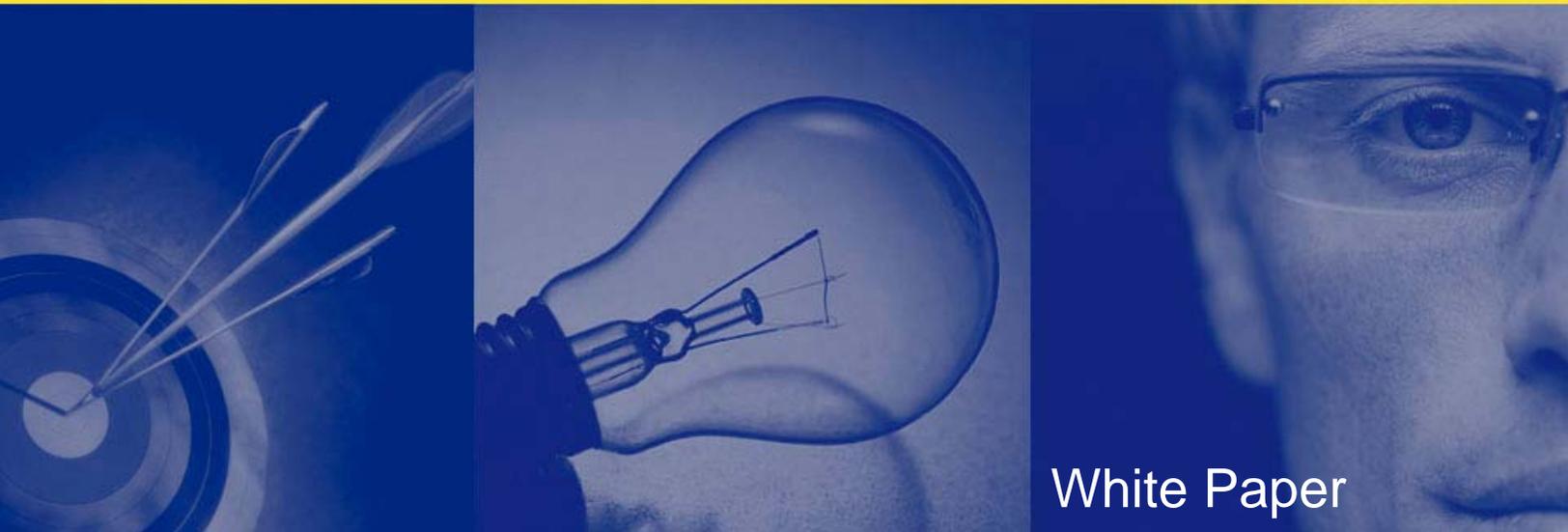


Four Essentials for Building Your SharePoint Strategy

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White Paper

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INTRODUCTION

Employee collaboration, and the technology to make it possible, is rapidly expanding as organizations strive to be more efficient, more competitive and more cost-effective. Recent sales of the best-known collaboration platform, Microsoft® Office SharePoint® Server (MOSS), underscore this growing desire to streamline collaboration to improve team productivity, and the willingness to invest in the most advanced technology to meet this goal. According to Microsoft, its MOSS business generated more than \$800 million in fiscal year 2007--a 35 percent increase over 2006--due to strong demand for its enterprise-ready, integrated server capabilities. Clearly SharePoint is emerging as a strategic platform for organizations worldwide. But for these organizations to be effective, they must create a comprehensive plan to support and manage their evolving SharePoint infrastructure.

For many organizations, the challenges of managing their SharePoint environment soon become apparent after deployment. SharePoint is often deployed at the departmental level, without the IT team's knowledge. Using SharePoint's intuitive graphical user interface, employees can create their own SharePoint sites and have them up and working in minutes--without requiring any IT support. This system works well until one of these SharePoint deployments runs out of space, or an item is accidentally deleted and needs to be recovered. Users contact IT, but IT has no knowledge of the deployment or what information is on the site. Forced into reactive mode, IT must do real-time discovery and work to resolve these issues. IT then is expected to manage all these local deployments without having a strategy or budget in place to do so.

The IT teams that support casual SharePoint users face significant challenges because they rarely know the true scope of their SharePoint environment. Without a proper plan – one that incorporates the discovery, management and development of SharePoint into the broader IT infrastructure – SharePoint can become a serious vulnerability. This vulnerability is further exposed because SharePoint is often outside the core IT infrastructure, meaning issues such as database structure, Active Directory, or Windows security models and compliance have not been considered. In today's regulatory environment, it's critical for IT and business owners to understand what information resides in their SharePoint environment and who has access to it.

