

XYZ SharePoint Workshop Findings and Recommendations

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This report summarizes the work performed by ABC Company for XYZ as agreed in ABC Company Work Order XYZ 10xx, signed by Txxx Bxxx, xx/xx/2014. It is presented in fulfillment of the following deliverables:

- Deliverable 3a: Hands On Workshop (session topics to be prioritized as most relevant to XYZ in time allotted)
- Deliverable 3b: Summary of Findings and Recommendations (Document)

Preparation Activities

Multiple preparation meetings and activities were conducted prior to the workshop. These included meetings with Txxx Bxxx, Mxxx Gxxx, Lxxx Rxxx, Sxxx Txxx and a two hour workshop preparation meeting with 8 department attendees on xx/xx/14. Additional preparation activities included creating a training site collection and working with Jxxx Bxxx of QRS, Sxxx Txxx and Lxxx Rxxx to resolve user connection and response time issues.

Hands-On Workshop

1. **Workshop Conducted July 29, 2014 from 8 am to 1 pm at XYZ Facility Session, 8 Participants**
2. **Topics** (These topics were prioritized and presented as most relevant to XYZ in time allotted.)
 - 2.1. SharePoint 101: Sites, Libraries, Lists, Views, List Math, Search, Native Forms, Metadata / Properties / Required, Alerts, Calendars, Outlook Integration, Explorer, Version Tracking and Recovery, Excel Import / Export, Web Parts, Basic Permissions and Groups, Navigation Options.
3. **Facilitated Session Topics for Customizing the Look and Feel of SharePoint:** (These topics were prioritized as most relevant to XYZ in time allotted.)
 - 3.1. Choosing Templates, Editing Sites and Pages, Adding Logos, Color Palates.
 - 3.2. A brief overview of advanced capabilities with Visio Services, InfoPath Services and Excel Services was provided. Several other topics suggested in the work order were not discussed due to irrelevance or lack of priority.

- 3.3. Look and Feel “Rough Up” White Board Session: Thanks to Sxxx, Axxx, Cxxx and Txxx for staying through the lunch hour to finish this important topic. See the “Look and Feel” Rough Up section for the output from this session.

Findings and Recommendations

The following summarizes our findings and recommendations for XYZ.

4. Goals, Outcomes, Priorities: The following summarizes our recommendations, based on our understanding of the XYZ team’s desires and direction.
- 4.1. **A “Modern, App-Based Look And Feel” To SharePoint 2013:**
- 4.1.1. **The Primary XYZ SharePoint Home Page:** See the Look and Feel Rough Up section, XYZ SharePoint Home Page. The callouts describe the function of the page. Note that it is designed to be a conventional “IIS” web site created and maintained by XYZ with Dreamweaver (not a SharePoint site.) Many links within this site will take users directly to the right place in SharePoint. Some parts of the page will have to be updated manually or XYZ will need to pay for programming to have automatic update.
- 4.1.2. **Department Top Level SharePoint Sites:** Maintain the “look and feel” of the home page while avoiding any modification to SharePoint. Allow department Power Users the maximum flexibility to use SharePoint as desired while maintaining a mandatory subset of the home page’s look and feel. See Look and Feel Rough Up Section, Standard Department Site. The callouts describe the function of the page.
- 4.1.3. **Department Sub-Sites:** Require the XYZ logo in upper left and encourage the power users to maintain a clean look and feel. Impose no other restrictions and allow power users to use sub sites as desired.
- 4.2. **Train and Support Power Users for Each Department:** SharePoint has many desirable capabilities but it can create a large support burden for the IT department. The best approach is to choose motivated and capable users within each department and train them to be “SharePoint Power Users”. They are closest to each department’s work and priorities and will serve as “level one” SharePoint support for their department members.
- 4.2.1. **Weekly Power User Lunch and Learn:** You will see in the work plan below a budget for this weekly training for six weeks. The power users will work with a SharePoint consultant (via net meeting) to use SharePoint for day to day projects that are valuable to the department. This will also lay the foundation for more advanced workflow and forms automation projects.
- 4.3. **Advanced Workflow and Forms Automation Projects:** See the section Summary of Major Department Needs, Desired Applications. Nearly every department has identified advanced, high value projects it can create with SharePoint. The power users will learn much of what is needed to design and create these solutions. Note that usually consulting help is needed for these advanced solutions.
- 4.4. **Files / Data to Be Moved to The New SharePoint 2013 Environment:** Each department will have to make its own decisions as to what data from SharePoint 2010 and shared network drives should be migrated.
- 4.4.1. **“What to Migrate” Recommendation:** When a power user in each department is responsible for file migration, the priorities usually work themselves out. It is generally not a good idea to do a “mass migrate” because many files are no longer needed or relevant. Items that meet the following criteria are best migrated to SharePoint:
- 4.4.1.1. Power Users will migrate their own department’s data to SharePoint 2013 as needed with techniques learned in the workshop and Lunch and Learn sessions.
- 4.4.1.1.1. The file is shared with multiple users.
- 4.4.1.1.2. The file needs a version history or audit trail so any mistakes can be easily corrected.

