

SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// FEBRUARY 2009

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SHAREPOINT ADMINISTRATORS HAVE a dilemma. On one hand, SharePoint was meant to be manipulated. Its features make it easy for users to point, click, drag and drop their way into a tailor-made collaboration environment.

On the other hand, SharePoint is software—and software breaks. Slapdash coding from careless users can make a perfect SharePoint world come crashing down.

What's needed are balance and a good SharePoint governance plan. In this month's issue, SharePoint MVP Paul Galvin offers tips on how to empower users while giving them boundaries in "Who Is Allowed to Customize SharePoint?"

Planning is also key for IT managers migrating from Windows SharePoint Services 3.0 to Microsoft Office SharePoint Server 2007. First, take proper inventory of the physical configuration of the servers that support your WSS implementation as well as the logical and software configurations. SharePoint expert Shawn Shell has practical advice for a smooth migration in "Make the Move from WSS 3.0 to MOSS 2007."

Did someone say public folders? They're dead, right? Or are they? Discover the real truth about public folders and the myths surrounding email archiving in "Five Things You Must Know about SharePoint and Exchange" by SharePoint guru Joel Oleson.

Do you have a SharePoint myth you want dispelled? Or do you want to share some of your SharePoint truths? [Send them our way.](#) We want to hear from you. ■



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Cathy Gagne, Editorial Director, cgagne@techtarg.com

Christine Casatelli, Editor, ccasatelli@techtarg.com

Martha Moore, Copy Editor, mmoore@techtarg.com

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

Jonathan Brown, Publisher, jebrown@techtarg.com

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

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

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SHAREPOINT IS A highly customizable platform.

You can click on site actions -> edit page and actually edit the page. You can add Web parts, configure them and drag them around from zone to zone. It's easy to download SharePoint Designer and figure out how to make dramatic changes to SharePoint's branding by clicking, pointing, dragging and saving. It's quite a liberating feeling, and it doesn't stop there.

SharePoint can be customized in all kinds of ways before it ever occurs to you to do things the old fashioned way—through code.

Proceed with caution, however. The SharePoint platform is open and invites customization, but it's still a software product. Careless customization can lead to poor design, unhappy users and performance problems. It can even wreck your system entirely, forcing you to test that

disaster recovery plan you hoped you'd never have to pull out from the closet.

You can avoid those kinds of nightmare scenarios with an appropriate governance plan that includes rules for customization. Follow these tips, and you'll get the best of both worlds—a highly customized SharePoint solution tailored to your company's business needs that is also stable and efficient for your user community.

DEFINING ROLES FOR CUSTOMIZATION

When you first consider SharePoint customization and governing activities relating to customization, you need to establish a handful of roles. These include:

■ **Casual users:** These people use SharePoint infrequently or have little or no interest in making system

changes. They want their search function to work well but are interested only in results, not changing how the system operates.

■ **Power users:** These are the high-volume users who also tend to be the best internal evangelists for SharePoint. These users are not programmers—otherwise, they would be part of the IT department—but they are keenly interested in business processes and issues and always look for ways to improve them using SharePoint.

■ **Site administrators:** Frequently power users, they are also explicitly “in charge” of one or more SharePoint sites.

■ **Developers:** These are the ones who live in the mysterious world of SharePoint CAML files.

Casual users should rarely make any SharePoint customizations at all. They won’t have the training to make sensible changes to the environment and will ultimately be a drain on IT resources.

Power users, however, should be encouraged to learn about SharePoint’s customization opportunities and should be trained on their proper use. Power users are close to the action. Combine their interest in business process with a training program

that enables them to solve business problems, and your SharePoint environment will grow in a good way.

Site administrators should expect to do the bulk of the customization work for a site and be the first line of support for a given site’s audience.

Despite SharePoint’s enormous flexibility, many business requirements cannot be met without programming. Although SharePoint places lots of customization power in the hands of end users, programming tasks should be undertaken only by developers.

COMMON CUSTOMIZATIONS WITH SHAREPOINT

For many companies, document libraries and custom lists provide backbone functionality upon which their entire SharePoint implementations rest. At the same time, it’s quite easy to customize them through views.

SharePoint has two types of views: personal and public. Public views should normally be created by power users or site administrators. Depending on the efficacy of a company’s SharePoint training program, developers may also need to create public views. Casual users should not create public views.

