



A Business Approach to SharePoint®: Making the Move

A Whitepaper

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Why SharePoint® 2010

Considering moving to SharePoint® 2010? You're in good company. Organizations worldwide are using the platform to move to the new mobile, flexible, highly collaborative business environment. Its flexible architecture allows enterprises to reduce dependencies on legacy platforms and consolidate software—realizing significant savings through reduced licensing and maintenance costs.

To access the full advantages of SharePoint® 2010, you need to make two decisions. The first is choosing the platform; the second is committing to a strategic and well-planned transition. This whitepaper tells how SharePoint® 2010 can transform your enterprise. It also shares lessons MicroLink has learned from over 200 SharePoint® implementations; you'll get a road-tested overview of how you can work with IT to chart the right course.

Advantages

SharePoint® 2010 offers companies higher flexibility and mobility at lower cost. It also puts business needs front and center, empowering users and enhancing collaboration so business and IT realize shared goals with greater efficiency.

Higher Capabilities

The platform brings new flexibility to capabilities previously available only from legacy platforms that are costly to license, outdated or technically challenging to implement such as WebSphere, BEA, Vignette or Drupal. Companies gain new benefits while being relieved of the financial

imperative to maintain staff skilled in complex maintenance. Here's an overview of key features:

- Greatly enhanced document collaboration
- Agile workflow modules
- Enterprise-level metadata management controls
- Combined data integration for business analysis, visualization and reporting
- Efficient web content management capabilities
- Strong, flexible security management framework that integrates easily with leading identity management solutions

	Phase	Teams
Keep the Business Running (KTBR) Team	Strategy & Design	① Strategy & Design
	Prototyping & Test	① Strategy & Design ② Platform Assessment & Specification ③ Solution Specific & Technical Requirements
	Specification & Requirements Definition	② Platform Assessment & Specification ③ Solution Specific & Technical Requirements ④ Implementation ⑤ Execution
Transition to KTBR	Execution & Migration	④ Implementation ⑤ Execution ⑥ Transition & Optimization
	Optimization & Preparation	⑤ Execution ⑥ Transition & Optimization

Shared Responsibility

SharePoint® 2010 distributes the responsibility for developing solutions and maintaining the platform, delivering cost savings for IT and greater efficiencies for business users. Business owners can create horizontally

*The more you
invest in
research, design
and testing
Now, the better
the solution will
serve the
organization over
time.*

integrated solutions through data sharing and content collaboration, empowering team-building across units as users access and use distributed shared services—all without IT help.

Multi-Tenant Occupancy

SharePoint® 2010 gives your enterprise architecture new flexibility. Most shared services now have their own databases, sometimes multiple, and are therefore more ‘scalable’, as well as shareable, across implementations. This gives businesses more flexibility and the ability to expand services as needed. Enhanced metadata management, data integration and server access strengthen operational efficiencies and simplify governance. Most striking, the platform enables multi-tenant occupancy: Site administrators can write once and publish to multiple places, creating efficiencies and lowering production costs—all the while collaborating securely with stakeholders both inside and outside the organization.

All these benefits provide exciting opportunities for business—but they depend on a well-executed implementation. Over our years of experience in enterprise architecture, information migration and systems modernization, we have seen the headaches that await companies not thoroughly prepared to adopt a new enterprise platform. Here’s our prescription for a smooth transition.

Decide

Your first decision will be the most important: to allocate the attention and resources to ensure a comprehensive, orderly approach. This requires a joint commitment from business and IT. If this foundation is not laid, you will miss out on the increased ownership and control SharePoint

offers business stakeholders; IT will miss out on executing a proper implementation that will fulfill requirements and prevent the stress and costs of rework; and ultimately both parties will miss out on the opportunity for a strong business/IT partnership that will move all objectives ahead.

