### Contents at a Glance

1. Introduction SharePoint 2013 (On-premises, Office 365 Cloud, and Hybrid) ................................................................. 1
2. Proven Implementation Strategies for SharePoint 2013 and Office 365 | SharePoint Online .................................................................. 31
4. Understanding SharePoint 2013 and Microsoft Office Integration with Office 365 Now In the Picture ........................................... 101
5. Implementing a Best Practices SharePoint 2013 \ Office 365 Information Architecture .......................................................... 119
6. Using Out-of-the-box Web Parts in SharePoint 2013 \ Office 365........... 171
7. Implementing a Best Practices SharePoint 2013 System Architecture with Future Hybrid Scalability Considerations .......................... 197
8. Business Intelligence Overview and Working with External Data Sources ........................................................................ 235
9. Governance Strategies for SharePoint 2013, Office 365 and SharePoint Online ............................................................... 269
10. Enterprise Content Management (ECM), Records Management (RM) and eDiscovery Best Practices........................................... 323
11. Upgrade and Migration Best Practices ................................................. 361
12. Installation and Configuration ............................................................. 407
13. Development Strategies and Custom Applications in SharePoint 2013, Office 365 and SharePoint Online ........................................... 429
15. Administration and Maintenance Strategies .................................................. 553
16. Social Networking and My Site Strategies ................................................. 585
17. SharePoint 2013, Office 365 and SharePoint Online: Training and End-User Adoptions Strategies .................................................. 605
18. Disaster Recovery (DR) and Business Continuity Management (BCM) Considerations ................................................................. 623
## Contents

### 1 Introduction to SharePoint 2013 (On-Premises, Office 365 Cloud, and Hybrid)

- Key SharePoint 2013 Methodologies and Best Practices ........................................ 3
- Presenting SharePoint 2013 ..................................................................................... 9
- Overview of SharePoint 2013 Key Features ............................................................ 10
- SharePoint 2013’s On-Premises and Office 365 ....................................................... 10
- SharePoint Server 2013 Technology Updates ......................................................... 12
- Feature Comparison of SharePoint On-Premises Versus Office 365/SharePoint Online ................................................................. 16
- SharePoint Server 2013’s Capabilities .................................................................... 18
- Summary .................................................................................................................. 30

### 2 Proven Implementation Strategies for SharePoint 2013 and Office 365 | SharePoint Online

- Where to Begin ........................................................................................................ 31
- SharePoint Public Relations and Communications Strategy .................................... 36
- High-Level Overview of a SharePoint 2013/Office 365 Deployment ....................... 40
- Identifying the Core Tasks and Milestones of Your Initiative ............................... 44
- Identifying Common Terms and Features of SharePoint 2013 ............................. 54
- Getting Acquainted with SharePoint Server 2013/Office 365’s Architecture and Understanding Its Components ................................................................. 60
- Summary .................................................................................................................. 65

### 3 Governed Utilization of the Features and Functionality in SharePoint 2013/Office 365

- Understanding Device Channels in SharePoint 2013 (BYOD) ............................ 70
- SharePoint 2013/Office 365: Preparing for Governance ......................................... 71
- Implementing a Best Practices Information Architecture from the Very Beginning ......................................................................................................................... 79
- Introduction to SharePoint 2013 and the Hybrid Cloud Mind-Set ........................ 82
- Social Computing in SharePoint 2013 .................................................................... 87
- Summary .................................................................................................................. 99

### 4 Understanding SharePoint 2013 and Microsoft Office Integration with Office 365 Now in the Picture

- SharePoint 2013 and Office 365: An Overview ..................................................... 102
- Planning for Apps in SharePoint and Office 2013 ................................................ 109
- Office 365 Compliance .......................................................................................... 111
How Safe Is My Organization’s Office 365 Data? ........................................... 113
Summary ............................................................................................................. 117

5 Implementing a Best Practices SharePoint 2013/Office 365
Information Architecture 119
Planning SharePoint 2013’s Taxonomy, Navigational Hierarchy,
and Overall Topology .................................................................................. 121
Where to Begin ............................................................................................... 126
Translating Your Business and Functional Requirements into SharePoint
2013/Office 365 Lists and Libraries ............................................................... 138
Modifying Lists and Libraries ...................................................................... 150
Creating and Modifying List and Library Views .......................................... 160
Working with List Content ........................................................................... 163
Creating Discussions and Surveys ................................................................. 166
Summary ....................................................................................................... 170

6 Using Out-of-the-Box Web Parts in SharePoint 2013/Office 365 171
Blog Web Parts .............................................................................................. 171
Business Data Web Parts ............................................................................. 173
Community Web Parts .................................................................................. 177
Content Rollup Web Parts ........................................................................... 180
Document Sets Web Parts ............................................................................ 191
Filters Web Parts .......................................................................................... 191
Forms Web Parts .......................................................................................... 192
Media and Content Web Parts ...................................................................... 192
Search Web Parts .......................................................................................... 194
Search-Driven Content Web Parts ................................................................. 195
Social Collaboration Web Parts ................................................................. 195
Summary ....................................................................................................... 196

7 Implementing a SharePoint 2013 System Architecture with Future
Hybrid Scalability in Mind 197
Understanding On-Premises, Cloud, and Hybrid Environments
in SharePoint 2013 ......................................................................................... 197
Three Major Types of Cloud Services .......................................................... 207
Should I Prepare for a Hybrid SharePoint Platform? .................................. 216
SharePoint 2013’s System Architecture ....................................................... 218
Key Areas to Consider Regarding Scalability in Your SharePoint 2013
Architectural Roadmap .................................................................................. 227
Understanding SharePoint Server 2013 Search Architecture ..................... 229
SharePoint 2013 BYOD Best Practices ......................................................... 233
Summary ....................................................................................................... 234
8 Business Intelligence Overview for SharePoint 2013 and Office 365 235
Business Intelligence Considerations in SharePoint 2013.........................237
Microsoft Excel Services, PowerPivot, and PowerView..........................240
Microsoft PerformancePoint Overview in SharePoint 2013....................243
Visio Services Overview in SharePoint 2013...........................................244
Database Connections and External Data Sources..................................245
SOAP Service Connection Review............................................................254
REST Service Connection Review...............................................................256
Reviewing an XML File Connection..........................................................257
Reviewing Linked Data Sources..................................................................259
Microsoft’s Power BI for Office 365..........................................................266
Summary.....................................................................................................267

9 Governance Strategies for SharePoint 2013, Office 365, and SharePoint Online 269
Governance Best Practices “from the Trenches” for SharePoint 2013 and Office 365’s SharePoint Online .........................................................269
SharePoint Architecture Governance.......................................................285
Security Governance for SharePoint 2013 and Office 365’s SharePoint Online.................................................................................................292
Social Computing Governance ..................................................................302
Operational and Technical Policies and Standards ....................................304
Uptime and Performance Standards ..........................................................307
Public and Hybrid Cloud Governance......................................................311
Customization Governance........................................................................313
User Interface Governance and Related Policies........................................317
Acceptable Usage Policy to Enforce in Your Governance Strategy ..........319
Summary.....................................................................................................322

10 Enterprise Content Management (ECM), Records Management (RM), and eDiscovery Best Practices 323
Proven ECM and RM Strategies for SharePoint 2013 and/or SharePoint Online.................................................................................................324
Records Management Best Practices ..........................................................328
Key RM and ECM Features for SharePoint Server 2013 and SharePoint Online.................................................................................................333
Content Types in SharePoint Server 2013 .................................................340
Content Type Hub......................................................................................341
Content Organizer......................................................................................341
Library and List Settings in SharePoint 2013.............................................345
Record Center Overview............................................................................353
eDiscovery Strategies in SharePoint Server 2013.....................................355
Summary.....................................................................................................360
11 Upgrade and Migration Best Practices 361

Ensuring That Your System and Information Architecture Strategy Aligns with Your SharePoint Roadmap ................................................................. 363
Understanding and Reviewing Your Current Technology Landscape ..... 367
Performing a Content and Configuration Assessment on Your Existing Environments ............................................................................. 371
SharePoint 2013 Upgrade and Migration Strategy Overview ......................... 380
Upgrading or Migrating SharePoint 2007 to SharePoint 2013 ......................... 381
Upgrading or Migrating SharePoint 2010 to SharePoint 2013 ......................... 386
Windows PowerShell Related SharePoint 2013 Upgrade and Migration Tasks ........................................................................................................... 391
Summary ..................................................................................................... 406

12 Installation and Configuration 407

Detailing the Installation, Deployment, and Configuration Requirements ................................................................................................................................. 408
Implementation Plan Overview—“In the Trenches” Scenario ......................... 410
A Proven Installation Process to Follow ..................................................... 414
Overview of the Configuration Process and Related Granular Tasks ........ 416
Summary ..................................................................................................... 428

13 Development Strategies and Custom Applications in SharePoint 2013, Office 365, and SharePoint Online 429

Overview of SharePoint 2013, Office 365, and Microsoft Azure Development Strategies ......................................................................................................................... 429
Reviewing the SharePoint App Model and the Composition of an App for SharePoint ........................................................................................................ 440
SharePoint 2013’s APIs, Office 365 API Tools, and the Development Options for Accessing Data and Resources ....................................................... 449
Security and Identity Management Considerations for Application Development ............................................................................................................. 458
Development Tools and Related Strategies for Public, Private, and Hybrid Environments ........................................................................................ 462
Developing Workflows in SharePoint 2013, Office 365, and SharePoint Online ................................................................................................................................. 481
BCS, External, and LOB Systems Integration Strategies ................................ 496
Summary ..................................................................................................... 489

14 Search, Web Content Management, Branding, and Navigational Strategies 501

Overview of Search in SharePoint 2013, Office 365, and SharePoint Online ................................................................................................................................. 502
Web Content Management Feature Deep-Dive .......................................... 524
Multilingual Sites in SharePoint 2013, Office 365, and SharePoint Online.................................................................................................538
Implementing Custom Branding for SharePoint 2013, Office 365, and SharePoint Online.............................................................................543
Summary.....................................................................................................551

