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A First Look at SharePoint 2010

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Gartner examines the fourth iteration and expansion of the SharePoint platform that began in 2001. CIOs, business planners and IT architects can gain initial insights into the improvements and challenges of Microsoft SharePoint Server 2010 (MSS 2010).

Key Findings

- MSS 2010 provides significant improvements in several key areas, including development tools, content management (CM) library and taxonomy limitations, where Microsoft Office SharePoint Server 2007 (MOSS 2007) was weak, and it will be better suited to large enterprise requirements.

- The 64-bit architecture and related SQL and Windows Server investments may be too costly to fit some IT budgets in 2010.

- Gartner believes MSS 2010 will not gain widespread adoption until 1Q12 or later due to CIO budget pressure and typical planning cycles.

- MSS 2010 brings key enhancements that make it more large-enterprise capable, but it still does not meet some high-end needs, such as synchronization between server farms, out-of-the-box integration with other leading CM systems, and a clearly defined flexible repository and storage strategy other than SQL. Users needing these functions will require third-party tools.

Recommendations

- Enterprises with specific immediate requirements and sufficient budgets for SQL Server and Windows Server upgrades to 64-bit versions should deploy MSS 2010 during 2H10.

- Enterprises with budget limitations should stay on MOSS 2007 until the middle of 2011 when the first service pack should be available.

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ANALYSIS

SharePoint 2007 has been a very popular product, generating well over a billion dollars of revenue for Microsoft in each of the last two years. SharePoint 2010 is poised to build on that success. Microsoft has changed both the naming of key aspects of SharePoint as well as making new functional enhancements. The word "Office" has been dropped from Microsoft Office SharePoint Server (MOSS) — the coming release is called Microsoft SharePoint Server 2010 (MSS 2010). Microsoft has moved away from industry-accepted functional descriptions such as "portal," "content management" and "collaboration" to their own "workload" descriptors: Sites (portal and Web content management [WCM]), Communities (social software), Composites (application development), Content (enterprise content management [ECM]), and Search and Insights (business intelligence). Microsoft's tag-line for the new release is "The business collaboration platform for the enterprise and the Web" which is an evolution from the 2007 messaging around being "people ready." The functional enhancements that are coming are broadly aligned with this shift as, based on user feedback, the 2007 release was deficient in several areas that are critical to enterprise scale and for supporting robust Web application efforts (see "Eight Things Microsoft Should Improve in the Next Release of SharePoint").

1.0 How Much of an Improvement Will MSS 2010 Be?

MSS 2010 is likely to continue SharePoint's growth as an information worker environment. While there are large SharePoint implementations, user feedback indicates that many of the deployments have still focused on midsize enterprises and large departmental uses. With the new version scheduled to be released in 1H10, Gartner believes MSS 2010 will address large enterprise use cases more successfully. Areas to consider include:

1.1 Development Ease

Ease of use and efficiency as a development environment has caused some IT frustration with MOSS 2007. While it has been used as a front-end to applications, its use as an application platform has been limited. Enhancements here include leveraging RESTful methods of Web interoperability, which enables mashup-style composite applications. The Business Connectivity Services (BCS) will allow bidirectional links to applications and databases, through Web services, or via application programming interfaces (APIs). Visual Studio 2010 can work in conjunction with SharePoint to allow faster native WebPart construction. These changes should help SharePoint continue to gain share as many users are now viewing SharePoint as an infrastructure-level default repository for unstructured data. Being able to better leverage that data, build applications that use that data quickly with links to other data sources and applications is key to IT strategies for agile development. In terms of system monitoring and reporting, Microsoft is beefing up the capabilities to monitor the SharePoint farm and rapidly identify potential issues.

1.2 Replication

A major shortcoming in MOSS 2007 has been the lack of replication between server farms. For companies that are dispersed globally, this has meant they have had to deploy a centralized architecture, and this has often created latency for the more remote users. Some have opted to beef up their WAN, use third-party replication tools, or have deployed unsynchronized multi-farm

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environments, which can lead to uncertainty as to whether workers are using the correct version of a document (see "Boost SharePoint Performance With an Application Delivery Network"). This challenge has not been addressed fully in MSS 2010. However, MSS 2010 will allow services such as BCS — formerly the Business Data Catalog (BDC), multi-site search and taxonomies to be shared across multiple farms. There is a new feature called "Enterprise Content Types" that syndicates content types across farms which may be useful in terms of establishing standard types in a multi-farm environment. In addition, Microsoft has added support for:

- Branch office caching (peer-to-peer) as well as the branch office cache server.

- Co-authoring to ensure that multiple content authors can work on content simultaneously regardless of location, avoiding the complexity of merging changes and dealing with collisions.

- A mobile view to provide a lightweight browsing experience and Office document-rendering experience for users with low bandwidth.

The leveraging of these common services across farms will partly address the shortcomings of lack of replication and is a step in the right direction.