The key is to **plan** properly and to **secure the right resources** upfront. This paves the way for a successful modernization effort, and is true for every platform. You'll need a diverse, well-balanced team capable of establishing a joint strategy with the business units and operating entities, equipped with the technical expertise the solution requires. A successful team shares ownership of the strategy and design:

- ✓ components of the portal architecture
- ✓ prototyping—taking advantage of SharePoint's ability to set up functioning "sandboxes" to assess capabilities before full-scale implementation
- ✓ specifications of the functional and technical requirements
- ✓ execution of the upgrade and deployment through the test phase of the program

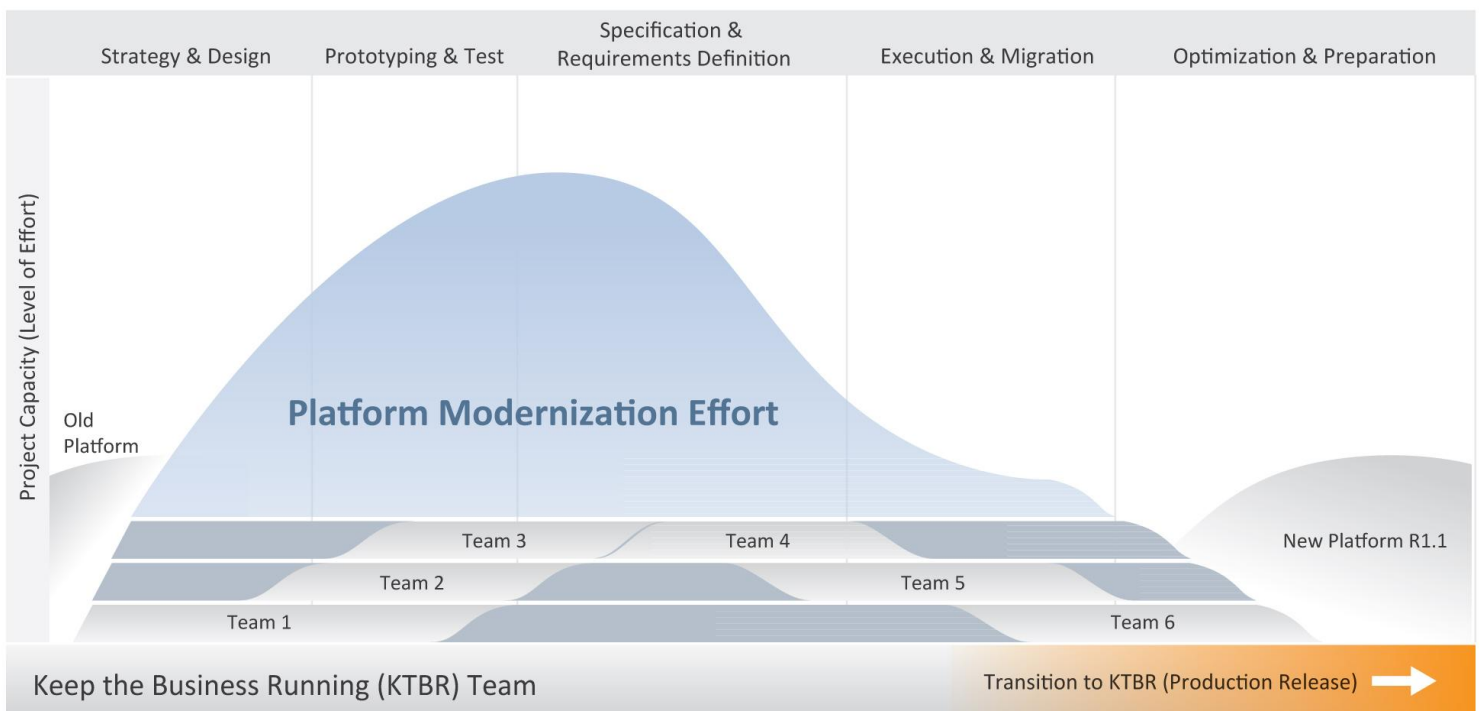
Prepare

Whether you're moving from a portal environment such as WebSphere, BEA, Open Source or an old-line content management system, here are the points your organization should review.

Business Considerations

Ask your team to explore the following questions:

How can SharePoint improve our operations? Do proposals and reports take too long to produce? Is finding and updating information complex? Are your databases in silos, slowing decision-making? Listing your challenges will help you identify your objectives. SharePoint can provide benefits from automating common tasks to accelerating your budgeting process to improving management of multinational business units.



