

What I Wish I Knew Before I Implemented SharePoint

**I Wish I'd Known That!**

# Who Am I?

- David Petersen
- SharePoint Architect/Developer/Evangelist
- MCSD, MCTS, MCP, USMC, DAD, GEEK
- <http://whatsthesharepoint.com>

# What This Will Cover

1. What are we building?
2. Who's playing?
3. Don't forget HAL.
4. Lock it up.
5. Someone has to install it!
6. Wire Me Up!
7. Sites, Webs, Libraries, Lists!
8. Governance.
9. You say meeta, I say meta.
10. Train!

# Good Implementation



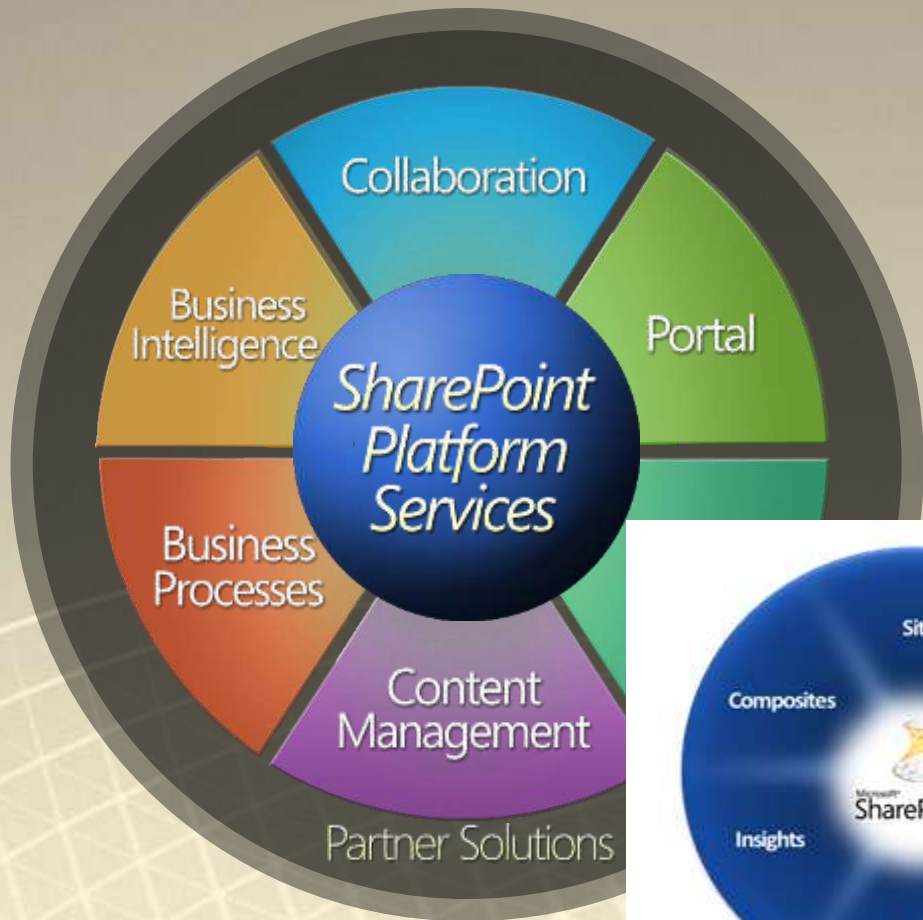
# Bad Implementation



# What This Won't Be

- Features and capabilities of SharePoint
- What's new with SharePoint 2010
- Specific to your situation.