If your organization is facing this situation, you can take effective measures to get your SharePoint environment under control. The key is to construct a solid plan to manage your current environment and plan for future growth.

BUILDING A SOLID SHAREPOINT MANAGEMENT STRATEGY

SharePoint can touch many facets of your organization's infrastructure, including Windows, IIS, SQL Server, Active Directory and Exchange. To be successful and utilize SharePoint as more than just a fancy file-sharing tool, you need to recognize the importance of SharePoint in the business and build a strategic plan. It is essential to bring all stakeholders together to discuss and participate in this plan.

An effective strategy for proactively managing SharePoint is about more than just backup, recovery, administration, or migration. Building your collaboration strategy with SharePoint is about scrutinizing the entire platform, including SQL Server, and reducing your vulnerability.

1. Create a Vision for SharePoint

SharePoint is usually adopted at the grassroots level, cropping up from end users, rather than being pushed down from IT. As this happens, and as IT realizes how critical SharePoint has become, you need to carefully consider a few questions that will shape how SharePoint is deployed and managed enterprise-wide. The person or team creating this vision should be able to answer the following:

- Do we have an enterprise-wide collaboration strategy?
- Is SharePoint part of this strategy? Is it the strategy?
- Do we want to extend the use of SharePoint from a simple team collaboration tool to include internal applications, external-facing applications and business-to-business applications with our suppliers?
- Do we want to convert existing applications to SharePoint-based applications, or use SharePoint for new applications only?
- Do we want to integrate other collaborative technologies with SharePoint?
- How do our plans for SharePoint fit into the broader information architecture for the entire enterprise?
- How will we manage the growth of SharePoint?
- How do we ensure that we have the proper management tools and framework in place to handle some of the challenges of intensive collaboration within SharePoint?

One thing you can do to understand SharePoint and its full potential is to start thinking of SharePoint as a platform – not an application – built on top

of other platforms (although applications do reside on SharePoint). Many people think of SharePoint as an application because they are used to the out-of-the-box functions it offers, such as team collaboration and personal sites. This is a very limited way to think of SharePoint, since this platform also provides a lot of flexibility in creating custom applications. For example, a customer relationship management (CRM) system built in SharePoint is an application built on the SharePoint platform. Whether you use the native capabilities and out-of-the box templates, or use SharePoint as the strategic platform for all collaborative applications for the enterprise, the next step is to determine what toolset is required to make it fully useful enterprise-wide.

When creating the vision for how SharePoint will be used in the enterprise, remember that its templates and Web parts do not fully leverage the capabilities provided by the SharePoint Object Model. The beauty of SharePoint is that it's effectively an open-ended platform for any level of customization. The simplest deployment scenarios use native functionality for things such as simple team collaboration. Highly complex deployments can include complete Web sites, such as www.hawaiianair.com. This fully functional site was built completely on MOSS 2007.

Other examples of SharePoint usage include systems for CRM, employee expense claims, help desk, complex project management, business intelligence, human resources management, global documentation, and applications that mix internal and external data, such as executive dashboards for key business performance indicators, or sales order processing systems.

SharePoint platform services make it much less expensive to develop an application than it would be to create one from scratch. However, a shortage of SharePoint developers is driving up costs and stifling the expansion of SharePoint in some organizations. Fortunately, third-party development tools can help organizations build complex applications in SharePoint. These tools can also help customize existing templates to take full advantage of the platform, while greatly reducing development and maintenance costs.

2. Establish the Importance of SharePoint to the Business

We've established that SharePoint often grows organically, starting with end users. IT is then forced to react as SharePoint propagates throughout the organization. Users rely more and more on the content stored in SharePoint, and it becomes critical to daily operations. A proactive SharePoint plan begins with knowing how much SharePoint impacts (or can potentially impact) these operations.

Getting a Clear Picture

First, you need to find out where SharePoint exists in your organization -- on servers, in site collections, and as team or individual sites. Until recently, it

was nearly impossible for organizations to get a true picture of SharePoint deployment with multiple versions such as 2003 or 2007, Windows SharePoint Services (WSS), SharePoint Portal Server (SPS) and MOSS. However, with the help of third-party tools that automatically scan and report on all SharePoint instances, IT can get a very accurate picture of the entire SharePoint environment in a single view.

