measured and justified.**

Some metrics that SLAs may specify include the following:

- The percentage of the time services will be available
- The number of users that can be served simultaneously
- Specific performance benchmarks against which actual performance will be periodically checked
- The schedule for notification in advance of network changes that may affect users
- Help desk response time for various classes of problems
- Dial-in access availability
- Usage statistics that will be provided. —WHATIS.COM



# SLA Checklist

A SERVICE-LEVEL agreement (SLA) should define the following components:

- 1. THE SERVICES PROVIDED:** These services might include Web hosting or application hosting.
- 2. THE SCOPE OF THE SERVICES:** This identifies who provides the hardware and software and maintains backups. The wider the scope, the higher the cost.
- 3. RESPONSIBILITIES FOR BOTH PARTIES:** These define each party's role in the agreement.
- 4. AVAILABILITY AND PERFORMANCE GUARANTEES:** These guarantees identify critical areas such as usage monitoring, minimum and target baselines, tools and metrics, estimated usage, expected peak periods, reporting tools, critical business hours and defined maintenance periods.
- 5. INCIDENT MANAGEMENT:** This element defines what an incident is and its severity, who will be notified and how quickly, who will respond and how often updates are issued during an outage.
- 6. CHANGE CONTROL:** SLAs need to be reviewed and adapted as business needs change. This component determines how often the SLA will be reviewed, who has authority to request a change and how soon changes must be implemented.
- 7. COST OF SERVICES:** The more demanding the SLA, the higher the cost. Determine the overall service costs, itemize components, define billing terms and determine which services may be needed that are not covered under the agreement.
- 8. PENALTIES AND REMEDIES:** Penalties or chargebacks can work to keep both parties from abusing the agreement. This component includes penalties for overuse of services, such as excessive bandwidth, utilization and volume. Determine who will be reimbursed for unused services and other losses. —SEARCHWINIT.COM

[Editor's Note](#)



[Nailing Down SharePoint Service-Level Agreements](#)



[How to Get the Most out of Hosted Services](#)



[Best Kept Secrets: Underutilized Features of SharePoint](#)

(Continued from page 5)

For starters, if you are creating an SLA from scratch, the best idea is to ease into it. Think about it for a moment—if you end up getting a bunch of new servers and other hardware for the sole purpose of making SharePoint available at all times, then you’ve got a lot of configuration work ahead of you. And, what do you think the odds are of getting everything to work perfectly right off the bat?

A more reasonable approach is to give yourself six months from the time of the initial deployment to when the SLA is actually enforced. That way, you can have time to fine-tune your new servers.

It’s also a good idea to use this time to test various failover scenarios and to get the rest of the IT staff trained on the failover procedures. Also, take the time to evaluate the deployment’s availability on at least a monthly basis as you work through the fine-tuning process.

## MEASURING SERVER AVAILABILITY

Another issue to address in the SLA section of your SharePoint governance document is specifically how the server’s availability will be measured. Many years ago I found myself in a situation in which one of the servers that I was in charge of went down unexpectedly. My boss was

already in a bad mood that day, and although the outage didn’t last very long, he began ranting about the server going down so often.

In actuality, the server really didn’t

*A more reasonable approach is to give yourself six months from the time of the initial deployment to when the SLA is actually enforced. That way, you can have time to fine-tune your new servers.*

fail very often. However, the burden of proof was on me. My only defense was the logs from the server.

To keep a situation like this from happening in your organization, it’s a good idea to document ahead of time what means will be used to track the server’s availability over time. While you’re at it, specifically define what counts as downtime. For instance, many organizations do not even allow servers to be taken down for scheduled maintenance. Others are a bit more lenient as long as notice is given ahead of time for scheduled maintenance.

### Editor’s Note

G

[Nailing Down SharePoint Service-Level Agreements](#)

M

[How to Get the Most out of Hosted Services](#)

I

[Best Kept Secrets: Underutilized Features of SharePoint](#)

## CLEAR DEFINITION OF DOWNTIME

Regardless of how your organization feels about downtime, it is important to have a clear definition of what does and does not constitute a breach of the SLA written into your governance policy.