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- 4.4.1.1.3. The file needs more security than is usually available on shared network drives.
- 4.4.1.1.4. The file needs to be a “single point of truth”. It is important that everyone has clear and easy access to the most current, up to date version of the file with no ambiguity or confusion.
- 4.4.1.1.5. The file needs to be archived or retained and reliably located many years in the future.
- 4.4.1.2. ABC Company has some advanced tools that can assist with larger volumes of file migration as needed.

Summary of Key Choices, Benefits and Costs: SharePoint Foundation vs. Standard vs. Enterprise

Here is a link to compare all features: <http://www.apps4rent.com/sharepoint-2013-features-comparison.html>

As a practical matter, XYZ needs the SharePoint 2013 Enterprise version. Foundation is wholly inadequate and Standard does not include five critical capabilities that XYZ needs:

- InfoPath Services (forms automation.)
- Excel Services (advanced dashboards.)
- Power View (advanced Business Intelligence capabilities)
- Visio Services (makes process flow diagrams easily useable to all users without having to own Visio, which is quite expensive.)
- Access Services (this includes a new relational database capability that XYZ will need as it progresses on more advanced department solutions.)

The cost estimate section includes the incremental cost for SharePoint Enterprise. Note that SharePoint Standard and SharePoint Enterprise cost the same - the price difference between the two is apparent in the per user CAL cost (Client Access License).

Work Plan and Cost Estimates to Meet Goals and Priorities

Labor Needed:

	Item	Labor Hours Estimate	Total Cost
1a	<p>ABC Company: Assist XYZ with resolution of technical items needed for SharePoint Foundation Environment</p> <ul style="list-style-type: none"> - Resolve slow response time problem (move SharePoint SQL Server to another location?) - External access link for employees working from home - Document library, add new item link opening InfoPath form. Should allow upload document - Configure email in central admin, confirm email alerts working - Add Up Arrow user navigation aid - Make sure logo working and passed down to all sites - Calendar: Get two way update working, see Scott, may be certificate related - Drag and drop file upload – make sure working for all users 	<p>Recommend 14 hours authorized, use only as needed.</p> <p>Fund additional hours only if prioritized and needed.</p> <p>e.g. Certain anomalies were noted during the workshop that may make a clean reinstall of SharePoint advisable</p>	\$2,100
2a	<p>QRS: Miscellaneous, Infrastructure Preparation for SharePoint Enterprise</p> <ul style="list-style-type: none"> - Set up login so user does not have to enter domain name - https: set up consistently so working inside and outside - Install or configure new SQL Server (or assist as necessary) 	<p>QRS to provide</p> <p>Assumes XYZ provides VM</p>	\$1,900
2b	<p>ABC Company: Configure SharePoint Server for Enterprise Features and Service Applications.</p> <p>Configure only these items at present:</p> <ul style="list-style-type: none"> - Excel Services - InfoPath Services - Visio Services <p>(Power View Services and Access Services to be deferred to later phases, as XYZ gets down the learning curve)</p>	6 hours	\$900
3	<p>ABC Company: Assist XYZ with Configuration and Links from XYZ SharePoint Home Page to SharePoint Department Sites</p> <ul style="list-style-type: none"> - Assist XYZ with creation of the internal standard IIS Web site to house the Primary XYZ SharePoint Home Page - Configure Search Center and link to SP IIS Home Page - Configure other links and items as needed 	5 hours	\$750
4	<p>ABC Company: Power user training and support.</p> <p>Two hours per week (one hour in L&L session, one hour</p>	12 hours	\$1,800

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	for prep and follow up.) Suggest 6 weeks to start.		
5	ABC Company: Assist users with migration of files from SharePoint 2010 and network file shares to SharePoint 2013	TBD, Only if Needed	
6	ABC Company: Web Site Programming for Advanced Features. These items include: <ul style="list-style-type: none">- Events calendar display- Sales Tracker display- Red, Green, Yellow Status Indicators	To be bid as needed	

Assumptions

- Two site collections only (Production and Training / Test / Development)
- Does not include a complete reinstall of SharePoint if that should become necessary

Approximate List Prices For Microsoft Software Needed. Microsoft's pricing varies widely. The items below will be needed.

