



What is SharePoint?

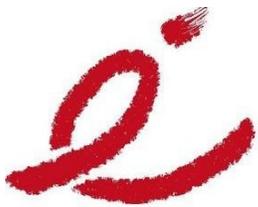
Dux Raymond Sy, PMP

*i*nterlab '09
DOE Web Collaboration

Brookhaven National Laboratory
November 16 - 19, 2009

The Reality of Information Management

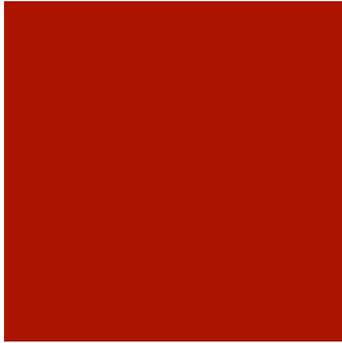
- On a piece of paper, identify three challenges you've faced in managing information
For example:
 - Multiple tools
 - Difficult to keep track of versions
 - Reporting
- Once completed, submit to Dux



Presentation Objectives

- After completing this presentation, you will be able to describe the benefits of leveraging SharePoint for your organization
- In addition, you will be able to comprehend SharePoint's capabilities to
 - Enhance Document Management
 - Promote better collaboration
 - Improve reporting
 - Automate business processes
 - Integrate with existing tools

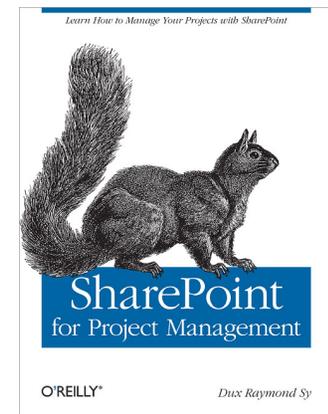




Dux Raymond Sy, PMP



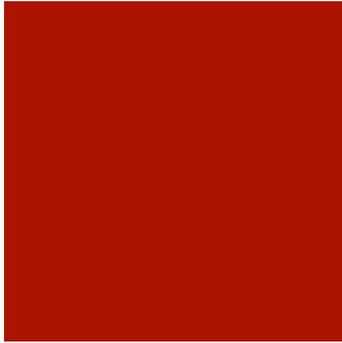
- Managing Partner, Innovative-E, Inc.
 - Author, "SharePoint for Project Management" by O'Reilly Media
 - Contract Author & Instructor, Learning Tree International
-
- For more information, connect with Dux
 - E-Mail: dux.sy@innovative-e.com
 - LinkedIn: meetdux.com/li
 - Blog: meetdux.com
 - Twitter: twitter.com/meetdux



Agenda

- Why SharePoint?
- 7 Ways SharePoint Can Empower Your Organization
- How to Successfully Leverage SharePoint
- Questions and Answers





Share

+

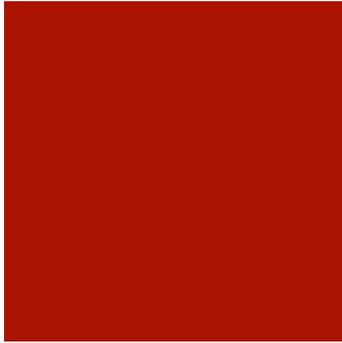
Point



What's SharePoint?

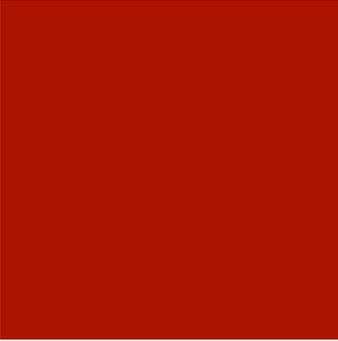
- The business collaboration platform for the enterprise and the web
- Allows *individuals* in an *organization* to *easily create and manage* their own *collaborative* Web sites
 - Simplifies how people find and share information across boundaries, and enabling better informed decisions
 - Seamlessly integrates with Windows and MS Office
- Does not refer to a specific product or technology
 - Using the word “Microsoft SharePoint” is like using the word “Microsoft Office”
 - Refers to several aspects of Web-based collaborative solutions