One more thing to include in your SLA is a policy that allows for exceptions under usual circumstances. For example, suppose that Microsoft released the next version of SharePoint and, for whatever reason, the upgrade process required the existing SharePoint deployment to be taken off-line for about a day.

You don't want to end up getting fired for violating the SLA just because you are performing an upgrade. That's why you need to build some flexibility into your SLA that allows management to sign off on "approved downtime" under certain circumstances.

SLAs and governance policies go hand in hand. Although it would ini-

tially seem that creating an SLA would be one of the simplest parts of creating your governance document, you actually need to put some work into it for your own protection. If

*Although it would initially seem that creating an SLA would be one of the simplest parts of creating your governance document, you actually need to put some work into it for your own protection.*

there is any chance at all that you could be penalized for failing to meet the SLA requirements, then your governance document needs to spell it out. ■

### Editor's Note

G

[Nailing Down SharePoint Service-Level Agreements](#)

M

[How to Get the Most out of Hosted Services](#)

I

[Best Kept Secrets: Underutilized Features of SharePoint](#)



### ABOUT THE AUTHOR

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



# How to Get the Most Out of Hosted Services

Editor's Note

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G

Nailing Down SharePoint Service-Level Agreements

M

How to Get the Most out of Hosted Services

I

Best Kept Secrets: Underutilized Features of SharePoint

**FOR SHAREPOINT, HOSTED** solutions can be particularly beneficial because they deliver a more efficient strategy for IT. But to get the most out of hosting services, SharePoint administrators need to do their homework first so they can figure out what they need for their business and who can offer it at the best price.

SharePoint has many performance and availability issues that systems such as Microsoft Exchange don't have. Although SharePoint is easy to deploy out of the box, a SharePoint-specific hosting provider can help you take advantage of some of the enhancements that can be activated to help customize services specific to SharePoint.

Because hosting SharePoint can be more challenging, extensive knowledge of SharePoint can help extend the functionality a provider brings to an organization. Below are three questions to ask when considering a

third party to either host or remotely manage a SharePoint environment:

## SHOULD YOU CONSIDER HOSTING?

Hosting is a cost-effective way of tapping the expertise of providers and their knowledge of best practices when that same knowledge may not be available in your own company. Look for SharePoint hosting providers that adhere to the following best practices:

- **Performance and High-Availability:** A hosting provider should implement a plan that will meet the standards of any business requiring the highest level of performance, service-level agreements (SLAs) and availability.
- **Data Backup and Restore:** Data is one of the most valuable assets that a

business retains. A hosting provider should recognize the importance of data to all businesses and should implement a backup and data recovery model that will ensure the quick and reliable recovery of any lost or corrupted data.

hosted applications as well. If any of these monitored items fall out of normal ranges or service levels, the hosting provider should have assigned employees available for immediate response and remediation.

**Editor's Note**



**Nailing Down SharePoint Service-Level Agreements**



**How to Get the Most out of Hosted Services**



**Best Kept Secrets: Underutilized Features of SharePoint**

■ **Security:** Although performance, high-availability and data backup/restoration are all important, security should also be a top priority for hosting providers. Security is achieved through the use of protocols in conjunction with processes. If a hosting provider does not specifically lay out its security practices, be sure to ask what measures are in place.

■ **Monitoring and Incident Notification:** Many data centers lack the proper monitoring and notification systems to ensure quick, decisive action if an incident occurs. Hosting providers should implement a monitoring/notification system that allows visibility into all integral hosting systems at both a high level and an extremely granular level.

In addition to knowledge, you'll need a solid infrastructure. Any hosting provider you choose should have a high-performing, highly available network and server infrastructure. Hosting providers must monitor environment controls such as power and cooling. Providers will keep an eye on

**WHAT COST-RELATED ISSUES SHOULD BE A CONCERN?**

When assessing hosting providers, there are many cost factors to take into consideration. Be smart about the questions asked and make sure to have all the answers before committing. A general rule of thumb is to start with the basics and get to a granular level as your understanding of the offerings progresses.

When it comes to costs, first get a handle on general hosting cost structures, both for the initial installation and on an on-going basis.

