

SHAREPOINT

PRACTICAL IT STRATEGIES FOR ENTERPRISE COLLABORATION /// AUGUST 2010

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SO YOU'VE BEEN a SharePoint administrator for a while now, but can you navigate all its functions? Sure, you can perform basic tasks and even answer user questions, but do you have what it takes to be a SharePoint master? It doesn't take much to get to the next level—just some knowledge about SharePoint's newest features and some skills to apply them in ways that add value to your organization.

For example, Sharepoint 2010 offers some reporting and monitoring tools that keep tabs on workflow processes. Using these workflow functions, you can get detailed information about what steps were taken during the workflow, who was involved and even what errors occurred during processing. This can be a valuable resource for power users in your organization who want to follow what's happening with their documents. Learn how to flex your SharePoint muscles in "[Mastering Workflow Reports in SharePoint 2010](#)" by Shawn Shell. A little know-how goes a long way.

Once you get the hang of workflows, how about bulking up your expertise in InfoPath? Although it's known as a versatile electronics form tool, InfoPath is notoriously underused. Paul Galvin offers tips on how to do it right in "[Make the Most of InfoPath Forms](#)."

The good news is that users in your organization are gung-ho for SharePoint. The bad news is that the number of SharePoint sites is becoming unmanageable. Take charge with Brien M. Posey's "[How to Stop SharePoint Sprawl](#)."

What's your favorite SharePoint feature? Share it with us at ccasatelli@techtarget.com. ■



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Mastering Workflow Reports in SharePoint 2010

Editor's Note

Take advantage of SharePoint's reporting and monitoring capabilities to keep tabs on workflow processes. **BY SHAWN SHELL**

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WORKFLOW IN BOTH SharePoint 2007 and 2010 can be a powerful feature to help automate business processes and enforce best practices. But, without proper oversight, workflows can get bogged down by end users, halted because of errors or simply ignored by workflow participants. To avoid these situations, administrators can rely on workflow reports and built-in monitoring within SharePoint.

To get started, you should know something about [workflows](#) in SharePoint. Out of the box, workflows can be tightly coupled with content types. Any time content of a particular type is contributed to a project, the workflow could be activated, regardless of where the content is contributed.

Alternatively, workflows can be activated by contributing content to a specific list or library. Finally, if configured to do so, end users—or content contributors—can activate a work-

flow manually. Because of the variety of methods used to initiate workflow processes, reporting on the status of those workflows can help administrators figure out what's going on.

Any time content of a particular type is contributed to a project, the workflow could be activated, regardless of where the content is contributed.

The first indication that a workflow has run or could run on content will be in the standard document library view, shown in **FIGURE 1** (see page 4). Along with the columns (metadata) in that library for any given view,

FIGURE 1

Workflow status in a document library

FAQ Wiki	Search	All Sites	
Type	Name	Modified	Modified By
	Contoso's Most Resilient Gear	5/6/2010 3:15 PM	Erika Cheley
	Gears Sales History	5/6/2010 3:15 PM	Erika Cheley
	Great White Gears Production Specs	5/6/2010 3:15 PM	Erika Cheley
	Longest-Lasting Gear	5/6/2010 3:15 PM	Erika Cheley
	New Document for Sprockets	5/6/2010 3:15 PM	Erika Cheley
	Project budget workbook	5/6/2010 3:15 PM	Erika Cheley

Approval - SharePoint 2010

Approved

Add document

there is a column for every workflow.

The column shows the status of the workflow running against the specific document. In this example, the Gears Sales History Excel workbook has had an approval workflow started and completed.

The last step in that process is an approval step, and the status is shown in the column corresponding

to the workflow. If you click on the status, you get additional information related to that specific workflow instance, shown in **FIGURE 2**.

The additional information on the workflow represents the outcome the last time that workflow ran on that document. The basic data tells when this specific instance of the workflow started and when it was last run.

FIGURE 2

Workflow details on the Gears document

Workflow Information	
Initiator: System Account	Document: Gears Sales History
Started: 6/27/2010 11:29 AM	Status: Approved
Last run: 6/27/2010 11:36 AM	

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It also shows you the status of the document. In this example, the last step was an approval, and the document was indeed approved. If additional information is required, you can look at the workflow history shown in **FIGURE 3**, which is a complete record of this instance of the workflow. It provides detailed information showing what steps were taken during the

workflow, who was involved and—in this case—what errors occurred during processing. Although it's unlikely that an administrator with farm-level visibility would access workflow history in this way, it does show what's available and what's tracked by SharePoint.

