

# SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// MARCH 2009

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## MANAGEMENT

### **Must-have Free SharePoint Tools and Add-ons**

*Are you on a tight budget? Download these handy tools and utilities for free to fill in SharePoint functionality gaps.* BY SHAWN SHELL

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*Make sure today's SharePoint governance plan will cover tomorrow's performance needs as usage grows.* BY BRIEN M. POSEY

# Doing More With Less

BY CHRISTINE CASATELLI

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**TIMES ARE TOUGH**, and IT shops are busier than ever doing far more with much less. Everyone is working harder to stretch their budgets. How about you? If you need to fill in some SharePoint gaps but don't have the money to do it, we're here to help.

In this month's issue, SharePoint expert Shawn Shell counts down the free tools and utilities that are a must for every SharePoint installation. Find the products you need at the price you can afford in "Must-have Free SharePoint Tools and Add-ons."

While you're still thinking about your budget, don't forget about your SharePoint governance plan. Have you even considered what your performance needs will be once SharePoint takes off in your organization? One way to stay ahead of the curve is to build in a set of criteria that defines when you should purchase a new server or when you should add resources to an existing SharePoint server. Microsoft MVP Brien M. Posey offers tips on how to think proactively in "Planning for Scalability in SharePoint Governance."

Are you a SharePoint all-star, or do you know just enough to be dangerous? SharePoint MVP Paul Galvin will set you straight in "Don't Do That With SharePoint." Ignore his advice and you could be looking at hours of work to clean up the subsequent mess.

Want to share your SharePoint wisdom with the rest of the folks in the trenches? [Send us your ideas](#). We want to hear from you. ■



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# Must-have Free SharePoint Tools and Add-ons

*Are you on a tight budget? Download these handy tools and utilities for free to fill in SharePoint functionality gaps.* **BY SHAWN SHELL**

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**LET'S FACE IT:** SharePoint has some functionality gaps. Because of that, managing SharePoint can sometimes be a challenge. To fill those gaps, many SharePoint administrators end up purchasing third-party tools to assist them in managing their implementations.

There are lots of terrific commercial tools and utilities available for SharePoint. But for organizations that either don't have the budget or can't justify the license costs for third-party SharePoint products, there are quite a few high-quality free tools. Produced and made available by the same commercial firms that market for-fee products, the free tools are often used to encourage customers to license other products. There are also quite a few open source or semi-open source tools from places like the Microsoft-sponsored CodePlex site.

To help you identify devices that might help you, check out the list

below for 10 free or nearly free tools, utilities and add-on products for SharePoint. Inclusion on this list is not an implicit endorsement; it is simply a list of products I've either used personally or know others who have used them successfully. In every case, you should test the product in your environment to ensure it meets your needs.

## ① **Business Data Catalog (BDC) Application Definition Editor**

This is a free utility provided by Microsoft in the Microsoft Office SharePoint Server 2007 Software Development Kit (SDK). Because Microsoft periodically releases updated versions of the SDK, be sure you have at least the update from late 2008. From experience, the tool is somewhat challenging to use, but it is useful in that it helps you configure a BDC application definition and it's a good, free alternative to

Lightning Tools Ltd.'s BDC Meta Man.

② **SharePoint Solution Installer**

This utility was created by Lars Fastrup to ease the task of installing SharePoint Solution files, which use the extension WSP, in a SharePoint environment. You would use this tool primarily to install custom solutions, and it operates very similarly to any standard installation process. The only real requirement is that you need the Solution ID, which is a GUID to identify the solution. The Solution ID should be available from the developer who constructed the WSP file. Many commercial companies have begun to use this utility because it works so well.

③ **SharePoint Work Acceleration Toolkit (SWAT)**

This toolkit was developed by iDevFactory of Universal SharePoint Manager fame. It allows you to interrogate your SharePoint farm and do all sorts of things, such as see site definitions that are installed, generate test data within a list, execute a CAML query against one or more lists, see which sites have been provisioned, review security settings, construct a hierarchy model—sites within a Site Collection—and a good deal more. SWAT was previously a licensable tool, but iDevFactory changed its policy on the tool and has decided to offer it for

free. You are still required to get a license, but there's no cost.