What roles can SharePoint assume from old-line server products? Create an informal inventory of frustrations with current software that could play a smaller role or be eliminated entirely with the new SharePoint platform. This will give IT a starting point for their technical assessment.

What are the costs by capability? Look for the hidden costs of your centrally managed solutions, including the escalating expense of adding new capabilities on an ad hoc basis. Also consider the savings of distributed ownership: calculate the operational savings of business staff providing 50% of their own solutions instead of initiating requests for IT support.

What processes should the new portal design deliver? Knowing your business requirements will inform IT's portal design. You might find that SharePoint 2010 will allow you to eliminate some current processes. You might also see opportunities for new, more powerful processes in the new environment. Ask the technical team for an overview of the possibilities.

What business content or data will be liberated by the solution? Make a list of opportunities for improving data or access to content so that employees are empowered to self-serve.

How will we use the enhanced metadata and business intelligence capabilities of SharePoint 2010? The platform's new Managed Metadata Service allows business owners to design and manage the way content is accessed, displayed and used. The software allows business teams to mashup data sources in spreadsheets for multivariate analysis of business operations. Ask IT to detail the options open to you.

What are our priorities? Consult every stakeholder so you can develop an accurate picture. You'll also find tips for identifying requirements later in this paper. Knowing your priorities will give IT guiding principles for planning the roadmap and timing the release.

Shared Logistics

What content repositories will our business needs impact? Will you be using databases like Oracle® and content management systems like Documentum® in the new environment? If you're not sure, get an overview of your current usage from IT so you can contribute to this discussion.

Are there any parallel projects going on? For example, are you already using separate technologies related to search or information classification? They will either need to be retired or migrated to the new system.

Do we currently use metadata to "tag" information for retrieval purposes? If so, you will need to create a list of these so they can be implemented in SharePoint 2010's searches. Otherwise you could lose all of your metadata.

What is the volume of data the business requires? The business and technical teams will need to collaborate on a content assessment and a plan to remove old files and software. Once this is complete, they can determine the data volume required for the new platform now, and how much to add for future growth.

How will the cutover be accomplished? Do you have years of legacy data you need to access 24X7? Telling IT your needs will help determine whether the upgrade is conducted all at once or in phases.

Have you developed any criteria, system requirements or strategies for process improvement? Do you have all current business processes documented? If not, you should get this done as soon as possible—if not by your team, by a skilled partner.

What is your current governance plan? Work with IT to make sure all systems are covered, processes well-defined, and the governance model is aligned with the business objectives.

There's a lot to consider—but much to be gained from doing it right. See “Secure the Right Resources” for an overview on how this assessment can be conducted without impeding your current operations.

Technical Considerations

Here are the questions the IT team will need your input to answer.

Do we have an inventory of all custom content, dashboards, reports and forms that will have to be transitioned to the new platform's capabilities or technology? There are many methods for migrating custom content; IT will need to know each content type to match it with the correct tool.

Do you have an inventory of all security settings? IT will need you to tell them who should have access to all databases, lists, libraries, web services and applications in the new environment. This will not only help them plan the integration and migration process, but also will show them where access levels need adjusting.

Are you considering modernizing your Active Directory structure and Access Control List (ACL) attributes? Let IT know you plan to use SharePoint's full capabilities in empowering employees to work across boundaries. Upgrading the Active Directory structure and attributes will keep SharePoint out of the Groups Management business, a huge plus for any enterprise.

Plan

Taking the time to plan will not only pave the way for a successful modernization effort, but it will also leverage the opportunity to perform some housekeeping tasks such as modernizing Active Directory to removing old or duplicate documents. As organizations explore SharePoint's capabilities, many are evaluating the prospects of collapsing the older generation of dedicated applications such as the Remedy® helpdesk solution or Jive® into a SharePoint solution, reducing their licensing costs.

Migrating to SharePoint 2010 takes preparation. You will know that you are ready when you can successfully develop the following. If this is beyond your organization's capabilities, an experienced outside team can provide the professionals and the process you need.