If all you're interested in is one document, this method works fine.

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FIGURE 3

Approval workflow history for the Gears document

Workflow History

▣ View workflow reports

The following events have occurred in this workflow.

<input type="checkbox"/>	Date Occurred	Event Type	<input type="checkbox"/> User ID	Description	Outcome
	6/27/2010 11:30 AM	Error	System Account	The e-mail message cannot be sent. Make sure the e-mail has a valid recipient.	
	6/27/2010 11:30 AM	Workflow Initiated	System Account	Approval was started. Participants: Sean Purcell; Sean Chai; Dave Natsuhara	
	6/27/2010 11:30 AM	Task Created	System Account	Task created for Sean Purcell. Due by: 6/29/2010 11:30:19 AM	
	6/27/2010 11:30 AM	Task Created	System Account	Task created for Sean Chai. Due by: 6/29/2010 11:30:20 AM	
	6/27/2010 11:30 AM	Error	System Account	The e-mail message cannot be sent. Make sure the outgoing e-mail settings for the server are configured correctly.	
	6/27/2010 11:31 AM	Error	System Account	The e-mail message cannot be sent. Make sure the outgoing e-mail settings for the server are configured correctly.	
	6/27/2010 11:31 AM	Task Completed	Sean Purcell	Task assigned to Sean Purcell was approved by System Account. Comments:	Approved by System Account
<input type="checkbox"/>	6/27/2010 11:36 AM	Task Completed	Sean Chai	Task assigned to Sean Chai was approved by Sean Chai. Comments:	Approved by Sean Chai
	6/27/2010 11:36 AM	Task Created	System Account	Task created for Dave Natsuhara. Due by: 6/29/2010 11:36:17 AM	
	6/27/2010 11:36 AM	Error	System Account	The e-mail message cannot be sent. Make sure the outgoing e-mail settings for the server are configured correctly.	
	6/27/2010 11:36 AM	Error	System Account	The e-mail message cannot be sent. Make sure the e-mail has a valid recipient.	
	6/27/2010 11:36 AM	Task Completed	Dave Natsuhara	Task assigned to Dave Natsuhara was approved by Dave Natsuhara. Comments:	Approved by Dave Natsuhara
	6/27/2010 11:36 AM	Workflow Completed	System Account	Approval was completed.	Approval on Gears Sales History has successfully completed. All participants have completed their tasks.

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In fact, it could be an excellent resource for power users who want to understand what's happening with their documents. But for the site or farm administrators of the world, this method isn't really that useful because the scope is too narrow.

Fortunately, there are facilities within SharePoint that can shed light on the broader view of workflows within a site collection. At a basic level, site administrators can view which workflows are associated with the site collection. In the Site Settings menu for a site collection, there's a Workflows link in the Site Administration category. In **FIGURE 4**, you can see that this link takes you to the list of workflows currently associated with the site.

Although the interface has a somewhat limited use, it does give you an overview of every workflow and tells you whether it's associated with con-

At a basic level, site administrators can view which workflows are associated with the site collection.

tent and whether or not it's active. In this way, administrators can get a broad overview quickly. Unfortunately, none of the information on this interface is clickable, so drilling in more deeply is not possible.

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FIGURE 4

<i>Workflows associated with the current site</i>	
FAQ Wiki Search	
Workflow	Status
Disposition Approval	Active
Schedule Web Analytics Alerts	Active
Schedule Web Analytics Reports	Active
Three-state	Active
Translation Management	Active
Collect Signatures - SharePoint 2010	Active

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When you need additional detail, you can drill down into workflow reports, shown at the list management level, through the Workflow Settings option located on the far right of the ribbon. Workflow settings tell you which workflows are associated with specific content within the list. The last option on that interface is View Workflow Reports, which gives you the ability to report on the specific workflows associated within the list. The menu will display all of the currently associated workflows,

giving you an option to report on activity and cancellations/errors.

If you select an individual report, you'll be walked through a report creation wizard (see **FIGURE 5**). The wizard immediately prompts you to specify the library where the report will be stored when completed.