When Quest Software developed its automated SharePoint discovery tool in early 2006, the company learned for itself how pervasive SharePoint actually was versus what the IT department believed. The IT department initially estimated that about 30 to 40 SharePoint sites existed throughout the company. After the tool completed its scan, Quest discovered it had more than 1,000 flourishing sites. Imagine what your organization might find when it does its discovery.

Analyzing SharePoint Use for Planning Growth and Improving Efficiency

After discovery, the next step is to learn how SharePoint is used across the organization. This includes analyzing the entire SharePoint environment to gain insight on user activity trends, server health and permissions. With such information collected and analyzed regularly, you can safely predict and plan for future growth without limiting the collaboration that SharePoint is providing.

This information might also reveal areas that could use improvement. For example, you might find that you could consolidate multiple SharePoint servers or locations to save money and increase efficiency. Or maybe you could upgrade 2003 versions to 2007 and consolidate at the same time.

Consolidating Collaboration Applications

With the SharePoint environment examined, understood and controlled, you can determine how best to structure your collaboration initiatives. There are several things to consider – while keeping your SharePoint vision in mind – when planning the right structure for your organization:

- Should we deploy a centralized or decentralized set of SharePoint Web farms?
- Should we migrate all shared data from public folders, file shares, Lotus Notes and other locations to SharePoint?
- Should we integrate that shared data instead of moving it? (This might prove effective when dealing with legacy systems, CRM packages or accounting software.)

Consolidating or integrating information into one central location, accessible via a single interface, can be a very powerful and effective part of your SharePoint strategy. In addition, it will drive much of your planning.

3. Determine Ownership and Accountability for SharePoint

Determining who should own SharePoint seems like a simple task, but many organizations and IT departments have not addressed it yet. Many times, the responsibility is given to the IT department as a whole. Sometimes, however, that specific responsibility falls into the lap of the least busy member of the IT team, usually on the day a VIP (like the company COO) needs a SharePoint item recovered. This is not a scalable management plan, and could potentially cost organizations significant time and productivity.

Defining SharePoint ownership can be very complex, but it's a critical step toward implementing a practical and effective SharePoint strategy. SharePoint ownership is not a simple matter of one person owning this platform. Rather, your SharePoint owner or team must work closely with various members of the IT organization and business owners to meet all goals and maintain security.

Below is a list of roles that could own all or parts of your SharePoint strategy, and should be considered in any plan.

IT Administrator

Typically the default owner of SharePoint, the general IT administrator is often forced to organically develop processes and procedures. Although this model is fine for the short term, in most organizations SharePoint needs a focus similar to other IT infrastructures, such as Active Directory or Exchange.

SharePoint Administrator

As platform usage increases and becomes strategic to the business, your organization will need a dedicated resource or team to provide full support. This person or team should be responsible for proactively managing parts of the infrastructure that are affected by SharePoint, such as hardware and software, network bandwidth, storage space, and lost items or sites. Support requests will come from the organization regarding site locations, permissions, lost information and much more. This team will be responsible for those requests as well as planning for the platform's continued expansion. The ability to automate and delegate these tasks will be critical to the team's success.

SQL Server Administrator (DBAs)

Since SharePoint is built on SQL Server, it's important to include SQL Server administration when developing your plan. SharePoint's performance can be greatly affected by the SQL Server database and should be managed appropriately.

If the SharePoint administrator is not responsible for SQL Server (in most cases they are not), they need to closely align with the SQL Server administrator or team. The SQL Server administrator needs to understand how SharePoint will affect SQL Server in the organization. For example, to conduct proper capacity planning, the SQL Server administrator needs to know the amount of projected SharePoint growth and the type of information to be stored in the content database.

Web/IIS/.NET Developer

Web developers customize applications on SharePoint to meet the needs of business owners. A Web development team can then be an effective ally when designing a strategic SharePoint platform. However, they are not typically the owners of the strategy.

Exchange Administrators

As organizations move to MOSS, Exchange Server is being tightly integrated with SharePoint via calendars and public folder migration. Exchange administrators should be working with the SharePoint administrator to determine where the Exchange data and processes best serve the employees and how they can work more efficiently. Exchange administrators probably won't own SharePoint responsibilities, but they will be involved in the overall plan and strategy.