Make sure you determine what SLA your business should be considering. Most SLAs should adhere to business needs—for instance, looking into whether your business can withstand a minute as opposed to an hour of downtime. If your hosted SharePoint application supports a business process that is used only between 8 a.m. and 5 p.m. Monday through Friday, then be sure you don't pay extra for 24-hour support.

On the other hand, if your hosted SharePoint application is used across time zones and is publicly accessible,

24/7 support is a much needed investment.

Be sure to ask how the billing cycles work. Will the bill come monthly? Per user? Don't be surprised by the costs.

Depending on the size of your business, there are different areas to consider when looking at a third-party hosting provider.

Small businesses might be most interested in exploring hosting through a third party because there might not be available resources for a dedicated IT department to handle issues such as database maintenance, user access and account administration—all of which may crop up with SharePoint.

For mid-market businesses, hosting holds the key to scalability and availability. It can help to maximize a business as it grows.

Another consideration is the reliability that will most likely be built into the cost structure. Cost is determined by the sensitivity of the business data at hand.

### **WHAT ELSE SHOULD YOU ASK YOUR HOSTING PROVIDER?**

Cost and availability are the big-ticket questions you absolutely need to ask any potential hosting provider. But what about the other details that can really set providers apart? Although some points seem minor, they could have a big impact on your business.

The devil is in the details.

The physical location of the servers for hosting providers is an important question, but oftentimes it goes unasked. For instance, if a hosting provider is located in Los Angeles where earthquakes are a real threat

*For mid-market businesses, hosting holds the key to scalability and availability. It can help to maximize a business as it grows.*

as opposed to a location such as Phoenix, this information could be critical.

Location dovetails into the disaster recovery plans. If a provider is located in a place that could have an effect on the data center—such as inclement weather—ask about a second data center. Most providers will build in a level of redundancy in which they duplicate their data in two secure locations.

A secondary location will need adequate resources to provide service in case the primary location becomes unavailable. If data is replicated to the secondary site, additional configuration steps may be required to restore

#### Editor's Note

G

Nailing Down SharePoint Service-Level Agreements

M

How to Get the Most out of Hosted Services

I

Best Kept Secrets: Underutilized Features of SharePoint

---

## » MANAGEMENT

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service in the event of a primary site failure. These additional steps should be documented and tested at regular intervals to be certain full recovery is still viable.

Asking yourself how much data your business is willing to lose should help define a redundancy plan by dictating how often backing up data should occur. Backups can take place daily, weekly or monthly depending on the business need. SharePoint data typically includes financial data, which is more sensitive than data that is hosted on Microsoft Exchange, so ensuring that the data won't be lost is key.

It can get complicated when deciding whether to have your SharePoint installation hosted by a third party. Before your company takes the

plunge, be sure to weigh all the important aspects of your implementation. Get answers to your questions

*Asking yourself how much data your business is willing to lose should help define a redundancy plan by dictating how often backing up data should occur.*

before signing a contract to ensure that the hosting provider can accommodate the needs that are critical to your organization. ■

### Editor's Note

G

[Nailing Down SharePoint Service-Level Agreements](#)

M

[How to Get the Most out of Hosted Services](#)

I

[Best Kept Secrets: Underutilized Features of SharePoint](#)



### ABOUT THE AUTHOR

**Paul West** is a co-owner and co-founder of SharePoint360 LLC, a SharePoint consulting and hosting provider. West has extensive experience with SharePoint architecture and implementations. He has been working with SharePoint technologies since the Microsoft SharePoint release in 2001.



# Best Kept Secrets: Underutilized Features of SharePoint

Editor's Note

*Data connection library, wikis and blogs, and enterprise social networking are just a few of the unsung heroes in SharePoint.* **BY SHAWN SHELL**

G

Nailing Down SharePoint Service-Level Agreements

M

How to Get the Most out of Hosted Services

I

Best Kept Secrets: Underutilized Features of SharePoint

**MANY ADMINISTRATORS HAVE** no idea what features exist on SharePoint or how to use them. For example, did you know that SharePoint has both wiki and blog functionality built in?

Did you know that SharePoint can help you collect information on what people are searching for and whether those queries return results in search? Or did you know that you can use SharePoint search to return results right within Microsoft Office? Maybe you did, or maybe you didn't.