In all cases, SharePoint dynamically creates an Excel workbook with both a pivot table report layout and the raw data. The pivot table is moderately useful for providing summary-level information but not much beyond

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FIGURE 5

Detail workflow reports

Approval - SharePoint 2010



Activity Duration Report

Use this report to see how long it is taking for each activity within this workflow to complete, as well as how long it takes each instance to complete.



Cancellation & Error Report

Use this report to see which workflows are being canceled or encounter errors before completion.

Document Disposition Approval



Activity Duration Report

Use this report to see how long it is taking for each activity within this workflow to complete, as well as how long it takes each instance to complete.



Cancellation & Error Report

Use this report to see which workflows are being canceled or encounter errors before completion.

Document: Collect Feedback on Document



Activity Duration Report

Use this report to see how long it is taking for each activity within this workflow to complete, as well as how long it takes each instance to complete.



Cancellation & Error Report

Use this report to see which workflows are being canceled or encounter errors before completion.

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that. But with the supplied raw data, you have the opportunity to craft your own reports and combine that data with data from other reports to create a composite picture of your workflow activity.

Like many other facets of SharePoint 2010, Microsoft tried hard to work in aspects of the Office products. In the context of workflow, the primary tool is Visio. If you've been paying attention to the new features, you know that Visio is now a first-class workflow creation tool, cooperatively with SharePoint Designer.

What you may not know is that the Web version of Visio, part of the Office Web applications, provides you with visualization capabilities.

As **FIGURE 6** (see page 9) demonstrates, you also have the opportunity to "see" the workflow steps, those

If you've been paying attention to the new features, you know that Visio is now a first-class workflow creation tool, cooperatively with SharePoint Designer.

involved and basic iconography that can help give you insight on the process.

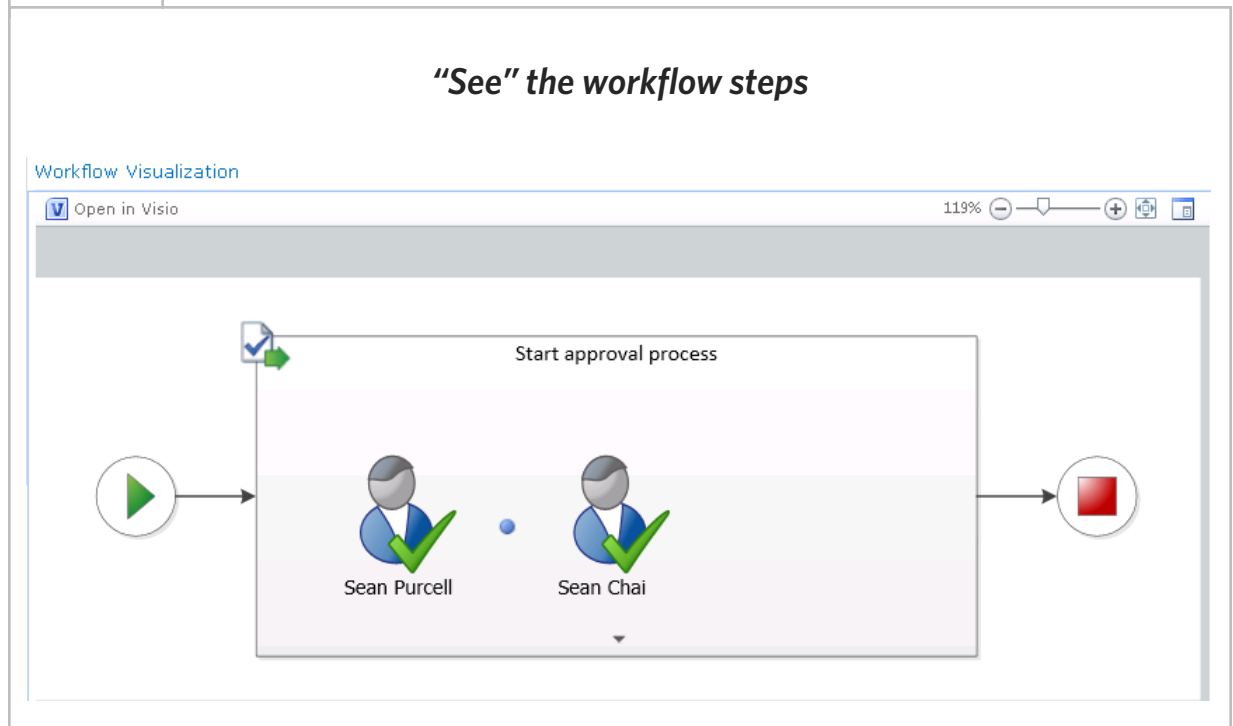
Workflow Capabilities in SharePoint 2007

