

**T**HIS BOOK IS FOR INFORMATION MANAGERS WHO ARE NOT PROGRAMMERS — BUSINESS analysts, information architects, search administrators, content and document managers. Typically these people are “boundary spanners” who act as a bridge between end users, subject matter experts, metadata managers, and IT staff. They participate in teams that create metadata repositories, develop information policies, and help business units tailor retrieval and discovery tools to streamline their workflows.

The book is based on the assumption that a successful SharePoint implementation depends on:

1. a multifunctional team that includes these boundary spanners;
2. a focus on users rather than technology;
3. the concept of search as a system rather than a stand-alone program or function;
4. an information ecology that provides services analogous to those available in the print publishing world.

Unfortunately, it’s hard to find how-to information for this approach. There is a wealth of high-level material, much of it published by Microsoft, for IT managers. There is also a great deal of technical information for programmers and SharePoint administrators on blogs and discussion groups. Information about using SharePoint in specific applications, such as content management, document management, or legal work, is also available. But there is little that deals with all aspects of the SharePoint search and discovery system, offers guidance on SharePoint information policy and strategy, and gives step-by-step implementation instructions. This book is intended to fill that gap.

### WHY SHAREPOINT?

SharePoint is only one of many technologies that I’ve followed since the Montague Institute’s beginnings in 1992. However, SharePoint has three characteristics that make it a good fit for our mission:

1. Its widespread adoption and comprehensive list of features has the potential to realign corporate information functions.
2. It is an application that supports learning, cross-functional collaboration, and publishing.
3. It is an end user development tool that can increase productivity and promote innovation.

The most exciting thing about SharePoint is that it lets people design a complete application from end to end with little or no help from a programmer. What the Internet did for telecommunications and Filemaker did for databases, SharePoint is doing for knowledge work. End user development tools like SharePoint can mean lower IT project failure rates and rework costs, less programmer time spent on customization and maintenance, and higher user satisfaction.

On the other hand, they can create security gaps, foster content chaos, increase customer support costs, and make it more difficult to upgrade software systems. SharePoint and similar tools allow knowledge managers and other nontechnical information professionals to expand their influence by helping to capitalize on the opportunities and meet the challenges.

### WHAT’S COVERED

This book covers the search, navigation, and management functions of SharePoint Server 2010 but not the FAST Search Server or Business Connectivity Services.

### SEARCH SYSTEM VS. SEARCH ENGINE

At the Montague Institute we have a substantial investment in original content and semantic tools. Because information is our stock in trade and end users are our focus, I view SharePoint as a search

*system* that can include one or more search *engines* as well as other components. The difference, explained in Chapter 1, is crucial to getting the most out of the SharePoint investment.

One of our major concerns has been how to interface our extensive metadata repository (aka the Montague Knowledge Base) with SharePoint and other information management tools. Throughout the book, I will be exploring this issue using examples of our own intellectual assets, which include:

- original articles from the *Montague Institute Review*;
- a knowledge base of contacts, Web sites, articles, images, and internal documentation;
- a metadata repository that includes controlled vocabularies and a thesaurus;
- an A - Z index topic index populated by live data from our metadata repository.

For more information on how we integrated these assets with SharePoint, see Chapter 12.

## TERMINOLOGY

Describing the SharePoint search system requires the use of two different vocabularies whose terms may be confusing or unfamiliar to readers. The first vocabulary is what I call *knowledge base publishing* — a mélange of concepts from library science, computer science, journalism, and business (see the Montague Institute A - Z index at <http://www.montague.com/Public/indexes.htm>). The second vocabulary consists of SharePoint-specific terms as defined by Microsoft, such as “Term Store Management Tool” and “Best Bet.” Terms are defined when they first appear in the text and, where appropriate, alternate terms from other systems or contexts are given. A glossary is included.

## TECHNICAL PREREQUISITES

Some of the customization processes described here can be performed only in SharePoint Central Administration by people with proper permission, but most can be performed by those with site collection or site owner privileges. If the step-by-step instructions don't work as you expect, check your permission settings and ask to have them changed if necessary.

Some functions won't work as described unless you are using the Internet Explorer Web browser and Microsoft Office 2010.

Most tasks do not require programming expertise, though for some of them XML familiarity is desirable. It's easier to manipulate XML using SharePoint Designer, a free Microsoft HTML editor.

## ACKNOWLEDGMENTS

I would like to thank Melissa Troemel, Dasen Woitkowski, Suzanne Sheppard Edwards, Denise Bedford, and especially Dan Antion for their comments and suggestions on the manuscript. Where the reviewers have contributed personal experiences, I've included them as Field Notes in blue boxes.