



SERVICE GUIDE

Overview of the Envisioning Phase for the Implementation of Microsoft SharePoint Server

Ensuring that you get the most out of your SharePoint investment

Effective envisioning for a SharePoint deployment is critical to its overall success. This document describes the key areas of focus for a structured envisioning phase and how it helps to build understanding of business requirements; the ways that specific products, configurations and techniques would best align with those needs, and determine the appropriate scope of the project.



Sample Schedule

The following sample schedule outlines the various areas of focus:

Note: The following schedule is merely an outline – a reference point to facilitate the discussions necessary to deliver a world-class enterprise SharePoint solution. The topics and timeline are certainly subject to change.

Areas of Focus	Mon	Tues	Wed	Thurs	Fri
Introductions & Project Overview	X				
SharePoint Capabilities Overview	X				
Understanding Your Organization	X				
Intranet, Extranet & Internet Scenarios		X			
User & Group Collaboration		X			
Business Intelligence & External Connectivity			X		
Workflow & Process Automation			X		
Identity Management, Access & Authentication				X	
Personalized Content & My Sites				X	
Document & Records Management				X	
Enterprise Search Strategy					X
Performance, Availability, Backup & DR					X
Envisioning Wrap-Up & The Way Ahead					X

Introductions & Project Overview

DESCRIPTION: After a quick “around the table” introduction, we’ll briefly describe the Envisioning process and ask for a high-level overview of the project.

DESCRIPTION: Particularly important for an organization whose members have a varying degree of familiarity with SharePoint's capabilities, this topic allows us to provide an overview of SharePoint's major moving parts – through live demonstration, discussion or both. The goal is to introduce (or perhaps merely refresh the team's understanding of) the technology and to set the context for the following topics.

BENEFIT: SharePoint's incredible popularity and high adoption rate means that many organizations and information workers are likely already familiar with at least some aspects of its functionality. However, in order to maximize the effectiveness of the Envisioning process, we'll briefly cover the wide range of SharePoint's native capabilities, including Document & Records Management, Business Intelligence & Workflow, Forms & Excel Services, Enterprise Search, Social Networking, Collaboration, and Publishing.

DESCRIPTION: Before diving into the specifics around how SharePoint should be tailored to meet your business needs, we first need to understand a bit about how your organization functions. What is the primary objective of the business or division? How is it structured? How many users do you anticipate participating in the solution, and where are they located? What does your current IT infrastructure look like? What are the major business challenges? Questions and discussion in this topic allow us to gain insight into how your organization operates, and how SharePoint might be designed and configured to work within that context.

BENEFIT: At its most fundamental level, the key to a well-designed SharePoint system is in the information architecture. Unlike other typical enterprise functionality like email, messaging or web publishing, the ROI from SharePoint generally does not come from simply installing the product and providing the service. Understanding your organization allow us to specifically design and configure SharePoint to meet *your* business needs while staying within your particular policy, security, usability and manageability boundaries.

DESCRIPTION: The purpose here is to discuss the various ways in which you envision users connecting to the system. Are all of the anticipated users local to your network? Is SharePoint primarily being considered to resolve internal, Intranet-only business issues, but may at some future date expand to include Extranet or Internet users? Does your organization currently have VPN capability, or perhaps using a 3rd-party remote access product like Citrix? Are you currently publishing any other service to the Extranet/Internet? If we anticipate the need for Extranet/Internet usage, can we leverage existing infrastructure like DMZ's, firewalls, load balancers, or would that need to be part of the design? Are there internal/external polices or laws that govern this type of access? These types of questions allow us to gain an understanding of the user base of the proposed solution, and the broad technology required to deliver it.

BENEFIT: Even if external access is a feature that's being considered for a later phase of the project, it's important to understand the direction you're heading to ensure that your system is designed to grow with you. The Internal/External access question can drive many aspects of an enterprise SharePoint deployment, from site topology to DNS namespace to performance.