- SharePoint 2013 List Price: (No longer any difference between Standard and Enterprise): \$6,798, one time (only needed for the SharePoint server for now.)
- SharePoint Enterprise CAL Cost Per User, List Price: \$105/user per year.
- SharePoint Standard CAL Cost Per User, List Price: \$70/user per year.
- Note that it should be possible to use the lesser cost CALs for some users who do not need access to advanced features.
- Note that no CAL cost is required for external users.
- Possible Additional SQL Server Costs if Response Time Requires a Standalone SQL Server:
 - MS Server 2008 or 2012 (approximately \$1,000.)
 - SQL Server 2014, Standard, 4 Core List Price: \$7,170

It is likely that XYZ can negotiate significant savings over these list prices.

Summary of Major Department Needs, Desired Applications

These notes summarize input from the Prep Meeting, xx/xx/14 and individual meetings.

Marketing, Rxxx, Sxxx

- Calendars 58 events/yr, sending calendar appointments,
- Literature
- MSDS sheets
- Marketing literature, 1000+ products, vendor maintain own literature
- Customer on boarding???
- Class signup
- Ideally customers able to update own profile

Accounting AR, Sxxx

- Sharing current documents, credit app, new customer setup forms, tax certs

Purchasing, Jxxxx

- Share vendor documents with marketing (spec sheets, vendor setup forms, marketing flyers)
- Procedure maps, how set up new piece of equipment
- Eliminating emails

Inside Sales, Gxxx

- Project management approach to new orders (tried Bxxxx sales gathers all, scans, signature, rework, deal with people out, sales contracts, XYZ equip review sheet, preinstall checklist, misc, email copy of mgmt. approval of terms, PO copy, check copy)
 - o Give outside sales a view to status
- Eliminating emails

HR, Dxxx

- HR Forms, Calendar, Announcements
- New hire onboarding form and workflow
- Exit form and workflow
- Possible advanced applications after basics are understood
 - o Performance management system
 - o Salary and compensation planning guide and standards
 - o Learning management system, automatically tracks completion of video training

Outside Service / Digital Service Department / Field Service Install, Sxxx

- Forms digital service waiver, preinstall checklist
- Service calendar, availability for techs
- Service forms do onsite, from iPad, email "uniform" document retrieval, doc mgmt., digital service call form, certificate of install
- Sharing other

IT Larry, Sxxx

- SOP folder, fixes, how-to's, troubleshooting, restricted access
- ISO files, large network file share, two sites, technical, .exe
- Public calendars Meeting rooms
- Fillable forms and workflow, IT setup, onboarding

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Operations, Txxx

Outside Sales – no input

Screen Service (Outside Services) – no input

AP – no input

Executive, Mxxx

- Dashboard / KPI
- Modern look and feel to web site

Intra-company / broadcast / Top Level Site

- Company Initiatives Status Operating Income, Sales, people to rate how company is doing