SharePoint Geek Vagen

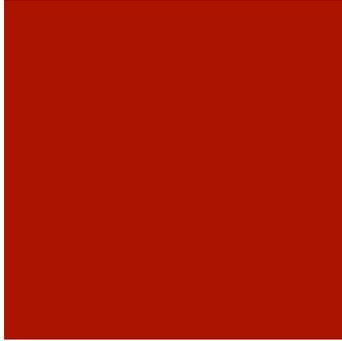




WSS vs MOSS

- WSS is the core technology of Microsoft SharePoint
 - Considered as the “engine” of SharePoint
 - Provides document management and team collaboration tools
 - WSS is available for free as long as your organization is utilizing Windows Server 2003 or above
- MOSS extends the capabilities of WSS
 - Going back to our car analogy, MOSS provides extended capabilities such as GPS, a DVD system, Voice Commands, etc.
 - Extended features include Enterprise search, Personalization, Enterprise Content Management, etc.
 - Unlike WSS, MOSS is not available for free





SharePoint as an Organizational Platform

- Individual groups can have a collaborative web site
- Access can be limited to the team and appropriate stakeholders
- Relevant information can be centrally stored and maintained
- Communications can be streamlined
- Relatively easy to use
 - IT intervention is minimal
 - Based on familiar tools and technologies: Web, Windows, Microsoft Office



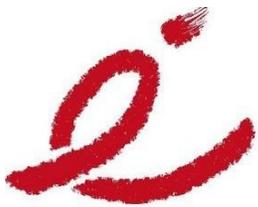
Agenda

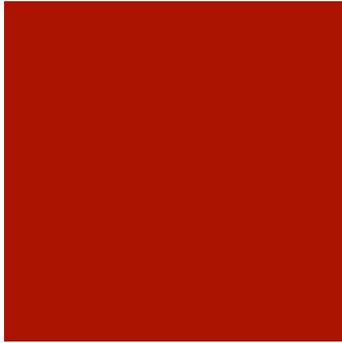
- Why SharePoint?
- 7 Ways SharePoint Can Empower Your Organization
- How to Successfully Leverage SharePoint
- Questions and Answers



#1 Easily Create a Collaborative Site

- Technical skill requirement is minimal
 - Microsoft Windows
 - Microsoft Office
 - Familiar with web browsing
- Easily define relevant access
 - Based on communication needs
- If deployed appropriately, IT does not have to deal with
 - Updating content
 - Defining account privileges
 - Maintaining a document repository

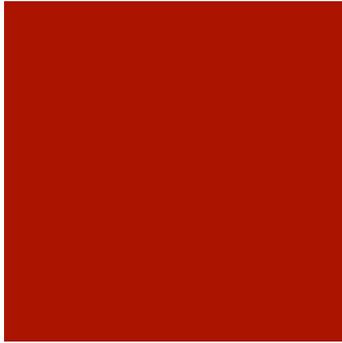




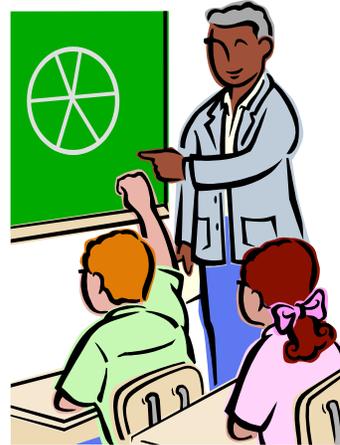
#2 Efficiently Manage Information

- SharePoint provides various tools to effectively centralize and manage information
 - Schedule
 - Documents
 - Change Request
 - Risk/Issue Log
 - Budget
- Document management features
 - Information storage
 - Check-in/check-out
 - Version control
 - Content approval





Demonstration



Creating a SharePoint Site

#3 Facilitate Team Collaboration

- Document Collaboration
 - Document Workspaces can be used to jointly develop requirements document, reports, templates, etc.
- Tools
 - Wikis to document lessons learned
 - Discussion boards for offline communication
 - Meeting Workspaces to support meetings





Example: Clarifying Requirements

The screenshot shows a SharePoint 'Discussions' page. On the left is a navigation menu with items like 'View All Site Content', 'Announcements', 'Calendar', 'Service Tickets', 'Project Tasks', 'Project Risks', 'UAT Log', 'Incident Management', 'Documents', 'Discussion Board', and 'Recycle Bin'. The main content area shows a discussion thread titled 'IS/IT Department/Division'. The thread text discusses identifying a secondary department/division structure for administrative consultation/signoff. A reply from 'Rafi' is visible at the bottom, stating: 'It really makes no difference to me either way. At the end of the day, all that matters is that Rafi breaking things down by IS and IT helps sort things out for others that's fine with me.'

