



What to look for in a SharePoint Management Tool

A White Paper for IT Administrators

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Information technology departments are embracing Microsoft SharePoint as a simple answer to a host of business information problems. However, SharePoint farms can quickly become difficult to manage, as sites proliferate and become a nightmare for administrators. According to a recent article in CMS Watch, “Unfortunately, as you grow very large SharePoint environments, the controls that enterprises would want to see simply don’t exist natively within the platform.”

Some enterprises may opt to wait until their deployment is 100% complete before thinking about ongoing administration. However, in our experience, that could be a costly mistake. The sooner you begin to think about administration tools, the sooner you can begin saving time, money, and headaches later on down the road.

Because a SharePoint management tool can have a huge impact on your environment and your organization, you’ll want to know what to look for in a third-party product. In this article we will cover the main things to look for when looking at a SharePoint administration tool.

Manage Across Multiple Sites

Since native SharePoint administration functions only operate at the individual site level, any decent SharePoint management tool should let you perform management functions across multiple sites or site collections, web applications or across the entire farm. This helps lower the cost of ownership and the time it takes to manage SharePoint by drastically saving time and effort on a day to day basis. For example, suppose you adjusted a quota template, and need to apply that updated template to 100 site collections. Using Central Admin, it would take an average of 35 seconds for each site collection, for a total of nearly an hour. However, if you use an administration tool, that operation on those same 100 sites can be performed in 11 seconds – you just saved yourself 58 minutes.

The more advanced tools out there will let you choose exactly which sites to perform analysis and actions on – for example, you can see if a particular user has permissions to access sites that are in different site collections or even different web applications.

Find it and Fix it

Since much of a SharePoint administrator’s time involves the day to day management of their environment, the best tools out there will help identify problems and then provide an easy path to fix them. There’s nothing more tedious than running a report or a search to identify a problem, then going through a million cumbersome steps to then fix the problem. For example, suppose you did an analysis to see who has permissions to a set of sites. To change those permissions, you’ll want to be able to do it from the analysis immediately, so you can move on to other things.

Security Trimmed

Since you’ve already setup a security infrastructure, you want to make sure your management tool leverages it instead of creating a new infrastructure to add to your headaches. Site administrators should only be able to see and manage the sites they have access to, just as site collection administrators should only see and manage the sites they have access to. Not all management tools are completely security trimmed, so make sure to look for it because with it you can leverage the security infrastructure you’ve put in place and you avoid any additional security configuration and management.

Extend Your Team

As sites grow and multiply in your organization, you might want the ability to extend your administration team across your enterprise before you get too bogged down in administrative tasks. The SharePoint management tool you select should therefore let you distribute responsibility according to your organizational needs so that other business managers and site administrators can manage their own sites and site collections. This way, they can just manage permissions without being overwhelmed with advanced functions they don't need or understand, while a central administrator can retain control. Therefore, along with the security trimming, you should be able to limit the functionality available to business managers or lower level administrators.

Leverage the Administrative Power of SharePoint

Since SharePoint already comes out of the box with some pretty valuable administration capabilities, it is important that any SharePoint management tool you choose work with them, not against them, allowing you to access what you need when you need it, not requiring you to switch between SharePoint and your management tool. You want a tool that let's you access those SharePoint management functions from within that tool. That way, you can navigate to any site, site Collection, web application or even a group or a list and then launch the familiar SharePoint management functions – like Site Settings or Central Administration functions like “Define Managed Paths” or “Web Application General Settings.”

Dynamic Analysis & Reporting

Like most things in an enterprise, SharePoint environments are never static, changing every day and in some cases, every minute. Your analysis and reporting tools should be just as dynamic, and should give you the ability to quickly uncover what is really going on so that you can fix it and move on. Ideally, a reporting tool will produce interactive / live results, so you have the option to drill down and across your results instantly. Suppose you want to perform a permissions analysis on a site. Based on your results, you decide you want to further explore the permissions of specific lists and libraries within that site. Or suppose you want to explore which sites a user has access to. After seeing the list, you decide you want to see who else has access to a particular site. With an interactive tool, you can. Static reports may do a great job of providing a snapshot in time, but for real in-depth administration, dynamic, interactive analysis is much more powerful and definitely the way to go.

