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MOSS 2007: Tales & tips from the trenches

October, 2007

We recently talked to several people in the throes of implementing the latest version of Sharepoint, Microsoft's collaboration and content management suite. Released in January 2007, Microsoft Office Sharepoint Services (MOSS 2007), is being widely implemented, evaluated, or considered by many of our members. Although the product promises significant productivity gains for users, we learned that the road to successful implementation can be a bumpy ride. In this article we outline the differences between MOSS 2007 and its predecessor, summarize the comments we gathered in our interviews, and provide some links to key resources.

MOSS 2007 vs. Sharepoint 2003

MOSS 2007 is more than an upgrade. As one person put it, "Office Sharepoint is largely a development platform — a shiny, Web-based front end to just about any Microsoft server application, as well as whatever third-party apps your [Business Connectors](#) can grab on to" (see "[Opinion: Is Microsoft's Sharepoint 2007 a golden app?](#)"). What this means is that a [power user](#) (not a programmer) can design a Web site for an application, make connections to programs and data feeds, select the necessary data, create a workflow around the data, and assign alerts and permissions within Word, Excel, Powerpoint, and Outlook.

That kind of power means that IT managers need to plan carefully to avoid the Lotus Notes syndrome — help desk problems caused by the proliferation of

unsanctioned mini applications across large organizations. Moreover, there's a need to maintain a consistent look and feel across all Sharepoint sites (both internal and external), which may require some custom development. For example, you'd never know that the Web site for [Hawaiian Airlines](#) is built on a Sharepoint infrastructure.

New features in MOSS 2007

New features in the current version of Sharepoint include:

- *Social networking* tools such as blogs and wikis are now integrated with Sharepoint collaboration functions, such as workspaces, tasks, forums, and surveys.
- *Tight integration with Office 2007*. Users of Word, Excel, PowerPoint, InfoPath, Project, and OneNote can interact directly with information stored in Sharepoint sites without having to manually download the content. Users can create workspaces, post and edit documents, and assign tasks, all while working on documents stored in SharePoint sites.
- *PEOPLE search*. MOSS 2007 allows users to find people not only by department or job title but also by expertise, [social distance](#), and common interests. There's also a function that lets employees list the people they know and those who belong to common distribution groups.
- *Business intelligence*. A new function called Business Data Search allows users to query data stored in external databases, such as Oracle or SAP, and create "dashboards" or score cards that display key performance indicators on a Sharepoint Web page.

- *Document workflow support.* Users can automate document review, approval, signature collection, and issue tracking using workflow applications.
- *Metadata and search.* Instead of the two types of search available in the previous version, MOSS 2007 has a much improved metadata-aware search that can be applied to Sharepoint content, other intranet content, and even external content.

Planning is key

These new features, however, require more planning. As one person put it, "I implemented Sharepoint 2003 by myself with only occasional assistance from our security and network specialists. MOSS 2007 requires a team approach with different people taking responsibility for custom programming, networking, security, Microsoft Active Directory and Exchange, databases, licensing, and search. You also need strong relationships with business units." Or, as one analyst put it, "Ease of installation obscures difficulty in customization and ongoing maintenance; administrators can easily get in over their head. Microsoft consultants will need substantial time to absorb and learn the tool. Experience with previous versions of SharePoint suggests that this learning process will be measured in years."

MOSS 2007 support

None of the people we talked to had MOSS 2007 running in a fully functional, production environment. Even the most experienced were still learning and experimenting. Microsoft provides extensive documentation, including worksheets, templates, and even a sample project plan (see [Links](#) below). But some people complained about the difficulty getting answers and fixing bugs. Others noted the dearth of experienced MOSS developers and consultants.

Here's what they said:

"With the last version I had direct access to a Microsoft rep, and I could find answers to most questions on the Internet or in books. With MOSS 2007, it takes longer to get answers. I no longer have access to a Microsoft rep. Now we have to rely on user groups and bloggers. There's no local training facility unless you're located in a major metropolitan area. Many of the speakers I've listened to tout their Sharepoint knowledge, but they're not experts. You have to wonder about the accuracy of their information. My advice is to install the trial version of MOSS (free for 180 days) and play with it. The real key is planning."

"I get calls every week from headhunters looking for experienced Sharepoint people. Recruiters say they are nearly impossible to find."

"I think our experience with Sharepoint is common. We've reported bugs to Microsoft, and they haven't fixed them."

"I went to a regional user group meeting and was shocked to learn that the group didn't have its own Sharepoint site."

MOSS 2007 search

Some of our interviews focused specifically on metadata, taxonomies, and search. Everyone cited the improved search functions, but some with highly developed taxonomies were disappointed that they couldn't readily use them without installing third-party taxonomy management and integration software. Some had decided to use MOSS 2007 for enterprise search, but others had decided to use something else and were looking at search engines with the

ability to crawl Sharepoint content. Comments we received on search included the following:

"We compared MOSS 2007 search with Google using a test collection of half a million documents. From a relevancy standpoint, both gave similar results without using metadata cues. I found that MOSS 2007 is easier to administer and maintain, but we need to add another person to our Sharepoint search team to handle the workload."

"Usage reports are an improvement over previous Sharepoint versions. One of the most valuable reports is the list of most popular search terms where there is no [Best Bet](#)."

"We liked the PEOPLE search, and the relevancy is much better, but we couldn't use our existing thesaurus as we had hoped. Now we're looking at other Sharepoint-compatible products for enterprise search."