15 Administration and Maintenance Strategies 553
SharePoint 2013, Office 365, and SharePoint Online Administration Overview..................................................................................................553
SharePoint 2013 Administration Considerations.................................................................................................................................559
SharePoint Admin Center in Office 365.................................................................................................................................566
Exchange Admin Center in Office 365.................................................................................................................................569
Lync Admin Center in Office 365.................................................................................................................................573
SQL Server 2012/2014 Best Practice Administration for
SharePoint 2013 ..........................................................................................575
SharePoint 2013 Backup and Recovery.................................................................................................................................577
Windows PowerShell Administration Overview.................................................................................................................................579
System Center 2012 Overview........................................................................................................................................581
Administration of Mobile Devices ........................................................................................................................................582
Summary.....................................................................................................583

16 Social Networking and My Site Strategies 585
Overview of Social Capabilities in SharePoint 2013, Office 365, and SharePoint Online......................................................................585
SharePoint Communities: Best Practices and Proven Strategies ..................................................................................................................586
My Sites in SharePoint 2013, Office 365, and SharePoint Online ..................................................................................................................595
Yammer Overview........................................................................................................................................602
Summary.....................................................................................................603

17 SharePoint 2013, Office 365, and SharePoint Online: Training and End-User Adoption Strategies 605
Key Considerations and Strategies to Ensure Long-Term Training Success ................................................................................................606
Training Requirements and Required Knowledge of Your Users ........................................................................................................610
Using Training to Drive User Adoption ........................................................................................................................................616
Implementing a SharePoint and/or Office 365 Training Site for Your Organization ..........................................................................................619
Free Training Material and Courses Available from Microsoft........................................................................................................620
Summary.....................................................................................................622
About the Authors:  
The EPC Group Team of Experts

Errin O'Connor is the founder and CEO of EPC Group and has completed more than 900 SharePoint and “Microsoft stack-related” implementations, including efforts relating to business intelligence (BI), custom application development, hybrid cloud strategy, Microsoft Azure, Office 365, SQL Server 2012/2014, Amazon Web Services (AWS), and Microsoft Project Server. This is Errin’s third Microsoft SharePoint book; he is also the author of *Microsoft SharePoint Foundation 2010 Inside Out* and *Windows SharePoint Services 3.0 Inside Out*, both by Microsoft Press. Errin continues to work closely with EPC Group’s clients to develop and implement scalable SharePoint 2013, Office 365, and SharePoint Online initiatives, as well as BI, ECM/RM, and hybrid cloud strategies with identity management, security, and compliance in mind. Errin can be contacted directly via email at errino@epcgroup.net.

Miranda Salley is the Vice President of EPC Group and she manages the full range of EPC Group’s technology consulting and solutions offerings. Miranda also oversees EPC Group’s operations and marketing teams and tailors EPC Group’s go-to-market strategies. She works with the full range of Microsoft technologies, including EPC Group’s hybrid cloud advisory practice, to ensure that the organization continues to stay on the leading edge of consulting. Miranda has over 14 years of experience in information technology, marketing, sales, and communications management. For the past 10 years, Miranda has served as a volunteer technology teacher, and a life skills and career mentor, as well as a leading board member for various Boys & Girls clubs and not-for-profits, allowing her to further her passion for technology and community responsibility. Miranda can be contacted directly via email at contact@epcgroup.net.

Timothy Calunod has been an active and involved SharePoint enthusiast since SharePoint’s first release. He has worked with every version of SharePoint in terms of design, implementation, architecture, administration, maintenance, troubleshooting, and solution creation to meet the unique needs of SharePoint deployments in various organizations and industries. Timothy has worked on hundreds of initiatives and is able to adapt to the technology requirements of EPC Group’s clients, whether it be for a business intelligence initiative, for a hybrid and federated SharePoint 2013 and Office 365 initiative, or to develop a governance and architecture strategy for a SharePoint implementation to support more than 250,000 users.

Joseph Jorden is a leading industry expert in designing and implementing various complex technical solutions for clients both large and small. Joe’s primary field of expertise is in custom software development for EPC Group's clients, focusing on SharePoint 2013 as well as all areas of custom .NET application development including application architecture, custom workflow development, SharePoint development and administration, SQL Server development and administration, database design, and security. Joe is also the author of numerous technical books on SQL Server, SQL Reporting Services, and business intelligence.
About the Authors

Andrew Christen has over 11 years of experience in developing, designing, coding, and testing applications using C#, ASP.NET, SharePoint 2013, SharePoint 2010, SharePoint 2007 development, C++, BizTalk, and multiple other scripting languages. Andrew’s industry-leading architecture skills that he provides to EPC Group’s clients expand beyond SharePoint development into seamless integration of other line-of-business (LOB) systems, C#/ASP.NET financial and inventory systems, custom .NET applications, and responsive web design, as well as architecting and designing web services using SOAP and XML. Andrew has extensive experience in SQL Server 2012 business intelligence, as well as migration initiatives from non-SharePoint systems into new SharePoint 2013 environments.

Daniel Galant has focused on educating clients on the latest SharePoint 2013 technologies, as well as architecting the overall design and implementation of Microsoft solutions for EPC Group clients both large and small. Daniel’s experience includes SharePoint system design, implementation, branding, and administration, as well as information architecture design and analysis. Over the past 15-plus years, Daniel’s expertise has also included Active Directory migration and consolidation, Exchange architecture deployment and administration, and network architecture and security. Daniel’s background in training helps him to convey difficult and often misunderstood technical topics in an easily relatable manner, and he has twice been awarded Microsoft MVP status.

If you are interested in contacting EPC Group.net for a possible project engagement, feel free to reach out to us via email at contact@epcgroup.net or email Errin O’Connor directly at errino@epcgroup.net.
Dedication

To Miranda, the smartest and most kind person I have ever met, and to the unbelievable patience you provided me during this year-and-a-half undertaking.

—Errin O'Connor

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This book has been one of the most challenging efforts of my life; there are so many sacrifices that go into it, and the individuals who support you through it cannot be thanked enough in a handful of words.

This book would not have been possible without Miranda Salley’s support and unbelievable patience, as she not only supported me in the writing and editing of the book but also ensured that the EPC Group organization and our clients’ needs were always met. I cannot ever thank her enough for ensuring that all aspects of the EPC Group, in terms of both our staff and our amazing clients, were always put first while I spent the past year and a half writing this book.

I would also like to thank the Pearson organization for their support in allowing me to rewrite almost the entire book when Microsoft released their 2012 R2 technology updates. This included the changes in Office 365 API Tools, SkyDrive’s rebranding to OneDrive, and the Microsoft Azure (Windows Azure) rebranding efforts. My goal was to publish a book that would be relevant in covering all the latest technologies and that would not be outdated after only six months, and Pearson allowed me to achieve that goal.
We Want to Hear from You!

As the reader of this book, you are our most important critic and commentator. We value your opinion and want to know what we’re doing right, what we could do better, what areas you’d like to see us publish in, and any other words of wisdom you’re willing to pass our way.

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Visit our website and register this book at www.informit.com/title/9780789751195 for convenient access to any updates, downloads, or errata that might be available for this book.
Introduction

The main goal of this book is to provide a central resource that shares lessons learned, best practices, and an unfiltered version of real methodologies covering what really works and what pitfalls you should avoid. Within the next 18 chapters, I have put together a compilation of what I have learned from working with clients “in the trenches” on consulting initiatives of all shapes and sizes, from small to mid-size organizations, as well as enterprise and global organizations.

Although every SharePoint 2013, Office 365, and/or SharePoint Online initiative does have very specific and granular underlying business and technical requirements, there is an approach you can take to ensure that your implementation is a success. With the ever-changing IT landscape around the private (that is, on-premises), public (that is, cloud), and hybrid (that is, resources both on-premises and in the cloud) cloud, this book dives into implementing this new technology with a “hybrid mindset” to ensure that your organization’s IT roadmap will align with your SharePoint 2013, Office 365, and/or SharePoint Online roadmap with scalability and security in mind.

There must be a strong focus on implementing your initiative with “future compatibility” in mind as relates to the information architecture (IA) as well as the underlying system architecture, but doing so with governance and identity management in mind. This includes the initial planning all the way through the implementation, configuration, custom development, go-live, and post-support to ensure that your organization focuses on end-user adoption and implementing this technology right the very first time.

I have covered SharePoint 2013 on-premises as well as implementations in the cloud in Office 365 and utilizing SharePoint Online but also how best to plan for and become familiar with Microsoft Azure, Amazon Web Services (AWS), Office 365 API Tools, SharePoint 2013’s new app model, OAuth, OData, business intelligence (BI), Power BI, and tools such as Windows Intune and System Center.

This is the third SharePoint book that I have written, and I felt that my first two SharePoint books, on SharePoint 2007 and SharePoint 2010, did not allow me to have the “unfiltered” feel that I have attempted to convey within this new publication. In 15 years of owning a SharePoint- and Microsoft-focused consulting firm, I have always worked with clients to try to limit the licensing they have had to purchase. I have no stake in whether a standard or enterprise license of a Microsoft product is purchased and try and walk through some of the “marketing fluff” that comes with new releases.

The “cloud” is here but that can still mean you have a private “on-premises” cloud. Your organization may also want to focus on moving some resources into the “public cloud” or just go “all in” and move nearly everything into a public cloud. Regardless of the underlying infrastructure, there are key considerations for compliance and regulatory elements, as well your organization’s future IT roadmap and the service level agreements (SLAs) you must provide to your users no matter what platform you may be focused on or considering.
There is a massive amount of hype around the cloud and what Microsoft’s plans are for SharePoint in the future. Microsoft is starting to work on the next on-premises version, so as much as Microsoft would like you to move all of your data into Office 365, SharePoint Online, Microsoft Azure (Windows Azure), or other underlying offerings, I have developed this book to ensure that your organization’s requirements are taken into consideration and the “marketing fluff” can be avoided.

There are some great new resources with the new Office 365 API Tools, along with new features and functionality within Visual Studio 2013 as well as Windows Server 2012 R2, SQL Server 2012/2014, and the openness that the new SharePoint 2013 App model allows for connecting to external data sources, that are also covered in great detail.

I also have focused on trying to get you to think about metadata (content types) and how best you can implement a core set of metadata so that you can more easily find content with the new SharePoint 2013 supercharged search engine, which now includes FAST Search in one single “SharePoint 2013 Search” offering.