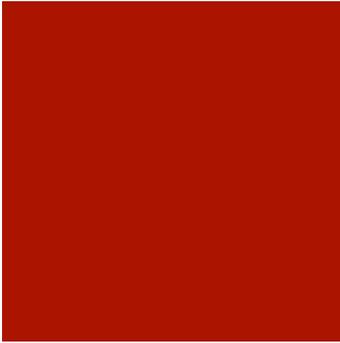
Subject	Status
Issues and concerns from November 12 demos	(1) Open
Transition Spreadsheet	(1) Open
Moving attribute from request to document level	(1) Open
IS/IT Department/Division/Function	(1) Open
web part feature	(1) Open
Comment on new form layout	(1) Open
System Messages	(1) Open
More Information	(1) Open
First draft of Document Attribute Master Sheet	(1) Open
Intranet	(1) Open
Version tracking - workspace vs GOL	(1) Open
default change approvers	(1) Open
Error when requester makes himself/herself an approver	(1) Open
requests generated by QAC	(1) Open
Obsolescence date / expiry date?	(1) Open



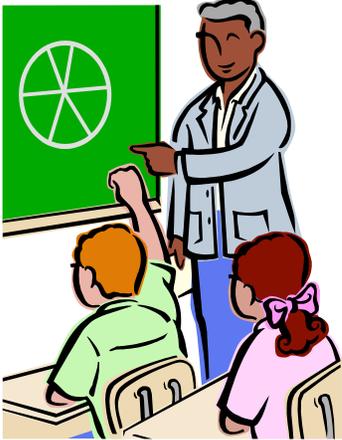
#4 Enhance Communication

- Right information for the right person at the right time
 - Tasks
 - Schedule
 - Reports
 - Dashboard
- Relevant information access
 - Appropriate privileges can be defined based on informational needs





Demonstration

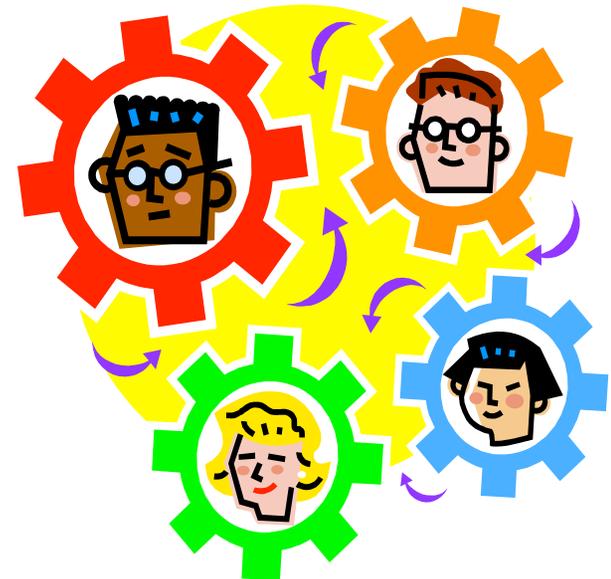


A Better Way to Collaborate During Meetings



#5 Automate Business Processes

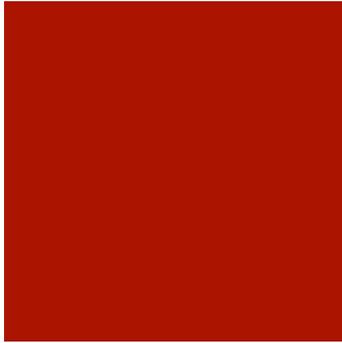
- Common project workflows
 - Change Control
 - Expense Reimbursement
 - Vacation Request
- SharePoint workflows
 - Three-State
 - Custom workflows