④ **Discovery Wizard for SharePoint**

Quest Software Inc. has made some tentative steps forward into the SharePoint market. The company has released its free discovery tool that tells operations folks how many SharePoint sites exist on the network.

⑤ **Remote stsadm Tool**

Stsadm is a necessity for managing SharePoint. But you can't always be "on the box" to execute administration commands with the tool. This CodePlex project aims to give you access to run stsadm commands remotely.

⑥ **SPDeploy**

This open source tool created by the consulting company Ascentium has primarily developer-centric functionality, but it is also useful for operations. SPDeploy enables remote deployment of code packages to SharePoint environments.

⑦ **SharePoint Features**

Microsoft MVP Scot Hillier leads a project on CodePlex that provides some valuable add-ons for SharePoint in the form of various features you can install and activate within your SharePoint farm. Features include a SharePoint log viewer add-in and other developer-, administrator- and

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user-oriented elements. One feature adds the required Web.Config entries for Ajax. Whether you download and install them one by one or download the entire project at once, you still have to install them individually. Those with developer leanings can even get feature source codes.

adhering to security and installation best practices. The utility produces a report that details areas where administrators can improve their environments.

**10** [World Clock and Weather Web Part](#)

Bamboo Solutions released this free Web part that displays the date, time and weather within your SharePoint environment. Although it's not exactly a business-critical function, it is handy.

Because of the sheer installed base, there are many cool commercial tools, add-ons and utilities available for the SharePoint platform. In all, the freebies listed here represent a mere fraction of the available components you can add to your SharePoint environment.

Take them for a test-drive, but know that you may be on your own if a problem arises. In these times, though, SharePoint administrators need all the help they can get. These tools certainly help fill in functionality gaps. ■

**8** [SharePoint Administration Toolkit](#)

Microsoft has released a toolkit to assist SharePoint administrators with common tasks that are, strangely, not included with the out-of-the-box administrative interfaces. The toolkit is a combination of command-line-based stsadm updates and additions to Central Administration. It includes several useful functions, such as a batch site manager and a way to synchronize your profile store in SharePoint between Shared Services providers.

**9** [Best Practices Analyzer for Windows SharePoint Services 3.0](#)

Microsoft released this tool back in 2007 with an update in 2008 to help organizations ensure that they are

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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 CMS Watch SharePoint Report 2009.

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# Don't Do That With SharePoint

Steer clear of these traps to save yourself hours of unnecessary work in your SharePoint environment. **BY PAUL GALVIN**

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**WE'VE ALL HAD** flashbacks to our childhood when our mothers told us, "Don't do that, or you'll regret it." But then we went ahead and did it anyway, right? As children, we just didn't have the wisdom or foresight to trust that advice. Now that we're older and wiser, we can take those words to heart.

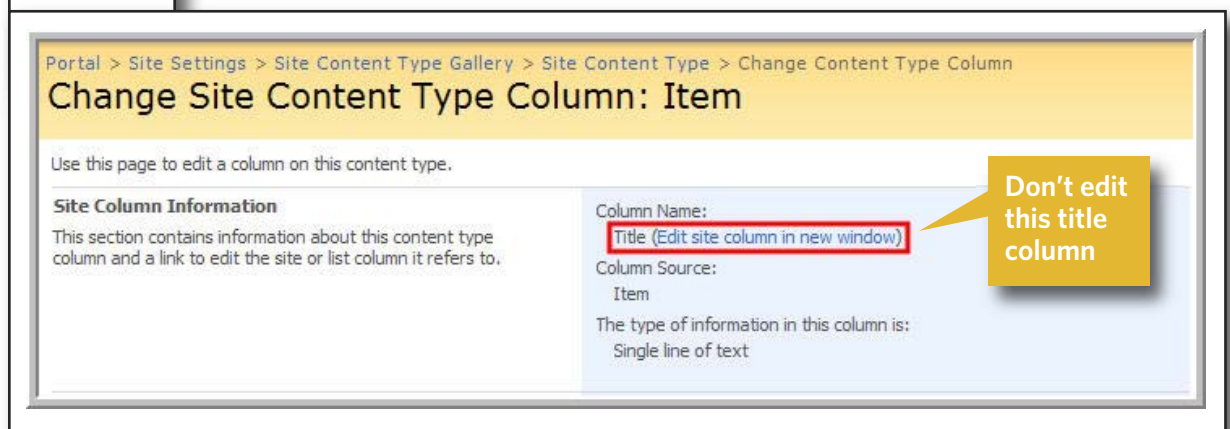
Here are five "don't do that" tips for SharePoint that can save you hours of unnecessary re-work down the road. Not interested in following this

advice? That's your decision, but don't say I didn't warn you.

