

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

