

# **CAN SHAREPOINT 2007 BE USED TO ASSIST CI?**

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## I. Introduction

My company, Cipher Systems, is a competitive intelligence consultancy. Part of our work is integrating our proprietary competitive intelligence software system into organizations across industries. During our 12 years of operation, we have seen increasing interest in how Microsoft's SharePoint platform might be used to assist with our clients' competitive intelligence technology needs. Therefore, I thought an article which assesses the compatibility of Microsoft's SharePoint 2007 architecture and its key functional components with the primary user requirements of competitive intelligence professionals across industry sectors might be of interest to quite a few of you out there.

We begin by assessing the key user requirements and key deliverables produced by competitive intelligence ("CI") professionals across corporate and institutional organizations. We then align these requirements with the key functional components of SharePoint 2007 in order to identify the gaps and synergetic areas between SharePoint architecture and CI professional requirements.

## II. CI Professional User Requirement Assessment

Cipher has found that the responsibilities and key deliverables produced by CI professionals are generally conditioned by two main factors:

- 1) The status of CI professionals in their respective organization: for instance, part-time CI professionals/researchers who share time with another corporate function such as Marketing Research, Sales Support or Strategic Planning will have a tendency to focus on tactical collection assignments such as compiling competitor profiles or publishing newsletters as he/she may not have the resources or the time to produce longer term/analytical deliverables. Conversely, full time CI professionals/research managers who have access to greater resources and budget can focus on the implementation of strategic and analytical CI deliverables such as market assessments, product launch analysis or M&A due diligence.
- 2) The specific industry sector in which CI professionals operate: for instance, CI Professionals operating in the Pharmaceutical and Biotechnology sectors are primarily focused on monitoring the product pipelines and clinical trial activities of leading competitors while CI professionals in the Telecommunications industry are focused on benchmarking the operational footprints, cost structure and product offering of leading competitors in or around specific MSAs. There are generally additional workflows and deliverables that are associated with these types of industry-specific tasks, which are not discussed in this report.

Regardless of the answers to the above conditions, we have seen that most CI professionals undertake the following tasks:

1. Monitor the news and publish weekly/monthly competitive/marketing intelligence newsletters
2. Monitor, benchmark, and profile key competitors and compile text-based competitor profiles in a matrix styled template
3. Address daily ad hoc CI queries and produce reports for internal users
4. Set up and manage CI teams and projects
5. Create and manage Key Intelligence Topics (KITs) and other strategic research reports for decision makers

### III. SharePoint 2007 Comparative Assessment

#### *SharePoint 2007 Overview*

Overall, SharePoint 2007 is primarily a server-based document management platform outfitted with basic collaboration features, including; a discussion board, a contact database and a Wiki management capability. Microsoft also added an RSS feed manager and a Web publishing functionality to its 2007 version to allow users to import, manage, and share external Web content with other site users.

From a general architectural standpoint, SharePoint appears somewhat “disjointed” to the average user and is organized as a content management “Tool Kit” rather than workflow- driven software. Some of the key functional components available in SharePoint 2007 include:

- **Document management features** to store and index a wide range of content across sites, including: reports, Wiki pages, forms, pictures, and data connection
- **Web publishing features** to create and publish web pages/web page libraries across various SharePoint sites and workspaces
- **Collaboration features** to post and manage announcements, contacts, and discussion boards
- **Project management features** to assign and manage tasks, track issues and deadlines (Calendar)
- **Directory management features** to create custom list views in datasheets and import their respective content into MS Excel

Due to SharePoint’s disjointed nature as described above, we have seen a large number of third-party providers who address specific parts of SharePoint’s functionality:

SharePoint Vendors	Contact Information	Product Name	General Purpose
Axceler	<a href="http://www.axceler.com/">http://www.axceler.com/</a>	ControlPoint	Access / Permissions Control
iDevFactory	<a href="http://www.idevfactory.com/">http://www.idevfactory.com/</a>	Universal SharePoint Manager	Access / Permissions Control