**NUMBER 1:  
DON'T CHANGE THE TITLE ON  
THE CORE ITEM CONTENT TYPE.**

SharePoint has a Title column on every custom list (FIGURE 1), and it's used throughout the environment. If you rename the Title to something like "organization," you will have the undesired consequence of changing it

FIGURE 1



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in more places than you had planned.

The problem will show itself very quickly—you'll probably receive phone calls from confused end users

ing special. It will not let you create a column with that name, but it *will* let you change the existing core column.

So you can rename the core Title column on Monday. But, when you realize your mistake on Tuesday, SharePoint won't let you fix the problem by setting the core column's name back to "Title" because "Title" is a reserved word. In other words, SharePoint allows you to enter a catch-22 situation and won't easily let you out.

The solution is to use a third-party tool, such as one you'd find on CodePlex, or to write some C# or VB.NET code and make the correction programmatically. The easiest thing, though, is to save yourself the trouble by never changing the Title column's name.

*If you rename the Title to something like 'organization,' you will have the undesired consequence of changing it in more places than you had planned.*

within the hour. It is difficult to fix and cannot be done out of the box. SharePoint recognizes the word *Title*, along with a number of other names, as be-

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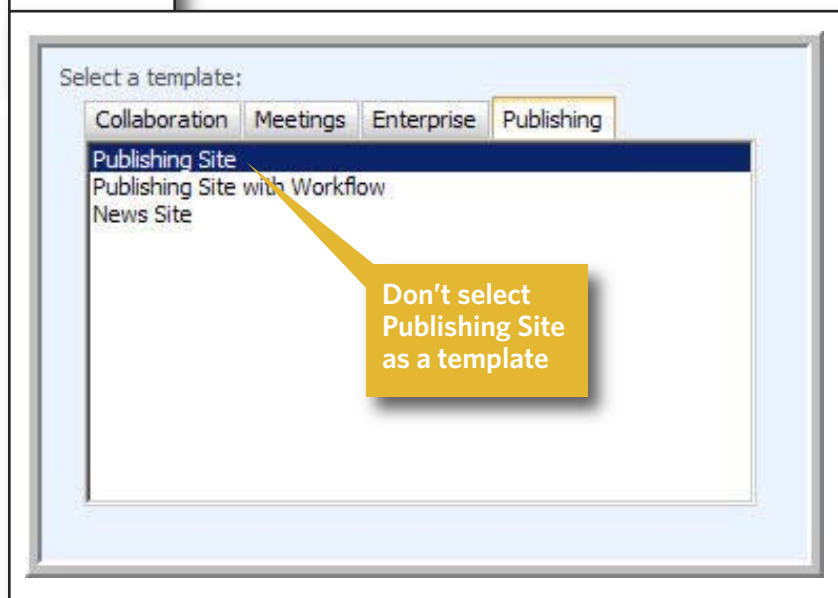
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FIGURE 2



