Microsoft

Planning for your first Microsoft Office SharePoint Server 2007 site

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Microsoft® Office

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Before you begin to set up a Microsoft Office SharePoint Server 2007 site, it will be useful for you to understand the main components of SharePoint Server, what they do, and how they fit together. With that understanding, you can develop a plan for managing your SharePoint Server site.

This article will help you with these two tasks. It will also direct you to other sources of detailed information as well as instructions for how to do the work.

This article emphasizes the importance of planning before doing. You may be tempted to begin building out your site before you have completely thought about what you want the final site to look like and do. Instead, start with this article. Then read this very comprehensive technical guide to planning SharePoint Server sites: Plan Web site structure and publishing (Office SharePoint Server), which is available at http://technet.microsoft.com/en-us/library/cc262789.aspx.

Get to know SharePoint

Before you can create your SharePoint sites, you need to know what the parts are and how they work. Here are the basics:

SharePoint technologies and products

The term “SharePoint” is often used informally to refer to either or both of two things: a Microsoft technology (Windows SharePoint Services) and a Microsoft product (Microsoft Office SharePoint Server 2007).

- Windows SharePoint Services is a technology built on Microsoft Windows Server, which is what your IT department may be using to run your enterprise network. Windows SharePoint Services 3.0 gives you a basic set of features you can use to set up team sites and facilitate collaboration among team members.
- Microsoft Office SharePoint Server 2007 is a Microsoft server product that extends the features available in Windows SharePoint Services 3.0 to provide enterprise-scale support for an organization’s content publishing, content management, records management, or business intelligence needs.

In addition to covering fundamental concepts that apply to both Windows SharePoint Services and Microsoft Office SharePoint Server 2007, this article covers many of the advanced features available in SharePoint Server. For a comprehensive introduction to the features available in SharePoint Server 2007, go to http://office.microsoft.com/en-us/sharepointserver/HA101732171033.aspx.

Sites

A web site is a group of related Web pages that are hosted by an HTTP server. Most Web sites have a home page as their starting point. The home page is connected to other pages in the site, so you can go from one to another by clicking by hyperlinks.

SharePoint sites have special characteristics:

- Sites can be subsites of other sites, and they can have subsites of their own. In other words, sites exist in a hierarchy.
- By default, sites contain navigation features that let you get to information and site features such as libraries, lists, calendars, and other sites.

Sites can be used for many purposes, such as:

- Coordinating projects, calendars, and schedules
- Discussing ideas
- Storing documents
- Sharing information
- Keeping in touch with other people
- Consolidating and displaying business data and information

Site collections

Sites exist in a hierarchy called a site collection. A site collection has a top-level site, from which the site collection administrator can manage the features of the site collection. A top-level site can have multiple subsites, each of which can have subsites of its own. The term “subsite” merely indicates that a site is the child of another site.

Permissions and other administrative settings are set at the top-level site in the site collection. Subsites of the top-level site can be configured to inherit these settings or have unique settings.

This structure enables you to have a main working site for the entire department, individual sites for different workgroups, and specialized sites for teams and projects.

For example, the SharePoint organization in your enterprise might look something like this:

Figure 1: Diagram of the structure of an example SharePoint Web site

Your department may have its own site collection, or it might be part of a larger site collection. For our discussion, it does not really matter, but you might want to check with your IT department to find out where you are in the hierarchy.

The term “site collection” is sometimes used informally to refer to any group of related sites. To avoid confusion, this article will use the term in its formal sense.

Workspaces

A workspace is a SharePoint site that is designed for a specific purpose, such as: collaborating on the development of a document, preparing for a meeting, or just discussing your favorite place to have lunch. When you use a workspace template, the site you create automatically has the features you’re most likely to need for the task for which the workspace was designed. Of course, like any site, you can customize a workspace any way you want.

Site and workspace templates

Windows SharePoint Services and SharePoint Server 2007 come with a number of templates you can use to create various kinds of sites and workspaces.

Template	Description
Team site	The Team site is an all-purpose template that can be used by any team—large or small—to create, organize, and share business information. You might use the site to store planning and budget documents, track issues and tasks, or share links and contacts with others.
Blank site	The Blank site template is empty, containing no libraries, lists, or sample content. If you want to create a site from scratch, this template is for you.
Document workspace	The Document Workspace template can be used for sharing and managing documents with others. The template includes features that are used to share and update files, keeping others informed on the status of those files.
Wiki site	The Wiki site template can be used to create a community site for a team or a project. Users can quickly and easily add, edit, and delete Web pages on the site.
Blog	The Blog site template can be used to create a site where users post information quickly and allow others to add their comments.
Basic meeting workspace	The Basic Meeting Workspace template can be used to create a site for planning, organizing, and tracking meetings.
Blank meeting workspace	The Blank Meeting Workspace template can be used to create a meeting workspace that is initially empty, containing no sample content or features.
Decision meeting workspace	The Decision Meeting Workspace template can be used to create a site for meetings that involve reviewing documents and recording decisions.
Social meeting workspace	The Social Meeting Workspace template can be used to create a site that helps you plan and coordinate social occasions.
Multipage meeting workspace	The Multipage Meeting Workspace template can be used to create a site that helps you plan, organize, and capture the results of a complex meeting or a series of meetings.

Template	Description
Document center	Use this site template to create a single site to centrally manage all of the documents in your enterprise. A Document Center site is optimized for creating and using large numbers of documents. This template includes a number of features that help you store and manage documents and tasks.
Records center	Use this site template to create a site to implement records management in your organization. The Records Center is a central repository in which an organization can store and manage all of its records. Typically, a Records Center site is designed and configured by an organization's records management professionals and Information Technology (IT) staff to support an organization's file plan.
Personalization site	Use this site template to create a site for delivering personalized views, data, and navigation from this site collection into My Site. The template includes personalization-specific Web Parts and navigation that is optimized for My Site sites.
Site directory	Select this site template when you want to create a site that lists and categorizes important sites in your organization. It includes different views for categorized sites, top sites, and a site map.
Report center	Use this site template to create a site for the creation, management, and delivery of Web pages, dashboards, and key performance indicators. The Report Center site provides a central location for business-intelligence-related information. This template includes special document libraries for storing reports, lists, and connections to external data sources as well as other features that enable users to search for items by using categories, view a calendar of upcoming reports, and subscribe to reports.
Search center with tabs	Use this template to create a customizable search site. The main Welcome page features a simple search box in the center of the page. The site includes two tabs: one for general searches and another for searches for information about people. You can add and customize tabs to focus on other search scopes or result types.
Search center	Use this site template to create a simple search site. The main Welcome page features a simple search box in the center of the page. The site includes pages for search results and advanced search.
My Site Host	Use this site template to create a site for hosting My Sites. **Note:** This site template is available only if you are creating a site collection within Central Administration.