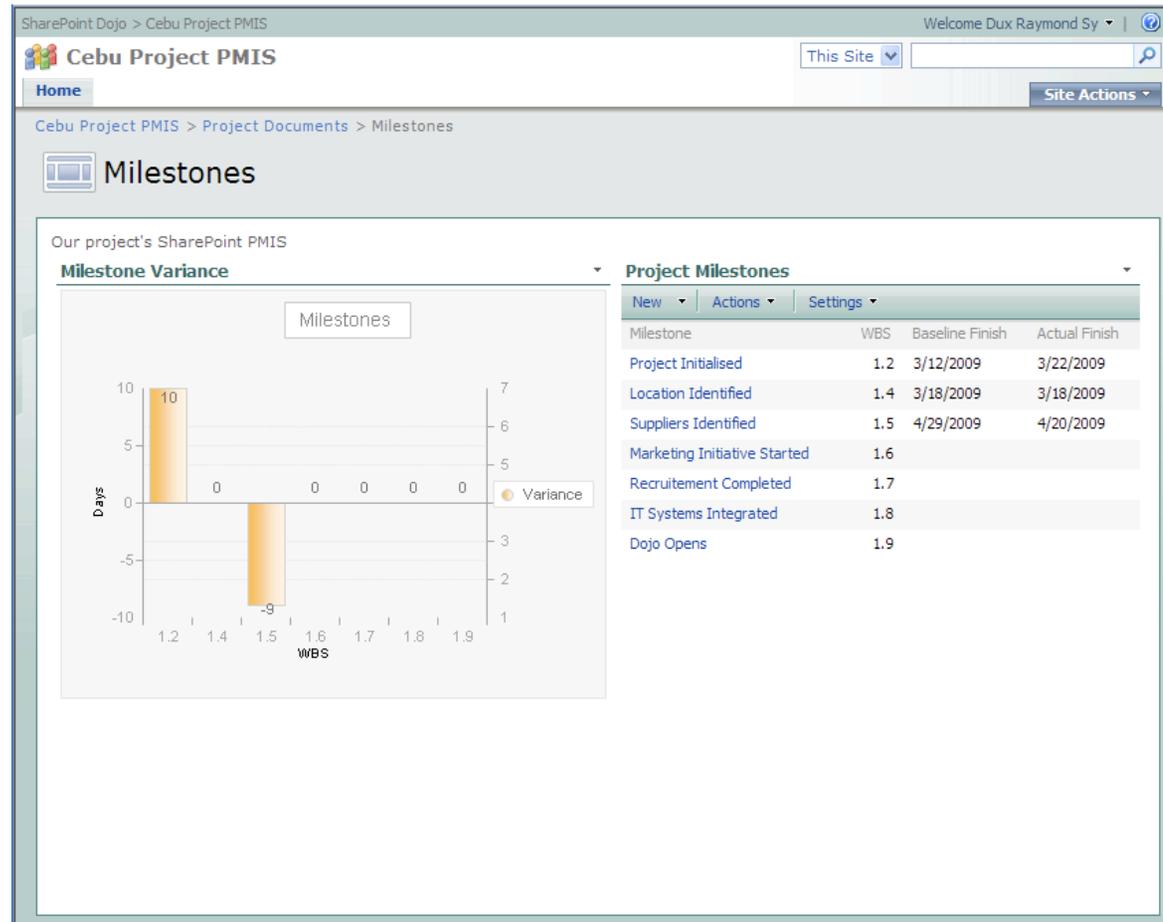
#6 Generate Relevant Reports

- SharePoint can be used to generate relevant
 - Interactive summary of a project
 - Project tasks information
 - Automated alerts
- Dashboards can be created using Web Parts
 - Red, Amber, Green (RAG) Status
 - Key Performance Indicators (KPI)
 - Charts





Example: Milestones Dashboard



#7 Integrate with Existing LOB Systems

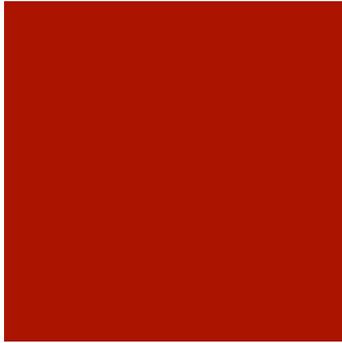
- Integrate SharePoint with existing data sources
 - SQL – based data
 - Web Services
 - XML
- Non Microsoft enterprise systems
 - CRM
 - Reporting Tools