Personal views, on the other hand, should be open to everyone. Keep in mind, however, that personal views

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cannot be “promoted” to a public view.

Using SharePoint Designer, users can re-brand their entire SharePoint environment, individual sites or even

individual Web pages by creating new cascading style sheets. Branding can become complex very quickly and, as a result, should normally be managed via a strict development process and

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Take Advantage of SharePoint Customization Tools

MICROSOFT HAS SEVERAL programming tools for SharePoint that you should make available to properly trained end users. Here are two of the most commonly used tools for SharePoint customization:

■ **InfoPath.** Included in Microsoft Office SharePoint Server 2007, companies can use this tool to create and deploy electronic forms that pull data from SharePoint and save that data back to SharePoint. A typical example of how InfoPath can be used is for an expense report.

Using InfoPath, you can create a Web form that allows employees to enter expenses. When finished, the user presses the Save button, and InfoPath saves the expenses into SharePoint. It is then typically integrated with a workflow solution.

In general, this tool is a good one to make available to end users so they can create their own forms. Do this only if you're ready to offer training before they use the tool and on-going support for tricky business requirements after the fact.

■ **SharePoint Designer.** A powerful tool for properly trained end users, SharePoint Designer 2007 helps create and customize sites and applications on the SharePoint platform. With SharePoint Designer 2007, users can build no-code solutions such as data views, reports and workflow tracking quickly by using menus, task panes and templates.

Power users and site administrators can also use it to create a sort of personal backup of their sites to provide protection above and beyond what IT provides. As easy as it is, SharePoint Designer is also a big risk. It's possible to badly damage a SharePoint environment using this tool.

carried out by developers. However, a properly trained power user or site administrator can make branding changes. This would normally be an exception to the rule.

Developers should be available to assist as needed. It's possible to accidentally bring down an entire SharePoint environment, leading to lost time and a mad scramble to restore it from backup.

Last but not least, training is vitally important and should be tightly integrated into any SharePoint governance plan. This is especially true as it relates to SharePoint customization.

It's important to balance the power that SharePoint's tools put into the hands of end users while avoiding risks that arise from that very same thing. If you take the tools away altogether, then you reduce risk and the support requirements associated with user customization.

The downside of taking away customization is that you won't unleash the power of those users. This sad outcome will mean longer development times and useful projects that

never get off the ground, leaving inefficient business processes intact that can be a permanent drag on your company.

As with many SharePoint governance issues, striking the right bal-

Training is vitally important and should be tightly integrated into any SharePoint governance plan. This is especially true as it relates to SharePoint customization.

ance is essential. The trick is to weigh the benefit from end users doing their own customization work with SharePoint tools versus the effort IT will have to give to support them. Each enterprise will calculate that particular equation in its own unique way. ■

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ABOUT THE AUTHOR

Paul Galvin is a Microsoft SharePoint MVP and a SharePoint solutions architect at EMC Corp. Galvin 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. He contributes to the SharePoint community through MSDN forums and his blog at <http://paulgalvin.spaces.live.com>.

Five Truths You Must Know about SharePoint and Exchange

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IT MANAGERS ARE often overwhelmed by SharePoint technology and unclear on how they can make the most of all of its features. Take the functionality between SharePoint and Microsoft Exchange. On any given day, IT managers receive hundreds of email messages, and many of them are critical and demand immediate decisions. But because of the volume, it becomes difficult to find, categorize and sort them all. Data becomes lost, and IT managers spend a great deal of time searching for information. In the process, they become less productive in other aspects of their jobs.

They don't know how to use SharePoint to make Exchange work better—probably because of the preconceived notions they have about the two. In any discussion about SharePoint and Exchange, IT managers want to come away knowing they're getting the biggest technology bang for the buck. Whether designing an email-archiv-

ing solution or deciding what to do with existing legacy public folders, IT shops need to know how to get the job done as efficiently as possible.

Learning how to dispel the myths about Exchange email-archiving with SharePoint will put them on the right path. Let's take a look at five myths and the truths that they're hiding:

1

MYTH #1: Public folders are dead.

Everyone thinks that public folders are going away, but that's not so. A couple years ago, the Microsoft Exchange team shared its thoughts about [the future of public folders](#) to help customers plan better. It was misunderstood. The truth is that the Microsoft Exchange team has actually been encouraging the use of SharePoint for new deployments as well as encouraging migration where possi-

ble and where overlap exists.