Top Reasons to Look at a SharePoint Administration Tool

MANAGE AND ANALYZE PERMISSIONS DOWN TO THE DOCUMENT LEVEL

Because SharePoint's permissions management is limited, the tool you select should ensure that permissions are set properly by evaluating user permissions at any point in the SharePoint farm, even down to the document level. Additionally, you should have the power to do a complete security analysis, including whether the user has been granted permission as part of a group or by having direct permissions. It should be easy to analyze what a user has access to, or alternately, you should be able to investigate permissions from the site perspective. For example, you should be able to find all sites where a user has specific permissions level like Administrator.

ENFORCE PERMISSIONS FOR ALL USERS

The management tool you select should let you easily manage permissions settings across the farm all at once. Instead of going into sites one by one, you'll want the ability to perform your permissions activity on multiple sites, saving significant amount of time, especially if your personnel changes frequently.

Set Permissions – Setting permissions should be easy, either directly or through a group membership. It should be flexible to work at the site, site collection, web application or even at the entire farm level. Advanced tools also let you specify custom permissions levels and permissions should be additive to retain the existing permissions levels.

Delete Permission – Deleting permissions should apply to both users as well as groups of users. When you delete permissions, they should be deleted from all sites, all groups in which they are listed as a member as well as web application policies. And, you should have the option of deleting a user from the site's All People list.

Reassign Permissions – As part of the process of deleting a user's permissions, you should be able to re-assign those permissions to someone else. For example, if an administrator changes jobs or leaves, you might want to reassign that user's permissions to another administrator.

Duplicate Permissions – Duplicating permissions makes it really easy to manage a dynamic SharePoint environment. If you have a "model" user in a department and a new user is added to the department, you should be able to easily, in one step, ensure that the new user is granted access to all the appropriate sites. This should work on a single user as well as a group of users all at once.

Duplicate Site Security – Similar to duplicating permissions, you should look for the ability to duplicate site security from a site to one or more other sites. This makes it easy to ensure that permissions are set consistently across a number of sites anywhere in your farm. You could use this capability to create site security "templates" to deploy your security settings across your farm.

Backup and Restore Site Permissions – Look for the ability to backup and restore site permissions. If someone in your organization inadvertently deletes permissions, they can be quickly and easily be restored without any loss of security. You should be able to do this on any selection of sites or site collections. The restore capability should restore all permissions down to the item level with the option to restore permissions for SharePoint groups, restore users to SharePoint groups and to restore the Site Administrator status.

MANAGE USER ACCOUNTS

With regard to user accounts, you'll want the ability to easily clean up accounts by deleting users from all permissions when they are no longer in Active Directory.

Manage SharePoint Groups – Your SharePoint administration tool should allow you to establish a relationship between a set of SharePoint groups. This 'association' synchronizes permissions and members and new groups can be added or removed from this association.

Find orphan users – Ideally, you can run an analysis that finds all users in SharePoint that are not in Active Directory anymore – even those users that have been marked as “inactive” in Active Directory.

Remove User Permissions - With a single click, you should be able to remove user’s permissions from all sites, files, groups, etc. Also, when users are removed from SharePoint, you should be able to easily delete users from all permissions.

EVALUATE SHAREPOINT USAGE

A SharePoint management tool should let you analyze all aspects of the usage of your farm. You should be able to look into the activity – who is accessing what; the growth of the number of sites, how much storage key sites use, find sites that are using the most storage, and even determine where Web Parts are being used.

ISOLATE SITES THAT ARE NO LONGER NEEDED AND DELETE THEM

How important to you are sites that have no activity over a period of time – or sites that only one user is accessing? With the right tool, you can analyze both the activity and the storage used on any sites so you can determine how important those sites are to your enterprise. It’s not uncommon to setup a site or set of sites for a particular project but they are no longer needed after the project finished. How do you know when the project is completed? Are those sites now sitting dormant? Maybe there are sites that users thought they needed but then never used. What about sites using the most storage? You should be able to easily analyze both your site activity and storage to get a better picture of what’s going on.