Agenda

- Why SharePoint?
- 7 Ways SharePoint Can Empower Your Organization
- How to Successfully Leverage SharePoint
- Questions and Answers





SharePoint Implementation Continuum



Address the Business Needs

- What are the business pain points?
 - Project Management
 - HR
 - Finance
 - Departments
- Proper requirements gathering is critical
 - Analyst should understand both the business and SharePoint
- SharePoint a platform



Analyze SharePoint Priorities

- What business need are you addressing?
 - Collaboration
 - Document Management
 - Automate Processes
 - Enhance Reporting
- Complex branding, unless necessary, should not be a priority



Establish SharePoint Governance

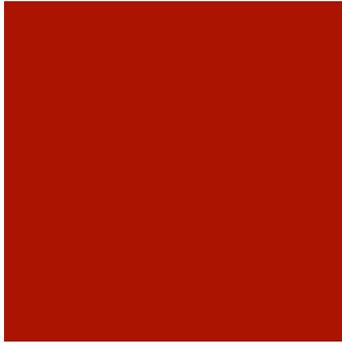
- SharePoint Taxonomy
 - Information Architecture
 - User Management
- Usage Policies and Guidelines
- Adoption Plan
- Support and Maintenance
- Future Releases



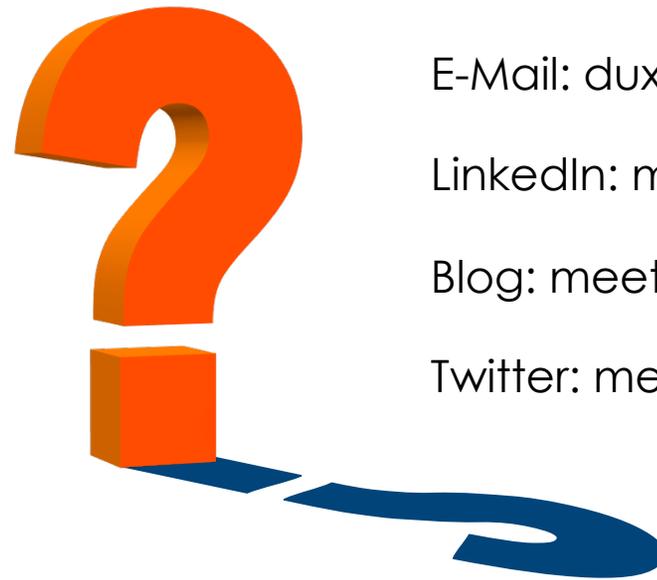
Agenda

- Why SharePoint?
- 7 Ways SharePoint Can Empower Your Organization
- How To Successfully Leverage SharePoint
- Questions and Answers





Questions?



E-Mail: dux.sy@innovative-e.com

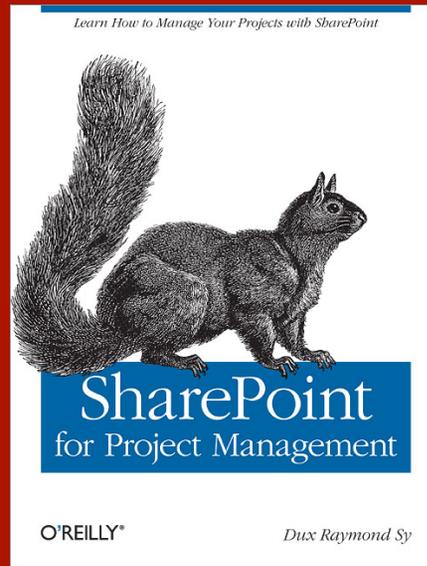
LinkedIn: meetdux.com/li

Blog: meetdux.com

Twitter: [meetdux](https://twitter.com/meetdux)



How did you like the presentation?
http://sp.meetdux.com/post_feedback.aspx



**Thank
You!**