Whether you are upgrading or migrating from a previous version of SharePoint, or are new to SharePoint, this book covers all aspects of every type of SharePoint implementation I have experienced since I started beta testing “Tahoe” (SharePoint 2001) back in late 2000. With the new offerings of SharePoint 2013, Office 365, and SharePoint Online, this publication will provide you the “from the consulting trenches” perspective in this fifth version of SharePoint, to cover all the moving pieces that encompass a successful initiative that will stand the test of time.

Who Should Read This Book?
This book has been written as a resource for anyone who will be involved in a SharePoint 2013, Office 365, and/or SharePoint Online initiative. The book covers topics from both sides of the coin, from extremely advanced topics for SharePoint architects, developers, and administrators, to power users, end users, and IT executives who may want to understand what the full life cycle of a successful initiative will entail.

This book covers topics for individuals of any “competency level” from those implementing a new SharePoint 2013 ECM/RM initiative or for readers who want to know how to implement a power-user strategy or even a successful training initiative. This book also covers the aspects of project management for those who may be managing these efforts and the communication and teamwork from various stakeholders that is required. There are granular areas that also cover compliance and regulatory issues for records managers or those who may work in the legal department for data such as PHI, PII, and HIPAA, as well as data stored in data centers in the EU and related global datacenter considerations.

This book also covers SharePoint 2013, Office 365, and SharePoint Online development strategies for developers interested in both learning and performing custom development; it also provides insight into the new “hybrid development mind-set” that is key to being a successful developer within these technologies.
Software Requirements
This book targets SharePoint 2013, Office 365, and SharePoint Online, as well as Microsoft Azure (Windows Azure), Windows Server, SQL Server, and Visual Studio. There are references to links to download trial versions of each of these technologies, as well as links to sign up for trials for any cloud-based services such as Office 365, Microsoft Azure, AWS, and even Visual Studio Online.

Code Examples
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With Microsoft having referenced SharePoint 2013 as, SharePoint Server 2013, Office 365 (Enterprise), and SharePoint Online in many news articles, recent conferences and publications, the term SharePoint 2013 is used in this book to refer to SharePoint Server 2013 and Office 365 | SharePoint Online for this and all following chapters, but the integrated solutions such as Microsoft Lync, Microsoft Exchange, and Microsoft Dynamics CRM are specifically referenced as they may be specific to an existing on-premises environment you currently have implemented or features of an Office 365 plan for which your organization may have procured.

At EPC Group, we have SharePoint Server 2013 on-premises as well as Office 365 Enterprise, the E3 plan, along with SharePoint 2013 instances in the Microsoft Azure platform and in Amazon Web Services (AWS) because we believe that the future of SharePoint is going to be that of a very hybrid nature. Both Microsoft Azure and AWS have trial offerings that you can also test and integrate at any time to begin to gain experience in the hybrid cloud.

I believe that SharePoint’s on-premises version will not be phased out for at least six to seven more years, and Microsoft has recently announced they have already begun working on the next on-premises release. This is my personal opinion, but I think with what has been released by Microsoft’s rather vague references regarding “the cloud
versus on-premises” and their ratcheting back of “cloud first” in press releases, they very much initially overstated how many firms would be “all in” in moving to the cloud in SharePoint 2013’s release. The public, private, and hybrid cloud offerings and technology are covered in much more granular detail in Chapter 5, “Implementing a Best Practices SharePoint 2013/Office 365 Information Architecture.”

The out-of-the-box SharePoint 2013 features that can quickly be deployed to your organization’s user base are vast, but the key to a successful SharePoint 2013 implementation is rolling out SharePoint in a governed and methodical manner.

One of the key areas to keep in mind that will ensure long-term SharePoint success and save the organization’s information technology (IT) budget over time is thinking of SharePoint’s user base from a device-centric approach and considering the related audiences and roles associated with them.

There will be various departments, user types, and specific content they will want to access. What type of device will these users use to access SharePoint?

There will obviously be internal users with secured authentication accounts using company-issued laptops, tablets, and mobile devices, as shown in Figure 3.1, but what is the expected user experience you are going to provide to these users? Your organization’s “bring your own device” (BYOD) policy may be in its infancy or even well-defined, but mapping out this strategy from the beginning is very important. Will your organization support a wide array of devices as SharePoint matures and new technology is developed?

FIGURE 3.1  An example of the wide array of devices from which users may access SharePoint.
It is important to have a common user experience throughout your user base, and it can vary based on the device and the related browser. This needs to be governed and support based on your organization’s policies, but you should always think in terms of being device as well as browser agnostic whenever possible; you should also follow a Responsive Web Design (RWD) user interface (UI) design for your SharePoint sites, communities, and branding elements, as well as all custom development. The Responsive Web Design methodology (e.g., Responsive Design) is important because it assists in providing your users an optimal viewing experience with common reading and navigation that will allow for functions such as panning, scrolling, and resizing across devices.

When planning your user base and the related features and functionality you will provide, it is also important to map out not only the devices, such as those in Figure 3.1, but also the locations of the users, as illustrated in Figure 3.2. If you’re a large or global organization or one that has users in multiple locations, in various countries, or possibly spread throughout the globe, you will need to keep the user experience and RWD in mind from a “device channel” perspective.
Understanding Device Channels in SharePoint 2013 (BYOD)

Regardless of the type of implementation your organization is trying to accomplish in phase 1, it is key to understand the underlying capabilities of SharePoint 2013 to ensure that your initial plans take full advantage of SharePoint’s out-of-the-box capabilities. SharePoint 2013 contains a device channel feature that is part of the SharePoint 2013 publishing infrastructure that will enable your organization to render site content, its images, and even the underlying content type while maintaining the same URL (uniform resource locator) across a selection of different devices.

On a recent project, EPC Group’s architecture team was tasked with implementing SharePoint 2013 with a specific and aggressive go-live date. This phase 1 deadline was for internal users with Active Directory accounts and was not targeted toward external or “mobile” users of the organization. It was key to walk through the Responsive Design considerations with the stakeholders of possible future phases and future mobility needs because there was a custom branding and UI design that their marketing department was having us implement in phase 1.

The design was very appealing and looked great, but it was important to help both IT and the business understand that the “look and feel” that would be implemented should follow Responsive Design but also take into consideration the “device channels” or ways the users within their company would access SharePoint long-term so that this branding would be compatible in future phases.

There is a difference in the “desktop version” of the SharePoint site compared to a “mobile rendering” of a SharePoint site. Your overall design must support a variety of devices that your organization may currently support as well as take into consideration possible devices that may be allowed in the future.

**TIP**

When a user from a mobile device (smartphone, tablet, and so on) opens a SharePoint 2013 site, the device’s browser submits something technically referred to as an HTTP GET request that includes a “user agent string.” This string contains information about the device, enabling that specific browser to then be redirected to a governed and specific master page view for that device (Windows Phone, iPad, Android, iPhone, and so on). Thinking in terms of not only initial users in phase 1 but also future phases in which mobile devices will be utilized will save a great deal of future time and effort.

In most SharePoint 2013 implementations, the initial strategy will target internal users; however, the mobile or BYOD strategy will quickly follow so it’s key to think in these longer terms regarding design. It’s also important to get an initial inventory and/or develop a “governed device list” for your organization to know exactly how users will be accessing SharePoint content.

Most devices allow for users to go to an app store to purchase or download additional browsers, so implementing your “supported” list is key to being able to let users know...
whether their device’s entire configuration is supported by the organization’s SharePoint 2013 deployment.

Table 3.1 shows an example of how you can start a device inventory of what will be allowed in the initial phase as well as what might be allowed in future phases.

### TABLE 3.1 Device and Related Browser Inventory

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Audience for Device</th>
<th>Known Browser Type</th>
<th>Is This Supported in SharePoint 2013?</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPhone</td>
<td>Executives, power users</td>
<td>Safari</td>
<td>Yes</td>
</tr>
<tr>
<td>Windows Phone</td>
<td>Some users in marketing, external user group “a”</td>
<td>Internet Explorer</td>
<td>Yes</td>
</tr>
<tr>
<td>Android</td>
<td>External user group “b”, some IT team members, etc.</td>
<td>Chrome</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**SharePoint 2013/Office 365: Preparing for Governance**

SharePoint 2013’s out-of-the-box core end-user features, such as lists and libraries as well as apps, web parts, and the sites and site collections they exist on, will be the most used areas of SharePoint, but using them and deploying them with governance in mind is key to your success. The policies of how these components operate (are governed) guide your SharePoint user community and its related components. SharePoint 2013 offers end-user capabilities such as these:

- **Collaboration Tools:** SharePoint sites facilitate team participation in discussions, shared document collaboration, blogging, building communities, and professional networking.

- **Content Management:** The document collaboration features allow for easy checking in and checking out of documents, document version control and recovery of previous versions, enforcement of retention schedules, information management policies, eDiscovery, destruction or information management workflows, and document-level security.

- **Business Intelligence:** This enables people to connect to, find, and act on information locked away in line-of-business systems by using a framework to integrate them securely into SharePoint search results, configurable and actionable dashboards, KPIs, reports, apps, mash-up interfaces, and web parts.

- **Search:** A feature and overall capability that provides users with the ability to find information that is security trimmed and stored in almost any structured or unstructured repository as well as “people information.” SharePoint 2013’s search includes the previous SharePoint Server 2010 Search capabilities as well as FAST search into once seamless “SharePoint 2013” offering.
In keeping the SharePoint as a Service (SPaaS)/SharePoint as a Platform (SPaaP) strategy in mind, which will grow in size and importance over time and will open up the hybrid SharePoint implementation mind-set, the strategies in the following sections should be strongly taken into consideration and molded around your organization.

## Preparing for SharePoint Site and Site Collection Governance

To paint a picture of how to prepare for SharePoint Site and Site Collection governance, I will walk through a few examples that apply to most organizations. SharePoint sites are usually created for collaboration or content management within the organizational structure or, alternatively, for a particular line of business (LOB) or department.

For example, as determined by the Site Owners, users from other locations may have access to content inside of these sites as well. Types of communication and collaboration in SharePoint include, but are not limited to, the following:

- Project sites
- Division department sites
- Professional networking (communities/My Sites)
- Team sites
- Content management/records management sites

Local sites may be created under the local SharePoint “root sites” or within the specific line of business or department. Functional area sites may reside below the local SharePoint “root sites.” The sites may be further split out below the functional area by business units. The sites may also be further split out with approval of the Site Collection Owner below the functional area.