DETERMINE WHAT YOUR USERS HAVE BEEN DOING

What better way to determine what information is valuable in your environment than by monitoring user activity? With the right tool it’s easy to determine exactly who is accessing which documents. You’ll want to be able to see all the users that are accessing each document or see all the documents a particular user has accessed. Maybe you need to determine whether one of the biggest documents on a site is really valuable. Or maybe you want to know what documents a particular set of users have been accessing. With the right tool, you can gain valuable insight into what your users are doing.

FIND SITES WITH THE MOST ACTIVITY OR LEAST ACTIVITY OR STORAGE

Ever wonder which sites are getting the most activity? Or how about which sites get no use at all? Maybe it’s time to re-organize or cleanup your sites. You should be able to analyze the activity at any level in the SharePoint hierarchy, including pages, documents or across disparate web applications. An activity analysis should tell you the total number of requests for the period you’re analyzing, as well as the average users per day, the size and the quota. A page activity analysis should tell you the top pages, who’s been accessing them and where they came from.

ANTICIPATE GROWTH OF YOUR FARM BY MONITORING THE GROWTH OF SITES, STORAGE AND ACTIVITY

As your users become more familiar with SharePoint, the usage of your environment will naturally grow. You should keep track of your site growth as well as your site usage, including the growth of storage and the activity on sites, site collections or web applications so you can manage this growth accordingly. You’ll should get detailed information on your SharePoint environment so you can perform a historic analysis for any period of time, giving you the insight to anticipate the needs of your users and to get a better handle on how your SharePoint farm is performing.

SHAREPOINT AUDIT AND CHANGE LOG ANALYSIS

Look for a SharePoint administration tool that gives you the ability to configure SharePoint Auditing across any set of site collections, sites or lists within your farm and then analyze/report on changes to documents, items, lists, libraries and sites. Both the Audit Log Analysis and the Change Log Analysis make it easy to track the activity of a specific individual in your environment within any scope of your farm, for any period of time, or to report on specific events. However, because the SharePoint Audit Log stores information in the Content Database, it can quickly become a scalability challenge for many farms. A SharePoint management tool can help you manage the size of the SharePoint Audit Log by automatically purging the audit records that are older than a specified threshold.

WEB PART USAGE

Before making a change to any web part, you should know which sites are using it. Unfortunately, with SharePoint, there isn't any place to go for that information. Third party tools can help provide an analysis of web part usage so you can identify which sites are using each web part, as well as all the web parts being used by each site. Details like when the web part was created, modified, last updated, size and more can go a long way to help manage your environment.

SCHEDULED REPORTS

Finally, in order to maximize your understanding and control of usage within your SharePoint environment, you will want the ability to schedule all ControlPoint reports/analysis. For example, you may want the ability to schedule a permissions analysis to run once a month across your entire farm and send a report to your company's security officer or add it to a SharePoint list.

CONTROL CONFIGURATION AND DEPLOYMENT OF SHAREPOINT

Fundamental to any SharePoint management tool is the ability to manage the configuration and deployment of SharePoint. Look for the ability to move and copy content within your SharePoint farm or between farms. You may also want the ability to ensure that a set of sites are configured consistently or to activate features across a number of different sites all at once. Basically, you want a framework to act on multiple sites within your farm in just one click.

REORGANIZE YOUR SHAREPOINT CONTENT

As your Farm grows, you may need to move or copy your content, i.e. promote some Sites into Site Collections or demote Site Collections into Sites. Reorganization of the company, new groups asking for new/more extensive applications or to easily move content between your test environment and your production environment are just some of the reasons you may need to move your content. Look for the ability to Move/Copy site collections, sites, lists, folders and items to destinations within the same farm or to another farm. You'll want the flexibility to either Move (Copy and Delete) or just Copy the content. Then, you can duplicate a "template" site collection, site or list to multiple destinations.