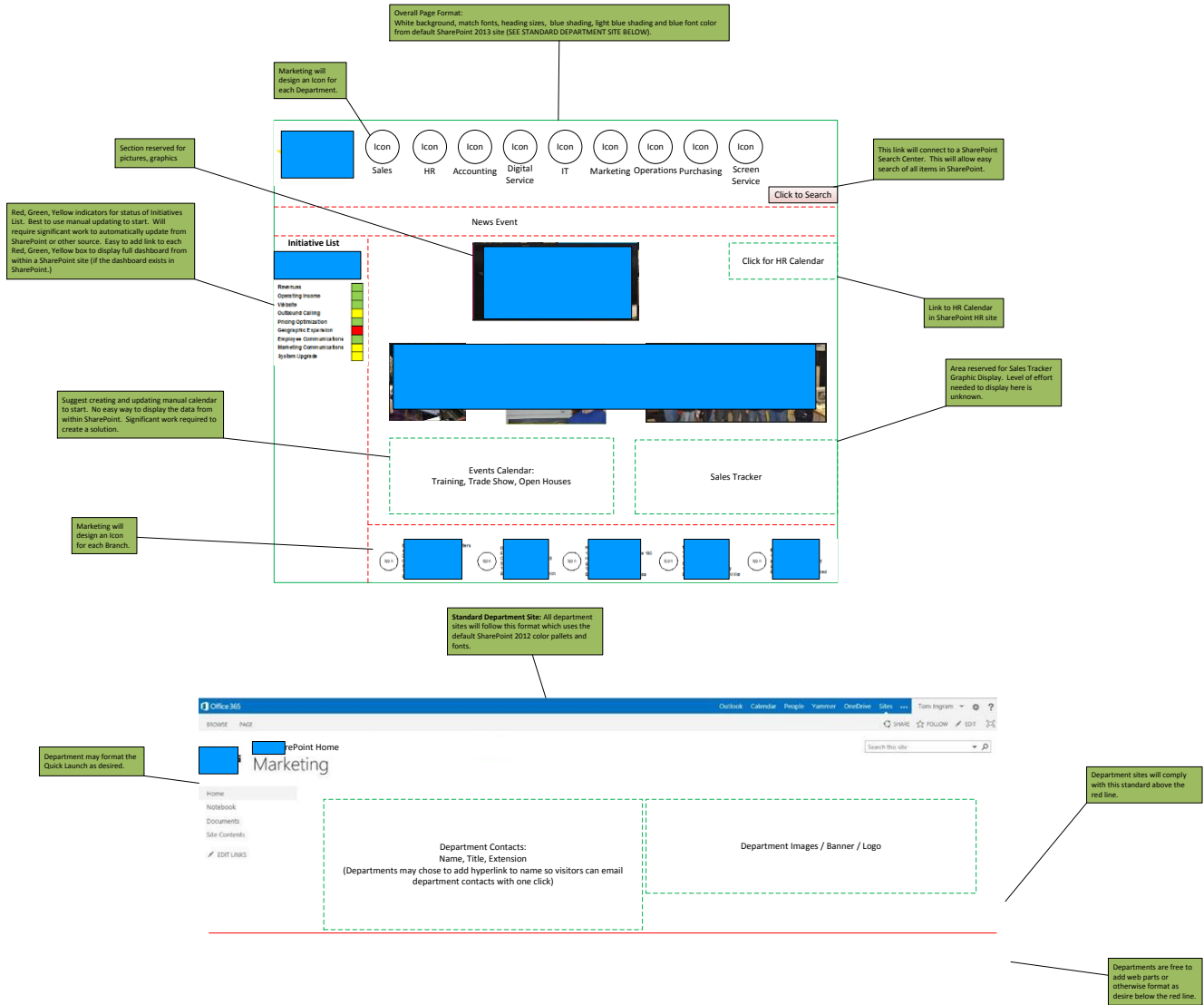
SharePoint "Cheat Sheet"

This summarizes reminders from the hands-on session. We recommend that all users keep this list handy.

- Upper left corner has the option for configuration and edit of on page items.
- Refresh and cycling the browser (Closing and reopen the page) resolves some changes in permissions and updates on pages
- Trouble with editing pages: go to the gear to allow editing
- Goal for all sites is to keep Navigation easy
- If you cannot find a web part, go to the "Site Contents" and Search for it in the "Add Apps" area
- The three dots ●●● opens the properties and settings of a SharePoint items
- Preferred Browsers: IE version 9. Above IE V 9, compatibility should be enabled.
- "Site Contents" shows what apps/modules are currently on your site, allows you to add apps, and sub sites
- In the upper right, the gear has Site Settings (which you will use extensively)
- Navigation can become very complex, proceed with care in editing and configuring it
- Library Tab on the upper left, has all the settings and overall behavior for the library including Library Settings which you will use extensively.
- When adding and editing settings, use default or preset configurations whenever possible
- Deleted items are stored in the "Recycle Bin" on the site for 30 day. Site Contents -> Recycle Bin (Upper right)
- When Filtering a view, "[Me]" criteria will use the currently logged in user to filter your data. i.e. My Items view have the "Assigned To" field equal to [Me]
- When designing your site, use the training and/or development to "rough up" the basic function and flow. This site will then be recreated in the production environment. (Suggest that you don't add a lot of data. It may or may not migrate to the production area.)

Look and Feel “Rough Up”

Below is a small image. The full Visio file has been transmitted to XYZ.



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Acceptance

Accepted in fulfillment of deliverable for ABC Company Work Order XYZ10xx.

Txxx Bxxx

COO

XYZ

X_____ (signature)

X_____ (date)