MANY ORGANIZATIONS ARE still running SharePoint 2007. Although SharePoint 2010 has many advantages, the reality is that chasing the latest version just because it's available isn't always the right decision.

Luckily, many of the workflow capabilities also apply to SharePoint 2007—specifically, workflow associates, reports on specific workflows and visibility into workflow history. What you don't get are some of the nice visualizations and report generation capabilities because of missing components like the Office Web applications.

Furthermore, the reporting in SharePoint 2010 does tend to provide somewhat better detail than its 2007 counterpart. But firms like Skelta and K2 provide add-ons to SharePoint to enhance both management and construction of workflows, and they all provide 2010 versions as well. ■

FIGURE 6



In the end, workflow can provide a great deal of value in most organizations. The challenge, historically, was getting enough insight into what's actually going on under the covers. Through SharePoint 2010, Microsoft has given administrators some of the

reporting and monitoring capabilities you need to keep tabs on processes. All of this combines to give you greater visibility and—more important—an ability to manage the increasingly complex world of 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, employees and partner portals as well as enterprise content management. He has spent more than 19 years in IT, with the last 10 focused on content technologies. Shell is a co-author of *Microsoft Content Management Server 2002: A Complete Guide*, published by Addison-Wesley, and he is the lead analyst/author on the CMSWatch SharePoint Report 2009.

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MICROSOFT INFOPATH 2010 helps organizations streamline business processes and design sophisticated electronic forms. Although InfoPath can be a pretty handy feature, it's often underused. Even when enterprises do take advantage of its functions, InfoPath isn't always used as well as it could be.

It's easy to slap a form together quickly, but a little extra knowledge can go a long way to turn InfoPath into a valuable business tool.

It's easy to slap a form together quickly, but a little extra knowledge can go a long way to turn InfoPath into a valuable business tool. Some great benefits of InfoPath include

reduced maintenance costs and frustration, satisfied end users, more flexible forms and more comprehensive enterprise solutions.

Some of InfoPath best practices include devising a naming convention and sticking to it, building a standard template and creating self-documenting forms. Take them one by one until you've incorporated them into the blood stream of your daily development cycle and then build upon them over time.

