SharePoint 2013 Online

Department Team Site

Site Setup Check List

8-10-2015

SharePoint is a web application platform in the Microsoft Office 365 suite. SharePoint combines various functions which are traditionally separate applications: intranet, extranet, content management, document management, personal cloud, enterprise social networking, enterprise search, business intelligence, workflow management, web content management, and applications to support various business activities. (Wikipedia)

When building a SharePoint Site it is important that staff have a checklist to ensure that they have accounted for the various items which need to be addressed.

These can be summarized as follows:

- Define the Need
- Submit New Site Request
- Meet With DTS
- Gather Requirements
- Design / Build Site
- Migrate Data
- Training and Reference documents
- Communicate Site Availability
- Ongoing Production Support

Define The Need	Activity	Lead	Description	Deliverable
Team Site need determination	Determine if there is a need for a SharePoint team site	Department Technical / Business	Determine if there is a need for 'S' drive, document sharing/collaboration	Determination of need. If there is need proceed, if not stop here

Submit Request for new site	Activity	Lead	Description	Deliverable
Secure Director Approval	Department Staff Requests local approval to request team site	Department project lead	Make request to Department director	Department director approved request
Submit Request	Fill out the form for team site creation for new users	Department project lead	Fill out the form to request meeting to discuss site	Filled out form sent to WMAT, meeting date

Meet with DTS	Activity	Lead	Description	Deliverable
Site Setup kickoff	Meet with department IT leads or business leads	WMAT	Provide and review the checklist with department, review the process	Reviewed checklist for specific department
DTS Educates Department Staff	Provide education / briefing for department staff	WMAT	Education component of meeting with department	Educated department staff

Create Team Site Plan	Activity	Lead	Description	Deliverable
Allocate resources	Allocate department staff to develop &	Department Management	Allocate department technical and functional resource	Assigned department resources

	operate the team site			
Create Team Site Plan	Create SharePoint Team Site management plan	Department resources	Plan of resources and actions associated with the team site	Completed team site plan
				(get template)
Requirements Gathering	**Activity**	**Lead**	**Description**	**Deliverable**
Introduction / Education	Requirements process description / Information Architecture	WMAT	Provide department staff basic required information	Department staff successfully briefed
Interviews	Hold One on One interviews	Functional Owners	Collect information and document processes	Required data to define the site purpose
Process Review	Document ASIS business processes	WMAT & Functional Owners	Map and document current business process	ASIS business process maps and process narratives
Workplace Environmental	Workplace Observations	WMAT & Functional Owners	Watch and view the business process in action	Observational data overlay for process understanding
Determine 'S' and 'V' Drive Data Needs	Determine 'S' and 'V' drive resolution	Functional Owners	Develop plans for how to handle the key data from those drives	'V' & 'S' drive plans
Determine Application Needs	Determine if there are small application needs	Technical and Functional Owners	Capture information about required 'helper' applications	Documented application information (as needed)
Establish Metadata Requirements	Establish metadata requirements for libraries	Functional Owners & WMAT	Determine what metadata required	Metadata needs determined. Search criteria and actions required to support it
Determine Users and Their Roles	Identify Potential Contributors / Consumers	Functional Owners	Determine which staff has which role	Staff list of contributors/consumers and roles

	Activity	Lead	Description	Deliverable
Define Security Profile	Develop the security profile	WMAT & Department Staff	Define / develop the profile of roles and access	Finalized security profile implemented in SharePoint
Determine Workflow Needs	Determine if there are workflow requirements for content activities	Functional Owner	Determine the different types of workflow that mat facilitate processes	Department workflow requirements finalized
Review / Confirm Requirements	Hold Requirements review session	WMAT & Functional Owners	Review requirements and other artifacts	Finalized process information
Design / Build Site	**Activity**	**Lead**	**Description**	**Deliverable**
Allocate Department Build Resources in Accordance with Site Plan	Identify Department staff to work with WMAT	Department Management	Department staff to work with WMAT to fit out site	Assigned resources – With dedicated time
Pre-Activity Briefing	Pre-design briefing	WMAT & Function /Technical Owners	Hold briefing on design & information architecture and site framework	Department staff briefed
Define Technical Staff Roles	Technical Staff preparation	WMAT & Technical Staff	Determine those technical items that need to be address and secure training for them	Technical Staff prepared
Define Functional Staff Roles	Functional Staff preparation	WMAT & Functional Staff	Determine those functional items that need to be address and secure training for them	Functional Staff prepared
Establish Basic Site	Create Basic Site	DTS, Core Systems team	Establish new SharePoint team site	Basic SharePoint team site
Configure Site Attributes	Configure site attributes	WMAT & Functional Owner	Using the information gathered in the other steps configure the site for use	Configured site ready for use

