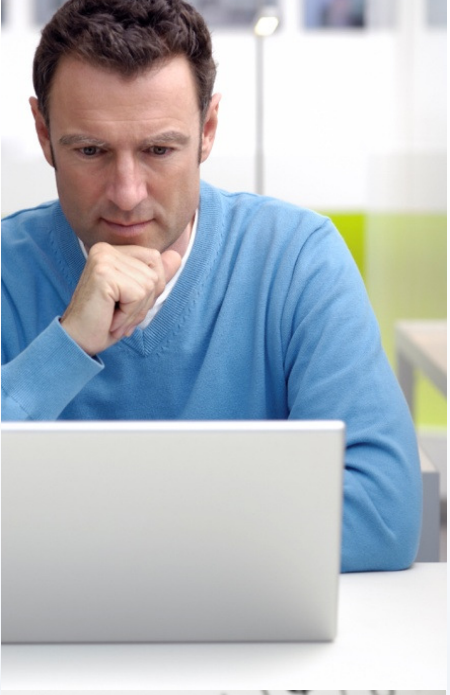

Out-of-the-Box?

The Reality of Implementing SharePoint.

White Paper
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Executive Summary

SharePoint's growing popularity means that if you have not yet encountered a SharePoint site implementation project, chances are you will. For all of SharePoint's capabilities and reputation for ease of use, it is generally not a solution that does exactly what you need "out of the box". In fact, organizations that see the greatest value from their SharePoint investment start with a good implementation plan.

Without proper planning upfront, deploying SharePoint can become difficult to control and manage, especially as the number of sites and the amount of content mushrooms. It is critical to proactively develop a process prior to implementation to manage these sites.

The governance plan you develop is your roadmap for administering, maintaining, and supporting the efficient use of SharePoint. Your governance plan should be based on a clear understanding of the end users' needs, the organization's existing knowledge and gaps in capabilities. As a result, you can ensure that realistic expectations and timelines are set.

This white paper will cover some of the "fact versus fiction" around SharePoint implementations. We will discuss the main components of an effective governance plan, key organizational considerations and thinking beyond "the box" when it comes to your SharePoint implementation.

Introduction

As organizations strive to be more efficient, IT is looking to collaboration tools and technologies to help drive productivity and cost efficiency. According to a November 2008 *CIO Magazine* survey, IT professionals named content management/document management and collaboration technologies as the top two things they were researching. SharePoint has emerged as a pre-eminent technology in the enterprise-level collaboration and document management space.

In order to achieve success with SharePoint, the ideal place to start is to create a governance plan. The plan defines the implementation and policies for usage of the environment to support and manage the organization's evolving SharePoint infrastructure.

While SharePoint is known as being easy to use from an end-user perspective, depending on the needs of the organization, it is not necessarily an out-of-the-box solution. Some organizations make the mistake of underestimating the complexity of their needs and the amount of "tooling" needed. This time consuming and potentially expensive error can be avoided with a good governance plan.

Creating a Governance Plan

For many organizations, the administrative challenges of managing SharePoint arise soon after deployment. If your organization is facing this challenge, you can take action to stabilize and control your SharePoint environment. The key is to construct a solid plan to manage your current environment and plan for future growth with all key stakeholders involved from the get-go.

Ideally, before the first site is even deployed, the organization should have established a governance plan for SharePoint implementation and policies for its usage. Ensure your organization's SharePoint governance plan asks the following questions to get a realistic picture of what the needs and expectations are of SharePoint in your environment.

1. ***Accessibility*** — Who should be able to access SharePoint and how

Key questions:

- Do we want SharePoint be accessible outside of the firewall or VPN?
- Are we creating access to SharePoint for Employees? Vendors? Customers? Clients?
- Will users be authenticated against Active Directory or a database repository? Do we have sufficient CALs to support the user base?