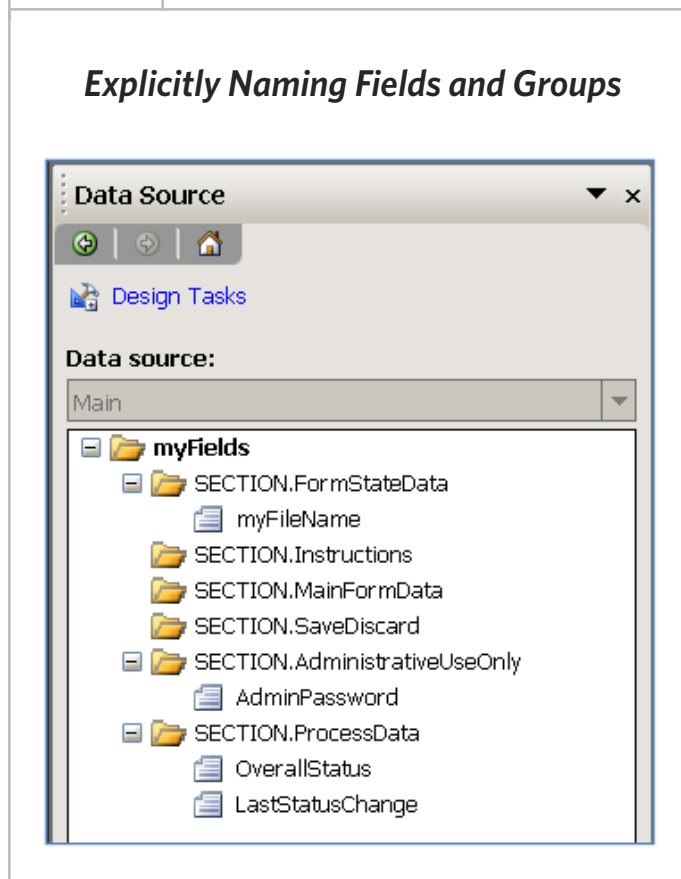
1

NAMING AND GROUPING CONVENTIONS

As with so many SharePoint functions, it's really easy to create your first InfoPath form. Fire up InfoPath, drag a few controls on the page and publish, and you've created your first form. This is an "anti-practice," and you should avoid it. Instead, take care to explicit-

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FIGURE 1



because it's labeled in the form, you won't get that support when and if you need to parse the XML programmatically.

■ **Promoting fields to SharePoint.** No one wants to promote a field called "field23" to SharePoint. You do get the option of naming the field from a SharePoint perspective, but now you need to remember that SharePoint field "PoNumber" is really "field23" in InfoPath. That's a recipe for long-term maintenance frustration. Avoid it at all costs.

Define a naming convention that, at a minimum, ensures that fields are named according to business purpose. Some

developers like to prefix fields with their data type and follow camel or reverse-camel notation—the specific field naming convention doesn't matter that much as long as it's consistent across forms.

Next, follow a convention for naming views on forms. InfoPath typically lists views in its various functions in alphabetical order. On a multi-page form, this can become confusing because InfoPath doesn't list the individual pages—implemented as InfoPath views—in the correct logical

ly name both your fields and your groups as shown in **FIGURE 1**:

It's a simple concept, but it has significant implications, including:

■ **Clarity of business purpose.** The meaning of "PoNumber" is immediately obvious, while the meaning of "field23" is not.

■ **Parsing Forms.** Completed InfoPath forms are XML documents. If you think you can live with "field23"

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sequence. Solve this problem by prefixing views with numbers and letters to force your own sort order.

FIGURE 2 shows the following naming convention:

- Numeric prefix to view names representing “pages” of a form.
- Early letter alphabet prefix for confirmation views.
- “P” for a print view
- “Z” for technical views that would not normally be provided to end users.

As with field names, the specific convention is not especially important as long as it’s effective for you and your team and applied consistently.

2

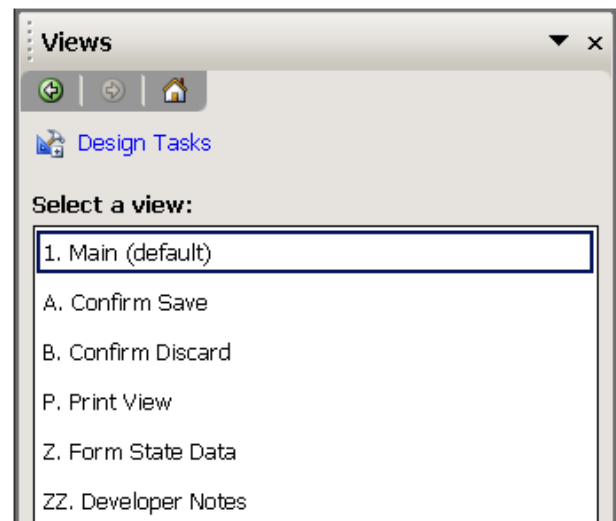
BUILD A STANDARD TEMPLATE

There are some basic elements to every InfoPath form. Recognizing this fact, build a template that includes the following:

- **Default Sections in your form’s Main data source.** The general idea is that we know that our forms will have certain standard groupings of data,

FIGURE 2

Naming Convention for Views



such as administrative content, page-one content and possibly others.

- **A print view place holder.** How many times have you released a form to production and then get an urgent request to provide a clean print view of the form? It’s easy to forget adding a print view during development. Avoid this surprise by building a place holder right into the template.

- **Developer notes section.** We’ll cover this in more detail next.

- **Administrative Control View.** Forms generally contain state information. Provide a view that allows maintenance developers to quickly

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view the state information of a given form for debugging and troubleshooting purposes. Secure access to this view by leveraging out-of-the-box SharePoint security.