But the fact remains that public folders and the custom applications built on them can be a nuisance for Exchange administrators. There are a number of common concerns—control, performance, scale and replicating chaos, to name a few.

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*Everyone thinks that
public folders are going
away, but that's not so.*

If you are deploying both Exchange 2007 and SharePoint technologies—either Windows SharePoint Services (WSS) or Microsoft Office SharePoint Server (MOSS) 2007—it doesn't make sense to build up a huge public folder deployment. It's confusing to users, and it is additional overhead for the team that's managing Exchange. Instead, in its next version of Exchange 2007, Microsoft has new ways of managing and supporting public folders with PowerShell cmdlets.

If possible, avoid deploying public folders. If you've got them already, don't freak out. They will continue to be supported without much investment.

→ **TRUTH:** The Microsoft Exchange team will include public folders in the next version of Exchange and, at a minimum, will support them for 10 years after shipping.

2

MYTH #2:

**Pointing managed folders
to a SharePoint list will
solve all archiving needs
in a turnkey, hands-off approach.**

In Exchange 2007, Microsoft introduced managed folders with the intention of providing administrators with an easy means to help users archive email. It's an incredibly insightful feature and—when implemented properly—can reduce mailbox sizes and capture the intended email. But, when *not* implemented properly, managed folders can be easily abused and used as a dumping ground.

One poor design example could be a managed folder called "Keep." All users can be told to put their stuff in that one folder, and it can be archived to SharePoint. It sounds like a great idea, right?

Wrong. First, putting all that junk into one list means that scale will be an issue. SharePoint doesn't scale well to support millions of items in one list, especially in a single view.

Second, what about the security of that list? Managed folders are an administrative setup. It's an option in Exchange, not an end-user configuration.

So what does a good design look like? How about a managed folder titled "Legal Hold" that stores requests from users who have legal holds related to an investigation or

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court case? On the SharePoint side, a specific document library is set up and secured, and a legal site administrator is responsible for any tagging and for managing the views. A special search view might be set up with specific indexed columns to support an easy search with no "Allitems" view.

→ **TRUTH:** To best take advantage of managed folders with SharePoint, you'll need a solid information architecture design as well as trained site and list administrators who understand the scale and can manage the volume with a custom view and indexed columns or folders.

3

MYTH #3:

It's better to keep all data in one place and to use metadata to search.

Although this is a common practice and popular method for personal storage, knowledge repositories in SharePoint do still require special information architecture designs.

The recommended limit of 2,000 items per folder popularized in WSS 2.0 isn't a bad one for those who don't have the time to invest in designing a query-based interface.

SharePoint administrators may want to recommend to their users that they limit the number of items on their lists to fewer than 1,000. With an upper limit of 3,000, the IT shop gets involved assisting groups

scale their lists more efficiently.

If you're looking for the easy answer to scale a SharePoint list, here is one approach: Use folders or indexed columns.

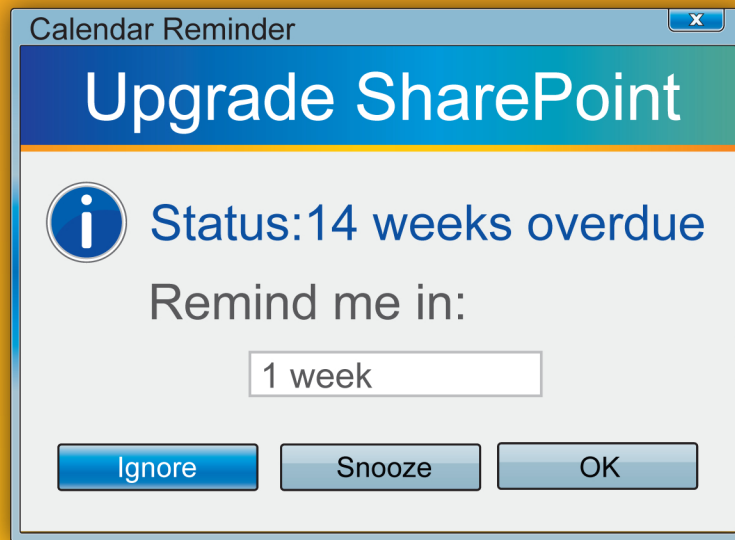
The recommended limit of 2,000 items per folder popularized in WSS 2.0 isn't a bad one for those who don't have the time to invest in designing a query-based interface.