Template	Description
Publishing site	Use this site template to create a blank Web site and quickly publish Web pages. This template includes document and image libraries for storing Web publishing assets. Contributors can work on draft versions of pages and publish them to make them visible to readers. The site includes document and image libraries for storing Web publishing assets. **Note:** This site template is available only if publishing features are enabled on this site (and the parent site).
Publishing site with workflow	Use this site template to create a site for publishing Web pages on a schedule by using approval workflows. It includes document and image libraries for storing Web publishing assets. By default, only Publishing subsites can be created under this site. **Note:** This site template is available only if publishing features are enabled on this site (and the parent site).
News site	Use this site template to deliver news articles and links to news articles quickly and easily. It includes sample news page layouts and an archive for storing older news items. It also features an easy-to-use layout for readers and news providers. This site template also includes two Web Parts that enable efficient news delivery: RSS Viewer and This Week in Pictures.
Collaboration Portal	Use this template to create a starter site hierarchy for an intranet divisional portal. It includes a home page, a News site, a Site Directory, and a Search Center with Tabs. Typically, this site has nearly as many contributors as readers and is used to host team sites. **Note:** This site template is available only if you are creating a site collection from within Central Administration.
Publishing Portal	Use this template to create a starter site hierarchy for an Internet-facing site or a large intranet portal. This site can be customized easily with distinctive branding. It includes a home page, a sample press releases subsite, a Search Center, and a login page. Typically this site has many more readers than contributors, and it is used to publish Web pages with approval workflows. By default, you can create only publishing subsites with workflow under sites that you create by using this site template. **Note:** This site template is available only if you are creating a site collection from within Central Administration.

In addition to the templates that come “in the box” with Windows SharePoint Services and SharePoint Server 2007, you can download a number of templates from the Microsoft Web site:

- **Application Templates for Windows SharePoint Services** These 40 Application Templates address specific business processes or sets of tasks in organizations of any size. They also provide a starting point for partners and developers to build deeper SharePoint-based solutions. The templates make use of Windows SharePoint Services 3.0 capabilities and are compatible with Microsoft Office SharePoint Designer 2007 to help make customization easier. You can also used these templates with SharePoint Server 2007. To download Application Templates, go to: http://technet.microsoft.com/en-us/windowsserver/sharepoint/bb407286.aspx.
- **Role-Based Templates for SharePoint Server 2007** Role-Based Templates for SharePoint My Sites are custom templates, designed for Microsoft Office SharePoint Server 2007 and the My Site functionality, and tailored to address the unique needs and requirements of specific roles within an organization. To download role-based templates, go to http://office.microsoft.com/en-us/sharepointserver/HA102282631033.aspx.

You can also produce your own custom site or list templates by setting up a site or list the way you want it and then saving it as a custom template. Custom templates are available for new sites and lists through the Site Template Gallery and List Template Gallery pages.

Pages

A SharePoint Web page is an HTML document that contains code modules called Web Parts. The Web Parts display data from different lists or libraries on the SharePoint site to create a dynamic Web page. All SharePoint pages are Web Part pages—that is, pages that contain Web Parts. When adding pages to your site, you can create a basic page, which contains only a rich text editor Web Part. Or you can create a Web Part page that contains several different Web Parts arranged in different zones on the page. If you’re working on a site for which the publishing features have been enabled, you may have the option of adding specialized Web Part Pages to your site.

Except for the basic page, you can add or remove Web Parts from these pages as you like. The layout and content of a Web Part Page can be set for all users and optionally personalized by each user.

Web Parts

All of the information stored in SharePoint is in lists. Appointments, document names, contact phone numbers, pictures of the office holiday party—everything is stored in lists.

Web Parts are modules of code that display the contents of these lists or data from other sources in a variety of ways. Some Web Parts also perform other actions, such as sorting information or searching for information. Many Web Parts will allow you to create your own custom views of information. You can also create your own lists, which will then appear in the Add Web Parts – Webpage Dialog box.

A Web Part is the basic building block of a Web Part Page. You can add Web Parts to Web Part zones in a Web Part Page and then customize the individual Web Parts to create a unique page for your site users.

For example, you can use Web Parts to display a calendar or a graphic, maintain a list of contacts, hold discussions with your team, show important business data, and many other things. SharePoint Server provides a large selection of Web Parts. You can also buy Web Parts from third-party providers, or you can even make your own (if you want to write computer code). One of the important parts of designing a SharePoint site is deciding which Web Parts to use and setting them up.

Figure 2: Typical page with an Announcement List View Web Part (1), a People Search Web Part (2), and a Calendar View Web Part (3)

List View Web Parts

A List View Web Part displays the contents of a list. You can use several List View Web Parts to show different views of the same data on the same or different pages. An update to the list in one place is reflected in all other places where the list appears.

> **Note:** You will not find a "List View Web Part" in the list of Web Parts on the Add Web Parts – Webpage Dialog box. List View Web Parts automatically take the name of the list whose data they present. Thus, the List View Web Part for a calendar list is called "Calendar."

Lists

Lists are among the most versatile and useful SharePoint features. When you create SharePoint sites, several types of lists are automatically created for you. You can customize and add items to these lists, create additional lists from the list templates, or create custom lists with the settings and columns that you want.

Do you have data in a spreadsheet that you want to use in a list on a SharePoint site? You can create a new list, including the columns and data, by importing a spreadsheet.

If you have database programs installed that are compatible with Windows SharePoint Services 3.0, such as Access 2007, and your browser supports ActiveX controls, you can integrate your list data with database tools such as queries, joins, and reports.

You can set up numerous views for a single list, so users can see just the data they need in the most useful way. For example, if you have a list of tasks, you can use one List View Web Part to provide one view that shows all tasks and another to show just the tasks that are due today. You can also have different views on different pages.

Calendars

A calendar is a special kind of list you can use just as you would use your Outlook calendar. In fact, you can link a SharePoint calendar to Outlook so you can see both calendars at the same time. Like other kinds of lists, the same calendar can appear in different views in several places through the use of List View Web Parts.

Libraries

A library is a location on a site where you can create, collect, update, and manage files with team members. Each library displays a list of files and key information about the files.

You can customize libraries in several ways. You can control how documents are viewed, tracked, managed, and created. You can track versions, including how many and which type of versions, and you can limit who can see documents before they are approved.

You can choose from several types of libraries, depending on the types of files that you want to store and how you plan to use them.

- **Document library** For most file types, including documents and spreadsheets, use a document library. (Some file types are blocked for security reasons.) You can upload files to a library or create new files in the library itself.
- **Picture library** To share a collection of digital pictures or graphics, use a picture library. Although pictures can be stored in other types of SharePoint libraries, picture libraries have several advantages. For example, from a picture library you can view pictures in a slide show, download pictures to your computer, and edit pictures with graphics programs that are compatible with Windows SharePoint Services.
- **Wiki page library** To create a collection of connected wiki pages, use a wiki page library. You can add to your library wiki pages that contain pictures, tables, hyperlinks, and internal links.
- **Form library** If you need to manage a group of XML-based business forms, such as expense reports, use a form library. Setting up a form library requires an XML editor or XML design program that is compatible with Windows SharePoint Services, such as Microsoft Office InfoPath.
- **Slide library** Slide Libraries help you share, store, and manage Microsoft Office PowerPoint 2007 slides. When you publish a presentation to a slide library, the slides upload as individual files, so they can be modified and tracked independently. The library maintains a link to the presentation, so that you are notified when slides change.
- **Translation Management Library** If you create documents that need to be translated to or from multiple languages, a translation management library can help you manage the work. A translation management library includes a workflow to manage the translation process and provide sub-folders, file versioning, and check-in/check-out.
- **Data Connection Library** Create a data connection library to make it easier to share files that contain information about external data connections.