Site collections can facilitate collaboration within groups, within organizations, and between teams. For example, when a request is granted for a site collection, a governed model should ensure that the requestor chooses or is assigned the user to be the Site Collection Owner and the Site Collection Administrator with the approval of the Farm Administrators.

For example, a SharePoint Farm Administrator can assume the role of the Site Collection Administrator. Also, a Site Collection Administrator may be responsible for, but not limited to the following:

- Site Collection security
- Site Collection features
- Site Collection audits and usage logs
- Site creation
- List, library, and content type creation outside the scope of default items governed by the Farm Administrators
Site Collections should maintain data storage, quotas, size limitations, and threshold settings in the manner specified by the organization’s SharePoint governance policy.

**Preparing Your Organization’s SharePoint 2013/Office 365 Organizational Support Governance**

SharePoint 2013’s governance is developed, monitored, and ultimately enforced by specific roles that can be referred to as the SharePoint “People Organization.” A best practices example of how your organization can implement this People Organization is detailed next.

**SharePoint Service Operations Teams**

The SharePoint Services Operations (SSO) teams consist of the following “roles” or “groups” of support members.

**SharePoint Services Team (SST)**

The SharePoint Services Team oversees staff providing SharePoint system administration and multi-level support. The SharePoint Services Team drives the process of aligning the SharePoint Service with evolving business requirements and strategic direction.

The SharePoint Services Team consists of the SharePoint Services Team Manager, SharePoint System Architects, SharePoint Farm Administrators, and Site Collection Administrators. The SharePoint Services Team directs all aspects of the SharePoint Services to ensure an effective and stable service offering in relation to SharePoint.

**Farm Administrators**

The SharePoint Services Team Farm Administrators manage the operation of the production, QA, and development environments for SharePoint. The SharePoint Services Team controls the SharePoint application and helps execute approved change requests.

The Farm Administrators within the SharePoint Services Team may have the authority of full central administration rights, full SharePoint services rights, and provision security for the site collections, and they assign permissions to the Site Collection Administrator.

The Farm Administrators are essential members of the SharePoint Services Team, and they should frequently collaborate with other Farm Administrators and Site Collection Administrators to resolve problems, to assist with issues, and for knowledge transfer and continuous training. The Farm Administrators may have the same access to all SharePoint environment instances.

**Site Collection Administrators**

Site Collection Administrators manage the SharePoint site collections and are part of the SharePoint Services Team with the specific goal of promoting new collaboration tools and other SharePoint applications within their location for the sites they manage to help improve efficiency and increase productivity.
Site Collection Administrators do not, in most cases, have access to the operating system. The Site Collection Administrator is an integral member of the SharePoint Services Team.

The Site Collection Administrator will also be

- Comfortable working with new SharePoint applications
- Able to quickly learn the capabilities of SharePoint tools
- Able to demonstrate strong functional knowledge of the tools to others

Possible additional tasks could be delegated such as the following:

- Creating subsites within existing sites
- Managing security of the SharePoint site with approved Active Directory Groups
- Creating new workflows and managing site content

**System Administrators**

The System Administrators manage the operating systems of all SharePoint Environments (Production, QA, and DEV) and do not always have central administration rights, and they usually do not have administrative access within SharePoint. The System Administrators follow the procedures for maintenance, backup, recovery, and overall change management set forth by the SharePoint Services Team for the organization.

The System Administrators provide monitoring of the system through

- Usage analysis and tuning
- Automatic monitoring and event notifications

The System Administrators perform maintenance on the servers and provide support for hardware and software updates. They provide documentation on the installation and configuration of the system in its environment. Your organization SharePoint platform install and configuration must be documented well enough so that it can be reinstalled and reconfigured to the last known good operating standards.

**Database Administrators**

The Database Administrators are responsible for installation, configuration, backup, recovery, and monitoring of the SQL Server 2012 databases required by SharePoint. Database Administrators typically do not have central administration rights and have no special administrative access within SharePoint.

The Database Administrators are typically not a member of the SharePoint Services Team but work with the SharePoint Services Team in case of issues such as business continuity exercises, disaster recovery, and content database issues.
SharePoint Roles
The following sections detail granular SharePoint roles as well as the related granular best practices considerations regarding each role.

High-Level Operational Roles
Permissions and responsibilities of the operations roles are persistent throughout SharePoint. Resources may serve multiple roles within the operations roles. The roles and responsibilities defined in Table 3.2 are specific to SharePoint 2013 products and technologies and third-party tools used for operations and maintenance of the SharePoint service.

Table 3.2 shows the roles along with the related responsibilities, tasks, and any additional permission-related information.

TABLE 3.2 Roles and Related Responsibilities/Permissions

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities and Tasks</th>
<th>Responsibility Assignment</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| SharePoint Services Owner (SSO) | –Responsible for the effective provisioning and ongoing management of the centralized SharePoint platform  
–Leads SharePoint Steering Committee  
–Leads SharePoint Services Team  
–SharePoint Steering Committee | SharePoint Services Team/TBD | TBD |
| SharePoint Service Manager | –Assists in the SharePoint Steering Committee  
–Assists in leading the SharePoint Services Team  
–Ensures that tactical initiatives align to strategic intentions  
–Reports to Steering Committee on the level of activity | SharePoint Services Team/TBD | TBD |
<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities and Tasks</th>
<th>Responsibility Assignment</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SharePoint System Architects</td>
<td>–Active Directory&lt;br&gt;–Profile Synchronization&lt;br&gt;–Patch/Release Management (validation and testing)&lt;br&gt;–Responsible for SharePoint farm infrastructure design, installation, guidelines, and best practices&lt;br&gt;–System Administrator’s day-to-day support</td>
<td>SharePoint Services Team/TBD</td>
<td>–Full Control given at the web application policy level for every web application in all farm locations&lt;br&gt;–Admin Control, full control to all central administration and SharePoint services in all farm locations</td>
</tr>
<tr>
<td>Network Engineers</td>
<td>–Firewalls&lt;br&gt;–WAN optimization&lt;br&gt;–Remote access management&lt;br&gt;–External access management&lt;br&gt;–Load balancing</td>
<td>TBD</td>
<td>–Will not have access to SharePoint or site configuration settings and will not be able to make any changes to the application</td>
</tr>
<tr>
<td>SharePoint Records Manager Administrator</td>
<td>–Responsible for new or modified records retention schedule categories&lt;br&gt;–Performs legal research to determine applicable federal, state, local record-keeping laws, citations, or requirements&lt;br&gt;–Works with the SP Administrator to ensure that content types are accurate&lt;br&gt;–Consults with Site Owners as needed before site decommissioning</td>
<td>Records Management/TBD</td>
<td>–Will not have access to SharePoint or site configuration settings and will not be able to make any changes to the application</td>
</tr>
</tbody>
</table>

**Granular Operational Roles**

Resources may serve multiple roles within operations because it is typical in an enterprise implementation for SharePoint Architects and Administrators to perform multiple roles.

Permissions and responsibilities in the operational roles will exist within the central SharePoint Services Team, whereas development roles may exist independently throughout an organization if it is regionally or globally dispersed. The roles and responsibilities defined in Table 3.3 are specific to SharePoint products and technologies and third-party tools used for operations and maintenance of SharePoint.
Table 3.3 shows the roles along with the related responsibilities, tasks, and any additional permission-related information.

**TABLE 3.3 Roles and Related Responsibilities/Permissions**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities and Tasks</th>
<th>Team</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| Farm Administrators        | –Responsible for SharePoint farm’s configuration, SharePoint services, policies, procedures, and governance/best practice enforcement  
                               –Day-to-day support for Site Collection Administrator  
                               –Serves as SharePoint champion for all locations | TBD  | –May or may not have system administrative or SQL administration rights  
                               –Full Control: Full control given at the web application policy level for every web application in all farm locations  
                               –Admin Control: Full control to all central administration and SharePoint services in all farm locations |
| SharePoint System Administrator Also referred to as: SharePoint Solution Architect | –Responsible for day-to-day maintenance of the SharePoint Platform | TBD  | –Will not have access to SharePoint or site configuration settings and will not be able to make any changes to the application |
| SQL Database Administrator  | –SQL Server database backup and recovery, SQL configuration, SQL upgrades and monitoring  
                               –Responsible for databases, site collection, and site backups | TBD  | –Will not have access to SharePoint or site configuration settings and will not be able to make any changes to the application  
                               –SQL Administrative rights |
| Network Engineer            | –Firewalls  
                               –External crawl content monitoring  
                               –Antivirus  
                               –Possible mobility management activities  
                               –Possible BYOD enforcement activities | TBD  | –Will not have access to SharePoint or site configuration settings and will not be able to make any changes to the application |
**SharePoint Solution Development Architect**

- Responsible for following best practices development standards as defined by the SharePoint Solutions Review Board
- Responsible for developing custom solutions such as apps, web parts, master pages, workflows, custom events, and custom organizationally specific records management features

**End-User Roles**

These roles are managed by the SharePoint Services Team with limited rights given to specific SharePoint 2013 skilled individuals.

Users may, in some cases, belong to more than one role and have additional permissions. Users may also be removed from lower-level roles because higher-level roles/permissions may encompass the permissions of the lower-level role.

Table 3.4 shows the roles along with the related responsibilities, tasks, and any additional permission-related information.

**TABLE 3.4  Roles and Related Responsibilities/Permissions**

<table>
<thead>
<tr>
<th>Roles</th>
<th>Responsibilities and Tasks</th>
<th>Training</th>
<th>Permissions</th>
</tr>
</thead>
</table>
| Site Collection Owner  | -Manage features and solutions for site collection  
                        | -SharePoint site provisioning for site collection  
                        | -Site Collection Owner  
                        | -Content creation  
                        | -Manage content  
                        | -Subsite management | Instructor led with good understanding of site administration, security, content creation, feature deployment | Access defined at the SharePoint application level; no access at the system level |
| Site Collection Owner  | Instructor led with good understanding of site administration, security, content creation, feature deployment | | | | | | |
|                        | Access defined at the SharePoint application level; no access at the system level         | | | | | | |
Roles | Responsibilities and Tasks | Training | Permissions |
---|---|---|---|
Site Owner | –Site Owner | Instructor led with good understanding of site administration, security, content creation, and records retention schedules | Access defined at the SharePoint application level; no access at the system level. |
 | –Content creation | | |
 | –Manage content | | |
 | Note: Annual/monthly auditing will be determined at the beginning of Phase 2 based on SLAs and the organization’s Policy. | | |
Member | –Content creation (documents, lists) | Computer-based training video (CBT) with good understanding of document libraries and lists and records retention | Access defined at the SharePoint application level; no access at the system level |
 | –Contribute to collaboration sites (blog, wiki) | | |
 | –Initiate workflows | | |
Approver | –Approve content (documents, lists) | CBT with good understanding of content approval and workflows and records retention | Access defined at the SharePoint application level; no access at the system level |
 | –Initiate workflows | | |
Visitor | View content | N/A | N/A |

**Implementing a Best Practices Information Architecture from the Very Beginning**

One of the great things about SharePoint is that it is very easy for users to store content, create content, and navigate. This can also become a challenge because from an IT and records management (RM) or information management perspective, it is important to get in front of this “challenge” as soon as possible so that an organizationally specific IM policy can be put in place before there are thousands or even hundreds of thousands of documents, records, and related content.