# 1. What are we building?



*Connect and Empower People*

*Cut Costs with a Unified Infrastructure*

*Rapidly Respond to Business Needs*

# 1. What are we building?

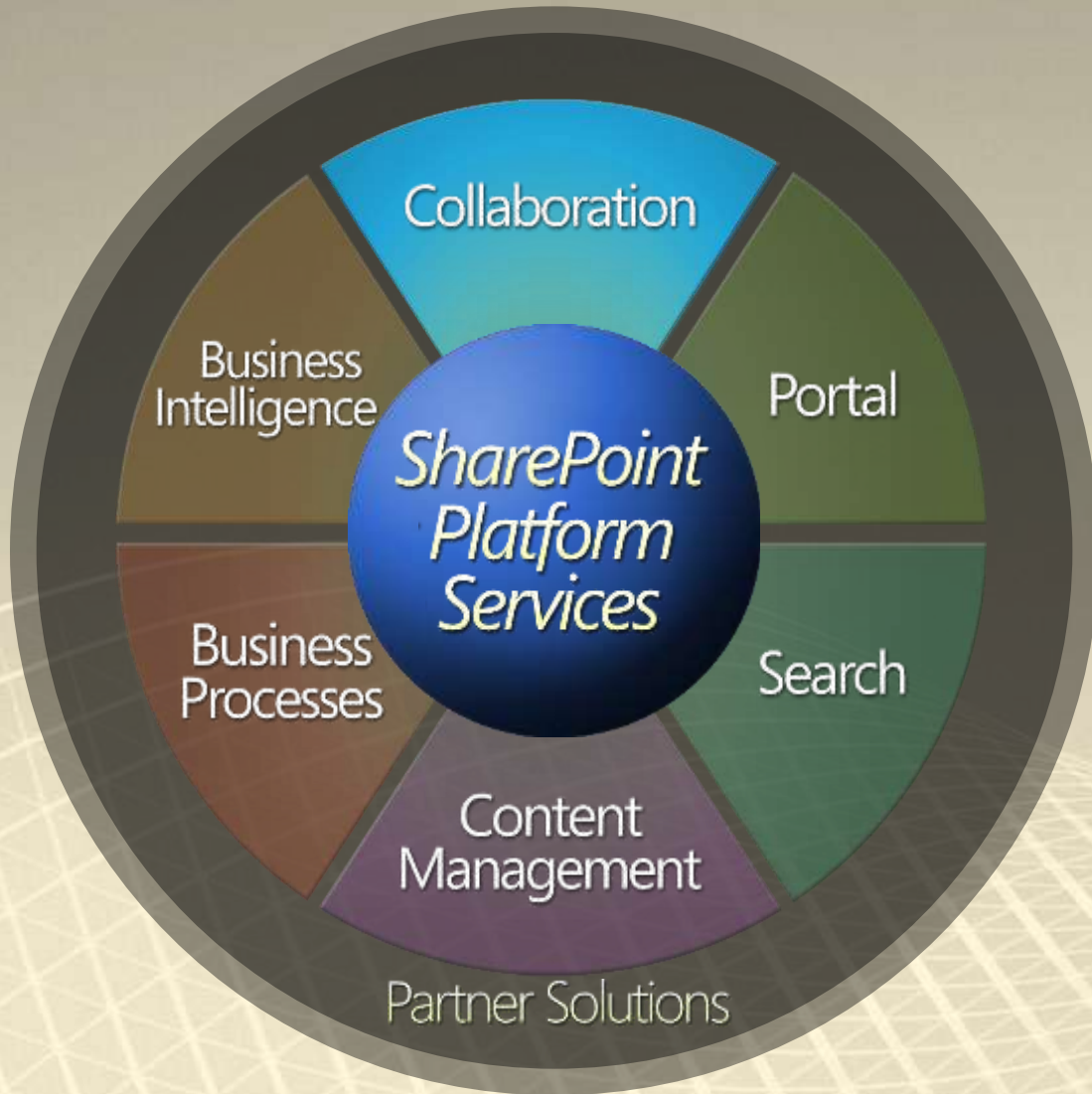
- Understand what is needed/wanted
- Marketed as an easy to use product
- Laundry list of features
- Certain functionality isn't available in certain scenarios.
  - Example: Publishing
- OOB / Customizations



# Planning Is The Key

Proper Planning Prevents  
Piss Poor Performance

# Collaboration



- Outlook and instant messaging integration
- Groove integration
- Documents, tasks and calendars
- Blogs and Wikis
- Basic project management