- **Report Library** A report library simplifies the creation, management, and delivery of web pages, documents, and key performance indicators that communicate metrics, goals, and business intelligence information.

Decide what you want to do with your site

The key to success in implementing SharePoint is planning, and planning begins with deciding what you want to do with your sites. You've seen by now that you can do many things with SharePoint, but two common business goals you may have are to:

- Facilitate communication and collaboration among members of your group
- Provide orderly, accessible storage for documents

Almost all organizations that use SharePoint use these basic functions. You may want to go further and use more of SharePoint's capabilities, but this is a good place to start, so we'll describe these two uses in detail in this section.

With SharePoint Server 2007, it's easy to set up sites that will handle both of these uses very well, but setting up a bunch of sites that will serve your department well takes some planning. Think of these two uses as the left brain and right brain of SharePoint.

Collaboration is the right-brain, creative, free, impulsive part of SharePoint Server. It encourages people to "do their own thing," to create sites and pages, to contribute to discussions, to comment on work-in-progress as ideas strike them.

Storing and retrieving documents is a left-brain task that requires policies, structure, rules, and discipline. Its aim is to help the department (or enterprise) manage its valuable information and make it readily available to those who need it.

It's possible (and desirable) to support both types of use, but without careful planning, you may end up with chaos. It's a good practice to separate, as much as possible, the sites dedicated to these two uses. Set up team sites where "anything goes" and set up document centers or other document management sites where rules are strictly enforced.

Collaborate with your co-workers

Collaboration can happen in two ways with SharePoint Server. First, you can set up SharePoint sites that contain features designed to make it easy for members of a group to work together, regardless of where they are physically, such as:

- Group calendars
- Discussion pages
- Wikis

- Shared Documents library
- Announcements list
- Tasks list
- Links list

This type of collaboration is fairly easy to set up and control.

The second way to foster collaboration is to create special sites for special circumstances. For example, suppose your boss asks your co-worker, Bill, to gather requirements and evaluate software for a new order-processing system. If Bill has the right level of permission on your department SharePoint site, he can easily create an individual site dedicated to this project. Bill can add the Web Parts he wants, grant access to the users he wants, and be operating pretty much autonomously in a matter of minutes. Bill can also create team meeting and document review sites, and he can use any of the other SharePoint features he has access to.

This ability to spontaneously create new sites can be a big benefit to the group, but it can get out of hand. When sites proliferate freely, problems can occur. For example:

- It can become hard for users to find the right site.
- Information can be duplicated in several sites, using up expensive storage space.
- Out-of-date information can be left on sites. It can be difficult for the user to know what version is correct.
- Managing permissions for a multitude of sites can become a major chore, and users might inadvertently wind up with access to information they really shouldn't have
- As employees leave the group, the sites they create may be abandoned, creating confusion for remaining site users.

While there are potential problems with the unfettered ability to create sites, that doesn't mean you shouldn't allow the practice. It does mean that you should set some policies for site creation that address the following areas:

- Who is allowed to create sites?
- Do new sites need to be approved in advance? If so, what are the criteria for approval, and who grants the approval?
- Should new sites use established templates and themes?

- How much information may be stored on a site? (That is, how much server disk space may it take up?)
- What are the rules for including navigation facilities on the site?
- How long should information be stored on sites before it is deleted or archived?

We'll talk more about policies when we discuss the governance model in the section "Plan your governance model." To learn more about the collaboration features in SharePoint Server 2007, go to http://office.microsoft.com/en-us/sharepointserver/HA102368801033.aspx.

Manage and store documents

Most organizations produce or use a variety of documents—memos, plans, contracts, presentations, etc. The information in those documents is vital to the functioning of the organization, so it's important to be able to create, store, and retrieve these documents quickly and easily. Managing and storing documents is something SharePoint Server does well.

> **Note:** For convenience, we'll use the term "document" in our discussion, but we really mean any kind of information in just about any form that originates in or flows through your organization. Thus, not only are Word files and Excel workbooks and PowerPoint decks considered documents, but so are text files, pictures, and SharePoint sites themselves. The SharePoint administrator decides which kinds of files to allow in SharePoint.

If your department maintains a relatively small number of documents—say, fewer than a hundred—your rules and processes for managing them can probably be fairly simple, but as the number of documents (and authors and readers) grows, so will the complexity of your management scheme. Eventually, you'll wind up with a formal document management system.

A document management system is designed to control the flow of information in your organization—how it is created, reviewed, published, and consumed, and how it is ultimately disposed of or retained. Document management planning considerations include how content will be organized in document libraries, the metadata to define for each type of content, the workflows that will be required during the content's lifecycle, and the policies to apply to the content.

You know how valuable your organization's information is. You pay a lot of people to produce it and a lot more people to use it. But information is worthless if it can't be found, or if there's any question that it is authoritative. SharePoint Server can help on both counts, but it takes planning, commitment, and effort to create a document management system. You can use SharePoint Server to develop a document management system for a single department or your entire enterprise. If you have a lot of documents to manage— hundreds or more—consider using a SharePoint Document Center site.

The foundation for your document management system is a well-thought-out information architecture. That's just a five-dollar terms for a way to categorize and manage your information. Think of it this way: Suppose you've been hired to set up a new public library for your town. Someone has already built the building, and someone else will supply the books, but you need to figure out how to make it all work for the customers.

You'll need to work out three main things:

- A method for keeping track of information about the books you have: who wrote them, what they're about, when they were published, and so on.
- A scheme for storing the physical books so they can be found easily.
- A method for tracking who has borrowed and returned books.

You could write information about the books on 3x5 note cards and file the cards in some logical way in a shoebox. You could number each card and put the same number on the corresponding book. Then you could put the books on shelves in numeric order.

That should work just fine, as long as you enforce the rules:

- No one is allowed to put a new book on a shelf until they have filled out a card and filed it in the right place in the shoebox.
- The book must be placed in the proper place on the correct shelf.
- If a book is lost or destroyed, its card must be removed from the shoebox, so customers don't wind up looking for books that are no longer there.

Your document management system will resemble a library, except that you won't have shoeboxes full of index cards or shelves full of books. Instead, you'll have lists and libraries on your computer.

To learn more about the Document Center site template, go to http://office.microsoft.com/en-us/sharepointserver/HA102410251033. To learn more about

other document management features in SharePoint Server 2007, go to http://office.microsoft.com/en-us/sharepointserver/HA102413991033.aspx.

Find out what features are available from your SharePoint administrator

Your ability to do some of the things you want to do may depend on how your site collection or SharePoint Server is set up. That's the province of the SharePoint administrators who maintain the SharePoint server. It's a good idea to find out who those people are and how to contact them. You're sure to need their help at some time.

They can tell you how SharePoint Server is set up and what features are available to you. If you explain to them any special functions you want to perform, they can help you find the best way to do them, or they can turn on the features that you need.

If you want to do some research on your own to determine if you need assistance from a server administrator or site collection administrator to enable specific SharePoint features you want to use, you can review this TechNet article, which explains the levels at which different features are enabled: http://technet.microsoft.com/en-us/library/cc678862.aspx.

Plan, plan, plan

Once you're clear about how you are going to use SharePoint (at least to start), you can proceed with detailed planning. Resist the temptation to start building sites. You're not ready yet. Follow the process outlined below to build a solid foundation for your SharePoint installation.