There is no magic answer to address this issue within all organizations because it differs among companies, their users, and the type of business or vertical the company is in, as well as the culture of the organization. There are, for example, some construction or manufacturing companies that have embraced new technology and others that have waited to see how some of the new offerings in information technology will take hold and flourish or possibly stall.

There are healthcare institutions that have focused on collaboration and document management and others that have been focused on other areas such as Electronic Medical Records (EMR) projects or other patient-specific productivity initiatives.
Some government institutions have embraced and taken records management and the institution’s retention schedule head-on, and others have waited to see what regulatory or related laws may pass before implementing this technology.

My main point here is that regardless of your current state, it’s time to address the roadmap and focus on implementing SharePoint 2013 within your organization to meet the specific short- as well as long-term goals of the organization.

**Understanding Your Organization’s User Base**
Understanding your organization’s user base, as well as the types of documents, content, and records they currently utilize or may want to utilize, will put you in a more educated position to implement a solid SharePoint platform.

**Identifying Your SharePoint User Audience**
There will obviously be several different user audience types within your implementation, but what is the best way to go about understanding how they may use SharePoint on a day-to-day basis, as well as determining the types of content and content volume they may access and create?

You can determine this by performing interviews with the specific groups, teams, or departments either via conference calls and Lync/WebEx-type virtual meetings or in person, depending on how dispersed the team members are and their availability. Another way to approach this is by sending out questionnaires to the team or the specific set of department stakeholders with core questions such as these:

- What are the standard functions that your department/team/business unit conducts in a given day or a given week (that is, what does a “day in the life” of your users look like)?
- What types of documents does your “area” create or have stored (that is, Word, Excel, PowerPoint, PDF, or are there any large files like CAD drawings, diagrams, media/video files, and so on)?
- Are there specific users who own or create specific records or documents for your given “area” (that is, are there any “records managers” identified that you should be aware of)?
- Are there any document retention schedules that exist within the organization that your “area” (department, business unit, team, and so forth) must follow or should be following in the near future?
- Are there any current workflows or business automation processes that you should be aware of?
- How are the documents within the given “area” stored currently (is there a network share, existing document management system, and so on)?
- Is there a current SharePoint system or other technology implemented where frequently used documents or even published content is stored? If so, please provide additional information.
Would it be possible to get a “count” or possible estimate of the amount of content that currently exists (for example, 25GB and 125,000 documents)?

Are there any common templates that are used to create common or frequently used documents for your “area”?

Are there any scanning or OCR (optical character recognition) requirements within your “area”?

Are there any existing systems that “tie in” or integrate with your existing documents or processes that you should be aware of?

**TIP**

This exercise needs to be completed for every area or department, team, business unit, or community because this will assist in your development not only of the SharePoint roadmap but also for your information architecture, navigational strategy, and governance strategy.

### Laying Out a Plan for Document Libraries

As mentioned in the previous chapters, document libraries are collections of files in SharePoint 2013 that users share with other users within a given SharePoint site. Now that you understand the types of users as well as the documents they use, store, and work with, you will need to implement an information architecture that consists of the proper governed document libraries to meet these needs.

Some document libraries are used specifically for that area or department or such, and you may consider those “private” documents libraries that are accessible only by the team members or users of that given group.

Other document libraries are cross-functional and are accessed and used by many different users or groups within the organization. These document libraries may store “public” or frequently used content or may even be a document library that is created for a specific project the organization is conducting that many different users and groups need to access and contribute to.

**TIP**

When you start to understand the types of users and the content they are using and now are digging into the types of document libraries that need to be created to meet both the business and the functional needs, you need to start thinking about the security (e.g., Active Directory Groups or SharePoint Security Groups) that will need to be created and managed to properly protect and govern this content.
Introduction to SharePoint 2013 and the Hybrid Cloud Mind-Set

Questions about the evolution and maturity of the hosted and hybrid cloud, as well as some of the data, privacy, and security concerns that exist around it, are questions that you will need to be able to answer with facts and a clear understanding when asked by key project stakeholders and users, as well as by your organization’s legal and compliance stakeholders.

As mentioned, SharePoint’s 2013 “on-premises” environment, versus “hosted, off-premises,” or “hybrid” environment, contains different offerings and capabilities as well as security, regulatory, and privacy implications. SharePoint 2013 stakeholders can sometimes find themselves at a fork in the road or between two possible paths, as illustrated in Figure 3.3, when selecting the type of environment or offering that will best service the organization in regard to cost, maintenance, and intellectual property security.

![Figure 3.3 The SharePoint on-premises versus Office 365/hosted architecture decision.](image)

There are also security- and regulatory-related questions that must be answered and addressed regarding storing personally identifiable information (PII), protected health information (PHI), HIPPA, and FDA (Title 21 CFR) Part 11. For global organizations, there are other regulatory concerns such as those of data centers in the European Union (EU) and Safe Harbor regulations that the U.S. and the EU have agreed to via the United States Department of Commerce and the seven principles of data protection and security.
TIP

A few new abbreviations are used throughout the Microsoft community regarding the cloud. Two of the more frequently used new acronyms are CAM (Cloud App Model) and SPO (Office 365).

There are also considerations related to the ability of your organization to develop custom solutions (workflows, apps, custom events, and so on) and promote these customizations to the cloud rather than into your on-premises environment, which you have full control over.

I have had hundreds of conversations with CIOs, CTOs, and key business stakeholders at organizations throughout the globe about this topic, and there are key considerations that must be vetted and understood when choosing a path for the organization even if a hybrid approach (that is, both on-premises and Office 365) is selected.

I was having this environmental conversation with a well-known oil and gas company’s CIO I was working with who had extensive intellectual property (IP) for which the organization had invested millions of dollars on researching and collecting. His statement to me during this conversation was, “There is no way I am going to risk our IP by hosting this information in a cloud for which I cannot guarantee I have full control.”

Another conversation that comes to mind is with the Enterprise Application’s Director, for which SharePoint was managed, of a Fortune 500 military contracting and aerospace company. He said, “We have a ton of business intelligence needs that require us to access multiple internal systems, and there is just no safe way to deploy this custom code to the cloud and then “hook” into our SAP and other systems from SharePoint due to permissions and federation issues we have discovered.” He made an interesting point during this conversation: “Do I want to have to get other IT hosting providers to have to review and approve my custom code prior to implementing it into their cloud after we develop it? This could cause additional delays I am just not comfortable with....”

In contrast, I had a conversation with the IT leader of a Fortune 500 manufacturing company who said they found Office 365 to be an excellent solution for servicing partners and clients who need quick collaboration sites set up that were also housed outside their company’s DMZ (a term commonly referred to as outside the company’s internal network database and perimeter), and the on-premises solution was not meeting their current needs.

I am not pushing you toward one environment or another but playing a bit of devil’s advocate regarding some of the concerns and elements you need to keep in mind when going “all in” on one type of environment or another.

TIP

When selecting the type of environment your organization goes with in the on-premises versus cloud discussion, it is always important to ask the hard questions about the capability to migrate specific or defined content back into the on-premises environment from
the cloud should your organization ever have that requirement. This may occur in an eDis-
ccovery process or some other auditing or BI type of effort, but it is key to be prepared and
guarantee that your provider can adequately meet this requirement.

Key Features of Office 365

Office 365 (O365) is an attractive offering to some organizations whose IT model as
well as related content security governance will properly be met with the requirements
of O365. Office 365 has an updated user interface and much improved administration
controls with an improving cloud-app development model.

Office 365 has several key features:

▶ **OneDrive**

OneDrive is a core element of Office 365. It offers users organizational control to
allow them to do the following:

▶ Sync and share documents.
▶ Collaborate on document security with individuals both inside and outside of
  their organization.
▶ Access content and information anywhere and from a multitude of devices.
▶ Control content life cycle and versioning.
▶ Manage access permissions.
▶ Access OneDrive with native mobile client apps for Windows 8 and iOS.

▶ **User Interface Updates (UI)**

The Office 365 user interface has been redesigned to allow for usability improve-
ments in navigation to include features such as these:

▶ **Drag and drop:** This enables users to upload content to sites by dragging items
  from their computer into a SharePoint document library.

▶ **On-hover:** This is a new “callout” feature that works with any document within
  a SharePoint document library, as well as from a search results, that enables
  viewing, sharing, and following or “jumping” right to specific content.

▶ **Touch:** This feature allows for large “touch targets” for easy navigation on
  mobile devices and should be part of your mobile device management and
  BYOD considerations for your organization’s governance strategy.

▶ **Yammer (in Office 365’s Offerings)**

Yammer is a key element of Microsoft’s social networking (that is, professional
networking) strategy, and it is designed to bring additional collaboration, file
sharing, and knowledge exchange within your company.

Depending on the release cycle you are currently in, it may be optional or may be
included with the Office 365 investment. Key features of Yammer include these:
Enables enterprises to become social quickly
- Offers easy access to groups and feeds
- Provides easy access across different devices and browsers
- Offers easy-to-use administration tools

**Office 365 Guest Links**

Office 365 allows users to share everything, including sites, folders, and individual documents, using the Guest Link feature, which enables users to invite guests from inside and outside the enterprise firewall to share and collaborate on specific documents. These permissions can be added and revoked like any other permission element in Office 365.