Business Owners

Some organizations began using SharePoint simply because business owners needed a solid collaboration tool for team coordination, and SharePoint was the natural fit. However, business owners rarely considered management of these SharePoint environments, which put the IT environment at risk. For example, the lack of consistent backups or a recovery plan makes this crucial data vulnerable to inadvertent deletions or server outages. But business owners can potentially play an important role in a SharePoint management strategy by accepting some management and maintenance tasks, such as specific site permission activities and general site layout and structure.

Collaboration Manager

In many organizations, multiple technologies are tied into collaboration, such as large, complex document management systems, offline collaboration, instant messaging and some aspects of e-mail. In many cases, an overarching collaboration manager with a unified vision of collaboration would be a good candidate to own the SharePoint strategy.

SharePoint Application Architects

The SharePoint application architect understands the spectrum of potential SharePoint use. The architect helps the organization determine which applications get built where and their requirements for administration, data migration, development and maintenance. This person can provide valuable insight into platform growth, which can be included in the SharePoint strategy.

Security and Compliance Managers

Because SharePoint can store all sorts of corporate information and has its own set of access controls, this presents the potential for security and compliance issues. Security and compliance managers can provide suggestions for how to ensure that information stored in SharePoint meets all internal guidelines and external regulations for compliance.

Bringing together all of these stakeholders can be incredibly challenging. By starting small and understanding which groups are the most active within your organization, you can gradually begin to bring SharePoint under control.

Although no one model for SharePoint accountability works for every organization, having a dedicated individual or team focused on employee efficiency is a critical part of any solid SharePoint strategy.

4. Determine How the Organization is Going to Manage and Support SharePoint

SharePoint deployments directly impact resources that IT oversees, such as network bandwidth and shared storage. This often leads to increased demands for support. In the worst cases, organizations lose substantial amounts of information because they don't have a comprehensive backup strategy. In other cases, SharePoint applications create bottlenecks on network resources. This not only degrades the system's overall performance, but it also wastes valuable time as network administrators try to identify the issue. Building a plan that includes efficient SharePoint management and infrastructure support is therefore the fourth essential step in creating your strategy.

Each of the following areas should be kept in mind when building your strategy:



- **Administration** - What is your plan for SharePoint discovery, reporting and usage analysis?
- **Recovery and Auditing** - What is your plan for recovery lost items? How can your organization best remain in compliance and manage SharePoint in the core IT infrastructure?
- **Migration** - Will SharePoint become the main repository for enterprise-wide data, including information from file shares, public folders, Lotus Notes and other sources?
- **Application Development** – How will the organization use SharePoint? What applications might be built on SharePoint?
- **SQL Server Management** – Is the organization properly managing SQL Server and planning for capacity and other issues that affect the SQL Server back end?

Administration

Daily administration of SharePoint includes understanding what sites exist enterprise-wide and how they will be managed. Usage analysis can help

proactive SharePoint teams anticipate problems and keep SharePoint running smoothly for end users.

Backup and Recovery

Backup and recovery of SharePoint data is an absolute must in any SharePoint environment. The recycle bin and other native restoration methods help provide some backup and recovery capabilities. However, a proactive comprehensive backup and restoration process that is simple and effective needs to be implemented to protect the data within SharePoint. The ability to schedule regular backups, and possibly compress the data to keep the backup size down, is a good first step. Before you restore a file or a site, carefully consider what backup to use, what data needs to be restored and how you plan to restore it.

Auditing, Security and Compliance

Collaboration, by its very nature, is an “open” process. Data owners begin using SharePoint to share information, without thinking about the potential sensitivity of the information or who has access to it. This raises a number of security and compliance issues, and is another critical reason for creating a strategic plan for SharePoint that includes input from a security or compliance manager.

It’s important to note that IT teams responsible for SharePoint assume that SharePoint security is being handled under the Windows or Active Directory platform security model. This, however, is frequently not the case. Since SharePoint is relatively new in most IT infrastructures, specific plans for mitigating SharePoint security and compliance risks need to be incorporated into the corporate compliance strategy.

Migration and Application Development: Standardize on SharePoint

Standardization can be much more than simply consolidating SharePoint servers or Web farms. Sometimes data needs to be migrated into SharePoint or integrated with SharePoint from external, business-critical systems. A standardization goal should include the migration of data or integration of data into SharePoint, making SharePoint the one universal console for end users.