"Relevancy ranking is a big improvement over Sharepoint 2003 search. We previously had problems extracting search log data, but now we can easily create reports."

"Search requires you to understand how people look for information. What kinds of attributes do you need to attach to documents? People expect instant gratification because of their experience with Google. We need to resell search to our users because of their bad experience with Sharepoint 2003 search."

"MOSS 2007 uses a thesaurus file for synonyms, but it's limited in size and there's no way to show broader/narrower

relationships. You can configure MOSS 2007 search to use metadata, but there's no auto-categorization function to add metadata to existing documents. Microsoft tells us that we should be spending time analyzing search logs and creating Best Bets and synonyms, but we don't have the extra eight or nine people that would require."

If you're not going to use MOSS as enterprise search, then your enterprise search engine must be able to crawl Sharepoint content. Products that people are considering for this purpose include Coveo, FAST, Vivissimo, BA Insight, Interse, and Ontolica.

Third party tools

Microsoft encourages Sharepoint customers to enhance the product through third-party tools. Taxonomy management products compatible with Sharepoint include Factiva Synaptica, Data Harmony Machine-Aided Indexer, Schemalogic SchemaServer, and Interse I-box.

Resources

In the course of our research, we found a number of useful Sharepoint resources, which are listed below.

SHAREPOINT 2003 vs. MOSS 2007

[Detailed comparison](#) (Excel spreadsheet)

[Feature comparison](#) (Microsoft article)

DEVELOPMENT & ADMINISTRATION

[Sample project plan](#) Sample MOSS 2007 project plan in Microsoft Project format.

[Planning & architecture for Microsoft Office Sharepoint Server](#)

2007 Downloadable book.

Microsoft documentation on specific modules, such as [Plan the end-user search experience](#), which includes Excel worksheets for gathering and organizing planning data.

EDUCATION & TRAINING

[Benchmarking Sharepoint for KM](#) Montague Institute
teleconference (December 2007)

[Taxonomies, search & Sharepoint](#) Montague Institute hands-on
Web-based course

MONTAGUE INSTITUTE REVIEW ARTICLES

[Using a thesaurus to enhance MOSS 2007 search](#)

[Workgroup productivity: Taxonomy, search, & Sharepoint](#)

[Collaboration software: the productivity perspective](#)

[Who creates Sharepoint sites?](#)

[Google & Sharepoint, social bookmarks](#)

OTHER ARTICLES, BLOGS & FORUMS

<http://www.sharepointblogs.com/> A searchable collection of multiple Sharepoint blogs. When searching, check the dates. Not all postings are about MOSS 2007.

[Google Sharepoint Group](#) Technical discussion group on Windows Sharepoint Services, the free version of Sharepoint.

[SharePoint Farmer's Almanac](#) – A Sharepoint trainer blogs about nitty gritty administration topics like how to give a user access to the SSP.

[Heather Solomon's blog](#) focuses on SharePoint branding, layout and usability. Includes [articles](#), tips, and [resources](#).

Bob Mixon's article on [Federated Search & Sharepoint](#).

Stefan Gossner's article on [How to add Best Bets & keywords programmatically](#).

Stefan Gossner's list of [Sharepoint resources](#). Links are grouped by subject. Most go to blog entries or Microsoft articles.

[Sharepoint industry sample collection](#) Targeted to small businesses, these are mockups of Sharepoint sites for different industries. Use this site to get a feel for the user interface possibilities for different corporate functions.

MOSS 2007 SEARCH

Mike Taghizadeh's blog entry on [MOSS Search Word Stemming](#). This feature, which must be turned on in MOSS 2007, makes the search function work better by finding articles about all forms of a word (e.g. run, runs, running).

[Big Sharepoint Resource list](#) from sharepointsearch.com.

Categorized by MOSS 2007 function, popularity, and level (e.g.

developers and everyone else).

[Sharepoint search forum](#). New on Yahoo groups.

CASE STUDIES & INDUSTRY-SPECIFIC RESOURCES

[Monsanto case study](#) on use of MOSS 2007 search <http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=201093>

Monsanto case study of MOSS 2007 search. See also [Vince](#)

[Arter's presentation](#) on the same topic.

[Mary Kay Sharepoint Search case study](#)

[Deploying MOSS 2007 at Microsoft](#). Article tells you know Microsoft implemented MOSS 2007 in its own shop.

[Microsoft Enterprise Search blog](#) Written by Microsoft consultants and product managers.

Bottom line

Problems and glitches are bound to turn up with any new product as powerful as MOSS 2007. Properly implemented, the impact on employee productivity can be huge, and in other applications, such as search and business intelligence, it's good enough to challenge the market incumbents. The combination of low cost and tight integration with desktop applications, has made Sharepoint (according to some bloggers) Microsoft's best-selling product to date.

Definitions

Best Bets. Documents and Web sites hand-selected by humans to appear at the top of the search results list, often designated with a star or other graphic.

Business connector. Interface code that allows an external application (e.g. Filenet, Oracle) to send and receive data from Sharepoint.

Power user. Someone who has considerable experience with [computers](#) and utilizes the most advanced [features](#) of [applications](#).

Social distance. The social gap separating individuals. For example, the social gap between you and your friend in the next cubicle is very short. The distance becomes greater between you and your friend's acquaintances or between you and your boss's boss.

Created on October 13, 2007 | Updated on October 17, 2007

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