MANAGEMENT OF CONTENT DATABASE USAGE

As your SharePoint farm matures, it often becomes necessary to move content around to accommodate unplanned growth. Look for a tool that makes it easy to gain insight into the usage of the Content Databases and gives you the power to re-align content when your Content Databases grow larger than expected. You may want to move content to a different Content Database or, as part of Moving or Copying a Site Collection, you can choose the Content Database.

ENSURE CONSISTENT BRANDING AND BEHAVIOR

Look for a tool that lets you ensure brand consistency and behavior across your farm by maintaining control over your site themes, site collection administrators, quotas, and regional settings across any number of sites or site collections all at once. Choose a tool that will make it easy to ensure the sites used by a local team have the same time zone setting, or will let you setup the quota for all your site collections across the farm all at once. The ability to set properties on Sites and Site Collections will give you the tools to allow you to ensure your farm is controlled how you want it to be.

REPORTING ON AND MANAGEMENT OF SHAREPOINT FEATURES

As SharePoint grows in your enterprise it becomes more challenging to keep track of which sites are using which features. Look for the ability to track features within Sites or Site Collections - filtered by the name of the feature, “activated features” and /or “hidden features”. For example, you may want to find all sites that have a particular feature activated (or not activated). You may also want the option to activate or deactivate features across any set of sites or site collections. So, when you need to activate a feature across multiple sites, it can be done in one step.

REPORTING ON AND MANAGEMENT OF SHAREPOINT ALERTS

While SharePoint alerts are quite useful, SharePoint lacks the ability to provide a global view of all the alerts that have been set either across the farm or by an individual. And, SharePoint also lacks the ability for an administrator to easily set alerts for multiple users at once. You should find a tool that can report on all users who have subscribed to alerts and, for a particular user, which alerts they are going to get. You may also want the ability to delete or make changes to alerts that already exist – for example, change the title, the Change Type, the Frequency, the types of changes to be alerted to, etc.

REPORT ON SHAREPOINT CONTENT TYPES

In SharePoint, custom Content Types may be used throughout the organization. If you wanted to cleanup Content Type usage, for example in anticipation of SharePoint 2010, it can be very time consuming. Look for a tool that will show you all the content types used by site and for each content type, where it is used. You want to be able to analyze usage right down to the item level. Additionally, you may want to filter on Content Types that are “available”, “Defined” or “In Use” and/or by Content type name.

POLICY ENFORCEMENT

As your SharePoint environment grows and more people are tasked with the day to day management of it, enforcement of governance policies or other corporate standards can become overwhelming. Make sure the SharePoint management tool you choose lets you ensure that the configuration of your site collections and permissions are kept intact by regularly resetting them. For example, you may want to ensure that the quota is enforced for all site collections, that a particular administrator is always configured as the Site Collection Administrator, or ensure that groups of user are never given access to specific sites (i.e. authenticated users) just to name a few.

GAIN PERSPECTIVE

The right tool will, simply put, help you gain perspective on your environment. You’ll want something intuitive and comfortable that you can use day to day to make your SharePoint management smooth and hassle free. Think of it as a framework that lets you see, explore and manage your entire farm and helps you easily maintain your inventory of sites automatically. Make sure to find one that lets you search meta data, the information about your sites, so you can quickly identify problem sites, sites close to quota, and

so on. You'll most likely want to be able to narrow your scope based on a particular criteria, such as site template, date created, permission levels, or number of files just to name a few. Such ad hoc discovery can give you plenty of flexibility, especially when you combine search criteria, so you spend far less time investigating and analyzing sites in your farm.

Summary

Hopefully we were able to provide some guidance in what to look for in add-on tools that manage Microsoft SharePoint. But now that you know more about what to look for, hopefully your search is a little more focused. Remember, the sooner you begin to think about administration tools, the better off you'll be. Smart administrators build a plan for management before their environment gets big and difficult to control. Armed with these points about SharePoint management tools, you are now ready to make an informed decision on SharePoint management tools.