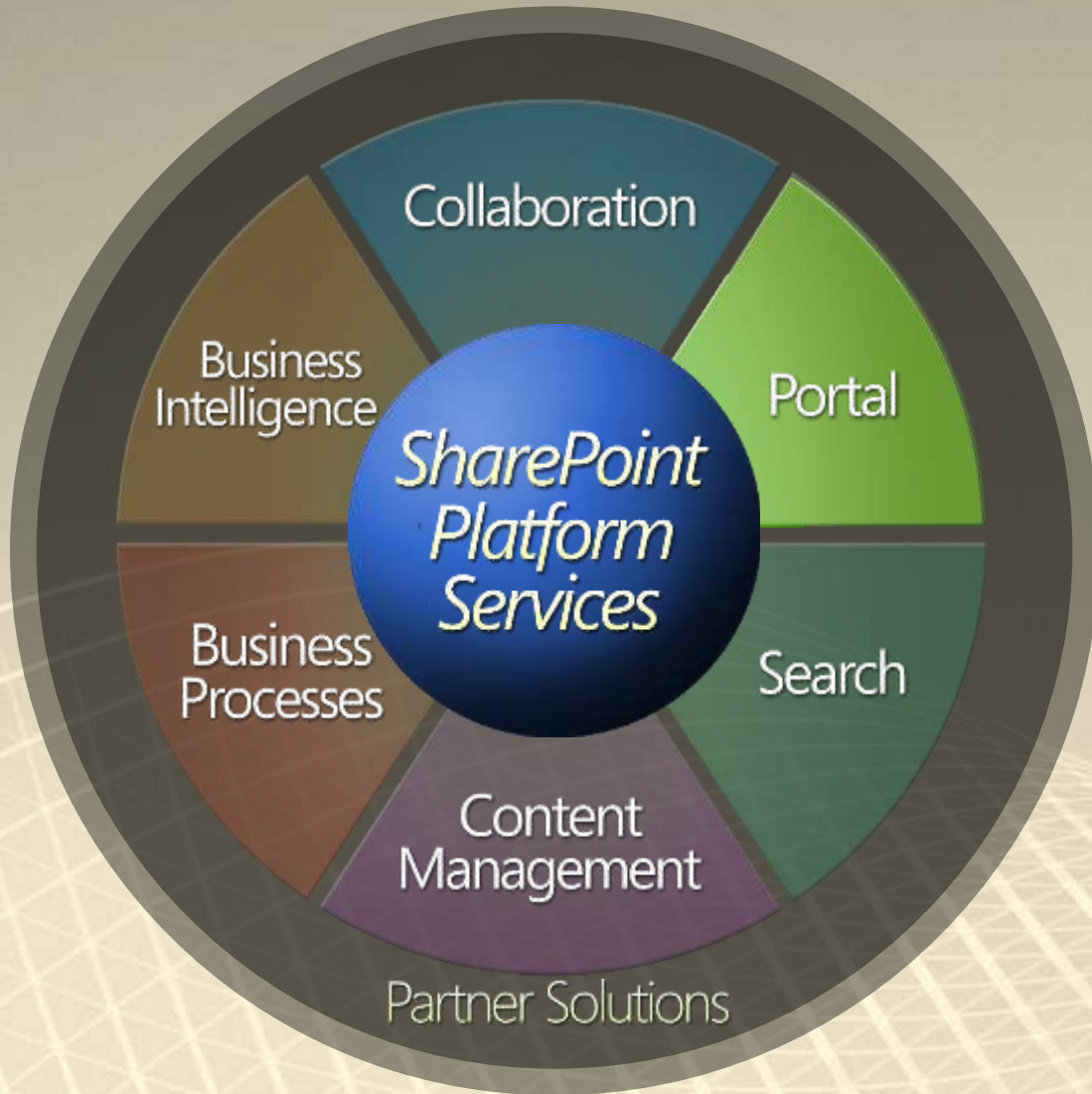


# 1. What Are We Building?

- Collaboration
  - How are you going to collaborate?
  - Do you have a specific requirement for this?
  - What version of Office are you using?
    - Fair – Office 2000
    - Good – Office XP
    - Better – Office 2003
    - Best – Office 2007 (and now 2010)

# Portal

Portal



- Enterprise Portal Template
- Site Directory
- My Sites
- Social Networking
- Privacy Control