When the default Allitems view grows as a list into the tens of thousands, not only does it take tens of seconds to render, but it can also cause content database-locking during query time. Microsoft has set up a scan to detect large lists of more than 3,000 items to ensure proper usage and to divide up content where it makes sense.

For document management deployments, use folders for better scale and retrieval. Keep each folder to less than 2,000 items. Even better is a limit of a hundred or so to prevent unnecessary scrolling.

Filters are one way of limiting the number of items displayed, but in

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large lists, those queries can be inefficient. Using Indexed columns is another way to manage list scalability and increase index query optimization. The most efficient method of retrieval is search queries. Even changing the default view to something quick or a simple search or filtering-based interface provides better performance for large lists. Make sure there is limited exposure to the Allitems view, which can have an impact on the content database on really large lists.

→ **TRUTH:** Divide up content where appropriate, and use folders to improve scale and retrieval.

4 **MYTH #4:** A SharePoint deployment isn't complete until the self-service email-enabled lists are turned on.

The email-enabled self-service lists can be powerful, but in most deployments they can easily get out of control. Without the proper planning and management, Active Directory objects will be created with archiving and with no lifecycle.

Many SharePoint complaints involve contact account naming standards. IT managers don't want to see random contacts in AD. Everyone wants to have the document library called "docs," and everyone wants to have the discussion list called "dis-

cussion." So, the real recommendation here is to know what you're doing because it's easy to end up with a mess.

Again, you don't want to send all data from all users to one list. Put content in context in different site collections, sites or folders, or as it relates to the context of the group, team or project. Information architecture planning and oversight is required to scale a document management repository in SharePoint.

Don't be surprised if it's more complex to set up content than you initially thought it would be. One way to make it easier is to set it up in a preproduction environment first and learn how it works by exercising administrative and trouble-shooting tasks around maintenance of the list, inbound SMTP and AD contact objects.

→ **TRUTH:** Most SharePoint environments don't need the email-enabled functionality and the oversight that all that requires. But if you do decide to use it, plan to set up specific content objects and point the lists at those.

5 **MYTH #5:** Email is safe and searchable.

Email is a place where users feel safe and where they can tuck away all of their important information for later use.

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Therein lies the problem because email servers are not always safe. The bigger problem is that each user's inbox and folders are not searchable for anyone else. This is counter-intuitive to enterprises that are trying to make valuable content reusable.

It's time to change this thinking and to start putting files where they belong. Users need to be able to share their relevant information with each other in SharePoint. Using the collaboration platform, they can save email messages in their entirety or their attachments to SharePoint sites even without email-enabled lists.

If users can learn to save important email in SharePoint according to context and in lists and libraries as they relate to projects, teams and groups, then that content is searchable and reusable. Those meeting minutes and project documents—among other files—can now take advantage of version control and history. They can also evolve to become published content in knowledge repositories. The resulting document history—and the collaboration around it—becomes extremely relevant.

What happens to email that isn't saved outside of user mailboxes? It dies. As email evolves, PSTs go away in many corporations. Quotas force email purging, and the liability of some secret conversation from years ago simply expires.

Those who manage compliance of

email would probably prefer that the content for legal holds and patents end up in the proper storage location—whether or not that location is a managed folder that's also managed on the SharePoint side. The legal

If users can learn to save important email in SharePoint according to context and in lists and libraries as they relate to projects, teams and groups, then that content is searchable and reusable.

department would probably prefer that the email have a defined expiration policy to keep down the volumes of chatter.

The bottom line is that relevant conversations and important documents that need to evolve should end up in SharePoint so the content can live on. This is a better line of attack than initiating some automatic push policy, which would be a security nightmare.

Microsoft designed SharePoint for collaboration. It's a way of sharing content securely throughout the enterprise. On a SharePoint site, the

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average document will be reused again and again by many people. The better the context and metadata, the more likely the content can continue to be useful.

→ **TRUTH:** The black hole of collaboration is yesterday's email and file attachments. Today, the way for enterprises to keep content relevant, safe and searchable is to keep it in SharePoint.