- On Monday, we can release version 1.0 of a form.
- On Tuesday, 100 people fill out those forms and kick off a bunch of associated and long-running business processes.
- Wednesday, we make a critical update to the form and post to production.
- On Thursday, another 100 forms are filled out and business processes start running.
- On Friday, someone calls the helpdesk with a problem.

Now the question is which form template are we talking about? Is it the Monday form or the Wednesday form? Solve this problem by adding a version number to the template itself, as shown in **Figure 3**.

This way, when someone calls and asks for help with a form, you can ask them which version number they are talking about.

3 SELF-DOCUMENTING FORMS

We often think of forms as a data entry vehicle and nothing else. But, they can be self-documenting in at least the following areas:

- **Business process state.** The next section, “The Form as a Database” describes how to use the form to manage business process information. Forms can and should provide an organized and intuitive view into that state information.
- **Version numbers.** Forms change over time. Consider this scenario:

FIGURE 3

Add a version number to the form

This template provided courtesy of Paul Galvin. If you have any comments or questions about this template, please email him: galvin.paul@gmail.com.

Template version: 2.0. Last updated: Jan 2010.

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■ **Technical notes.** Use the form template to store developer notes, specifications, change history—really, any relevant technical information. Hide these notes behind a secured view, and you have an integrated and self-documented solution that will reduce maintenance costs and frustration over time. See **FIGURE 4** for an example.

4

THE FORM AS DATABASE

Any form worth its salt is really the starting point for some kind of business workflow process. Your typical workflow will cause emails to be sent off for approval, possibly send messages to external systems—such as ERP or HR—handle multi-level approval

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FIGURE 4

Developers Notes

Developer Notes

Add any notes here that would be of value and interest to people that need to do any kind of development work on this form.

Date	Who	Note
07/17/2009	Paul Galvin	When this form is opened, a rule assigns the field "myFileName" a value based on <u>userName</u> () and the current date. The rule only fires when "myFileName" is blank.
Jan 2010	Paul Galvin	Various updates in response to user feedback.

Admin View

This template provided courtesy of Paul Galvin. If you have any comments or questions about this template, feel free to email me at pgalvin@cgsinc.com.

Template version: 2.0
Last updated: January 2010.

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trees with delegation and so on. For these processes to work properly, they need to keep track of the business process state. Who approved it? Who is next in line for approval? Did the HR update process succeed or fail?

The form itself can maintain this state information. Add a section to the form's main data source for this purpose. Your end users won't normally see these fields, but your back-end automated process can see them and update them as needed. Then, provide a nicely formatted view to show this data, and you have a single consolidated view of everything going on with this form.

The point here is that a form isn't merely a vehicle for data entry—it's also a database for business processes.

5

USE SHAREPOINT SECURITY

Take advantage of SharePoint's security model within your forms. There are a number of scenarios where you might like to show or hide information on the form based on a current user's group membership—SharePoint group, AD group or even custom groups via forms based authentication. At first glance, this seems difficult because there isn't any convenient out-of-the-box feature that

allows you to do this. You can achieve this indirectly, however, by following these simple steps:

- **Create a custom list.** The standard OOB custom list is sufficient.
- **Create rows in the list and give them a title that maps to a business purpose.** For instance, if you want to secure the Admin view of a form, create an item whose title is "Admin View."
- **Break security inheritance on the row.** Ensure that only administrative users have read access to that row. SharePoint will allow you to specify AD users and groups, SharePoint groups and even FBA users/groups.
- **Add the list as a data source to the InfoPath form.**

At runtime, your form attempts to read the specific row from the list whose title is "Admin View." If the user filling out the form has read access to the row, the query will return a non-blank result, and you know the user is an administrator. Otherwise, they will return a blank result (length = 0) and you know he or she is not an administrator. With this fact established, you can now dynamically hide or disable the "Admin view" button. Use this tech-

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nique to secure or dynamically alter the form any time you need to do so based on security group membership.

Using SharePoint can be easy. That's its weakness as well as its

strength. Make the most of the SharePoint platform by instituting some best practices that will make users happy and senior management even happier. ■

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What is My Template?