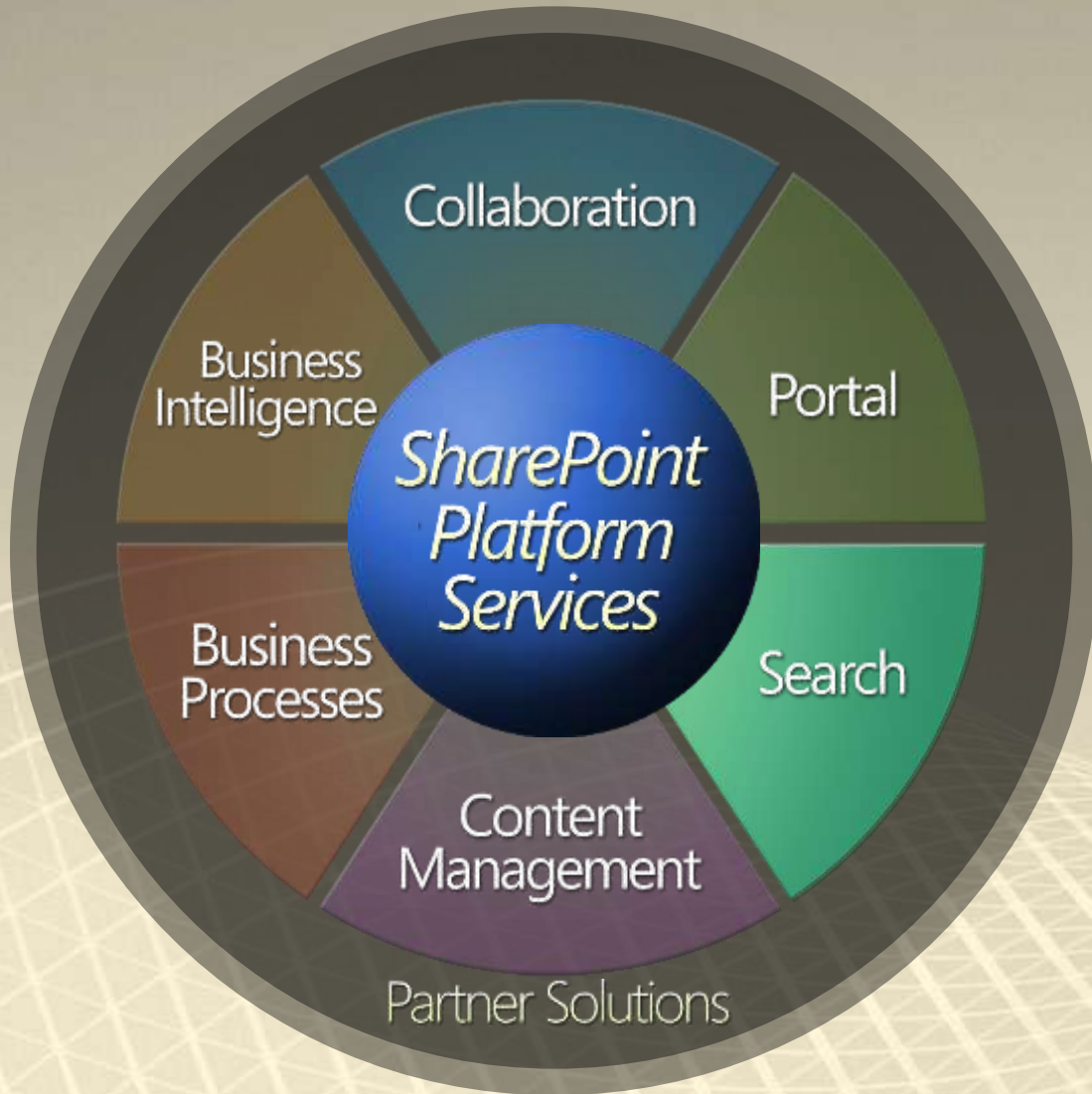
# 1. What Are We Building?

Portal

- Portals
  - Enterprise, Department, Team
  - My Sites
  - Social Networking
  - All, some

# Search

Search



- Enterprise scalability
- Contextual relevance
- Rich people search
- Rich business data search

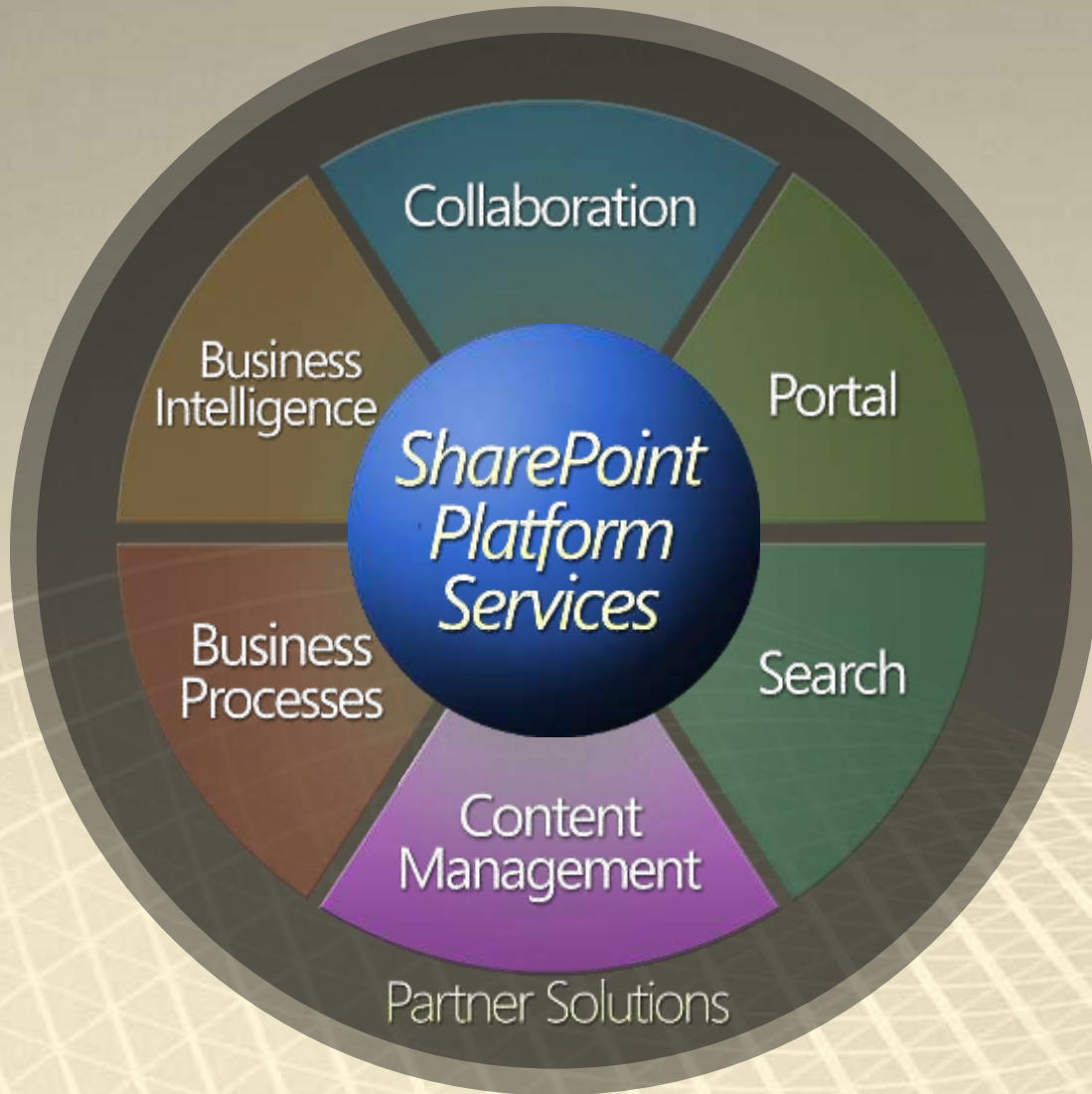
# 1. What Are We Building?