User and Group Collaboration

DESCRIPTION: The purpose of this topic is to identify how users and groups in your organization can work together in the easiest, most efficient manner possible. In the current environment, how do people work together on tasks or projects, and what types of things do they usually work together on? Is it primarily person-to-person communication, or does the work typically take larger teams to produce? Does collaboration generally follow the organizational chart and take place within a single department or division, or is it common to see work span across multiple departments? Are teams permanent or semi-permanent groups of people, or are they more ad-hoc in nature? All of these are examples of the types of questions that allow us to shape SharePoint collaboration to meet your needs.

BENEFIT: Collaboration certainly isn't new – your information workers collaborate today using any number of methods: meetings, email, cell phones, scribbled notes and hallway discussions. The question around whether SharePoint will become a preferred alternative to any of those existing methods depends nearly entirely upon how easy, intuitive and capable the system is designed to be.

Business Intelligence & External

DESCRIPTION: The discussion points here are around SharePoint functionality such as the Business Data Connector, Data Filtering, Excel Services, Reporting, KPI's and Executive Dashboards. Does your business data reside in external systems such as SAP or Siebel? Does your organization make extensive use of Excel spreadsheets? Is there a system today that consolidates or reports that information? Is the goal to migrate data away from any legacy systems into SharePoint, or leave it in place and merely expose it via SharePoint? What sort of data would be important to see in an Executive Dashboard? The goal of questions such as these is to identify the sources of your business data, whether internal or external, and discuss how that data should ultimately be shared and reused.

BENEFIT: The difference to be made here is as simple as the difference between *data* and *information*. There's very little doubt that your organization is awash in data. The value in a well-designed SharePoint system is taking what may be an overwhelming amount of uncorrelated data, and presenting it in such a way as to provide the key decision makers with organized, timely and actionable information. The guiding principle is to not only expose data through SharePoint, but expose it in such a way that actually enhances decision making.

Workflow and Process Automation

DESCRIPTION: The goal of this topic is to identify those business processes that can be automated (or further automated) to maximize efficiency and speed. Are documents frequently routed for editing and approval? Is process standardization currently an issue? Are there current tasks or processes where coordination and timely notification are problems? Is your organization required to maintain detailed audit trails for internal processes? Do most processes stay within your organization, or do they typically involve external customers, companies or agencies? The questions here are designed to provide a detailed view of some of your most challenging and complex processes in order to determine how SharePoint's powerful automation tools might provide value.

BENEFIT: Automation alone is often not enough to solve tough business problems, and this is where expert business analysis plays a major role. To be sure, this topic is a fantastic opportunity for members of different departments and teams to discuss their perspective and help reach a consensus regarding the overall automation of a process. Additionally, our expertise in SharePoint-based automation helps to ensure that the technology brought to bear actually improves the process, instead of merely making a bad process go faster.

Identity Management, Access & Authentication

DESCRIPTION: At a base level, SharePoint is a place where users interact with content. In order to have a secure and auditable system, we need to be able to reliably identify those users, and grant them rights and permissions based on that identity. What systems are in place today – Active Directory, ADFS, MIIS, Trust-Based Resource Forests, Forms-Based, etc? If Active Directory is in place, do the current security groups mirror the anticipated SharePoint groups? Do policies or laws drive auditing requirements around access? Will everyone authenticate to SharePoint in the same way, or will different groups require different authentication mechanisms? This discussion provides us with an understanding of how you authenticate to and access content today, and where you may be heading in the future.

BENEFIT: Simply put, this topic has the potential to have an enormous impact on the SharePoint infrastructure design. While SharePoint is certainly capable of utilizing a wide range of authentication techniques, the complexity is always in the details. Additionally, it is far better to design your system from the ground up with the intention of meeting a particular policy or legal standard than it is to engineer that compliance after the system is built.

Personalized Content & My Sites

DESCRIPTION: To create a SharePoint solution that delivers the right information to the right people, it's important for us to identify both the groups and the content to be delivered. In terms of categorizing content, how might we break your organization up into logical audiences? When workers seek out a colleague, what search criteria (department, title, city, etc.) would be most helpful? Does your organization maintain a "company directory," and is keeping it current a challenge? These questions spark a discussion that provides insight into how SharePoint might best be configured to target your users with specific, relevant content.