Identify the stakeholders

Site planning should not take place in a vacuum. The success of your work depends on getting the insight and support of your stakeholders.

A stakeholder is someone who has a stake—an interest—in the outcome of your efforts. By this definition, everyone who has a business need to use your Web site can legitimately be considered a stakeholder. People who interact with your sites fall into three broad categories:

- **Sponsors:** These people are usually managers or higher executives who are ultimately responsible for your department's sites and pages. They pay for the work, they approve the results, they give their authority to the governing policies, and they promote the use of the sites.
- **Administrators and Site Builders (who may have various titles):** These people are the individuals who create, manage, and maintain the sites and pages. Their scope may range from the entire department's set of sites and pages down to a single site for a particular team.
- **End Users:** These people are interested only in how SharePoint can help them get their job done. End users might include people outside of your department.

There are a couple of special stakeholders to consider:

- **The people in the IT department who manage the enterprise SharePoint installation.** They can help you get the greatest benefit from SharePoint Server, and they can also make sure that you stay within their guidelines and capabilities and don't do anything that would be detrimental to the overall system.
- **People in your enterprise who are responsible for complying with government regulations and other standards or policies.** You should at least consult them to see if the information in your sites needs to be managed or protected in any special way.

To identify your stakeholders, you could create a table like this:

Person or Group	Role	Main Responsibility	Secondary Responsibility
Project managers	Manage work on projects done by internal and external employees and vendors	• Maintain project plans • Maintain project budgets • Maintain status reports	Manage project artifacts
<First Name Last Name>	Department Manager	• Be the SharePoint project sponsor • Approve site development • Foster acceptance in department	
Vendor Relations Group	Manage vendor qualification, contract, and compliance	• Maintain vendor qualification documents • Maintain vendor contracts • Maintain compliance evidence	Maintain vendor communications

As you identify stakeholders and find out what they want to do, you have an opportunity to:

- Provide some informal education about SharePoint Server and its features
- Manage stakeholder expectations regarding what they might be able to do with SharePoint Server

If your organization is not familiar with SharePoint Server 2007, you may want to give them an overview of its capabilities to expand their vision of what a SharePoint site can do for them. You could give presentations at staff meetings, hold voluntary brown-bag demos, create and share brief documents or slide shows, or whatever else would work well to get the word out. This is the education part, where you encourage users to think of ways that SharePoint could improve the way they work.

The expectation setting comes when you find out what the stakeholders' priorities are. You need to let them know what things you'll be able to do "out of the box" and what things will take more customization or even custom development. They will need to make the final decision about aligning priorities with the time and resources available to accomplish them.

Set up a planning group

Good planning is essential to the successful deployment of SharePoint sites, and good planning depends on having good information. Even if you're pretty familiar with your

organization, it's a good idea to set up a planning group to help you gather information and develop your plans. There are two benefits to setting up a planning group:

1. It helps ensure that you don't overlook any important users or business needs.
2. It's a starting point for building awareness of SharePoint Server 2007 within your organization, which will help you gain acceptance when the time comes to implement your sites.

Recruit people for your planning group who represent the groups of stakeholders.

Plan your governance model

The governance model is the set of policies, roles, responsibilities, and processes that you establish to guide, direct, and control how the people in your department use SharePoint Server. The thoroughness and thoughtfulness that you put into developing your governance model will determine, more than anything else, whether your use of SharePoint Server meets your goals and the expectations of your stakeholders.

Setting up the right governance model for your department is a balancing act—balancing the need for order with the natural human tendency to resist control. Your department's culture is an important consideration. It may not change the policies you come up with, but it may affect the way you enforce them.

Your company may have a governance model in place to cover the site collection in which your sites will be located. If this is so, you can extend that model to cover the particular circumstances in your department. If there is no top-level governance model at your company, you will still want to develop one for your department if you want to avoid chaos.

Your governance model needs to include topics such as:

- Site creation
- Site lifecycle and retirement
- Site size limits
- Use of themes and templates
- Permission management
- Information architecture

  Note: Permission management and information architecture are included in the governance model, but they are big subject in themselves, so we'll talk about them

in their own sections: Plan for managing permissions and Plan your information architecture.)

Here are some other things to think about for your governance model:

- **Storage limits:** Your IT department may have set a limit on the amount of disc storage your department can use. That space will have to be divided among all of your sites, pages, and libraries. You need to find of if there is a limit and, if so, decide how you will apportion it. (Your IT department can provide a regular report that shows how much space each of your SharePoint sites is using.)
- **Customization:** How far can users go in customizing the appearance of their sites and pages? You may decide to be more liberal with internal-only sites and more restrictive with sites that are open to people outside your department. Your company may have standardized branding, site templates, or page layouts you will need to use.
- **Classification of information:** If the information you're dealing with has high value to the company, requires special security, or is covered by regulatory compliance rules, you may want to set up a classification scheme to identify specific types of content that need to be managed carefully. You can then use features such as content types, information management policies, and workflows to manage how this content is handled.
- **Lifecycle management:** Sites such as document worksites and discussion sites tend to hang around after they are no longer useful, which uses up valuable storage space. Also, if stale information is allowed to remain on a site, it can cause confusion and error. Set a schedule for reviewing sites and their contents (at least once a year) to see if they are worth keeping. (SharePoint Server has features, such as usage reports and information management policies , that can help with this task.)
- **Data protection:** SharePoint Server's backup and recovery features protect your data from accidental loss. The frequency of backup and the speed and level of recovery are set up by the IT administrators of the enterprise SharePoint installation. Check with them to see what levels are available to you and let your users know what they need to do if they lose data.

It's a good idea to set up a SharePoint list to help keep track of your sites. Your list might contain information such as:

- Title of the site

- Site creation date
- Name of the owner
- Name of the site owner's team or department
- Purpose of the site
- Expected lifespan of the site
- Site's URL

The list might also contain other types of information you want to track about sites. As a SharePoint list, this registry will be easy to access and maintain.

Figure 3: A site list will help you keep track of sites

This list will make it easy for you and others to find the person responsible for a site when maintenance is needed.

To learn more about Governance, go to the Governance Resource Center for SharePoint Server 2007 on TechNet: http://technet.microsoft.com/en-us/office/sharepointserver/bb507202.aspx.

Plan for managing permissions

There are many ways to assign permissions to people, and there are many levels of permission you can assign. Your goal should be to balance security with complexity. You want to make sure that authorized people can get to the information they need while unauthorized people are kept out. And you want to do this without creating a permission scheme that is so complex that it becomes an administrative burden.

There are three broad categories of users who will need different levels of permission:

- **Administrators:** These users have broad permissions to configure and make changes to sites. They can enable features and create new sites and site collections. Depending on how your organization configures permissions, they may or may not

have permissions to update the actual content on sites. There will be relatively few (but at least two) of these in the organization.

- **Site owners or designers:** These users need to be able to create and customize sites and pages. There should be a limited number of these people—enough to handle the workload of creating and maintaining sites and pages. One or two per team or workgroup should probably suffice.
- **End users:** These users view your SharePoint site as a utility and they use its capabilities to get their job done. They may use the site to create and edit documents, or they may just find and read information on the site.