Converging on SharePoint can seem like an onerous task. After all, migrating existing applications to SharePoint (or anywhere for that matter) can be very disruptive to the business if not managed properly. One alternative is to defer or spread the migration exercise over time by integrating SharePoint as the front end to the various back-end applications in the organization.

Once the front end is standardized on SharePoint, users have a single consistent experience, and IT can begin to move part or all of the back-end application, if necessary. Best of all, these decisions about the back end can

be transparent to the user community, making this a great strategy to mitigate risk, while consolidating the user experience on a single platform. Another benefit of consolidating onto one platform is that it's easier to staff and support, eliminating many resource issues.

SQL Server Management

Managing the back-end of your SharePoint environment is critical for SharePoint to function optimally across the enterprise. Organizations should take steps to maximize the performance of SQL Server, while simplifying tasks and providing visibility into, and control over, SQL Server environments.

Backup

Everyone knows how important backups are, yet it's remarkably common to find IT shops that do not regularly back up their production databases. Almost as bad as not performing backups at all is performing backups that aren't tested and verified to work. It's a simple and important step for your SharePoint strategy to make sure that SQL Server backups are always good and always available.

Capacity

SharePoint feeds end users' very heavy appetite for data. Without taking into account capacity management on the SQL Server back end, a SharePoint environment can quickly get out of hand due to massive growth in documents and list objects, poor permission models and unnecessary sites. Capacity planning and analysis will allow you to usage growth trends, so you can more effectively plan for growth.

Manage Support Calls

Supporting an unmanaged SharePoint infrastructure can prove labor intensive for the IT team, particularly when the support calls are for SharePoint sites they never knew existed. And as SharePoint usage increases, you can be assured that support calls will increase as well. An over-extended IT department will typically receive calls to retrieve deleted SharePoint information, set up permissions and build custom features into sites. With a little data and knowledge about the environment, IT can plan accordingly and better support its end users.

Network Bandwidth and Storage Space

Because of its version history record, SharePoint can consume on average two to three times the amount of storage space as a file share drive. Many IT departments have been taken by surprise when they find that network bandwidth is entirely consumed due to the proliferation of SharePoint sites.



By understanding the requirements and resources needed to support SharePoint, you will be able to intelligently manage its growth.

CONCLUSION

SharePoint-based collaboration is playing an increasingly strategic role in the way today's businesses operate. It is no longer acceptable to deal with SharePoint issues on an ad-hoc basis, and assign issues to whomever is free at the time. A clear SharePoint strategy, along with processes and tools to help you manage to that strategy, are required to effectively administer and secure this platform. When these items are in place, IT can be more productive in executing the strategy and ensure the vital libraries of business information that are stored in SharePoint are protected.

IT and business owners that take time to build a strategy for SharePoint, even well after deployment, will be better equipped to manage the platform for the long term. To create an effective strategy, your organization should follow four steps:

Step 1: Create a vision for SharePoint in your organization

Understand how SharePoint is actually used today across the entire organization.

Step 2: Establish SharePoint's importance in the organization

Understand why SharePoint is critical to your organization. This will help you better assign ownership and better plan to manage the platform and support your stakeholders.

Step 3: Assign clear ownership of SharePoint responsibilities

Various stakeholders will be impacted by SharePoint in your organization. Understand which groups are the most active within your organization and begin a gradual process of bringing SharePoint under control.

Step 4: Have a clear plan for managing and supporting SharePoint that will be effective enterprise-wide

Understand the impact SharePoint will have on the organization's infrastructure and resources. With this knowledge, you will be able to identify critical areas that require additional resources, as well as tools that will provide the most return for your organization.

By carefully considering these areas, you will be able to build a strong, strategic plan for SharePoint in your environment and realize the full potential of this collaboration platform.

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David Waugh is responsible for Quest's solutions for SharePoint and collaboration. Waugh joined Quest with the company's acquisition of FastLane Technologies in June of 2000, where he had been vice president of marketing since 1998. Waugh has an extensive technical and marketing background, and formerly managed product marketing for the Business Intelligence Division of Hummingbird Communications Ltd. Prior to that, he held various executive and management positions in marketing, product management and product development.

Waugh earned a bachelor of computer science degree in 1985 from the University of Western Ontario. He also attended graduate school, studying and teaching computer science at James Cook University. As a lecturer at James Cook University, he developed and taught computer sciences courses and helped form the computer science department.

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