1.3 Offline Capabilities

The demand for a good offline experience for SharePoint has been significant. Until MSS 2010, the typical options for organizations with this use-case has been to employ third-party tools such as those from Colligo, Infonic and DigiLink. However, the Groove technology which is an optional rich client, has evolved and is now called "SharePoint Workspace 2010." This allows you to download content, line of business data, InfoPath forms and site material to your computer and resynchronize when reconnected and upload any changes. We expect this, as well as efforts at building out strong mobile device interfaces to SharePoint to be welcome enhancements, as the mobile and disconnected user states are both common and access to information is still important.

1.4 Social Software

MSS 2010 brings improved social networking, new social feedback mechanisms for navigation, discovery and filtering; as well as new Web-based collaborative authoring tools. Some users will still look to best-of-breed tools for extended social software needs. The contextual "ribbon" menu familiar from Office 2007 products is now available throughout the product, and the number of clicks needed to perform common interactions has been reduced. Wider support for standards like Extensible Hypertext Markup Language (XHTML) and Web Contents Accessibility Guide (WCAG 2), and less on ActiveX, should make it easier for third-party developers to build SharePoint extensions. Support for browsers beyond Microsoft's own Internet Explorer will open up access to Mozilla Firefox and Apple Safari users. While it is not the "perfect" social software platform, SharePoint has achieved widespread adoption because Microsoft has generally done a good job of meeting *most* of the requirements of *most* enterprise users.

1.5 Content Management, Search and Workflow

Microsoft has expanded SharePoint's support for large collection of documents. Limitations in library size has made configurations of MOSS 2007 more challenging as system integrators (SIs) dealt with work-arounds. Now, MSS 2010 can store millions of objects in a single library for knowledge worker repositories. Additional work has been invested in the areas of taxonomy, records management and metadata. Key improvements here are the ability to offer more flexible content types and the ability to define taxonomies at the enterprise level and allowing them to be consumed as a service application across many site collections.

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Microsoft will fully integrate the FAST Search technology with SharePoint in the Office 2010 release. The product is effective and extensible, and it's one of the several sophisticated and flexible search platforms available. Workflow capabilities are being enhanced with ability to use Visio to diagram workflows and then export them to SharePoint Designer for implementation. Microsoft uses the Visio visualization in the browser to show you which step of the workflow you're on and what's remaining. While SharePoint itself will remain primarily a horizontal tool offering infrastructure-level content storage, there are growing numbers of SIs who are verticalizing SharePoint to address the specific domain needs of various industries. Regarding the WCM aspects, Microsoft has gained more customers who are using the WCM capabilities of MOSS for large public websites, but Gartner still has not seen Microsoft make significant enhancements to the WCM functionality per se. This is an area they could invest in further.

1.6 Repository and Storage Architecture

One of the ongoing complaints from the MOSS 2007 heritage is the lock-in to SQL as the underlying repository. Storing documents directly in a database as Binary Large Objects (BLOBs) has never been considered an efficient practice as databases are not optimized for unstructured data. MSS 2010 does not offer any particular advancement here, but over the last two years of SharePoint 2007 updates, two APIs have been introduced by Microsoft which may offer some help. They are the External BLOB Storage (EBS) and Remote BLOB Streaming (RBS) APIs. Microsoft has not clearly set forth a road map of which API to use under what conditions, so be sure to talk with your Microsoft advisors before building out any customized storage architecture. Third-party solutions exploiting these APIs are beginning to come to market. BlueThread's StoragePoint is one example (also see http://msdn.microsoft.com/en-us/library/bb862195.aspx).

Overall, working with content in a SharePoint environment enables better management and version tracking, collaborative editing, streamlined review and approval processes, and better access to the content than in e-mail or shared drives. The cost for storing information on SharePoint, instead of a file share, is likely to be higher, because SharePoint runs on SQL, which probably will cost more in terms of SQL licenses, although this can be offset to a degree by ensuring only the one correct version of the content is under management. Examine this cost factor when making judgments about what content to move to SharePoint. In some cases, where very large files are involved for specific use cases (for example, video files on a file server for the marketing department) some users are opting to leave those files in other environments (digital asset management systems, for example) because of the potential negative performance impact of moving those to SharePoint.

1.7 Content Integration

Many users have multiple ECM vendors in place and seek a coexistence strategy. There is no specific functionality on-point on this issue in MSS 2010. While Microsoft partners are more than willing to assist in integration jobs, users would like to see better native integration between SharePoint and other systems. The level of integration available today is mostly Web Parts integration — this is not as seamless as some clients want. The pending Common Management Information Standard (CMIS), however, governs the exchange of content between ECM repositories. Microsoft has worked with several other ECM vendors on this standard. However, ECM products are not expected to incorporate CMIS until later in 2010. For the time being, organizations will still need to use custom adaptors and connectors to make ECM systems inter-operable. Microsoft is planning a CMIS connector to be available some time in late 2010.