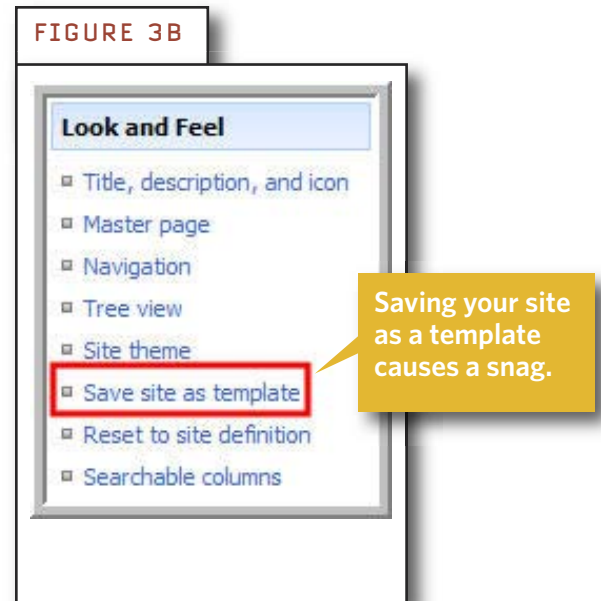
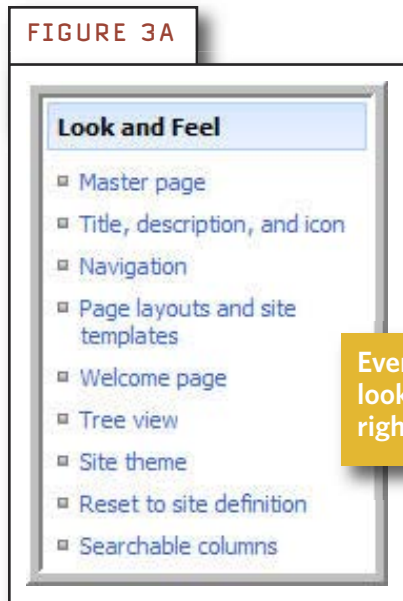
### NUMBER 2: BEWARE OF "PUBLISHING SITE" TEMPLATES.

If you create a site based on a publishing site template, you cannot save that site as a template (FIGURE 2).

More than one SharePoint pro has set out to create the perfect custom template. They do



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everything the right way: They interview the users and work with them over a period of a week or two to design the ideal custom template. But when they create the site to use as a template, they hit a snag.

Here's the problem: Everything looks perfect, but then you go to save your site as a template so you can reuse it, and can't do it.

FIGURE 3A shows the look-and-feel options for a site based on a publishing template, and FIGURE 3B shows a

site based on a collaboration template.

If you've done this to yourself, your best bet is to start over with a collaboration template. Consider using a blank template or possibly a team site template as your starting point. If you want or need publishing features in your custom template, enable them on your site, as shown in FIGURE 4.



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### **NUMBER 3: DON'T DEFINE CONTENT TYPES IN THE WRONG PLACE.**

Content types fit within the site hierarchy of your sites. Consider the following hierarchy:

```
Portal
  SubSite A
    SubSite AA
    SubSite AAA
  SubSite B
    SubSite BB
  SubSite C
    SubSite CC
    SubSite CCC
```

If you define a site content type at "SubSite C," it will be available to SubSite CC and SubSite CCC. But it will not be available to SubSite A, SubSite B or their children. There is no easy way to move a Site Content Type around in the hierarchy. If you make this mistake, your only alternative is to delete the Content Type and re-create it at the right position in the hierarchy.

Deleting a content type can be drastic and—very possibly—impossible as a practical matter. Once content such as documents or Web pages use a Content Type, you cannot delete it. The most important lesson to draw here is that a well-thought-

out information architecture is vital for a healthy SharePoint environment.

### **NUMBER 4: DON'T EXPECT TO REUSE SHARE- POINT DESIGNER WORKFLOWS.**

SharePoint Designer is a friendly wizard that allows properly trained business analysts to create workflows. Companies leverage these workflows to solve a wide variety of business problems. But, a SharePoint Designer workflow has a major technical limitation that escapes the notice of many first-time SharePoint users: It is always tied to a specific list.

Many times, organizations define multi-step workflows that solve business problems common to multiple teams and divisions within a company. Wouldn't it be great if you could design and implement a workflow in one list and then just drag and drop the workflow to another list in the environment? It might be, but you're out of luck.

There are some highly technical methods to get around the reuse problem. But, the time required to create a technical solution is just not worth it.