Bamboo Solutions	<a href="http://www.bamboosolutions.com">http://www.bamboosolutions.com</a>	Helper Web Parts, Business Components, Solution Accelerators	Content / Project Management Applications
BrightWork	<a href="http://www.brightwork.com">http://www.brightwork.com</a>	BrightWork pmPoint	Content / Project Management Applications
CorasWorks	<a href="http://www.corasworks.net/">http://www.corasworks.net/</a>	Workplace Suite v10	Content / Project Management Applications
AvePoint	<a href="http://www.avepoint.com">http://www.avepoint.com</a>	DocAve SharePoint Backup/Recovery/Migration	Content Backup & Recovery
Ceyoniq Technology GmbH	<a href="http://www.ceyoniq.com">http://www.ceyoniq.com</a>	"nscale 6"	Content Backup & Recovery
CommVault	<a href="http://www.commvault.com/">http://www.commvault.com/</a>	Simpana 8	Content Backup & Recovery
Casahl Technologies	<a href="http://www.casahl.com/">http://www.casahl.com/</a>	CASAHL ecKnowledge	Cross-Platform Integration / Migration
Metalogix	<a href="http://www.metalogix.net/">http://www.metalogix.net/</a>	Metalogix Migration Manager Suite	Cross-Platform Integration / Migration
Scinaptic	<a href="http://www.scinaptic.com/oneplacemail">http://www.scinaptic.com/oneplacemail</a>	OnePlaceMail	Cross-Platform Integration / Migration
Actify Inc	<a href="http://www.actify.com/">http://www.actify.com/</a>	DesignShare	Document Protection / Data Security
Datapolis	<a href="http://www.datapolis.com">http://www.datapolis.com</a>	SharePoint Column Protector	Document Protection / Data Security
/N Software	<a href="http://www.nsoftware.com/sharepoint/">http://www.nsoftware.com/sharepoint/</a>	SharePoint Workflow Activities	Secure Messaging / File Transfer

## Security Concerns<sup>1</sup>

It is also important to note that SharePoint 2007 presents a number of potential security flaws that would need to be addressed by corporate organizations before they use SharePoint to host and manage Competitive Intelligence data:

<sup>1</sup> Refs:

<http://www.jwsecure.com/dan/2008/09/10/hacking-sharepoint-part-2/>  
<http://www.jwsecure.com/dan/2008/04/26/sharepoint-administration-port-security/>  
<http://www.codeplex.com/MossRegexSearch>  
<http://www.securiteam.com/cgi-bin/htsearch?config=&restrict=&exclude=&method=and&format=long&sort=time&words=SharePoint>

- The default security model of SharePoint 2007 allows all site users to have read access to all documents posted in all sites
- The “centralized repository” configuration of SharePoint 207 increases its vulnerability for the potential hacking of sensitive corporate data, e.g., salaries, phone numbers, customer lists, passwords, strategic plans, etc.
- SharePoint’s outward facing servers can be easily scanned/hacked via Google/ further network mapping can be accomplished with popular security tools such as "nmap"
- SharePoint Regular Expression Search Tools allow security analysts to query the entirety of a SharePoint site's MSWord documents for sensitive data; although, it can also be used by hackers
- As SharePoint’s framework grows, vulnerabilities in code increase - SharePoint encourages a plug-and-play mentality with the allowance of module-code; as such, varying code allows multiple breach points to the site, server, and increased risk to users
- Source code by Microsoft: will have same vulnerabilities for all MS products (memory leaks, buffer overflow vulnerabilities, XSS vulnerabilities, etc) - will also suffer from the same timeliness of Microsoft patching services

## Comparative Assessment

### 1) Overview

The following provides a comparative breakdown of the leading user requirements with some of the key features available in SharePoint 2007. In summary, our comparative assessment indicates that SharePoint 2007 Out of the Box features only provide partial support for the following user requirement categories and key deliverables:

- Monitoring news and producing newsletters
- Monitoring and Profiling key competitors and compiling text-based competitor profiles in a matrix styled template
- Addressing internal queries and produce ad hoc CI reports
- Producing and managing KITs or other strategic reports produced by CI professionals.

On the other hand, our assessment does show that SharePoint 2007 configuration and Out of the Box functionality is better suited to support the following CI user requirement categories and deliverables:

- Creating and updating matrix based competitor profiles / benchmark analysis
- Managing CI teams and projects

## 2) Functional Assessment

The following provides a comparative breakdown of SharePoint 2007 functionality with the primary user requirements of CI professionals:

Key CI User Requirements	SharePoint 2007 Compliance Level	Compatible Functionalities	Functional Gaps
<p>1) <u>Monitor the News and Publish Weekly and Monthly CI Newsletters</u></p>	<p><b>Limited</b></p> <p>SharePoint built in RSS Management and Web Pages creation functionality can help users retrieve and post news announcements in the Shared Document section of the database.</p> <p>However, the average CI user would need to rely on external software development services in order to implement an effective CI news tracking tool.</p>	<p>SharePoint 2007 offers the following built-in capability to support this requirement:</p> <ul style="list-style-type: none"> <li>• <u>RSS Feed Manager</u> in SP's Site Setting Manager allows users to enable/disable RSS news feeds in a specific suite collection</li> <li>• <u>RSS Viewer</u> can help view, manage, and organize feeds</li> <li>• <u>Server Web Pages Publishing</u> function (including built in text editor) can help users post news announcements and related documents (attachments) in the shared document section of the database</li> <li>• Built-in <u>Calendar</u> feature allows</li> </ul>	<p>SharePoint 2007 is missing the following features to support this functional CI requirement:</p> <ul style="list-style-type: none"> <li>• <u>Federated Web Search</u> functionality to search for news content across multiple web sites from a Single Point of Search</li> <li>• <u>Automatic Search Alert</u> functionality to automatically track content and notify users of relevant postings</li> <li>• <u>Automatic Text Summarizer</u> to create and display abstracts of news articles published in database</li> <li>• HTML report template manager</li> <li>• <u>Newsletter Production Workflow</u> to automate the steps associated</li> </ul>