- Search
  - Findability
  - Taxonomy

The ability to find something given a classification, how well it's organized. Wurman(1996)

# Content Management

Content  
Management



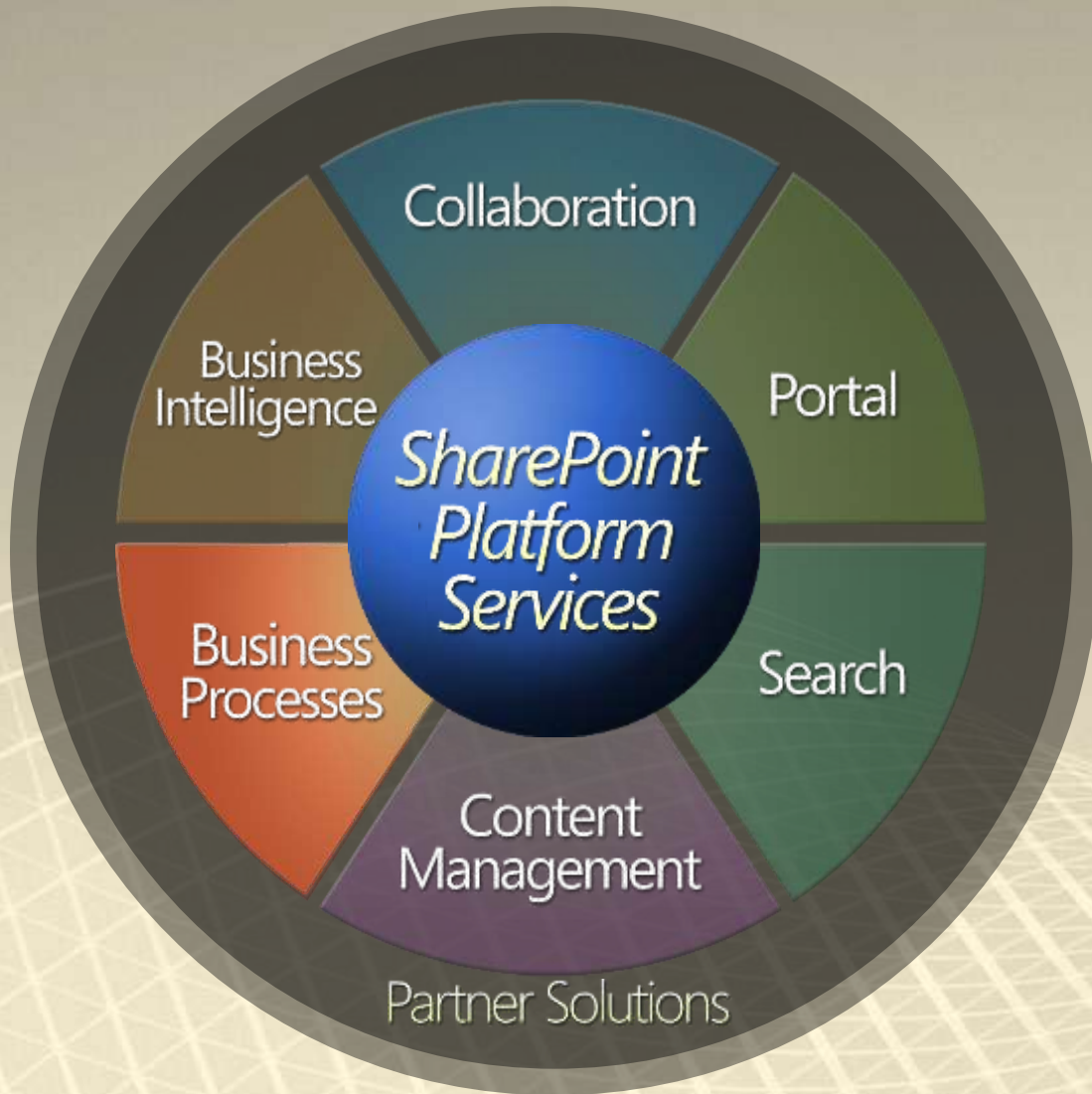
- Document management
- Records management
- Web content management
- Policies and workflow