2. Backups and Disaster Recovery — How will we handle file storage and deletion

Key questions:

- How long do we want items to remain in the Recycle Bin to allow for recovery?
- How often should site-level and database-level backups be performed?
- For how long should backups be retained?
- What will our process be for recovering lost or deleted sites?
- Where will backup files be stored? How quickly must the system be restored following a disaster?

3. Forward Thinking — Planning for future growth and use of SharePoint

Key questions:

- How fast do we expect SharePoint usage to grow over time? How many sites do we expect?
- How many users will be accessing the system, and how frequently?
- How big will our sites get?
- How many servers will we need for front-end web, database, indexing, and other services?
- How many separate site collections will be needed?

4. Records Retention and Expiration — What will we do to ensure compliance and best practices

Key questions:

- What records and files are subject to long-term retention?
- To what industry standards and compliance policies must we adhere?
- Will users be responsible for submitting records for retention, or should it be automated?
- For how long should records be retained?
- Should expired documents be deleted automatically or routed for periodic review?
- Should archiving be used?

5. System Support – Processes and decisions around in-house or third-party support

Key questions:

- Who will provide first tier help desk support?
- How will support issues be logged?

- What is the escalation process for support items?
- What level of support should be purchased from Microsoft and third-party vendors?
- Is there an SLA (Service Level Agreement) provided by IT?

6. Capacity – Planning for content capacity

Key questions:

- How much disk space do we have available for content?
- What, if any, should be the maximum sizes for sites?
- Do different size limits apply to different types of sites and files?
- What is the maximum file size for uploaded files?

7. Site Requisition – Responsibilities and processes for site management

Key questions:

- Who has responsibility for creating new sites?
- How will new site requests be received?
- What features will be required by the site?
- What, if any, training should be required in order to become a site administrator?

8. Custom Extensions — Planning for customized process or application development

Key questions:

- What types of extensions will be allowed? Custom web parts? Custom workflows? Custom features?
- What naming conventions and other development conventions should we require?
- Do custom items need to go through a code review process?

9. Branding — Decisions around standardizing the look and feel of SharePoint sites

Key questions:

- Do our sites need to be branded with the corporate colors?
- Are there required design templates to which sites must adhere?
- Are custom themes allowed?

10. Content Management Policy — Rules and limitations on content types permitted

Key questions:

- Are our employees allowed to create personal sites?
- What content must be restricted on those personal sites?
- What custom properties should be tracked in the user's profile, and who should be allowed to see them?

How Global Are You?

Organizations that have multiple sites or are collaborating with vendors, suppliers and customers need to think through how to manage a global SharePoint environment. Globalization is a bigger task than just a single Web farm that incorporates multiple languages.

Some points to consider:

Bandwidth

The biggest issue of globalization for an organization is bandwidth. If you have offices in multiple continents, then a standard SharePoint farm will not be efficient for page requests coming from around the world.

Some options include:

- Separate server farms based on location
- WAN accelerators
- Multiple server farms with a regional and global search index to speed up search results
- Utilizing SQL replication to push data to synch up with other regional server farms
- 3rd party tools – Syntergy offers a SharePoint replicator product that is specialized to push SharePoint content from one farm to another farm

Search

Some organizations don't really go looking through other group's areas of content, except for search purposes. In those instances, search is the most important to speed up across the globe. You need to consider having a more global approach verses a regional farm. This is more specific and quicker.

Security

Security and authentication is another major factor in globalization that should be considered if SharePoint is also opened up to AD/internal users.

Thought Starters

In addition to the questions posed earlier, here are some additional "current state" questions you should review with your team.

1. What is your organizational distribution? How many base locations do you? How many information workers? Are you centrally hosting SharePoint now? Cross Coast? Cross Atlantic?
2. What is the current and/or projected size of your content database?
3. What is your organizations authentication model? A/D implemented? Central/Distributed?
4. Which applications are used globally versus those that are or primarily used in a single location?

Beyond the Box

To maximize the full potential of SharePoint, begin thinking of SharePoint as a platform and not just another application. Many people think of SharePoint as an application because they are used to the out-of-the-box functions it offers, such as team collaboration and personal sites.