Configure Site Security	Configure site security	WMAT & Technical Owner	Based in site users and roles configure their permissions	Configured site security
Configure Site data Holding areas	Configure site content holding areas	WMAT & Functional Owner	Based on information types and other data configure the information holding areas of the site	Configured holding areas ready for use
Complete Site setup	Finish Basic Site up for use	WMAT team	Add in specific elements for new site	SharePoint team site ready for use
Develop Site Navigation Diagram	Navigation site diagram	WMAT & Functional Owner	Determine site navigation and document	Site navigation diagram
Top Level Navigation Elements	Integrate Top Navigation for site	WMAT & Functional Owner	Define the top navigation page of the site	Defined site navigation
Quick Launch Elements	Integrate Quick Launch	WMAT & Functional Owner	Define those items on the quick launch menu	Defined site quick launch
Recent Menu Elements	Integrate recent menu	WMAT & Functional Owner	Define those items on the recent menu	Defined recent menu
Apply Data Retention Policies	Implement MD data retention policies	Functional Owners	Apply the appropriate retention policy to specific data types	Implemented data retention policies
Information Architecture Content Types	Determine Content types	WMAT & Functional Owner	Determine the different types of content objects are required for the things the department wants stored	Department Content types finalized
Information Architecture Metadata	Determine metadata needed	Functional Owner	Determine the different types of metadata are required for searching	Department metadata finalized

Information Architecture Lists / Libraries	Determine lists or libraries needed	Functional Owner	Determine the lists or libraries the department needs	Department lists and libraries finalized
Implement Workflows	Determine if there are workflow requirements for content activities	Functional Owner	Determine the different types of workflow that mat facilitate processes	Department workflow requirements finalized
Knowledge Transfer for site turn over	Provide final knowledge transfer prior to turnover	WMAT & Technical Staff	WMAT provides the final admin education required to fully manage the site	Prepared department technical staff
Provide security credentials	Provide security credentials to site admin	WMAT & Technical Staff	Finalize security setting for turnover	All initial security in place for turn over
Turn Over site	Site turnover meeting	WMAT & Technical & Functional Staff	Review final items and confirm readiness. Site is turned over if all it ready	Site turned over to department
Migrate Data	**Activity**	**Lead**	**Description**	**Deliverable**
Secure Department Resources for data migration	Establish resource support for effort	Functional Owners	Determine who will support the migration and what activities they need to perform	Defined resources with work assignments
Determine Specific Data to be Migrated	Perform data scrubbing	Functional Owners	Determine just what data will be moved into the new site	
Data Migration Mapping Metadata	Mapping meta data	Functional Owners drive process	Mapping metadata to source information documents	All metadata mapped
Data Migration Migrating Content	Migrate Content	Functional Owners drive process	Migrate the content desired from source to SharePoint	All content migrated

	Activity	Lead	Description	Deliverable
Data Migration Quality Control	QA migrated data	Functional Owners drive process	Review the content and test that all items such as search work as expected	Confirmed content

Training & Reference Documents	**Activity**	**Lead**	**Description**	**Deliverable**
Training Activities	Provide user training support	WMAT team	Department staff training support	Trained Department Staff
Reference Materials	Provide SharePoint training library	DTS Office 365 & WMAT	Develop / Source SharePoint training / reference materials.	Training and reference libraries

Communicate Site Availability	**Activity**	**Lead**	**Description**	**Deliverable**
Develop Staff Communications	Provide department adoption communication plan	Change Management	Develop SharePoint site adoption plans and support communications	Fully developed department adoption plan and communications packet
Announce Site Availability	Announce Department site available for use	Department Management	Include new links to sites	Department Staff Notified that new site is available

Ongoing Production Support	**Activity**	**Lead**	**Description**	**Deliverable**
311 coordination	Mc311 coordination	Department Technical Staff / MC311	Ensure that MC311 has proper access to required information	MC311 is aware of and linked to new site as required
DTS coordination	Add site to the DTS intranet site	Department Technical Staff / DIS	Ensure that the site has the proper links to various county portals	Site is linked to appropriate central county sites

Site Questions

Site Things

- Metadata is power
  - Save many files in the same place with metadata to separate

- How to achieve site stickiness
  - Determine why people would want to use a site and come back
  - Ideas
    - No FLASH
    - No Auto start of Multimedia
    - Be careful of slider load rate
    - Be memorable
    - Interesting, Engaging, Unique

- Service Value proposition
  - The reason I come to / continue to use the team site is???
    - To find things
    - To get work done

Why should I go to / use this site?

- There are tools I can use
- There are things I have to do and only can do via the site
- There is information / links I need there
- I am working on projects with others there
- To see what's new in your department
- Get access to other tools I need from the County

How often would you expect a staff person to use the site?

- Never
- As required
- Daily
- Multi-times per day