Below is a checklist of items required for a successful first release. IT will need your input and collaboration on each:

- ✓ Develop a framework for assessment, design, delivery and evaluation of the platform; examine and reexamine how SharePoint fits into your enterprise architecture.
- ✓ Target a reasonable scope within the roadmap for the first release.
- ✓ Develop a first draft of the governance and management plan. You will revise and update this document until it reflects all goals, stakeholders, responsibilities and checkpoints.
- ✓ Identify proven processes for transitioning the platform to SharePoint 2010.

- ✓ Identify the required skill sets, determine if there are any gaps, and hire the right team.
- ✓ Develop a plan and stick to it.

Strategy and Design

After determining SharePoint's role in your enterprise, develop a roadmap. Working together, business and IT can reach a solution design that will scale to meet business needs. The Strategy and Design phase should include the following:

- ✓ *Architectural Specification* that details the conceptual model—technical and functional—that outlines the solution recommendations, along with a detailed description of SharePoint's value to the business units: the delta between today and tomorrow.
- ✓ *Functional Design* that includes business requirements documentation of how the system will meet the needs of the business, aligned to functional business scenarios with detailed use cases, decision models, reporting criteria, and the specified capability of the planned release cycles.
- ✓ *Communication and Governance Plan* that includes training requirements and support for the organizational transition to the SharePoint 2010 platform. Experienced consultants will be able to identify challenges and plateaus commonly associated with SharePoint adoption after the initial Discovery period.

Technical Assessment and Delivery Requirements

Technical assessment and delivery requirements documents should include:

- ✓ *Hardware Infrastructure Plan* that includes a technical description with illustrations on the physical requirements for the system, including the role of virtualization of the server software.
- ✓ *SharePoint Server Configuration Plan* with scripts that includes a technical description of how the functional design is implemented to fulfill the business requirements. Where possible, scripts are provided to implement the configuration according to Microsoft-preferred technical approaches for managing SharePoint deployments. A detailed build guide of the solution should be provided as a common courtesy.
- ✓ *Data Migration Plan* that includes options for migrating legacy content from old-line applications or from previous versions of SharePoint. You may not have to migrate everything. Experienced engineers should be able to save you money.
- ✓ *Test Implementation Plan* that details the test environment and includes a process for validating that the solution meets business use cases, technical requirements, the build plan, and a rollback plan.

Documenting System Requirements and Business Processes

Most IT teams will ask if you have documented the system requirements and business processes. Doing so ahead of time jumpstarts the process. If

you haven't documented them, an experienced outside firm can help this process go smoothly.

If you're documenting your needs in-house, here's how to lay the groundwork:

- ✓ You do not need to know how to relay technical concepts to the IT team—but you do need to be able to describe symptoms of what's not working, identify any web services you've found useful, and give details such as who needs to access the service, where and how often. This will help IT to translate your needs into requirements that will fulfill today's needs and scale for future growth.
- ✓ Portal platforms such as SharePoint are toolkits, not products to be used "out-of-the-box." They need to be tailored to your organization's needs to successfully leverage their capabilities. Investing in the platform can pay dividends right away; haphazard upgrades almost guarantee the need for costly resets a few months into the adoption cycle.

Secure the Right Resources

Moving to SharePoint 2010 will require diverse functional and technical skills to successfully design, deploy, and extend the platform to deliver the highest business value. Choosing the right team is essential for a successful modernization.


Most companies don't have the resources to fill this need. They also want to gain the efficiencies of experienced specialists and avoid the risks of costly mistakes. If you fall in this category, outsourcing your modernization effort will be a strategic option.

Look for consultants who have a proven record in successful SharePoint integration. They should provide a clear process and value-added resources— from training materials and sample forms to a governance overview and model showing how to establish shared oversight. They should also supply clear direction and organization for every step of the migration, giving you ongoing support, advice and peace of mind.

The following diagram illustrates a typical platform modernization effort, along with a recommended team structure.