# 1. What Are We Building?

- Content Management
  - Content Types
  - Integrated Document Management
  - Records Management
  - Web Content Management

# Business Processes

Business  
Processes



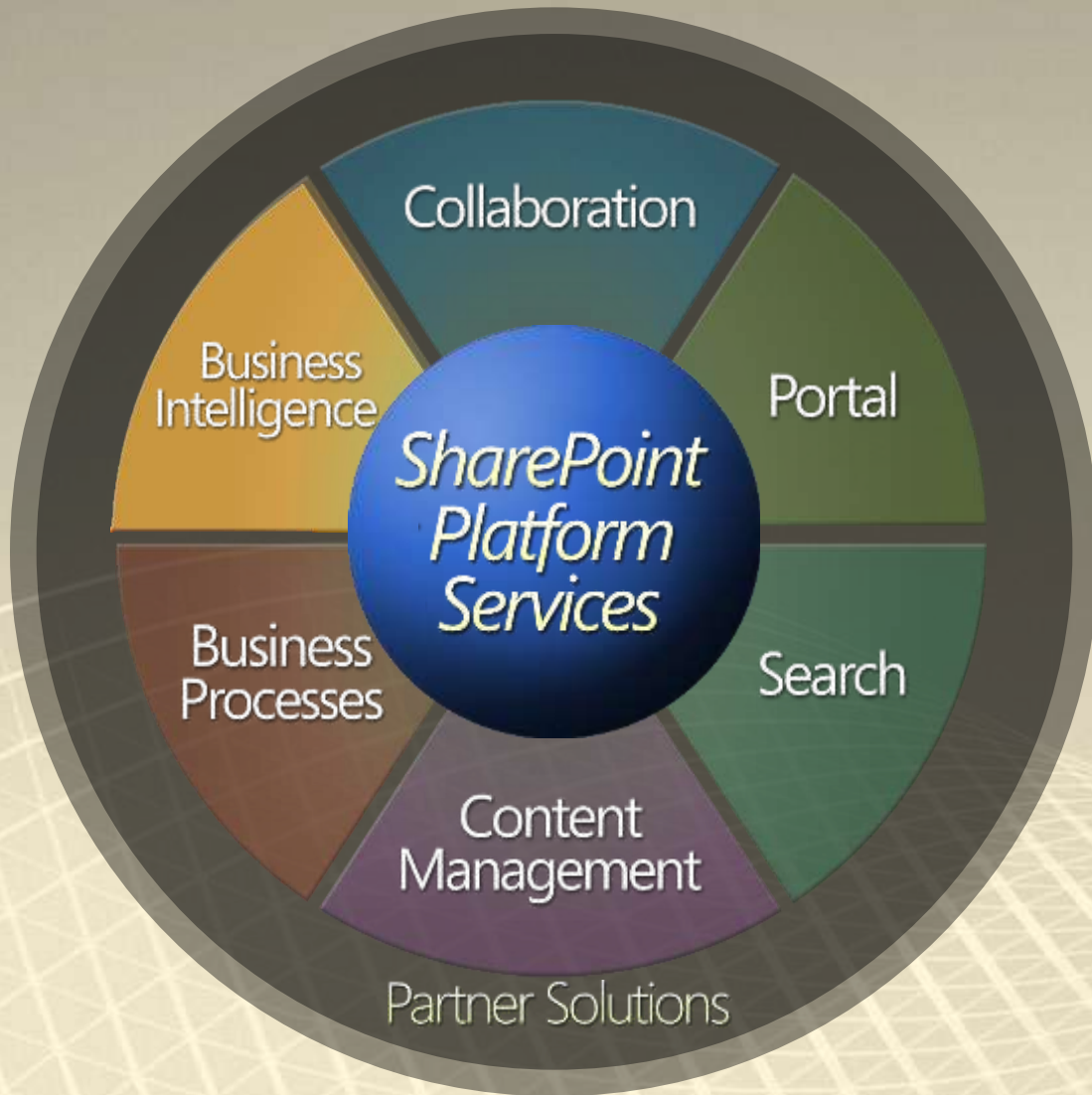
- Rich Forms
- Web Forms
- Workflow

# 1. What Are We Building?

- Business Processes
  - Form Services
  - Workflow
  - LOB actions
  - SSO

# Business Intelligence

Business  
Intelligence



- Server-based Excel
- Report Center
- Web Parts
- Dashboards
- Business Data Catalog