### **NUMBER 5: WORKFLOW HISTORY IS NOT AN AUDIT TRAIL.**

This is an insidious issue because

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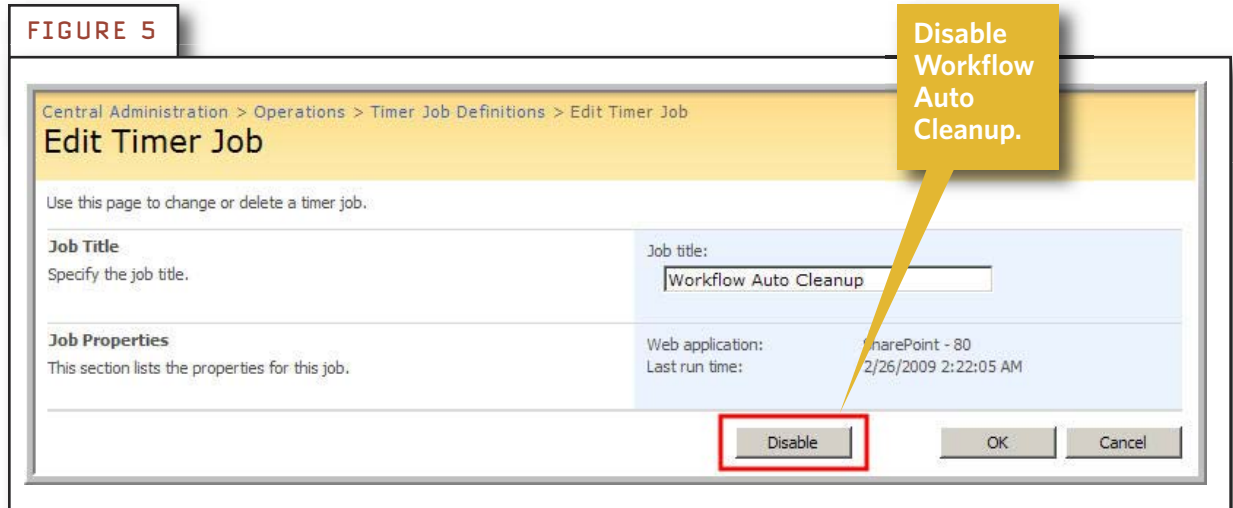
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you would never notice the problem until it's far too late. For example, an auditor is tapping you on the shoulder, asking you to demonstrate when a particular financial document was approved and by whom. You go to the workflow history and it's empty. Why? By default, SharePoint purges workflow history after 60 days.

There are several ways to address this problem: You can disable the job that does the purging (FIGURE 5). You can change the purge interval using the stsadm command line program. Or you can write your own audit mechanism. SharePoint Designer can write critical auditable events to a

custom list.

The best choice is to leverage built-in auditing, possibly with a third-party tool that specializes in audit reporting in a SharePoint environment.

So there you have it. Now you know what not to do.

Some of these SharePoint pitfalls are relatively easy to overcome, such as picking a publishing template as a base for your own custom templates. Others are not.

And for those, you may have to start over. Use these tips to avoid these traps, and you'll have a more stable and productive experience with SharePoint. ■



### 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 such areas 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>.

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## WHAT HAPPENS WHEN SHAREPOINT GOES DOWN?

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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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# Planning for Scalability in SharePoint Governance

*Make sure today's SharePoint governance plan will cover tomorrow's performance needs as usage grows.* BY BRIEN M. POSEY

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**PERFORMANCE AND** scalability are two critical, but often overlooked, considerations in a SharePoint governance plan. Traditional file servers typically don't get bogged down as the volume of data stored on the server increases, but the same cannot always be said for SharePoint. That's why it is so important to plan for scalability from the very beginning.

When considering SharePoint governance, remember that an organization is not static. The volume of enterprise content stored in SharePoint's lists and document libraries is almost always going to grow exponentially over time.

The number of SharePoint sites created by individual departments in your organization is likely to grow steadily as well, so make sure that the SharePoint governance plan you create today will still be viable tomorrow as the scale of your organization's SharePoint deployment increases.

## SETTING QUOTAS FOR THE LONG TERM

One way to plan for SharePoint scalability is to determine whether the quota limitations you have set in your governance plan are going to remain practical over the long term.

Because the volume of data that's stored in SharePoint's lists and libraries increases exponentially over time, users will eventually reach the quotas you have established. When this happens, users typically end up having to purge old data to make room for new data.

How can you know for sure whether the quota limits you impose are going to force users to delete documents that they need for their jobs?