CONSIDER THIS SCENARIO: A user calls up and says, "There's a problem with my InfoPath form." You know the form in question, and you also know that at least three different versions of the associated InfoPath template are floating around in the SharePoint environment. If you didn't follow the best practice for self-documenting forms, what do you do? All is not lost. The template is embedded in the XML file itself. To find it, follow these steps:

1. Save the offending form to your hard drive.
2. Open it using your favorite XML editor. Visual studio or even notepad will work. Note that you'll select File -> Open. If you simply double-click on the XML file itself, it will attempt to open the form using your local InfoPath client program and not be helpful.
3. Examine the XML and locate the section.

Your template name is right there in plain sight. Locate the template, and begin researching the problem with the confidence that you have the correct template in hand. ■



ABOUT THE AUTHOR

Paul Galvin is a SharePoint MVP and co-founder of Arcovis LLC, a SharePoint consulting organization providing services to clients in the New York metro area. 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>.

How to Stop SharePoint Sprawl

It's great that SharePoint has taken off in your organization, but how do you get a handle on the mega-proliferation of sites? **BY BRIEN M. POSEY**

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SHAREPOINT MAY BE the most flexible and most powerful application that Microsoft has ever created. But it has been said that with great power comes great responsibility. Unless the proper governance is put into place, SharePoint can quickly spiral out of control. Learn which factors can lead to SharePoint sprawl and how you can regain control of your SharePoint deployment.

To understand why SharePoint sprawl happens, you have to move beyond the idea that SharePoint is simply an application for developing websites and think of it as a collaboration tool. Sure, a lot of organizations use SharePoint to create their corporate intranet, but there are several other types of sites that organizations can also create.

Team sites are probably the most widely used type of SharePoint site. A team site is a dedicated SharePoint site that allows a team, department or workgroup to collaborate on a proj-

ect. Team members can use the site to store documents, share contact information, display data or share news related to a project.

Although team sites can be extremely useful, they can also be a major source of SharePoint sprawl.

Although team sites can be extremely useful, they can also be a major source of SharePoint sprawl.

Team sites can become quite unwieldy because in an uncontrolled environment, team members may create any number of sub sites. Each of these sub sites can contain multiple document libraries, meeting workspaces and so on.

The reality is that SharePoint contains built-in templates for creating a huge variety of site types, and any of

these sites have the potential to spiral out of control if left unchecked.

WHY IS SHAREPOINT SPRAWL A PROBLEM?

The consequences of SharePoint sprawl can vary depending on the type of organization in which the sprawl is occurring. For example, the most immediate effect in a small organization might be the excessive use of disk space on the server that is hosting the SharePoint database. At first, this may not sound so bad

because disk space has become inexpensive. But there are at least a couple of other related side effects that need to be considered.

One side effect is that having a rapidly growing SharePoint database can throw a kink into your backup efforts. Your users will expect you to back up their SharePoint data on a regular basis.

Because of that, you may find that you have to invest in a higher capacity tape drive. Or you might have to devise a backup strategy that allows you to back up an ever-expanding

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How to Solve Document Library Sprawl

ANOTHER TYPE OF SharePoint sprawl that can cause problems for organizations is document library sprawl.

SharePoint document libraries are linked to a powerful search engine, and they can also be configured to support the retention of multiple versions of documents. Because of that, some organizations are beginning to copy frequently used data from file servers to SharePoint document libraries.

Don't get me wrong—there is nothing wrong with using SharePoint as a file server. In fact, it might eventually become the norm. The problem is that many organizations also leave a copy of their data in the original location on the file server. This results in having two separate versions of a file stored in two different locations. This can lead to excessive disk usage as well as user confusion.

One easy solution is to establish a clear governance policy that dictates how SharePoint document libraries should and should not be used. That way, you can prevent the problems that come from having multiple versions of the same file scattered across your network. ■

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data set within your allotted backup window.

Another side effect to uncontrolled SharePoint sprawl may not manifest itself for quite some time. If you have

organizations. Think about it for a moment: SharePoint sprawl is caused by the unplanned—and often undocumented—creation of SharePoint sites. The problem is that any one of these sites could potentially contain data that is subject to regulatory requirements. If users are creating sites in a chaotic manner, then you can bet that there has been no regard for retention policies, metadata or taxonomies.

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ever worked through a SharePoint upgrade, then you know how much work is involved in the planning process and in the post-upgrade testing.