# 1. What Are We Building?

Business  
Intelligence

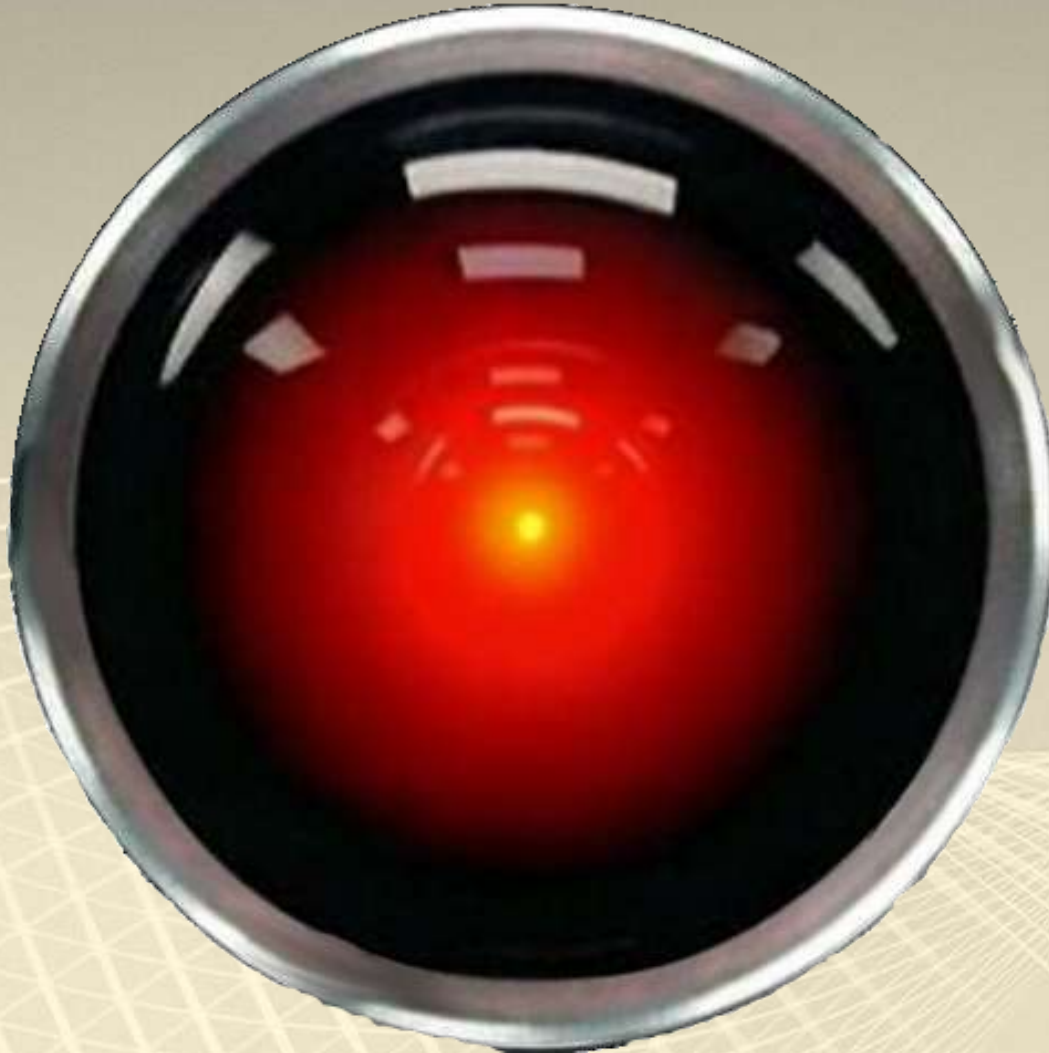
- Business Intelligence
  - Excel Services
  - BI Web Parts

## 2. Who's Playing?

- Selecting your team.
- IT Team
- SharePoint Administrator
- Site Administrator
- What expertise does your user base have?
  - Who is your Rock Star?