Resources

Listed below is the complete list of recommended resource roles and responsibilities. In an optimal scenario every role would be filled by an expert in that particular area:

Keep the Business Running (KTBR) Team				Transition to KTBR (Production Release) 		
Skill Sets	Team 1: Strategy & Design	Team 2: Platform Assessment & Specification	Team 3: Solution Specific & Technical Requirements	Team 4: Implementation	Team 5: Execution	Team 6: Transition & Optimization
Product Manager	●	●	●	●	●	●
Solution Architect	●	●	●			
Technical Architects	●	●	●			
User Experience Designers	●	●	●	●		
Visual Designer		●	●	●		
Information Architecture		●	●	●		
Content & Metadata Architect		●	●	●		
SharePoint Architect		●	●	●	●	
Systems/SharePoint Engineer			●	●	●	●
Infrastructure/SQL Engineers			●	●	●	●
.Net Developers	●		●	●	●	●
Validation/Test Engineers	●				●	●
Technical Writer/Trainer						●
Operations & Maintenance Engineers						

- ✓ *Product Manager*. Manages the production of the solution, communicates client’s needs to team and status to stakeholders,

reports progress, manages risks, escalates issues as needed and ensures delivery is in budget, on schedule and within scope.

- ✓ *Solution Architect*. Leads the solution design from the development of the strategy to the design of the functional and technical solution; is a member of the program team. Identifies current/future business requirements and processes; documents business requirements and functional specifications for the technical architects.
- ✓ *User Experience Designer (information, content architect, and visual designer)*. Transitions the functional specifications into a meaningful easy and efficient front-end solution for information management through intuitive access points to documents, content and data; providing clarity to the engineering team on the execution of the solution.
- ✓ *SharePoint Architect*. Identifies system requirements based on business requirements, provides system integration, defines and performs system-level testing and leads the technical implementation.
- ✓ *Technical Architect*. Upgrades of legacy content/data, coordinates the detailed upgrade timeline and performs content/data inventory to see what needs to be included in the implementation.
- ✓ *.Net Developer*. Focuses on implementation, configuration and the customization of SharePoint. The Developer builds new web parts, builds interfaces with other applications, configures server features, etc.

- ✓ *SharePoint / Systems Engineer.* Identifies, designs and implements the SharePoint hardware and software to bring the SharePoint solution online. Coordinates with the Windows Server Engineer as needed to provide design requirements for the rest of the components contained within the infrastructure which will integrate with the SharePoint portion of the total solution.
- ✓ *Windows Server / Active Directory / Exchange Engineer.* Identifies, designs and implements the Infrastructure hardware and software requirements to bring the total solution online, assists with the design of the Active Directory structure and any initial rules that may need to be set via Group Policy Objects (GPOs).
- ✓ *Infrastructure/SQL, Security Engineer.* When firewalls are used for software or hardware, makes sure that the proper rules are in place to limit/allow access based on the client's needs and makes sure that access to equipment is kept as secure as possible.
- ✓ *Technical Writer or Trainer.* Follows a process in parallel with the project to build clear, accurate and concise documentation for the organization (e.g. user guide, tutorials, training material, FAQs, administration guide, support material); assists in user testing; assists in editing; often assumes/facilitates other documentation or training roles/tasks for the project.

Reach the Goal

SharePoint will accelerate your capabilities to a new level if you make the right decisions up-front. Keep in mind that regardless of your platform choice, modernization is a necessity to stay ahead in the new mobile environment that is increasingly dominated by a distributed workforce.

Many of these principles are essential for every upgrade; choosing SharePoint allows you to increase flexibility and decrease costs. Combining a proven platform with a strategic, disciplined implementation will provide increased ROI and speed your time-to-market, while reducing the risk of costly delays and business interruptions. The choices are yours—and so will be the rewards.

About the Authors

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Andrew Nick has over 12 years of business intelligence development experience and nine years managing technical projects with a focus on implementing large data management solutions and enterprise reporting software suites. Mr. Nick possesses strong technical and subject matter domain knowledge in the public sector.

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About MicroLink

MicroLink is a Microsoft Gold Certified Information Technology Partner. We are a leading provider of Microsoft Solutions Design & implementation Services for the U.S. Department of Defense, agencies of the federal and state governments, and commercial enterprises worldwide. Our consultants support a range of infrastructure clients from in-theater military units overseas and enterprise e-Government portals, to large-scale corporate intranet and extranet solutions. Further, we have successfully implemented almost 200 SharePoint® deployments in commercial and federal government marketplaces.