For new Exchange deployments, SharePoint is strongly encouraged for application development. The functionality of calendaring in either system for team calendars should be compared and contrasted based on out-of-the-box functionality based on requirements.

In the email-enabled public folders versus email-enabled SharePoint environments debate, IT shops may find that public folders have increased functionality but, again, they should consider their requirements.

The scalability of SharePoint lists is a major consideration and will require oversight, especially when

using email-enabled lists. The default Allitems view can be problematic, and you may need to replace it with a search or filter-based interface. Use folders and indexed columns for large lists.

Some guidance may be required to help users understand where and when content should be stored. Email messages and attachments stored in SharePoint can contribute to the enterprise immensely in terms of project collaboration and knowledge sharing when secured in the proper context. Training users to tag content with metadata will increase the usefulness of documents.

The clear overlap between SharePoint and Exchange does not need to be a gray area. With the myths cleared away, corporations can understand the distinct differences and advantages and use the right platform for the right purpose. Storage and sharing of documents in SharePoint has advantages in collaboration, document management capabilities and discoverability with a rich search Web interface. ■

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ABOUT THE AUTHOR

Joel Oleson is a senior product manager with Quest Software. As former senior technical product manager for Microsoft Office SharePoint Server, Oleson focused on topics related to enterprise deployments of SharePoint, such as performance, scale, backup/restore and high availability. His blog is [SharePoint Joel's SharePoint Land](#).

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WHAT HAPPENS WHEN SHAREPOINT GOES DOWN?

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

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

KEEP LINES OF COMMUNICATION OPEN

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

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

KEEPING SHAREPOINT AVAILABLE

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Make the move from WSS 3.0 to MOSS 2007

Windows SharePoint Services 3.0 is the core of the SharePoint product line, so moving to Microsoft Office SharePoint Server 2007 isn't as painful as you might expect. **BY SHAWN SHELL**

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THINKING OF FINALLY making the move from Windows SharePoint Services (WSS) 3.0 to Microsoft Office SharePoint Server (MOSS) 2007? If you're serious about SharePoint, then migrating makes sense because your organization can get a lot more value from using MOSS 2007.

There has been a lot of confusion regarding the differences between the Enterprise and the Standard Client Access License (CAL) suites for SharePoint. If you're struggling with which one to choose, consider that there isn't one right answer. However, the compelling reason to spend more for the Enterprise CAL comes down to a few key services: Excel Services, Forms Server and unlimited search indexing.

In addition, Microsoft just recently granted Enterprise customers a license to use their Business Intelligence tool PerformancePoint for

SharePoint. This effectively makes SharePoint a very compelling BI platform in addition to a content management tool.

Once the decision is made to move forward with the broader SharePoint offering, companies are left trying to determine what the best approach is for migrating and what to retain in their existing SharePoint infrastructure. They also have to integrate the new features and either ensure that user data remains in place or that it's migrated to the "new" location.

The good news is that WSS is the core of the SharePoint product line. That means the larger MOSS product depends on the foundational services provided by WSS. Because of that, moving from WSS to MOSS isn't as painful as you might expect. There should be no instances where you lose functionality—MOSS will simply add to the functionality you already have.

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To begin your migration, make sure you take a proper inventory of your existing environment. Pay particular attention to the architecture of the existing WSS farm. Be sure you understand not only the physical configuration of the server or servers that support your WSS implementation but also your software configuration. Here are some elements to pay special attention to:

■ **Farm configuration:** A SharePoint farm generally describes the number and configuration of your servers. In many small WSS implementations, a single server may have been used. In moving to MOSS, you may convert to a small or medium farm. This will affect the configuration of the SharePoint application and security.

■ **SharePoint applications:** In SharePoint terms, an application is essentially an IIS website that is "SharePoint-enabled." If you've started with WSS, you're likely to have at least two applications defined. With MOSS, there will be at least four or five applications.

■ **Site collections:** Next in the hierarchy are SharePoint site collections. SharePoint applications can house one or more site collections, usually off one or more URL elements like `http://yourapplication/sites/[sitecollection]`. The biggest challenge here is

really all about site structure. Your MOSS implementation may have a radically different taxonomy, and you'll need to move things around.