SharePoint Server comes with a default set of permission levels:

Permission Level	Description	Who should have it
Full Control	Full Control gives administrator access to the site. Members of the Home Owners group have this permission level by default. This permission level cannot be customized or deleted.	Limited number of top administrators (but at least two)
Design	Design enables users to change the layout and settings on the pages to which they are granted rights. Users in this group can create lists and document libraries, edit pages, and apply themes, borders, and style sheets on the site or site collection.	Limited number of "power users"—two or three per workgroup or major section of the site. These users will support others in setting up and customizing pages. For a large organization, this could be a full-time role.
Contribute	Contribute enables users to submit content to areas in the site to which they are granted rights. Users in this group can add, edit, and delete items in existing lists and document libraries. Members of the Home Members group are assigned this permission level by default. **Note:** In Microsoft Office SharePoint Server 2007, users with Contribute-level permissions can edit list items, which was not allowed in previous versions of SharePoint Portal Server. This is an important difference for groups who are upgrading to Office SharePoint Server 2007.	All members of a workgroup who need to create and maintain documents, lists, and other information on the site. Most members of the workgroup will have this level of permission.

Permission Level	Description	Who should have it
Read	Read enables users and groups to search for, view, and browse through content on the site. Users and groups with this permission level can also open current items and document. This permission level is assigned to the Home Visitors group by default.	Usually users outside the immediate workgroup who need broad read-only access to the information maintained by the group. For example, manufacturing employees may need general access to process documents maintained by the engineering department.
Restricted read	Restricted read is designed to give users access to a specific list, document library, item, or document, without giving them access to the entire site. Previous document versions and user rights information are not available to people and groups with this permission level.	Users who need read-only access to a very limited set of information. For example, all employees may have restricted-read access to the current employee manual; manufacturing employees may have access to a production-schedule spreadsheet.
Approve	Approve enables users to edit and approve pages, list items, and documents.	Anyone who is accountable for the contents of the site.
Manage Hierarchy	Manage Hierarchy enables users to create sites and edit pages, list items, and documents.	Depending on your governance policy, this level could be limited to a small group or made widely available.

You can also make up your own permission categories by combining specific rights from a list of more than 30 options.

With so many choices, it's impossible to prescribe a permissions scheme that will work in all organizations. However, here are some guidelines:

- **Keep it simple.** Try to keep the number of different permission levels to a minimum. If possible, stick with SharePoint Server's default permission levels.
- **Use groups.** Assign individuals with similar information needs to a group and then give the group a particular permission level on various sites, libraries, and so on. The group can have different permissions in different places. When new people join the organization, you can add them to the appropriate group (or groups) and they automatically get the appropriate access to different sites.
- **Avoid assigning permission to individual users as much as possible.** When you do assign permission directly to an individual user, keep track of where you assign the person and what permission he or she has. This is particularly important

for information that may fall under regulatory scrutiny. You may be asked at some point to identify who has access to a particular site (fairly easy to do) or what sites a particular person has access to (fairly hard to do without good records).

- **Segregate information by security level.** SharePoint Server enables you to set permission at the folder or document (file) level, but it's much more efficient to set permission on a library or even the site that contains the library.

To learn more about managing permissions, review the following articles:

- Manage permission levels: http://office.microsoft.com/en-us/sharepointserver/HA101172091033.aspx
- About controlling access to sites and site content: http://office.microsoft.com/en-us/sharepointserver/HA101001441033.aspx
- Understand groups and permissions on a SharePoint site: http://office.microsoft.com/en-us/sharepointserver/HA102371171033.aspx
- Customizing user access to folders, list items, and library files on a SharePoint site: http://office.microsoft.com/en-us/sharepointserver/HA102547891033.aspx

Create a permissions matrix

A permissions matrix is a guide to help users know which groups have which permissions on which kinds of sites and other components. When someone creates a new site, the matrix will guide them in assigning groups and permissions.

Start by making a list of the groups or categories of people who will be using your SharePoint sites. Use whatever categories make sense for your organization; just be sure you cover everyone. (It's OK to have a category called "other," but use it as a last resort.) Make enough groups to provide the level of distinction among users that you need to manage your sites, but don't make too many groups, or you'll start to defeat the purpose of using groups in the first place.

Next, list the categories of sites, components, and content for which you want to manage access.

Groups	Things							
	Home site	Personnel sites	Team sites	Contract libraries	Employee lists	Policy manuals	Price lists	Product specs
Administrators	FC	FC	FC	FC	FC	FC	FC	FC
Librarians	R	X	X	FC	FC	R	R	FC
Group supervisors	A	R	C	C	C	A	A	A
Authors and editors	R	X	R	C	C	C	X	C
Sales managers	R	R	RR	C	C	C	A	C
Trainers	R	X	R	D	D	C	X	R
Sales Team	R	X	FC	C	R	R	C	C
Prod Dev Team	R	X	R	C	R	C	C	A
External users	RR	X	X	RR	X	X	X	X

FC -- Full Control
D -- Design
C -- Contribute
R -- Read
RR -- Restricted read
A – Approve
X – Group not assigned here

The permission matrix should not be a static document. As your department's use of SharePoint sites evolves, so should the permissions matrix. Plan to review it periodically to make sure it still fits your organization.

Also, be prepared for the inevitable exceptions that will come up. The matrix should be a guide, not a rigid rule.

Who's going to be the bad guy?

It seems obvious to say, but the best-thought-out polices won't do any good if no one is willing to enforce them. That means that sometimes, someone will have to say "no" to a request that might be perfectly reasonable except that it doesn't fit within the guidelines. It's a good practice to set up a governing body to enforce the governance model. Your executive sponsor needs to lend his or her authority to this body. At the very least, you need to identify a local administrator for your SharePoint sites who has the authority and permission level to enforce policies.

The best way to enforce your policies is to educate your users about why the policies are important and why it is in their best interest to follow them and to encourage others to do likewise. For example, if a user neglects to fill in the metadata for a document, he or she may save five minutes, but each user who later tries to find the document may have to spend many more minutes (and a lot of frustration) in searching.

Roll with the punches and make room for exceptions

There will always be exceptions to your policies. Just as a tree limb bends in the wind and doesn't break, your policy must be able to bend to accommodate legitimate exceptions. The key word is "legitimate." When an exception comes up, consider why it came up, what effect handling the exception will have on the overall effectiveness of the site, and what precedent you're setting for the future.

Plan your information architecture

Information architecture is the organization of information—documents, lists, Web sites, and Web pages, and more—to maximize the information's usability and manageability. Information architecture should be planned and governed so that information is managed in a way that:

- meets the organization's business goals
- meets regulatory, privacy, and security requirements

Information architecture is one of the most important parts of implementing SharePoint Server 2007, and it deserves plenty of time and effort. "Information architecture" is just a fancy term for a plan or framework that includes the kinds of information your organization produces or uses and how you're going to manage it. It's important to get the plan for your information architecture right (or as close to right as you can), because the ability of your coworkers to quickly and accurately find the information they need to do their job is a key contributor to the success of your organization.

It will take time and effort to produce a good (i.e., complete and useful) information architecture, but there are rewards for doing a good job:

- Consistent use of metadata can make it easy to search for and compare related items of information.
- Well-designed and well-managed storage of content can prevent the proliferation of duplicate versions of documents. As a result, users feel confident that they are viewing the authoritative version.

- A well-designed storage plan will help make the best use of limited storage space.