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1.8 SharePoint in the Cloud

In the 2007 release, SharePoint Online provided predominantly collaboration features found in Windows SharePoint Services. While the online option has only been available for one year, Gartner has not yet seen large-scale adoption of this first-generation effort (see "Microsoft SharePoint Online and IBM LotusLive Drive Content to the 'Cloud'"). However, in the 2010 release, SharePoint Online will provide over 90% of the features of the premises-based version offering the range of features including content management, portal, enterprise search, business intelligence and the ability to develop on the platform. Sandbox Solutions will enable better ability for customization of cloud-based applications. This increase in capabilities should drive more users to the cloud offering.

1.9 Business Intelligence

PerformancePoint Services are in the box with MSS 2010 and will offer stronger dashboarding technologies that will enable data aggregation from multiple systems. As enterprises store more and more unstructured data in SharePoint and integrate that data with transactional systems, the demand for visibility and reporting around key business processes will only increase. This is a ripe area for future expansion of the SharePoint platform. See "SWOT: Microsoft, Business Intelligence Platforms, Worldwide."

2.0 Should I Invest in MOSS 2007 Now, or Wait until MSS 2010 Is Out?

Gartner expects that Microsoft will make its stated release deadline and that MSS 2010 will be released in the first half of 2010. However, as has been the case with past releases, it is often prudent to wait until the first service pack to make sure the platform is stable and any major issues are resolved. Therefore, advanced users with demands that are pressing may want to look at moving to SharePoint 2010 when it becomes generally available. For more mainstream users, it may be wise to wait until SP1 is released, which will probably be about nine months later. For users already well into their 2007 efforts, it is important to avoid undue customizations of the environment and stay as much as possible to standard configurations. Customizations may introduce fragility when it comes to migration time.

As Microsoft SharePoint evolved in the first three iterations, Microsoft changed the Web Parts model each time. These changes created problems for companies that did significant customizations to their SharePoint applications and environment. This created opportunities for partners like Quest, AvePoint, Vamosa, K2, Casahl, Tzunami and Metalogix who offer tools to assist with migrations. With MSS 2010, the Web Parts model morphs a bit further with greater emphasis on Ajax and Silverlight Web Parts. Microsoft does offer a migration checker tool that came out in SP2 of MOSS 2007. It can be used to check for customizations or other issues that may create challenges during migration. Test any third-party applications, Web Parts or custom-built extensions that are integrated for compatibility.

3.0 An Interconnected Microsoft World

For organizations considering the move to SharePoint 2010, it's important to first assess the overall readiness to embrace 64-bit computing and build a timeline regarding upgrades to the 64-bit versions of Windows Server and SQL Server. SharePoint Server 2010 will be 64-bit only and will require 64-bit Windows Server 2008 or 64-bit Windows Server 2008 R2. It will require 64-bit SQL Server 2008 or 64-bit SQL Server 2005. Costs for these products can vary based on many factors, such as whether you have software assurance and the appropriate hardware in place. Evaluate the overall investment you may have to make to implement SharePoint 2010 including the licensing, hardware and labor costs. While a browser-based experience of SharePoint is

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common, Microsoft is moving increasingly toward the Office and Workspace 2010 clients. MOSS 2007 has been one of the big reasons organizations have moved to Office 2007, and it is expected the same to hold true with the 2010 releases. MSS 2010 is at the center of the collaboration features of Microsoft Office 2010 and at the heart of the self-hosted Web release. Organizations interested in these features will require MSS 2010 to get them. So the elements of the Microsoft information experience — from Outlook/Exchange to Office to SQL and SharePoint — are all interconnected. The benefits of being on the latest versions of all the Microsoft platforms are extolled in the Microsoft whitepaper "Good, better, best: Office and SharePoint Products and Technologies" (see http://technet.microsoft.com/en-us/library/cc263391.aspx   ). However, CIOs and IT planners must understand the road they are going down and that their dependence on Microsoft will likely get stronger. The mix of skill sets in the IT organization will have to focus on ramping up on SharePoint skills (see "Toolkit: Estimating the IT Staffing Impact of Microsoft SharePoint"). One can argue the benefits of a having a relationship with a dominant vendor who has a rich "ecosystem" — but nonetheless, enterprises should go into this with a clear understanding of the vendor's strategy — to keep you on the latest version of not just one application or platform, but a set of interconnected ones. This is not a slight on Microsoft but would be true for any similar infrastructure vendor.

For those IT shops under strict budget scrutiny who have not or cannot make the required level of hardware and related software investments, the impact may mean staying on SharePoint 2007 for the near future. Gartner believes MSS 2010 will not gain widespread adoption until 1Q12 or later due to current CIO budget pressure and typical planning and upgrade cycles.

RECOMMENDED READING

"Microsoft Addresses Biggest Social Software Holes in SharePoint 2010"

This research is part of a set of related research pieces. See "Roundup of Business Intelligence and Information Management Research, 4Q09" for an overview.

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