■ **Sites:** A site is a basic unit within a site collection, which has to have at least one site. Your existing sites will have been created with a WSS Site Definition. Those definitions will still exist in MOSS, but with the addition of MOSS Site Definitions, there may be opportunities for migrating content to a more appropriate MOSS Site Definition from the existing WSS Site Definition.

Once you have a good handle on your existing WSS environment, follow these migration tips to ensure a successful migration to MOSS:

→ **If you already have a stable WSS environment,** consider leaving it in place and installing MOSS in parallel, which would enable you to continue to leverage the WSS environment while gaining the benefit of MOSS. This is especially relevant if your WSS environment was largely used as a team or project collaboration.

→ **If you're moving from a single server implementation to a small or medium farm,** make sure you know which service identities are being used. Each SharePoint application is

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Partial feature comparison for WSS 3.0, MOSS Standard and MOSS Enterprise

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Features	Windows SharePoint Services 3.0	Microsoft Office SharePoint Server '07 Standard	Microsoft Office SharePoint Server '07 Enterprise
Wikis and blogs	○	○	○
People and Groups lists	○	○	○
Calendars and surveys	○	○	○
Email integration	○	○	○
Task coordination	○	○	○
Document collaboration	○	○	○
Issue tracking	○	○	○
My Site personal site		○	○
Content syndication		○	○
Site directory		○	○
User profiles and the profile store		○	○
Site manager		○	○
Mobile device support	○	○	○
Integration with Microsoft Office Access 2007, Excel 2007, PowerPoint 2007, and Word 2007	○	○	○
Integration with Microsoft Office Outlook 2007	○	○	○
Integration with Microsoft Office SharePoint Designer 2007	○	○	○
User interface	○	○	○
Search results	○	○	○
Enterprise content sources		○	○
Indexing controls		○	○
Business data search		○	○
Business document workflow support		○	○
Document action bar	○	○	○
Retention and auditing policies		○	○
Records repository		○	○
Legal holds		○	○
Navigation controls	○	○	○
Content publishing and deployment		○	○
Site templates	○	○	○
Page layouts		○	○
WYSIWYG Web content editor		○	○
Policies, auditing and compliance		○	○
Browser-based forms		○	○
Form import wizard		○	○
Compatibility checker		○	○
Integrated, flexible spreadsheet publishing			○
Business Data Catalog			○
Report Center			○
Configuration management	○	○	○
Single sign-on		○	○

SOURCE: MICROSOFT

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» IMPLEMENTATION

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tied to an application pool that has a specific network identity. Some WSS implementations may use SYSTEM or NETWORK SERVICE. On a single machine, this may be fine. If you create a new farm with more than one server—or you simply expand your farm to include more servers—you'll need to use domain accounts, even if your users use Forms to authenticate. This will affect your ability to access the WSS content databases as well as the configuration database. You must either grant the new network identities access to the existing databases or back up and move the existing sites/site collections.

→ **If you're changing the taxonomy/structure of your WSS sites to better integrate with your new MOSS environment**, you may be able to use the export and import capabilities of the STSADM command to move existing sites and site collections into the new structure. This option won't solve every problem, but it can be very effective in helping the migration to MOSS and a new structure.

→ **You can't change the site definition used for a site after it's been created.** If you want to leverage MOSS site definitions, like Publishing Sites instead of a WSS site definition, you'll have to move the content. Take a look at companies like [Metalogix](#) or free utilities on [CodePlex](#) to assist you in moving user content.

→ **Workflows and other customizations created with SharePoint Designer can't be moved to the new MOSS environment.** This is not a limitation of WSS but rather a fact of SharePoint even in the MOSS environment. Consider recreating the workflows or more global customizations in Visual Studio and installing them as a site collection feature to enable broader distribution.

In all, your migration to MOSS from WSS may be a challenge. However, given that WSS is the foundation of MOSS, your chances for success are high. Just make sure you take care of the details when you make the move. ■

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ABOUT THE AUTHOR

Shawn Shell is the founder of Consejo Inc., a consultancy based in Chicago that specializes in Web-based applications, employees and partner portals, as well as enterprise content management. He has spent more than 19 years in IT, with the last 10 focused on content technologies. Shell is a co-author of *Microsoft Content Management Server 2002: A Complete Guide*, published by Addison-Wesley, and the lead analyst/author on the CMSWatch SharePoint Report 2009.

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