In planning your information architecture, here are some of the questions to consider:

- How easy it is to find information?
- Does the information need to go through a formal authoring/editing/approving process?
- How is information stored and retrieved?
- How do users navigate to information?
- Who needs access to the information?
- Should the information be included in or excluded from any particular search scopes or indexes?
- How long will the information need to be retained?
- What will happen to the information at the end of its life?
- If the information is to be archived, where will it be stored?
- How redundant or overlapping is the information?
- What metadata is needed for each type of information?
- What templates are used for creating information?
- How will the information architecture be governed?
- What security, regularity, and privacy requirements apply to the information?
- Do you need “development” sites, where documents can be worked on out of public view, and “publishing” sites, where finished documents are available to general users?

Some of the planning may have already been completed. For example, if your enterprise or department already has standards and policies for the creation, management, and disposal of documents, your site policies, standards, and practices will need to dovetail with them.

Your information architecture policy will result in rules and processes that your users will need to follow. To encourage compliance, do the following:

- Consider your organization’s culture and its tolerance for prescribed processes.
- Make the rules and processes as brief and easy to understand as possible.

- Educate your users about the benefits of following the rules and the negative effects of ignoring them.

In developing your information architecture, be sure to include representatives from all areas and levels of the organization, both to benefit from their insight and to gain their acceptance (and support) for the final plan. You might even want to seek the advice of people outside your organization, such as customers or suppliers, if they play key roles in producing and using your group's information.

For more information about implementing and governing information architecture, go to http://technet.microsoft.com/en-us/library/cc262900.aspx.

What kinds of information are you going to manage?

What kinds of documents does your department produce—financial reports, sales presentations, proposals, progress reports, feasibility studies, spreadsheets, flowcharts? Make as complete a list as possible of the kinds of documents your group produces or obtains from others.

> **Note:** "Document" refers to any kind of computer file: Word, Excel, PowerPoint, PDF, image files, etc.

Here's a suggestion for how to proceed. This effort is best done by a team, and it may take a few meetings to get it done.

1. Make a list of all of the kinds of documents your organization produces or receives. This is a good group activity. Don't worry about the details at this point; just make the most comprehensive list you can. Remember that a document can be anything that contains information in any form. Write each type of document on a separate piece of paper and tape it to the wall in any order.
2. Go through the list item-by-item. For each item, list its characteristics (sometimes called properties or attributes). Again, be as thorough as you can for each item. Don't worry about how important a property is, just write it down. Don't worry if some items have a property, such as color, that other items don't.

It might be useful to create a table like this:

Generic name	Progress Report	Project cost summary	Project work documents
File type	.docx	.xlsx	Various
Originator	Project managers	Ron Harrison	Anyone on project team
Audience	Project stakeholders	Executive committee	Project team plus vendors
Security level	Low (without cost numbers)	High	Low
Average number per month	1/project, ~8-10 total per month	1	Many per project
Retention policy	Retain for life of project	Retain current and past 11 months	Retain for life of project
Disposition	Archive when project closed	Archive after 12 months	Project Manager review at end of project; archive significant documents, destroy others
Significant for regulatory compliance?	No	Yes	No

3. Now sort the different kinds of documents into groups according to their properties. No two kinds of documents will have precisely the same set of properties, but common properties will begin to emerge. Group the document types based on those common elements. Note that some groups may contain several kinds of documents, and others may contain only one. At the same time, you'll begin to see the relative importance of different properties. Discard those properties that are obviously unimportant. For those properties that are important, be sure you have a value for that property for every document type.

   By this point, you have a good first draft of your information architecture. You have identified the content types (the groups of document types). You have also identified the important properties of these content types, which you'll keep track of through the use of metadata.

4. The last step is to write down the policies that will govern the way you manage your information. The scope of the policies is up to you, but they should take into account the questions listed above.

Finally, remember that things change, and your information architecture needs to be able to accommodate changes when they come along. You may start to work with new kinds of content, or the processes and policies for existing documents may need to be revised to meet changing circumstances. Review your plan regularly and make adjustments as necessary.

Naming conventions

We give our documents names that mean something to us, but those names often are meaningless to others. If someone needs to know what “pt bud v5 9-14.xlsx” is about, he or she will have to open it to find out. That wastes time. If the document were named something like, “product training budget 5th revision.xlsx,” the user could tell quickly what the document contained.

Naming conventions can make it easier to catalog and find documents. Like any rule, the easier it is to understand and follow, the more people will follow it. Remember that the document name doesn’t have to contain all of the information about the document. For example, if you have a rule that budget worksheets must be stored in the Budgets folder in the Product Training library, then the name of the files doesn’t need to contain that information. The name could be limited to the revision number, or the expense category, or some other meaningful information. Its location tells us that it’s a product training budget document.

You may need more than one convention, depending on what kinds of documents you manage.

Use content types and metadata

Content types are categories of content. For example, proposals, financial reports, project plans, trip reports, and contracts could all be different content types in a SharePoint site. (Actually, the term “content type” applies to more than just documents, but we’ll stick with documents for now.)

You define custom content types in a site's content type gallery. A custom content type must be derived, directly or indirectly, from a core content type such as Document or Item.

After it is defined in a site, a custom content type is available in that site and in all subsites below that site.

One of the key things that differentiates one content type from another is metadata. Metadata is information about a document. Think of the cards in the shoebox: The information on the cards is metadata about the books on the shelf. The properties of a Microsoft Office file, such as a Word document, are metadata.

A proposal would have one set of metadata elements (such as customer name, product line, and proposal manager) while a trip report would have another (such as trip date, destination, purpose, and traveler.) Most likely all documents will have some elements in common (author name, publication date, security level), but all will also have significant differences in their metadata elements.

When you put the two concepts together, you get a pretty powerful tool for managing documents. It's easy to see that different types of documents could have different sets of metadata, as illustrated in the following table:

Metadata	Content Types					Notes
	Contract	Change Request	RFI	RFP	Response	
Recorded	X	X	X	X	X	Y/N – indicates that physical copy has been filed in Project Office
Vendor	X		X	X	X	Lookup field to approved vendor list
Project	X	X				Lookup field to project register list
Expiry	X					Date
Evaluators					X	Person lookup – multi-select
Vendor version					X	Number
Approver	X	X	X	X		Person lokup – single select
Survey					X	URL – link to survey for this response

You define appropriate metadata elements for each content type. By declaring a document to be a particular content type, you automatically assign the set of metadata to it.

Metadata can be useful in many ways. Using metadata, you can:

- Track a document through its life
- Produce catalogs of documents that can help users find information they want quickly
- Organize documents in libraries
- Manage the retention and disposition of documents
- Obtain more accurate search results
- Filter and sort lists on meaningful characteristics

Many users have encountered metadata already when working with Microsoft Office applications. All Microsoft Office applications allow users to add standard metadata, such as title, subject, and author, as well as custom metadata to their files.