But there is so much more that SharePoint can offer since this platform also provides a lot of flexibility in creating custom applications. For example, a customer relationship management (CRM) system built in SharePoint is an application built on the SharePoint platform. Whether you use the out-of-the box templates, or use SharePoint as the strategic platform for all collaborative applications for the enterprise, the next step is to determine what toolset is required to make it fully useful throughout your organization.

When creating the vision for how SharePoint will be used in the enterprise, remember that its templates and web parts do not fully leverage the capabilities provided by the SharePoint Object Model. The benefit of SharePoint is that it's effectively an open-ended platform for any level of customization. The simplest deployment scenarios use native functionality for things such as simple team collaboration. Highly complex deployments can include complete, fully functional sites built completely on MOSS 2007.

Other examples of SharePoint usage include systems for CRM, employee expense claims, help desk, complex project management, business intelligence, human resources management, global documentation, and applications that mix internal and external data, such as executive dashboards for key business performance indicators, or sales order processing systems.

SharePoint platform services make it much less expensive to develop an application than it would be to create one from scratch. Internal resources don't have to prohibit this customization either. Third-party development tools can help organizations build complex applications in SharePoint while greatly reducing development and maintenance costs.

Key Takeaways:

Proper planning is the key in terms of infrastructure and backup/ disaster recovery. By default, SharePoint sets up a single content database. However, if the implementation grows out of control this database can grow to be too large. Microsoft recommends not letting databases grow to be larger than 50-100 GB. A recent client of ours exceeded this recommendation. As a result, SQL backups were failing, and the disaster recovery plan didn't work as it should have. For such large backups, the entire site could be down for days in a disaster situation.

The client is currently breaking apart the large database into smaller, more manageable chunks. The Microsoft best practice is to start your SharePoint implementation with multiple site collection and/or content databases set-up. This will ensure that the individual databases never grow to be too large.

Without proper planning around customization and development, adding new servers becomes complicated. As the company and implementation grows, there can be a need to grow out the site with extra Web servers to handle the increased traffic, performance and users/functionality. However, it's crucial that the implementation is planned correctly in terms of services, customizations and custom development. If not, it's a more difficult process to add in additional Web servers later on.

Without proper governance, sites grow out of control. Define roles and responsibilities at the beginning to ensure there is proper control as it pertains to site creation, security and custom development. Proper planning around this (turning on SharePoint Quotes, site owner emails, reports, etc.) can help manage the process. Also, all customizations and custom development needs to be done with regards to best practices so that adding in new servers, upgrading or installing service packs, and hot fixes will not overwrite any changes.

Top Blunders to Avoid

1. Using MOSS as a network drive replacement
2. Poorly designed items such as search, security, taxonomy and organization of sites, and shared services
3. Lack of capacity planning.
4. Not involving all key stakeholders in the beginning
5. Implementing all applications at one time
6. Lack of governance planning
7. Overlooking the need for migration of existing content
8. Security so tight it constrains the users

Source: Shankar's Musings, "Top 10 Pitfalls for SharePoint Implementation," http://techdhaan.wordpress.com/2008/05/08/top-10-pitfalls-for-a-sharepoint-implementation/.

Conclusion

We've learned that having a vision and plan for SharePoint within your organization is key to a successful implementation. However, "out-of-the-box" SharePoint may not fit all the needs or meet all the expectations of your organization, especially as it grows more complex. Once you've developed a vision and governance plan, finding a third-party with deep SharePoint expertise to assist with validating the plan and implementing SharePoint may be more time and cost efficient than trying to manage the project entirely in-house. This is particularly true if your organization does not have a great deal of SharePoint expertise in-house.

For more information on how SharePoint can assist you in meeting your organization's goals, please contact Innovative Architects at info@innovativearchitects.com or call Dan Michaels at 770-623-2764.

About Innovative Architects

Innovative Architects is a Microsoft Gold Certified Partner specializing in providing leading edge technology solutions to business problems. Find us on the web at **www.innovativearchitects.com.**