These and other really useful features come "for free" within SharePoint. Take a look at these top 10 underutilized features:

## 10 SHAREPOINT SEARCH AS A RESEARCH SOURCE

You have probably used the thesaurus or the Lookup function in Office at one point or another. This

specific feature uses something called the Research Task Pane within Microsoft Word, PowerPoint and Excel. This feature is available in Microsoft Office SharePoint Server (MOSS) 2007.

To leverage SharePoint as a re-search source, try the following:

1. Open Microsoft Word.
2. Right click on any part of a document, with or without text.
3. Click the Lookup option from the context menu.
4. Pick Research Options from the bottom on the Research Task Pane that appears.
5. Click the Add Services button, and type in this url: [http://\[server\\_name\]/\\_vti\\_bin/search.asmx](http://[server_name]/_vti_bin/search.asmx). In it, [server\_name] is the address of your MOSS 2007 server.
6. Click Add and then Install when prompted to add your SharePoint application. It will be listed in the dialog box.

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## » IMPLEMENTATION

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7. Then click OK to close the Add Services dialog.
8. The next time you perform a “lookup,” your SharePoint application will be listed in the dropdown list of research sources available.

### Editor's Note

**G**

[Nailing Down SharePoint Service-Level Agreements](#)

**M**

[How to Get the Most out of Hosted Services](#)

**I**

[Best Kept Secrets: Underutilized Features of SharePoint](#)

**9 SEARCH ANALYTICS** Many SharePoint users complain that search within SharePoint stinks. Unfortunately, no one ever seems to know how to fix it. Although the answer will be different from one organization to another, one underutilized feature that can help is search analytics. It can tell you what terms are used to search for content, what queries return no results and what queries produce results with no clicks.

You can get Site and Site Collection analytics in the Site Settings menu of a Site or Site Collection, depending on what level you want data. For search analytics, you'll need to visit SharePoint Central Administration site in the Search Settings section. This feature is available in Microsoft Windows SharePoint Services (WSS) Site/Site Collection and MOSS Site/Site Collection and search.

**8 RSS FEEDS** Really Simple Syndication, or RSS, has been around since the late 1990s. Its

original use was to create a simple, standardized method for syndicating news content to a broad audience. But RSS has broader application than just news. In fact, everything in SharePoint can be syndicated through a standard RSS feed. This means that, using an industry standard format, you can make content within SharePoint available to applications across your enterprise.

This is particularly useful if you want to surface content from lists or libraries in Outlook 2007 because Outlook has a built-in RSS feed reader. Or, if you have a public website, you can provide an automated news feed without any programming. This feature is available in both WSS and MOSS.

**7 BUSINESS DATA CATALOG** The Business Data Catalog, or BDC, allows SharePoint to access structured data from various enterprise systems. That could be a SAP implementation or just a database inside of SQL Server or an Oracle server. Any data repository that you can connect to with a SQL call or a web service is available to the BDC.

Using the BDC, you can then expose that data to SharePoint's search engine. This enables users to find data in a database or an enterprise system by simply submitting a

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## » IMPLEMENTATION

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query much like they do for content. Then you can retrieve search results and individual records through pre-build web pages in SharePoint. In addition, the BDC allows you to

creating a trust and managed location for storing pre-build data connections. These connections can be created by a trusted and knowledgeable member of your team. They can then be uploaded and used by anyone who has access to the library. You can find this feature in MOSS only.

### Editor's Note

G

[Nailing Down SharePoint Service-Level Agreements](#)

M

[How to Get the Most out of Hosted Services](#)

I

[Best Kept Secrets: Underutilized Features of SharePoint](#)

*Blogs are good for situations where an expert wants to share information and knowledge.*

include this data in list columns or feed profile information about users from your HR system. MOSS Enterprise is the only version that has this feature.

**5 WIKIS AND BLOGS**  
Wikis and blogs tend to be underutilized and poorly understood by many organizations. But they represent a great leap forward in helping to distribute information and content. Blogs and wikis have different approaches to authoring content, but both solve a critical challenge in the enterprise—how to enable knowledge workers to easily share information. On blogs, individuals produce content that can be easily shared and commented on by others. Wikis are a more collaborative and democratic method for group content contribution.