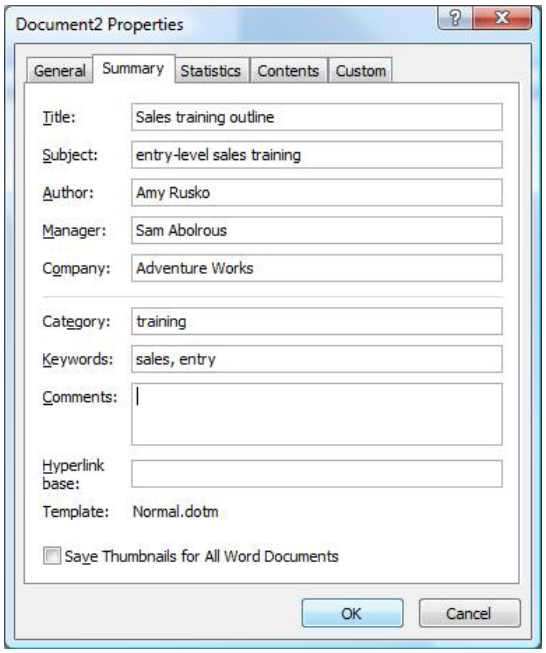

Figure 4: Typical document properties

SharePoint Server makes it easier for users to enter metadata. When a user creates a new document based on a SharePoint library template, he or she is prompted to enter custom metadata for the document when that document is opened in a Microsoft Office program.

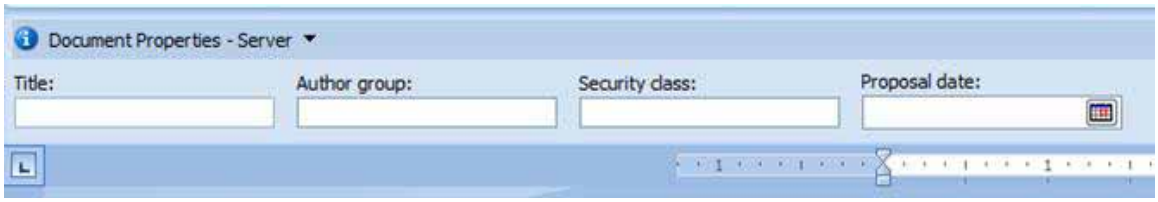

Figure 5: Metadata prompts for new document

As useful as metadata is, it isn't free: Someone has to enter the information for every document. Busy people may not want to take the time to enter the metadata when they create or edit a document. When you set up metadata for a content type, be careful to:

- Limit the amount of metadata you require the user to supply. Don't add metadata fields just because it would be interesting to have the information.
- Have a specific, defensible justification for every item of metadata.
- As much as possible, use option buttons, checkboxes, and pick lists for metadata items. Avoid requiring the user to type information into a field if possible.

You will need to sell your sponsor and key stakeholders on the value of using metadata, educate your users on the importance of adding the data, and monitor documents to make sure users comply with the policy.

To learn more about content types, go to http://office.microsoft.com/en-us/sharepointserver/HA101495511033.aspx.

To learn more about metadata, go to http://sharepoint.microsoft.com/blogs/GetThePoint/Lists/Posts/Post.aspx?ID=40

Plan your sites

Now you have an idea of the kinds of things you want to do with your SharePoint sites, and you have a well-thought-out (and agreed upon) information architecture and governance model. You're ready to start laying out your sites and pages.

Map out the organization of your sites

Start by making a site map. A site map is like a city map: It shows how buildings (sites and pages) are grouped into areas and how you can find your way to the ones you want. A site map shows the sites, pages, and features you plan to construct. It can be a simple list, or it could be a hand-drawn diagram on the back of an envelope, but a pictorial presentation is probably easier to grasp and better for presenting to stakeholders. Microsoft Office Visio 2007 has templates designed specifically for making site maps. You can also use one of the SmartArt hierarchy templates in Microsoft Office Word 2007 to quickly create a good-looking site map like the example below, suitable for presentation to your stakeholders.

Figure 6: Typical site map

Here's where your information architecture takes shape. If you've done a thorough job of designing your information architecture, this part will be easy.

There are two basic ways to arrange your sites and pages:

- **By function:** Each major department on the organization chart has its own set of sites, pages, libraries, and so on, all of which follow the governance model and information architecture. For each department, there might be a site for policies, one for training, another for personnel, and so on. This arrangement is more suited to collaboration.
- **By type or use or information:** Each type of information (policies, product data, training, and so on) would have its own site. On the site, there could be a page for engineering, one for manufacturing, one for marketing, and so on. This arrangement is more suited to information management.

There's a third option—a hybrid of the first two: Below the top site, you could have one branch of subsites arranged by organizational unit and another by type of information. The benefit of this approach is that it makes it easier to manage security if you want to make documents available to the general enterprise public but restrict access to departmental discussions and working areas.

In deciding how to organize your sites, try to anticipate how a new user would search for information. What's the most intuitive organization? Because adults have different learning styles and different ways of approaching a task, no single scheme is going to satisfy

everyone. You're likely to wind up with a mixture of both organization approaches, but try to be as consistent as possible. Remember that you can use links to present different "virtual" organizations.

Finally, if possible, have a group of typical users test your site organization to see if they can understand how they would navigate to the information they want. To learn more about planning the structure of site collections and sites, go to http://office.microsoft.com/en-us/sharepointserver/HA102560511033.aspx.

The top (home) page

Your home page is where people go for the first time. Beyond establishing the branding of your group of sites, the main function of the home page is to help people understand the organization of your site collection and where they should go to find what they want.

You want your home page to look attractive and inviting, but the best graphic design puts users first and helps them find their way. Avoid design flourishes that get in the users' way. Also avoid user interface elements that are especially subtle. For example, don't count on users to mouseover just the right spot to discover a link.

Subsites and pages

Subsites and pages should be designed to accomplish specific purposes. If possible, avoid having sites and pages that simply contain links to other sites further down the line. Try to design your site structure so that users can get to the information they need with no more than three clicks.

Develop your "brand"

You'll want your sites to have a consistent "look and feel." This is sometimes called "branding," especially if it involves using an organization's formal logo or color scheme. When you brand a site, you apply a consistent visual and functional style to your department's sites: consistent use of color, placement of Web Parts, methods of navigation, and so on.

Good branding has two benefits:

1. Users recognize that the site they're visiting belongs to your department.
2. Users have a familiar experience on every site, so they aren't confused or frustrated by different organization and functionality on different sites.

It may be helpful to start with "wireframe" drawings of sites and pages. A wireframe is just an abstract diagram of what features will be on a site and where they will be located. If you

expect to have different kinds of sites, such as team sites or project sites, work out wireframe drawings for each type.

Here's an example of a wireframe drawing for a home page:

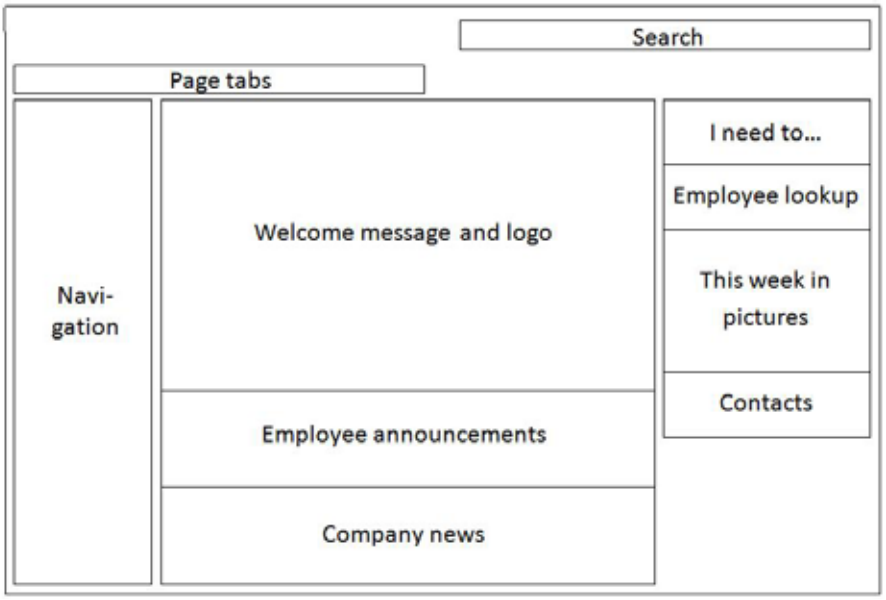

Figure 7: Typical wireframe drawing

Customize your sites

With your wireframe drawings in hand, you can create custom templates for the kinds of sites you will need. When users create a new site or page using one of your custom templates, they start with the basic arrangement, navigation features, and color scheme you set up. They save time by not having to build everything from scratch, and your group of sites has a consistent appearance and way of working.