The answer is that there is no way to be sure the quota limits that work fine today are always going to be appropriate. So design your gover-

nance plan in a way that allows you to adjust limitations as business needs evolve.

There's not a good rule of thumb for SharePoint capacity planning that works in every situation. History has shown that as new versions of the applications used to produce various documents are released, the document format also tends to evolve and become more bloated.

You can start by making a basic assumption that your volume of data is going to double every two years. The reality might be that the data may increase much more rapidly if your company is growing.

Or it may increase a lot more slowly if the company decreases in size or if it doesn't adopt new applications or produce many documents.

If you are serious about planning for SharePoint governance, then you should be vigilant about your databases.

It's easy to forget that the documents stored in SharePoint lists and libraries actually reside in back-end SQL Server databases. As the volume of data in the lists and libraries increases, database performance typically decreases.

So plan ahead and budget for additional or higher performance SQL Servers. That way, you can keep SharePoint performing well, even as the volume of data stored in the various document libraries increases.

## SETTING CRITERIA FOR MANDATED UPGRADES

At what point should you expand? Make sure your SharePoint governance plan covers that too. Come up with a set of criteria that defines when it is necessary to add resources to an existing SharePoint server or

*Come up with a set of criteria that defines when it is necessary to add resources to an existing SharePoint server or when to purchase a new server.*

when to purchase a new server.

Technically, this is capacity planning, not governance. But making capacity planning part of a governance document gives SharePoint administrators the ability to perform any necessary upgrades, because the "rules" in the governance document say that they have to.

Getting top managers to sign off on upgrades is always easier when it isn't going to cost them anything in the near future. So if you define the conditions that warrant an upgrade or a new server in the governance document—and can get management to sign off on that document—then it

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should be easier to get new storage capacity when you need it.

As you draft this portion of the document, keep it open-ended enough that it will remain relevant as technology changes. For example, you shouldn't say "additional storage needs to be purchased when the available storage falls below 50 GB." A statement like that might be fine for today, but five years down the road it could be that having 50 GB of space remaining would represent a critical condition.

Consider wording in your governance document that uses percentages instead of defined amounts to give you more flexibility. For example, you might say that additional storage is required when the available storage space falls below 10% of the total

capacity. Each SharePoint deployment will be different, so figure out which numbers are appropriate for your own organization.

*Consider wording in your governance document that uses percentages instead of defined amounts to give you more flexibility.*

So what do you do if you already have a governance document in place, and it doesn't make any provisions for planned scalability or other types of capacity planning? One

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## Factor in Compliance in Your Scalability Equation

**IF YOUR COMPANY** is subject to compliance regulations that mandate the long-term storage of certain documents, you need to consider the impact on your back-end SQL Servers. Your best bet might be to create a SQL Server dedicated to the long-term storage of seldom accessed documents. SharePoint has several ways for figuring out how recently a document was used. By offloading those documents to a different database on another server, you can help keep your primary SQL Server databases performing well.

Many organizations also use a document-archiving mechanism to ensure that even if a user does delete a document to make room for more documents, there is always a way to get that document back should the need arise.

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option is to scrap the document and start over, but you probably won't have to do anything that drastic.

The first thing to do is explain to management that although the governance document is fine for today, it doesn't address the issues that the IT department will face in the future as the organization grows. Once you have received management's blessing for updating the document, then it may not be a bad idea to survey the department heads on how they plan on using SharePoint in the future.

Although hearing from department heads might be valuable, it may also prove to be a waste of time. After doing this, I've found that managers have a tendency to say one thing and do another. Even so, I have had at least two situations in which asking some basic questions up front kept me from making some major mistakes in my capacity planning efforts.

Assuming that your governance document is in fairly good shape, you will probably be able to easily amend the document by adding your new capacity planning and scalability poli-

cies to it. At least be sure to review the rest of the document to see if you need to make any other changes.

You don't want to have to repeat

*Assuming that your governance document is in fairly good shape, you will probably be able to easily amend the document by adding your new capacity planning and scalability policies to it.*

this process a year or two down the road. Still, you should include a provision in the document that gives your department the right to revise the capacity planning and scalability section in the future, should the need arise. That way, you won't have to seek permission from management every time you must revise your scalability plans. ■

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





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