Blogs are good for situations where an expert wants to share information and knowledge. Wikis are better when a group must collaborate to produce a single article. In either case, SharePoint makes both constructs easy to create, update and disseminate based on your needs and requirements. WSS and MOSS users alike can take advantage of this feature.

### **6 DATA CONNECTION LIBRARY**

Where's that database and how do I connect to it?

These are two common questions for power users and non-power users alike. Each type of user would like data in a database for local analysis in Excel, but they don't have the knowledge to find the data. Further, you don't necessarily want every user creating unique connection to your data.

The data connection library seeks to solve some of these challenges by

## 4 ENTERPRISE SOCIAL NETWORKING

Who is on your team? Do you know someone in HR who could introduce you to the vice president in that group? What has your corporate expert on Active Directory been working on lately? These are all questions that the social networking features of SharePoint can help answer.

SharePoint keeps track of multiple profile attributes of users within the system. You can indicate that you want to “follow” others inside and outside of your department—those of you who use Twitter will understand this concept. This means if Jane posts a blog entry on her My Site, and you’re following her, then you’ll be notified about the new entry. If you need to be introduced to people in a different department, perhaps you can look them up using people search and then browse other people in their group to see if you have any contacts. And all of this functionality is provided out of the box with SharePoint. This is a MOSS-only feature.

## 3 MY SITES

My Sites are a feature in SharePoint that allows individuals to “own” their very own site collection. There are downsides to this feature. Everything from the violation of data security policies

to excessive consumption of storage can be side effects when end users have loads of control over a site collection.

If you can mitigate the challenges, though, My Sites can be the key to enabling user-directed personalization. They provide the flexibility to give end users the freedom to surface content and applications they chose themselves. They even have the ability to create and manage their own collaborative sites. You can find this feature in MOSS only.

## 2 CONTENT QUERY WEB PART

This is a standard web part that ships with MOSS—but not WSS. It allows you to query content across a SharePoint site collection and display it as navigation. The web part does not use search. Rather, it uses the native SharePoint Collaboration Application Markup Language, known as CAML, to find content matching the criteria you’ve provided.

The biggest advantage to the web part is that you can radically customize how the results are displayed. This allows organizations a great deal of flexibility when using this web part. For example, you can use the web part to query the Site Collection for all news items across multiple department sites and display them like navi-

### Editor's Note

G

[Nailing Down SharePoint Service-Level Agreements](#)

M

[How to Get the Most out of Hosted Services](#)

I

[Best Kept Secrets: Underutilized Features of SharePoint](#)

gation elements on the home page of an intranet. Again, this one is a MOSS-only feature.

gramming is required. Plus, it will yield a ton of information that can be used in processing the expense report. WSS and MOSS each have SharePoint Web Services as a feature.

**Editor's Note**

**G**

**Nailing Down SharePoint Service-Level Agreements**

**M**

**How to Get the Most out of Hosted Services**

**I**

**Best Kept Secrets: Underutilized Features of SharePoint**

**1 SHAREPOINT WEB SERVICES**

SharePoint exposes nearly all of its functionality through SOAP-based web services. Although you'll have to be a developer—or someone who understands web services—to take advantage of this feature, it can provide a standardized way to send and retrieve data from SharePoint.

For example, suppose you want to get someone's first and last name or the name of that individual's manager for an expense approval process using an InfoPath form. You can leverage the UserProfile web service from SharePoint to submit a query for that individual and retrieve his or her profile details. In this example, no pro-

*Don't worry—you can't really be faulted for missing a few of these because SharePoint is a vast product.*

Which one of these features have you ignored, or which one didn't you even know existed? Don't worry—you can't really be faulted for missing a few of these because SharePoint is a vast product. But now that you know, perhaps you'll be able to get additional value from your SharePoint environment. ■



**ABOUT THE AUTHOR**

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

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**About Idera:**

Idera provides powerful and easy-to-use tools to simplify the management of Microsoft SharePoint environments. Our solutions ensure the safety and integrity of SharePoint content by automating the backup and recovery process, and reducing the time required and complexity of SharePoint administration. From managing small farms with tens of users to enterprise deployments with many thousands of users, our products ensure that your SharePoint environment performs quickly and reliably.