We're assuming that you have a home site that was set up for you by your IT organization. They may have applied corporate branding and functional touches, or they may have given you a default SharePoint team site. In either case, you can customize your sites to the extent that your enterprise policies allow.

You can customize your site directly in the Web browser. For example, a site that includes a calendar, shared documents, announcements, and shared contacts might benefit from customizations such as:

- Adding the team's logo to the site
- Applying a new theme to enhance the site's appearance

- Customizing the site's navigation elements to improve its usability
- Adding Web Parts to the home page to add functionality

Other customizations, such as configuring navigation and adding Web Parts to pages, can also be done in a Web browser by using the SharePoint Server 2007 user interface.

To go to the next level of customization, you can use Office SharePoint Designer 2007, a product for creating and customizing Office SharePoint Server 2007 Web sites, to make more advanced changes. For example, you could do such things as:

- Customize the master page to create a unique, branded site framework
- Create custom layouts for various types of pages
- Create cascading style sheets that implement the enterprise's color scheme and fonts
- Create data views for presenting information stored in back-end systems, such as personalized displays of payroll and benefits data

You can use the site templates that come with SharePoint Server as they are, or you can customize them for your particular needs. Template modifications that you make at the top site of your group will be available to all subsites.

You'll find more information about Microsoft Office SharePoint Designer 2007 here: http://office.microsoft.com/en-us/sharepointdesigner/HA101656311033.aspx. Click here (http://office.microsoft.com/en-us/sharepointserver/HA101577751033.aspx?pid=CH101237721033) for information about creating and editing master pages.

To learn how to change the color or theme of a site, go here: http://office.microsoft.com/en-us/sharepointserver/HA101488571033.aspx?pid=CH101784951033.

These articles give you good information about working with Web Parts: http://office.microsoft.com/en-us/sharepointserver/HA102382101033.aspx?pid=CH101021211033 and http://office.microsoft.com/en-us/sharepointserver/HA100974631033.aspx?pid=CH101021211033.

Develop your navigation scheme

SharePoint Server 2007 gives you many options for customizing the navigation features on your sites. As much as practical, allow the user to go from one site to another without having to backtrack to a higher-level site and then work their way back down. Keep asking the question, “If a user is viewing this content, where are they likely to want to go next?” SharePoint has an extensive set of navigation features you can use to help the user.

> **Note:** What users see depends to some extent on the level of permission they have and on the specific features that the enterprise SharePoint administrators have implemented. If you can, it’s a good idea to set up test accounts and assign different levels of permission to them. Then, by logging on as one of the test accounts, you can test how your sites would behave for someone with that permission.

For detailed information about how to manage navigation for a SharePoint site, go to http://office.microsoft.com/en-us/sharepointserver/HA102487861033.aspx?pid=CH101248791033.

Document your site and train your end users

SharePoint Server 2007 has an intuitive, Web-based interface and it includes Help, but using and administering sites can be a challenge to some users. To complicate things further, the set of things that users can do depends on their permissions levels. Additionally, everyone needs to understand the governance policies and information architecture you have set up and what they need to do to adhere to them.

All that adds up to a need for documentation and training. At a minimum, you need to document your governance policies, information architecture, and site structure. Best practices, helpful hints, and links to additional information are also useful. It's a good practice to create a document that combines all of this information and post it on your SharePoint site where users can find it readily. Be sure to update the document as time goes by and changes are made.

For training, you’ll probably need two levels:

- **Training for end users:** This training should give an overview of the layout of your sites as well as demonstrations of how to use the navigation features and elements such as libraries, calendars, and lists. It should also cover the key points of governance and information architecture that the users will be expected to follow.

- **Training for administrators and site designers:** In addition to the end-user training, this group will need more detailed information about how to create, customize, and maintain sites. They will also need to be trained in your security policies and how to administer permissions.

Here are some resources to help you develop and provide training:

Resource	Location
This training package presents a grand tour of the latest features and changes in SharePoint Server 2007. It includes articles, videos, and interactive tutorials that lead the user step-by-step through the rich features of Office SharePoint Server. You can host this training package on your SharePoint server, or your users can download it to their own computers.	http://office.microsoft.com/en-us/sharepointserver/HA102488011033.aspx?pid=CL100796281033
Here is a series of brief, narrated courses users can take at their own pace. The courses cover the essentials of libraries, calendars, slide libraries, workflows, and Excel Services.	http://office.microsoft.com/en-us/training/HA102358581033.aspx
For those who want to go beyond the basics, this series of video demonstrations covers many of SharePoint's most useful capabilities, as well as some of the tasks of administering a SharePoint server.	http://office.microsoft.com/en-us/sharepointserver/CH102066971033.aspx
Check here for a library of webcasts, podcasts, and video tips for using SharePoint. Programs range from 2 minutes to 1 hour.	http://office.microsoft.com/en-us/webcasts/HA102547461033.aspx
If you would like to develop your own training presentations, you can go here to download sets of PowerPoint templates that will give you a head start. You can customize the presentations to fit your organization's specific needs.	http://office.microsoft.com/en-us/help/HA101926501033.aspx#8
Finally, here's a potpourri of training resources.	http://office.microsoft.com/en-us/results.aspx?qu=sharepoint+training

Resource	Location
For continuously updated and expanded Help, as well as online training, video demos, and other assistances resources, visit the SharePoint Server home page on Office Online.	http://office.microsoft.com/en-us/sharepointserver/FX100492001033.aspx

Effective training leads to success on the part of the users, and success leads to acceptance and compliance. By properly training your user community, you can increase satisfaction with your SharePoint implementation and reduce support costs.

Speaking of support, you may want to identify someone to act as a local resource to answer users' questions, at least for a few weeks after you launch the site. Also, make sure users know where to report problems or request assistance. As an alternative, you could set up a discussion group on your SharePoint site where users could go to get help from their peers.

Go for it

You've done your homework. You've decided how you want to use your SharePoint sites; developed policies for governance, information architecture, and access; designed sites templates that work for your department; and trained your colleagues how to use the SharePoint tools.

Finally, you and your co-workers are ready to build SharePoint sites for your department. It may seem that you've spend a lot of time and effort getting ready to use something that's pretty easy to use in the first place, but as your SharePoint sites grow, you'll see your investment in planning pay off. So go to work and have fun.