		<p>users to report and post industry events in SharePoint's Calendar <u>but</u> it does not allow them to categorize each entry nor to include attachments or URLs associated with each entry</p> <ul style="list-style-type: none"> <li>• <u>Workflow Designer</u> can be used to generate automatic e-mail notifications to users and manage newsletter distribution lists.</li> </ul>	<p>with the creation of newsletters (search, analysis, formatting, publishing in Word, PDF, or HTML format)</p>
<p>2) <u>Monitor and Compile Profile of Key Competitors</u></p>	<p><b>Limited</b> for text-based Competitor profiles since SharePoint does not feature built in workflow report publishing functionality to produce competitor profile reports in HTML, MS Word, and/or PDF formats</p> <p><b>Higher</b> for matrix-based benchmarking reports due to SharePoint's built in <u>Custom Lists</u> and <u>Import Spreadsheet</u> capability.</p>	<p>SharePoint 2007 offers the following built-in capability to support this requirement:</p> <ul style="list-style-type: none"> <li>• <u>RSS Feed Manager</u> in SharePoint Site Setting Manager allows users to enable/disable RSS competitor news feeds in a specific suite collection</li> <li>• <u>Custom List</u> functionality helps users set up web-based spreadsheet (Competitor Libraries) with</li> </ul>	<p>SharePoint 2007 is missing the following features to support this functional CI requirement:</p> <ul style="list-style-type: none"> <li>• <u>Federated search functionality</u> to retrieve competitor information from Web sources and from internal sources (data repositories)</li> <li>• <u>Competitor Profile Publisher</u> or report wizard to automate the production of text based competitor profiles (search, analysis, formatting, and publishing</li> </ul>

		<p>customized headers and views in order to post documents and/or text content associated with key competitors' capabilities and benchmarks.</p> <ul style="list-style-type: none"> <li>• <u>Summary View</u> functionality can also help users dynamically sort competitor-related content according to customized views associated with key competitors and/or markets</li> <li>• <u>Server Web Pages Publishing</u> function (including built in text editor) can help users post content and documents (attachments) associated with specific competitor profiles (and profiling criteria) and in the shared document section of the database</li> <li>• <u>Built-in Import Spreadsheet</u> capability helps users import competitor matrices and data points into</li> </ul>	<p>competitor profiles in HTML, MS Word, or PDF format)</p>
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		MS Excel	
<p><u>3) Address Daily Ad Hoc CI Queries and Produce Reports for Internal Users</u></p>	<p><b>Limited to Moderate</b></p> <p>SharePoint does not offer a federated search engine to search across internal and web- based information.</p> <p>In addition, SharePoint lacks a CI publishing workflow to automatically collect, analyze, and publish reports in response to the daily queries of internal users.</p> <p>However, SharePoint does provide a suite of tracking, collaboration and document management tools to help CI users manage the production of Ad Hoc CI reports in their respective organizations.</p>	<p>SharePoint 2007 offers the following built-in capability to support this requirement:</p> <ul style="list-style-type: none"> <li>Built in <u>Tracking</u> features such as <u>Project Tasks</u> and <u>Issue Tracking</u> can be used to log in, prioritize, and manage CI requests from internal users</li> <li><u>The Wiki</u> functionality (including <u>Wiki Page Library</u>) can be used to post dicussion topics and collect information on newly posted CI requests</li> <li><u>SharePoint's Document Library</u>, (including <u>Data Connection</u> and <u>Report Library</u>) and the <u>Server Web Pages Publishing</u> function (including built in text editor) can be used to post, index, and organize background information and analytical</li> </ul>	<p>SharePoint 2007 is missing the following features to support this functional CI requirement:</p> <ul style="list-style-type: none"> <li><u>Federated search functionality</u> to retrieve competitor information from Web Sources and from Internal Sources (Data Repositories)</li> <li><u>CI Report Workflow Manager and Report Wizard</u> that would allow users to: <ul style="list-style-type: none"> <li>- create and manage report templates</li> <li>- Compile an analytical trail and assign a specific document, web page, report and/or news article to a report</li> <li>- Generate and distribute CI reports to original requestor</li> <li>- Store and update CI requests/reports</li> </ul> </li> <li>Customizable user interface and user profiling to automatically</li> </ul>