**Public Website Feature**

The public website feature in Office 365 comes with a large number of customization options for sites and individual pages. There are added publishing capabilities, web parts, and built-in Search Engine Optimization (SEO) property options and advanced design options.

You are also able to disable this feature and have it remain invisible until needed per the governance policies that are developed to control the SharePoint platform. The public website feature also enables users to utilize the Design Manager to completely redesign the sites from scratch.

**TIP**

Any customization and branding work done in the public website feature must follow the organization’s governance strategy as well as any corporate logos or style elements.

**e-Discovery**

Office 365 Enterprise comes with an e-Discovery management site, via integrated Exchange Online, that enables organizations to add sources and create queries to discover content across SharePoint sites and SharePoint document libraries, mailboxes, and discussions, while keeping them in place in Office 365, Exchange Online, and Lync Online.

**Site Mailbox Feature**

The Site Mailbox feature combines Office 365’s document management capabilities with Exchange Online’s email solution. Teams can organize project-related content and email into a single view while keeping documents in their proper location. With the Site Mailbox feature, site mailboxes can be accessed through Outlook 2013, as well as Office 365.
Enterprise Search
Office 365 search has been greatly improved in the relevancy of search results, enabling users to find the content they are searching for with the appropriate results. SharePoint Server 2013 and Office 365 have the same search engine and capabilities, with the added FAST features that were optional in SharePoint 2010 included natively. This enables users to control the search experience and also provides powerful metadata-driven results and filtering options.

Office 365 PowerShell Capabilities
Office 365 enables administrators to use Windows PowerShell to manage their subscriptions as well as scripting tasks associated with provisioning new sites, site collections, and performing upgrade activities. SharePoint 2013 has a web-based companion tool called the Windows PowerShell Command Builder Tool for “power users or super users” with relatively moderate IT skills.

Office 365 API Tools
The new Office 365 API Tools continues to extend the platform and will open up more possibilities around the hybrid cloud by adding not only the ability to access SharePoint 2013 on-premises, but also extending the platform in Microsoft Office 2013 by adding the ability for both sites and native applications to consume Office 365 data.

Yammer Considerations
Microsoft acquired Yammer in June of 2012, and understandably it takes time to finalize a technology roadmap within a technology of this magnitude. Office 365 users have been provided with an option to replace Office 365’s activity-stream component with Yammer's, which is the first step and integration point between Yammer and SharePoint.

Microsoft has also offered the capability to embed a Yammer group feed into a SharePoint site. This is available through the “Yammer application” available in the SharePoint App Store, which will work with both on-premises and Office 365.

Microsoft has also provide organizations with the option to replace the newsfeed in SharePoint 2013/Office 365/SharePoint Online with Yammer.

OneDrive for Business (Previously SkyDrive Pro) Considerations
OneDrive for Business, previously SkyDrive Pro, has made several recent updates, such as providing SharePoint users who have Personal Site Use Rights with access to Microsoft’s cloud-based OneDrive to store data and providing that same access via OneDrive from their smartphone or mobile device (see Figure 3.4).
Social Computing in SharePoint 2013

Social computing, or what I like to refer to as professional networking to assist in sometimes overcoming some internal political hurdles, is one of the most powerful and sometimes underused features of SharePoint. Those who have worked with SharePoint 2010 or 2007 in the past will be familiar on some level with SharePoint My Sites capabilities, depending on whether the organization opted to implement them. In SharePoint 2013, however, the professional networking capabilities of SharePoint include not only radically improved My Site features but also a new Community Site template, which adds a new layer to this social computing powerhouse platform.

A Community Site is a new SharePoint 2013 site template that provides a forum type of experience within the SharePoint platform. This of course will add to your governance planning, but the way it has been architected into the SharePoint 2013 fabric, it adds a great deal of value and cements SharePoint 2013 as the social computing tool for enterprise organizations.

If your organization has worked with knowledge management (KM) initiatives in the past, it is helpful to think in terms of these communities to help categorize and spawn discussions among different groups or team members across the organization. This feature does not replace My Sites at all but rather is an added layer to help promote open communication and collaborative exchange by enabling users to share things like best practices and lessons learned, as well as to share and promote their personal expertise.

I have had the opportunity to work with organizations in the past on their knowledge management initiatives in SharePoint. I wish this feature had been included in past releases of SharePoint but it’s here now and KM directors should take notice.

The Community Portal, which is a collection of the individual Community Sites on differing and specific topics, provides discussion lists and web parts directed specifically at the knowledge management and “community” experience.
CHAPTER 3   Governed Utilization of the Features and Functionality

TIP

The SharePoint 2013 community features are available only in SharePoint Server 2013 and are not made available in SharePoint Foundation 2013.

Understanding the Community Reference in Terms of Social Computing

It can become a bit confusing when referring to the “community” features of SharePoint 2013 because the term itself is also used to refer to other common SharePoint elements. It’s important to keep the specific use of the term in context. The SharePoint Community Sites are for the enhancement of social collaboration and knowledge management within the organization.

You may also hear users or stakeholders refer to “communities” in terms of the IT community or SharePoint’s “Power User” community which are, in fact, communities but more granularly they are just specific user groups or sets of individuals.

I think this is important so that you are able to set the tone with the SharePoint stakeholders and user base when describing the different SharePoint terms so that there is no confusion or overlap of terms.

Features and Practices of SharePoint Communities in Terms of Social Computing

This new Community Site feature in SharePoint 2013 enables users to further organize discussions as well as categorize feedback and knowledge and apply “metadata” or content types such as “lessons learned” and “best practices.” It also enables users to get feedback from other team members within the organization who may have come across the same issue that a current Community is discussing and offer invaluable feedback to the Community users to solve a specific problem in a much faster manner.

Just as a SharePoint site or set of SharePoint sites should have a “power user” or “super user” assist in owning issues and championing the specific sites, communities need moderators to manage the community by enforcing the organization governance as well as reviewing and addressing posts for appropriate content.

There is also a new feature that allows each community to contain information about its member and content reputation that will help them earn “status” or the “gifted badges” type of recognition from the Community moderators when they do things such as posting discussions, promoting or liking content, or providing feedback by using the “marked as a best answer” feature in SharePoint 2013 communities.

A new SharePoint community can be created either at the site collection level or at the site level. The decision of where to create the sites, at which level, can be influenced by which features you would like to provide (that is, activate and so on) within a specific community or a greater set of community sites.
Understanding the Community Portal Template Versus the Community Site Template

SharePoint 2013’s Community Portal template is actually an enterprise site template with a web part page and has the inherent capability to provide search-driven results, that is, audience-driven results. This template provides additional web parts such as the “Popular Communities” web part to display communities that are flourishing and are very active, which is ultimately determined by the number of replies to posts as well as the number of members within the community.

The Community Portal page can be accessed from the Sites link on a user’s My Site.

**TIP**

It is important to note that you can have only one Community Portal per SharePoint Server 2013 farm.

The Community Site template contains the same base list, libraries, and features of a standard SharePoint Team Site template.

It is important to add the SharePoint Community features to your overall SharePoint Roadmap as well as governance model because this provides an additional layer of sites as well as a possible hierarchical element to your existing navigation and overall SharePoint topology.

Many of the terms used within SharePoint communities are common to other areas of SharePoint Sites; however, the following terms are new and you should understand and champion them when implementing communities into your SharePoint 2013 platform:

▶ **Moderator**

The moderator is a community member who has permission and access to tools to manage, or moderate, the community settings and members. The moderator should be deeply involved and tasked with reviewing and addressing posts that are flagged as inappropriate, as well as sometimes combining sets of “discussions” or threads to better organize them for consumption by the user base.

The moderator should also set rules per the organization’s governance model for discussions and the quality of content that exists within the community, as well as champion the community to ensure that it’s being used and does not become “stale” and irrelevant.

▶ **Reputation**

Each and every member of a SharePoint Community Site earns a reputation within the community based on specific activities and feedback from other members. This can occur when the member’s posts are liked or an answer to a discussion is rated as
a best answer provided. The new reputation functionality is maintained at the site level and is specific only to that individual Community Site.

A member may be more knowledgeable in a specific area or Community and thus may have a stronger reputation in a different community due to his or her skill set and vast knowledge base on a specific topic or interest.

▶ Gifted badges

The Community moderator can provide or assign a community member with a gifted badge to designate the user as a special contributor of the community. These gifted badges help community users understand who are the possible experts in a given community and provide them with insight on who may be able to give them the best and most informed information.

▶ Best reply

Within a SharePoint Community discussion, multiple replies will be given on a specific topic or question, but one reply can be designated as the best reply. The best reply designation can be given by either the user who originally posted the topic or question or the moderators of the community. When a user starts to build up a number of best reply tags, the user will start to build a reputation within the community.

My Sites in SharePoint Server 2013

A My Site is a personal site for a given user that allows them to display information such as their profile and relevant skillsets, as well as information regarding sites they are interested in and a newsfeed of recent activities. This also provides the users with access to their OneDrive, as well as their blog, aggregated list of tasks, and other personal information.

A user’s My Site consists of two site collections, the SharePoint 2013 farm’s My Site host site collection and the user’s individual site collection.

TIP

When a My Site host site collection is created and users then create their individual site collections, this data is maintained in one or more content databases that are associated with the web application that you specify to host My Sites. It is possible to add content databases to this web application if multiple databases are required for storage due to size and other considerations are necessary. Also, the My Site host site collection and the related configuration that enables and creates individual My Sites site collections must be enabled before users can create My Sites.

Ensuring Best Practices My Site Architectural Configuration

SharePoint Server 2013’s My Sites, as shown in Figure 3.5, do have core architectural and configuration requirements or prerequisites that must be put in place to ensure that all My
Site functionality is made available and that they function in a best practices and high-performing secured manner.

![SharePoint Server 2013 My Sites](image)

**FIGURE 3.5** A newly created SharePoint Server 2013 My Sites.

SharePoint Server 2013’s managed metadata service application enables web applications to store and access keywords from a managed metadata term database. These features are required for My Sites users to specify keywords as their areas of expertise in the Ask Me About section, as well as to utilize the new hashtag feature in Posts and Newsfeeds, and for social tagging by using the “Tags and Notes” feature within My Site.

The managed metadata service application must be configured as the default keyword term store for the web application.