BENEFIT: In SharePoint, "My Sites" are special sites that are personalized for each user. They are enabled by default, and the decision to disable them can sometimes lead to unintended consequences, as they drive a large portion of SharePoint's social networking functionality. Likewise "Audiences" and "Personalized Web Parts", although not enabled by default, provide a tremendous mechanism for displaying information relevant on a per-user or per-group basis.

Document & Records Management

DESCRIPTION: The goal here is to identify any policies, procedures, technologies or regulations that effectively constitute your document management requirements, and ensure that SharePoint helps you meet those targets. Are there existing document/records management policies in your organization today? What are the main "content types" of your documents? Is a DRM/IRM solution required/desired? Is document versioning required, and which types of documents would be versioned? What type of metadata should the system store for each document type in order to provide for a robust searching and categorization? Do you typically archive a large amount of data for long periods of time? Questions along this line help us to better understand your particular document lifecycles.

BENEFIT: Document management focuses on the storage and organization of documents to support active work in progress, while records management addresses the long-term storage and management of finalized business documents. When organizations do not have any kind of formal document or records management system in place, content is often created and saved in an unmanaged and decentralized way on scattered file shares or document libraries. Effectively configuring these elements in SharePoint can help prevent this, and thus make it easier for employees to find and collaborate effectively on content. DRM/IRM solutions can go a step further, and help prevent the unintentional/unauthorized disclosure of content – whether inside or outside the organization.

DESCRIPTION: The conversation around Enterprise Search is centered on shaping a user-friendly and business-functional search interface within SharePoint, and ensuring that the results are relevant and accurate. Security trimmed results notwithstanding, should everyone generally be able to search the same content? Are there external content sources that SharePoint should index for search? Are these content sources local or remote? How might we logically divide the enterprise content into “scopes” to allow for narrowing a search? In terms of size, what’s the total amount of content – both SharePoint and external – that we expect to index for search? The questions in this topic are designed to facilitate a discussion that results in a world-class enterprise search system.

BENEFIT: Everyone realizes that in terms of delivering a great solution, the focus shouldn’t be so much on “searching” for content but rather on “finding” it. And truth be told – even a very poorly designed system generally allows “searching” for something. To provide information workers the capability to easily find content such as documents, files, pages, people or lists, the Enterprise Search functionality in SharePoint must be configured to index the content and deliver the results in an intuitive way.

DESCRIPTION: The central theme of this topic is to discuss the requirements around system performance, outages and disaster recovery to use as measurable standards for system design. Are there existing SLA’s around performance or downtime? Are local backups enough, or is offsite/cold site/warm site storage required? Should the SharePoint solution have “site resiliency” such that in the event of a complete site failure, services switch to another facility? Are you using 3rd-party products (such as Backup Exec, HP OpenView, Tivoli TSM, etc) today to backup enterprise applications? Do you have any web applications today that serve the same anticipated user base that SharePoint will serve? This discussion provides us with the information needed to architect a system that meets your specific requirements.

BENEFIT: When it comes to this topic, the derived solutions are often the result of balancing several factors: budget, manageability, risk assessment and service level agreements. The combination of these factors is generally unique to any particular organization and there simply isn’t a “one size fits all” solution. SharePoint can very easily (and often unintentionally) be configured, modified and utilized in ways that crush performance and invalidate entire categories of backup and disaster recovery techniques.

DESCRIPTION: A quick summary to discuss what we’ve learned, an opportunity to ask clarifying questions, and an outline of possible next steps.

“Our lesson on the importance of SharePoint deployment planning came with a price-tag of \$100K, the cost to redesign our site structure and migrate content to the new environment...”

- Katie Omri, Project Manger
Fred Hutchinson Cancer Research Center

Trilogy Solutions offers world-class, leading edge SharePoint architecture and deployment services. Our certified SharePoint consultants will plan and architect for all aspects of your SharePoint implementation.