		updates related to each topic.	display relevant set content and/or features to selected users based on their specific interests and/or job responsibility
4) <u>Set Up and Manage CI Teams and Projects</u>	<p><b>Moderate to High</b></p> <p>Although SharePoint 2007 does not offer a cohesive CI project management functionality, it does provide the basic tools required to effectively manage the implementation of CI projects and teams across a corporate organization</p>	<p>SharePoint 2007 offers the following built-in capability to support this requirement:</p> <ul style="list-style-type: none"> <li>• Built in <u>Tracking</u> features such as <u>Project Tasks</u> and <u>Issue Tracking</u> can be used to log in, prioritize, and manage CI requests from internal users;</li> <li>• <u>The Wiki</u> functionality (including <u>Wiki Page Library</u>) can be used to post dicussion topics and collect information on newly posted CI requests</li> <li>• <u>SharePoint's Document Library</u>, (including <u>Data Connection</u> and <u>Report Library</u>) and the <u>Server Web Pages Publishing</u> function (including built in</li> </ul>	<p>SharePoint 2007 is missing the following features to support this functional CI requirement:</p> <ul style="list-style-type: none"> <li>• CI Workspace to access, create and manage CI projects and deliverables from a single interface</li> <li>• Ability to view the status of all on-going CI projects from a single view (project start date, project owner, key questions, and project due date)</li> <li>• Instant Messaging functionality for direct communications with CI team members</li> </ul>

		text editor) can be used to post, index, and organize background information and analytical updates related to each topic.	
5) <u>Create and Manage Key Intelligence Topics (KITs)</u>	<p><b><u>Very Limited</u></b></p> <p>Some of the project management and collaboration tools currently featured in SharePoint 2007 could be applied towards the management and implementation of Key Intelligence Topics.</p> <p>However, SharePoint does not offer the workflow functionality to support the production of KITs and would require extensive customization to meet this requirement.</p>	<p>SharePoint 2007 offers the following built-in capability to support this requirement:</p> <ul style="list-style-type: none"> <li>• Built in <u>Tracking</u> features such as <u>Project Tasks</u> and <u>Issue Tracking</u> can be used to log in, prioritize, and manage CI requests from internal users</li> <li>• <u>The Wiki</u> functionality (including <u>Wiki Page Library</u>) can be used to post discussion topics and collect information on newly posted CI requests</li> <li>• <u>SharePoint's Document Library</u>, (including <u>Data Connection</u> and <u>Report Library</u>) and the <u>Server Web Pages Publishing</u></li> </ul>	<p>SharePoint 2007 is missing the following features to support this functional CI requirement:</p> <ul style="list-style-type: none"> <li>• <u>Federated Search Functionality</u> to retrieve competitor information from Web sources and from internal sources (data repositories)</li> <li>• <u>KIT Management Workflow</u> to allow users to: <ul style="list-style-type: none"> <li>- Create KIT statements (topic, questions, background information, scope, etc)</li> <li>- Create project team and assign tasks (based on questions)</li> <li>- Compile an analytical trail and assign a specific document, web page, report and/or news</li> </ul> </li> </ul>

		function (including built in text editor) can be used to post, index, and organize background information and analytical updates related to each topic.	article to a Key Intelligence Question - Generate and distribute KIT reports to original requestor - Store and update KIT requests/reports
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## Conclusion

SharePoint 2007 features a series of tools and services which are directly compatible with the primary user requirements of CI professionals. However, SharePoint 2007 requires a significant amount of programming and technical customizations in order to fully meet the key CI user requirements and deliverables listed in the first section of this report.

Some of the key factors limiting SharePoint's ability to meet the primary user requirements of CI professionals include:

- SharePoint is primarily configured for power or technically savvy users and would require the implementation of a user friendly interface in order to be effectively applied by CI professionals
- SharePoint lacks the Intelligent Workflow functionality required to support and automate the CI production cycle applied by research professionals; specifically search, prioritize, analyze, and report
- SharePoint presents a number of major security flaws that must be addressed by corporate or institutional users who are considering using SharePoint to support its Competitive Intelligence function

Going forward, we expect Microsoft to seek to address some of these shortfalls with their next release. It is likely, though, that you will continue to need to work with IT on performing extensive requirements capability assessments even as the software progresses, to ensure that it truly captures your needs and your organization's, before committing to a stand-alone CI system build exclusively in-house on SharePoint 2007.

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