I would also recommend for any SharePoint 2013 implementation that the SharePoint Server Search service application be enabled, but in terms of My Sites it is absolutely a requirement. This enables users to search from within their My Sites for people in the organization based on names or areas of expertise, which I believe is one of the most popular features of My Sites. This also enables users’ search results to access the hashtags in microblog posts.

**Expertise Search/People Search**

The expertise search capabilities within SharePoint Server 2013 My Sites is another very popular features that should be enabled within your organization because it provides tangible return on investment (ROI). The People search and expertise tagging will help your organization’s users to locate other team members who have identified themselves as having significant experience with a particular subject area or topic.

The My Site features in SharePoint enable users to add terms to their profile that describe areas in which they have experience and thus populate the searches of users using the expertise search.
If your organization’s deployment is global in nature, it is key to take specific regulations of certain geographical locations as well as specific countries’ laws into consideration because there are limitations in specific areas of the globe where certain information in My Site profiles cannot legally be shown and must be governed and removed or “trimmed” for you to be in compliance.

What Are Communities in SharePoint 2013 in Terms of Specific Audiences, Users, or Departments?

When SharePoint is implemented within an organization, there are business requirements that must be accomplished, as well as the information technology goals and key benefits that are embraced by IT to deploy SharePoint and support it for the long term.

From the very beginning, communities or “sets of certain types of users” start to develop, and those related users within those communities have their own sets of goals, processes they want to improve on, and collaboration or increased knowledge sharing in the governed and secure manner that SharePoint offers.

This is true for a SharePoint implementation of any kind, whether it be an enterprise content management (ECM) initiative or a new intranet or an increased “social” or “professional networking” related strategy the culture is striving to embrace.

Three core types of communities exist within any SharePoint 2013 implementation. There are, of course, many subcommunities and types of users that flow out of these main community types, but these are the three that can be identified at the very top level:

▶ The “Knowledge” community and related users, whose goal is collaboration, knowledge sharing, social/professional networking, and retaining this knowledge for the long term.

A goal of this community is to prevent knowledge loss when staff members leave the organization and to provide their best practices, lessons learned, and intellectual property knowledge when new staff come into the company.

▶ The “Power User”/“Super User” community, which provides the “care and feeding” as well as support to ensure that the Knowledge community continues to thrive. This group is made up of team members or users who work with the Knowledge community as well as the business leaders who set these goals and the IT and Operational community that “keeps the lights on” and ensures security, performance, governance, compliance, and business continuity.

▶ The “Operational” community, which supports both the Knowledge community and the Power User/Super User community. This community is made up of the technical staff with roles such as the SharePoint administrators, Site Collection Owners, Site Owners, infrastructure, networking, and security.

The Operational community is also getting ever-growing requests to support the Knowledge community, which is knocking at the door regarding mobility, smartphones, tablets, and the bigger BYOD questions.
The Knowledge Community

One thing I have stressed with my team members at EPC Group, the SharePoint and Microsoft consultancy I founded about 15+ years ago, is to take the word “SharePoint” out of many conversations and focus on the business and functional goals at hand. Microsoft SharePoint is the technology you are using to accomplish these goals, but think in terms of how the technology can meet the needs of the communities.

There is a bit of a new blurry line when talking about SharePoint communities today, with SharePoint 2013 having a new level or hierarchy of Community Sites (templates) that support specific communities. However, I think it’s key to think in terms of knowledge management and Networks of Excellence (NoE) that initially created many of the best practices and strategies that drive SharePoint communities today.

So, taking a step back and using the NoE concept in the knowledge management world, the following are roles, responsibilities, and best practices that should be taken into consideration.

Executive Community Sponsor

- Approves and supports the business case and vision for knowledge sharing at the functional, business unit, operational, and/or executive levels
- Signs off on the business case, vision, and resources for knowledge sharing
- Remains involved through executive briefings and communications with the organizational community sponsors

Community Sponsor

- Sets goals and related performance criteria for the community
- Fosters widespread interest and enthusiasm for knowledge sharing and community participation
- Directs and presents the strategic input of the community to executives

Community Leader

- Directs the activities and sets the priorities of the community
- Manages the usage and appropriation of community resources
- Ensures the quality and timeliness of community activities/deliverables
- Develops a team concept within the community dedicated to learning and innovation
- Participates in and leads all aspects of community planning, design, development, and deployment
- Oversees the processes, content, technology (portal administration), and people resources to increase the effective sharing of best practices and lessons learned across business units
Works closely with knowledge-sharing leaders and staff to incorporate training and standards

- Measures community maturity and effectiveness with accountability
- Communicates knowledge-sharing success stories and lessons learned
- Gives recognition to the community, and enables award or recognition of submissions
- Guides research and benchmarking projects (where applicable)
- Encourages qualitative and quantitative benchmarking to identify new areas of improvement opportunity
- Appoints, coaches, and supports the community coordinators

**Community Coordinator**

- Ensures effective content management by collecting and managing the right information that supports the community
- Ensures that SharePoint’s content is updated and relevant to the user’s needs
- Monitors collaborative spaces (sites) to extract new knowledge and to identify issues that require responses
- Builds awareness of and access to the right people and right information that supports employees’ daily workflows (day-to-day tasks)
- Maintains processes for knowledge acquisition, storage, maintenance, and dissemination
- Facilitates community interaction and outreach to increase the number and contributions of active members
- Links community members with subject matter experts to answer questions or provide solutions
- Collects and packages knowledge-sharing success stories and lessons learned and champions these to other communities to keep a sense of competition within various communities to strive for excellence

**Community Core Team Member**

- Actively participates in and steers network activities under the guidance of the community Sponsor
- Builds regional sponsorship for and engages regional members in knowledge-sharing activities
- Formulates and executes plans to deploy community deliverables at the regional levels
▶ Provides a link between the strategies of the community and the strategies of the regional business units
▶ Develops relevant measures of success for the community
▶ Engages local community coordinators and subject matter experts (SMEs) in knowledge-sharing activities

In identifying these different roles, there is a best practices framework to be followed to ensure SharePoint Community effectiveness, as shown in Figure 3.6, along with 10 critical success factors.

**EPC Group’s SharePoint Community Effectiveness Framework**

Identified 10 Critical Success Factors

- Leadership and Sponsorship
- Clear Business Case (Justification)
- Adequate Resources and Defined Roles
- Members Engaged
- Clear Deliverables and Activities
- Development of Trusted Relationships
- Transfer Processes (Lessons Learned)
- Supporting Technology (Easy-to-Use Standards)
- Motivation, Recognition, and Rewards
- Community Measurement

**FIGURE 3.6** EPC Group’s SharePoint Community effectiveness framework.

In identifying this framework, there is a best practices SharePoint Community operating model, as shown in Figure 3.7, that should be followed to ensure SharePoint compliance as well as continued care and feeding of the community.

There is always the question of “the users and participants have a day job and tasks they must manage, so how can this be worked into the SharePoint network and overall participation?” Figure 3.8 details an approach to this question.

Within any network, critical or very time-sensitive issues or areas of possible improvement will come to the attention of community leaders and the roles identified previously.

Figure 3.9 details a workflow or process showing an example of how these community items can be dealt with head-on; it also puts a timeframe out there for resolution of issues so that they are not prolonged and the community itself does not become irrelevant because users have stopped providing or sharing knowledge due to an unresolved issue.
CHAPTER 3   Governed Utilization of the Features and Functionality

Expanding the Intersection Between “Day Jobs” and Community Activities

GOAL: By deliberately designing a community through business planning, activities become more relevant to individuals and the intersection can be expanded.

GOAL: By linking part of an individual’s performance expectations to community participation, the intersection can be expanded as well.

FIGURE 3.7   EPC Group’s Community operating model.

FIGURE 3.8   A graphic showing the intersection between a user’s “day jobs” and the user’s community activities.
FIGURE 3.9 A workflow example showing how community items can be addressed head on but how a timeframe can be assigned for issue resolution.

Lastly, you want to ensure that you have defined metrics, as shown in Figure 3.10, and have an understanding of the maturity model, as well as how relevant each community’s knowledge is, to ensure that it is being updated and used, and that ROI is being gained from the network. Figure 3.10 compares the knowledge gained from communities to the time spent to provide a starting point for your organization.
The Power User/Super User Community
The Power Users/Super Users are the users who support the care and feeding of SharePoint, as shown in Figure 3.11, communities and really “keep the lights on” by helping enforce security strategies, governance, and compliance. They are your “first line of defense” and will limit IT involvement in extremely common issues that IT should not have to be pulled into when they should be concentrating on more pressing or higher-priority items.

Who Should First Engage with the Knowledge and Operational Communities

FIGURE 3.11 Power Users or SharePoint Administrators: Who should be your organization’s first line of defense?

Because IT and the Operational community are usually extremely busy working on keeping the lights on, the Power User community, as shown in Figure 3.12, should be your first line of defense as well as a friendly face to engage the business and work with IT to resolve community issues.

The Operational Community
The SharePoint Operational community and related roles support the following in SharePoint 2013:

- People (permissions, Active Directory, groups, and so forth)
  - Roles and teams
  - Sponsorship
Process and policies (enforcement)
- Security
- Content management (policy enforcement from a technical level)
- Hardware and services
- Procedures (from an automated or technical level)

Communication and training (from a technical level)
- Communication plan
- Training plan
- Support plan

Who Should First Engage with the Knowledge and Operational Communities

- There are frequent situations where a Power User could handle non-administrative tasks in their site/department/region.
- Users, new to SharePoint, account for a large number of the SharePoint-related Help Desk tickets.
- How could a Power User help those users (initial training, mentoring, etc.)?

Figure 3.12 Power Users should be your organization’s first line of defense to handle common and easily answered questions from your SharePoint 2013 user base.

Summary
This chapter covered the core strategies for implementing some of the most high-profile features of SharePoint 2013, such as sites, site collections, and the social computing (that is, communities and My Sites) while ensuring that the implementation is done in a governed, best practices manner.
This chapter also covered the initial considerations for your organization regarding implementing a best practices information architecture. This was covered in a manner that will ensure that you are considering the types of users as well as the types of devices and the users’ locations that will be accessing the SharePoint platform.

