

SharePoint Project Checklist

**Your 12 step plan to a successful
SharePoint implementation**



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Your 12 step plan to success in implementing SharePoint

1. Pre-Project Planning

Identify the Project team – this should include all areas of the business that SharePoint will be used by, IT technical lead and Project Manager – best practice here is to use a non-IT person as Project Manager

Identify training needs for project team

Identify “Super Users”

Step 1 Completed

2. Inventory

Identify which documents your business holds

Which of these documents are ‘Controlled Documents’

Which electronic forms are used?

Which database systems / ERP systems are in use

List Departments or areas that will use SharePoint

Which version of Microsoft Office is being used?

Step 2 Completed

3. Create or Review Relevant Business Policies

Document Control Procedure

Data Protection

Update User entries in Active Directory

Define who is permitted to change Active Directory User entries

Business Organisation Chart, linked to Active Directory

Step 3 Completed

4. What will SharePoint be used for?

Who will use it?

Which documents will be on SharePoint (do you want archive documents on SharePoint)?

Which forms and systems?

Will "MySites" be used? - (This is a feature of MOSS 2007)

Will it be the user's Internet Home Page?

Will Image/Video storage be required?

Will E-Learning be integrated into SharePoint?

Is mobile access required to SharePoint?

Is there a need for offline copies and synchronisation for Laptop users?

Should it be linked to external website?

Is Microsoft InfoPath required?

Step 4 Completed

5. Configure SharePoint Server or Server Farm

Email setup

Search setup

Backup setup

Link to Active Directory

Setup Workflow

Step 5 Completed

6. Plan SharePoint Structure

- Structure of Sites (i.e. Home / Departments sub-sites with standard layout).
- Controlled Documents metadata setup
- Define Site Administrators
- Develop Project Team (can be made up of Site Administrators)
- Do you want shared Calendars, Contacts across sites?
- Develop a standard Site Template
- Develop standard site lists
- Security and Permissions. (Best practise is for all domain users have at least 'Read' access unless site\list\library contains sensitive data)
- Do third-party packages require integration to SharePoint?
- Do you want to receive any emails in SharePoint?
- Will the Top Link Bar be the same on each page?
- Will the Quick Launch Bar be same on each page?

Step 6 Completed

7. Design SharePoint Structure

- If required use SharePoint Designer to create Master Pages
- Setup any required Workflow (using SharePoint Designer)
- Setup up any required Alerts and Audiences.
- Add relevant royalty free images to sites
- Add 'Approvers' group on SharePoint
- Create and configure any required Office Templates

Step 7 Completed

8. Test SharePoint Structure

Setup a Department/Group as a test group creating all new documents in SharePoint

Receive and Review feedback

Test Alerts

Test Search

Test Workflow

Test full backup and restore

Test backup and restore of individual site

Step 8 Completed

9. User Training

All staff/users should attend ½ day training course

Purchase SharePoint CBT Clips and add to SharePoint server (available from officetalk)

Recommend IT staff receive SharePoint Designer Training

Step 9 Completed

10. Document Import

Best practise is to house-keep current documents on File Server. Remove all duplication and expired documents

On a per Department basis upload all required documents (Word, Excel, PowerPoint, PDF etc) to relevant SharePoint Site \ List \ Library. (If copying in bulk use Explorer view)

Remove imported files/folders from File Server

Edit Metadata entries for each document. (Use DataView to allow bulk entering)

Step 10 Completed

11. Roll-out SharePoint

Use a phased approach 1 group or Department at a time

Prevent Write access to File Server

Change user policies to enforce save to SharePoint and make Home page SharePoint site

Add any required offline solutions

Step 11 Completed

12. Review SharePoint Roll-out.

Allow users to suggest what else can be added

Review User Usage Data

Step 12 Completed