### 3. Don't Forget HAL



# 3. Don't Forget HAL

- What hardware do we have?
- Virtualized?
- Clusters
- ~~32~~/64 bit
- Web Front Ends
- Application Servers
- Database Servers
- Backup/Recovery



SP2010

## 4. Lock It Up!

- What security?
- Use AD Groups
- Don't break inheritance
- Plan security
- Internal/External
- SSO
- Admin Tool



# 5. Someone Has To Install It!

- Read before you begin
- Understand License Models
  - Change in 2010
- Service Accounts
  - Technet: Plan for Administrative and Service Accounts
  - Joel Oleson: <http://tinyurl.com/spserviceaccounts>
- Database Server
- Start small – add more later.



## 6. Wire Me Up, Before We Go-Go!

- Why wire frames are your best friend.
- Begin with planning
- Identify navigation bottlenecks
- Identify Security Groups
- Site Collections / Webs / Lists
- Proof of concept – Manage expectations

# 7. Sites, Webs, Libraries, Lists!

- Understand Difference
- One Database per Site Collection
  - Size Limits: Talk to your SQL folks. How much can they handle?
- Only certain lists can be mail enabled
- Rule of 2000

# Web Application

Content  
DB

## Site Collections (SPSite)

### Site (SPWeb)

Lists (SPList)

- Document Library
- Custom Lists

# 8. Governance

- The Who, What, When, Where and How
- What happens if I delete a site?
- How do we recover a site collection?
- Index schedules
- Back-ups
- Document Retention Policies

# 9. You say meeta, I say meta!

- Beyond the file system.
- Throw the box away!
- Findability
- Taxonomy
  - 000 – Computer science, information & general works
  - 100 – Philosophy and psychology
  - 200 – Religion
  - 300 – Social sciences
  - 400 – Language
  - 500 – Science (including mathematics)
  - 600 – Technology
  - 700 – Arts and recreation
  - 800 – Literature
  - 900 – History, geography, and biography



000 – Computer science, information & general works

000 Computer science, knowledge & systems

000 Computer science, information & general works

001 Knowledge

002 The book

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010 Bibliographies

010 Bibliography

011 Bibliographies

012 Bibliographies of individuals

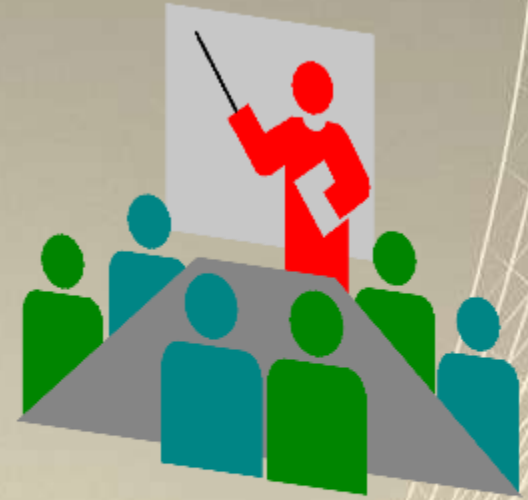
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020 Library & information sciences

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# 10. Train

- Stay on track.
- Who?
  - Site Collection & Site Admins
  - End Users
- How?
  - Lunch and Learns
  - SharePoint Shepherds Guide for End Users.
    - <http://www.sharepointshepherd.com>
  - EndUserSharePoint.com

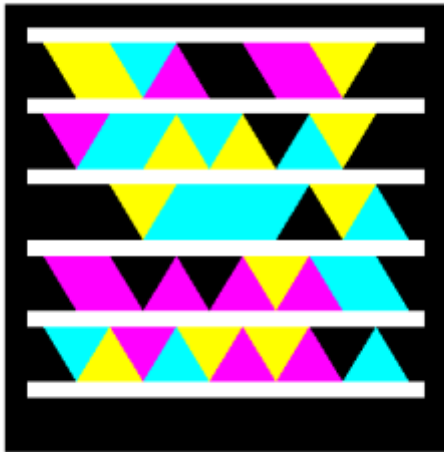


# References

- [www.wssdemo.com](http://www.wssdemo.com)
- SharePoint Deployment Planning Services
  - <http://www.microsoft.com/licensing/software-assurance/packaged-services.aspx>
- SharePoint Website
  - <http://sharepoint.microsoft.com>
  - Whitepapers
  - Webcasts
  - Deployment Resources
- Office Integration – Fair, Good, Better, Best
  - <http://tinyurl.com/officeintegration>

# Questions?

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  - Web: <http://whatsthesharepoint.com>



[tag.microsoft.com](http://tag.microsoft.com)

The logo features a stylized, golden-yellow circular graphic composed of several overlapping, curved lines that create a sense of motion and depth. The text "SharePoint Saturday" is positioned above "New Orleans" in a clean, black, sans-serif font.

**SharePoint Saturday**  
**New Orleans**