Any time that you allow SharePoint data to expand uncontrollably, you complicate future upgrades or migrations to new versions of SharePoint because each SharePoint site requires planning and testing. The worst part is that you may end up wasting time planning for the migration of SharePoint sites that haven't even been used for quite some time. Also keep in mind that it's better to prevent excessive SharePoint sprawl from occurring in the first place than to try to deal with the consequences down the road.

Finally, SharePoint sprawl can be especially problematic in regulated

WAYS TO AVOID SHAREPOINT SPRAWL

To protect your organization from the negative effects of SharePoint sprawl, it's a good idea to put controls in place long before you ever make SharePoint accessible to your end users. I recently heard about one organization, for example, who involved its compliance team during every step of its SharePoint deployment.

By doing that, the organization was able to ensure that its SharePoint platform would be designed in such a way that would force data to be stored in a consistent manner. It was also able to put all of the necessary retention policies in place before users began storing any data within SharePoint document libraries.

But what if you have inherited an existing deployment, and SharePoint sprawl has already occurred? In this type of situation, the first thing that

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you must do is to take steps to prevent the sprawl from getting any worse. After that, you can focus on reducing the sprawl that has already occurred.

There are two critical steps to controlling SharePoint sprawl. First, you need to implement controls to prohibit users from randomly creating SharePoint sites. That way, whenever users need to create SharePoint sites, they will have to go through a central point of contact.

The idea setting up a central approval process isn't to have a corporate bureaucrat deciding which employees are worthy of having their requests granted. If a user needs a SharePoint site, he or she should be allowed to have a site. The reason for having someone to oversee site creation is that it makes it a lot easier to track site creation and usage.

As part of the process, any users who are requesting SharePoint sites should be required to provide certain information along with their requests. Some of the essential information might include the following:

- The name of the user who is making the request

- The requesting department
- The name and contact information of the user's supervisor
- The user's telephone number
- The user's e-mail address

The second step is to perform a periodic check to see which sites are still being used. I once had a client ask me to help him with a SharePoint sprawl problem. After taking an inventory of the SharePoint sites that existed within the organization, we set out to determine which sites were still being used. To make a long story short, we couldn't even figure out who some of the sites belonged to. Many of the sites that were identifiable belonged to employees who had left the company or changed departments.

Collecting user information gives you an easy way of identifying the owner of each site. That way, you can check every six months or so to see if the site is still being used.

If the user who requested the site leaves the company, then you also have the contact information for that person's supervisor, and you can ask him or her whether or not the site is still in use. ■

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ABOUT THE AUTHOR

Brien M. Posey has received Microsoft's Most Valuable Professional award seven 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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AvePoint is a global technology company and software innovator headquartered in the United States. Since its founding in 2001, AvePoint has become the world's largest provider of infrastructure management software solutions for Microsoft SharePoint Products and Technologies. Propelled by the world's largest SharePoint-exclusive research & development team, AvePoint is the premier provider for EPG, SMB, Mid-Market and Government organizations demanding the most powerful and flexible infrastructure management solutions for their SharePoint environments and assets. AvePoint's award-winning DocAve Software Platform is recognized as the industry standard for comprehensive and scalable SharePoint backup and recovery, administration, replication, migration, archiving, deployment management, reporting, storage optimization, and content lifecycle management.

AvePoint is headquartered and maintains its principle engineering center in Jersey City, NJ, with wholly owned sales and engineering centers in the USA—San Jose, Los Angeles, Seattle, Chicago, Washington D.C., Houston, Boston; Ontario, Canada; Melbourne, Australia; London, United Kingdom; Munich, Germany; Johannesburg, South Africa; Tokyo, Japan; Singapore; and Beijing, Changchun, Dalian, China. AvePoint's global team, fortified by an expansive network of certified partners, help more than 6,000 enterprise customers—including many Fortune 500 companies and government agencies—to protect, manage, optimize, and integrate their mission-critical SharePoint environments. AvePoint is a Depth Managed Gold Certified Microsoft Partner and GSA provider.

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About Idera:

Idera provides powerful and easy-to-use tools to simplify the management of Microsoft SharePoint environments. Our solutions address real-world challenges including SharePoint content organization and migration, performance monitoring, backup and recovery, security and administration. From managing small farms with tens of users to enterprise deployments with many thousands of users, our products help SharePoint administrators save time and manage SharePoint more efficiently.

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