The next chapter goes into detail on how SharePoint 2013 integrates with Microsoft Office 2013.
Index

A

acceptable usage limits for My Sites, 596
acceptable usage policy, enforcing governance strategies, 319-322
Access Services, 13
accessing SharePoint 2013, 68
device support, 68
account requirements for upgrades or migration, 378-379
ACS (Access Control Service), 461
ADFS (Active Directory Federation Services), 104
Admin Center, 557-559, 566-569
administration
mobile devices, 582-583
SQL Server 2012/2014 best practices, 575-577
tasks, 559-561
Application Management, 561-562
search administration, 564-565
security administration, 562
Windows PowerShell, 579-583
administrative and training governance, 43
administrator training, 610-611
AES (Advanced Encryption Standard), 115
aligning system and information architectures with roadmap, 363-367
Analytics Processing component of search, 509-511
anti-spam, Office 365 security, 114
APIs
CSOM, 450-452
Office 365 API Tools, 452-454
REST APIs, 454-458
server object model, 450
search, 457-458

App Catalog, 109-111
configuring for web applications, 111
App Management Service, 13
Application Management, 561-562
Application Tier installation, 415-416
apps, 58-60, 109-111

APIs
CSOM, 450-452
Office 365 API Tools, 452-454
REST APIs, 454-458
server object model, 450

audience, 59-60
authentication, 458-462
adding permission requests, 459-460
default permissions, 459
external authentication, 459
granted permissions, 459
internal authentication, 458-459
S2S, 460-462
authentication, configuring, 445-447
autohosted apps, 442
cloud app model, 443-444
configuring, 444-449
directed examples of, 60
high-trust apps, configuring, 447-449
licensing, 436-438
low-trust apps, configuring, 447
provider-hosted apps, 441
SharePoint app model, 440-442
SharePoint-hosted apps, 442
submission process, 436-438
architecture, 65. See also cloud computing

core databases
  Central Administration content database, 65
  configuration database, 64-65

data management architecture, 63
governance, 285-291
  site collections, 285-286
IA. See IA (information architecture)
infrastructure layers, 61
logical architecture, 131-138
  service applications, 134
  site collections, 136-137
  sites, 137-138
  web applications, 134-136
  zones, 136
My Site configuration, best practices, 90-91
RBS, 63
scalability, 227-229
  recommendations, 228
  SQL Server 2012 scalability, 228-229
search architecture, 229-233
  core elements, 230-231
  most liked search features, 229-230
  refiners, 230
security layers, 63
selecting, 199-200
  cloud-based DR, 215-216
  compliance-based DR, 211-212
  international law, implications of, 213-216
shredded storage, 63
system administrators, 218-227
system architecture, minimum server requirements for SharePoint 2013
deployment, 218-219
technical architecture design process, 201-202

ARMA (Association of Records Managers and Administrators), 326

audience
  for apps, 59-60
  for communities, 92-99
    knowledge community, 93-97
auditing
  capabilities, 232-233
  sites, 291
auditing capabilities, 554-559
authentication, 458-462
  adding permission requests, 459-460
  default permissions, 459
  external authentication, 459
  granted permissions, 459
  internal authentication, 458-459
  S2S, 460-462
authentication, app configuration, 445-447
authoring tools, 489-495
  SharePoint Designer 2013, 489-491
  Visio 2013, 491-492
  Visual Studio, 493-495
autohosted apps, 442
availability, 308
awareness campaign, 39
AWS (Amazon Web Services), 67, 211
  website, 211

B
backup and restore, 577-578
  content-only backups, 635-637
  content-only restoration, 647
data recovery guidelines, 309-310
documentation, 641
full farm backups, 632-635
IIS-based backups, 639
options, 640
Recycle Bin, 298-299
restores, performing
  complete catastrophic restores, 643-645
  with PowerShell, 646
service account considerations, 642
shared services provider backups, 637-638
SharePoint Root backups, 639
System State backups, 639-640
unintended downtime procedures, 310-311
web application documentation considerations, 642
base OS configuration, 417
batch files, performing backups with, 634
BCM (business continuity management)
  best practices, 623-624
  preparing for
    content considerations, 625
    support systems, 627-628
    web infrastructure considerations, 625-626
BCS (Business Connectivity Services), 29-30, 496-499
BDC (Business Data Connectivity), 29-30
best practices, 3-4
  BCM, 623-624
  BYOD, 233-234
defining for Communications Management Plan, 34
DR, 623-624
governance, 269-284
  mission statement, defining, 270
  principles for SharePoint usage, 273
  roles and responsibilities, 273-275
IA design, 119-121
  analysis process, 130
  questions to ask, 127-128
  records management, 131
  taxonomy, structuring, 130-131
IM
  document libraries, 81
  user base, identifying, 80-81
MDM, 546
migration, 361-363
My Site architectural configuration, 90-91
RM, 328-333
  core team, building, 329
  initiative, implementing, 329-330
scalability, 24
SQL Server 2012/2014 administration, 575-577
best replies, 90
BI (Business Intelligence), 13, 235-239
capabilities of SharePoint Server 2013, 25-26
database connections, 246-251
  connection string method, 249-251
  custom SQL commands, creating, 251-254
  username and password method, 247-249
Excel Power View, 242-243
Excel Services, 241
external data sources, 245-247
IA initiatives, 126
Microsoft BI stack, 237
PerformancePoint, 243-244
Power BI, 266-267
PowerPivot, 241-242
REST service connections, 256-257
SOAP service connections, 254-255
SSBI, 239-240
Visio Services, 244
XML data connections, 257-259
"big bang" migration versus iterative migration, 366-367
BitLocker 256-bit AES encryption, 115
BLOBs, RBS, 63
Blog web parts, 171-173
bottom-up implementation, 4-5
branding, 27-29, 543-551
   composed looks, 549-550
   CSS, 547
   device channels, 545-546
   HTML-based master pages, 547
   online branding, 543-544, 546-547
   page layout, 547
   Snippet Gallery, 550-551
   themes (SharePoint 2013), 549-550
breaches of security, 212
browsers, initiating supported device inventory, 71
built-in templates, creating lists, 139-141
business cases, including in training, 618-619
Business Data web parts, 173-177
BYOD (bring your own device), 2
   best practices, 233-234, 546
   device channels, 70-71
   mobility, 25
BYOL (bring your own license), 211

C

CAM (Cloud App Model), 83
capabilities of SharePoint Server 2013
   auditing, 232-233
   BCS, 29-30
   BI, 25-26
   branding, 27-29
   ECM/RM, 18-20
   end-user capabilities, 71
   identity management, 26
   logging, 232-233
   mobility, 25
   monitoring capabilities, 232-233
   search capabilities, 20-21
   social computing, 22-23
   upgrade process, 26-27
   WCM, 23-24
   Yammer, 23
capturing user requirements and performance metrics, 43-44
CDN (Content Delivery Network), 210
Central Administration content database, 65
Central Administration, performing full farm backups, 632-633
challenges to records management, 330-331
derailment change management integration with training, 615-616
"Change the Look" feature, 29
checklist of SharePoint 2013 components, 628-630
claims, support for in SharePoint 2013, 26
closed communities, 590
cloud app model, 443-444
cloud computing
   ADFS, 104
   architecture, selecting, 199-200
   AWS, 211
   Cloud First strategy, 206
   Directory Synchronization Server, 104
   DNS records, 104
   DR, 215-216
   hybrid cloud
      governance, 311-313
      preparing for, 216-218
   IaaS, 207-208
   PaaS, 207
   platform monitoring, 554-559
   private clouds, 198-200
   public cloud governance, 311-313
   SaaS, 207
   SharePoint 2013 cloud initiatives, 204-205
   SharePoint 2013 P.P.H (Private, Public, and Hybrid) Decision Framework, 205
   success stories, 203-204
technology pushes, 204

tenants, 104

Windows Azure, 209-211

CDN, 210

Cloud First strategy, 198, 206

coauthoring, 344-345

CodeLens, 466-467

Columns settings (lists), 350

Command Builder, downloading, 579

communication matrix, Communications Management Plan, 34-35

communication schedule, Communications Management Plan, 35-36

Communications Management Plan, 33-36

  best practices, 34
  communication matrix, 34-35
  communication schedule, 35-36
  objectives, defining, 33
  scope, 33
  stakeholders, 33

Communications settings (lists), 349

communities, 88, 92-99, 598

  best replies, 90
  closed communities, 590
  community sponsor, 93
  gifted badges, 90
  knowledge community, 93-97
    community coordinator, 94
    community core team members, 94-97
    community leader, 93-94
    executive community sponsor, 93
  membership, 593-595
  moderator, 89
  moderators, 594-595

My Sites, architectural configuration best practices, 90-91

open communities, 590

operational community, 99

power user/super user community, 98-99

private communities, 589

promoting user interaction, 591-593

reputation, 89

roles
  community owners, 593-594
  members, 594
  visitors, 594

communities for social interaction, 589

communities of interest, 589

communities of practice, 589

communities of purpose, 589

community coordinator, 94

community leader, 93-94

community owner, 593-594

Community Portal, 87-90, 590

community site template, 591

Community Sites, 87, 89-90

community sites, features, 586-587

community sponsor, 93

Community web parts, 177-179

comparing

  ECM and RM, 325-326

  iterative and "big bang" migration, 366-367

Office 365/SharePoint Online with SharePoint Server on-premises, 16-17

SharePoint Server 2013 and SharePoint Foundation 2010, 13

compatibility, Workflow Manager, 12

compliance

  architecture requirements, 211-212

  Office 365, 111-113

composed looks, 549-550

configuration database, 64-65

configuring

  App Catalog for web applications, 111
  apps, 444-449
    authentication, 445-447
high-trust apps, 447-449
low-trust apps, 447
Workflow Manager, 486-489
connection strings, 249-251
content
ECM/RM requirements, identifying, 18-20
governance, 43
libraries, 56
site collections, 52
sites, 52
types, 57-58
content and configuration assessment, performing, 371-380
IT communication strategy, 376-378
planning for new architecture, 374-375
PowerShell cmdlets, 372-373
time constraints, 375-376
training strategy considerations, 374
user base, reviewing, 373-374
content databases, 65
upgrading, 392-393
Content IA, 123
content managers, training, 614-615
Content Organizer, 341-345
Content Organizer feature, 341-345
Content Processing component of search, 507-509
Content Rollup web parts, 180-190
content type hubs, 327, 341
content types, 327, 340
syndication, 327
content-only backups, 635-637
content-only restoration, 647
Context IA, 122-123
core databases, 64
core elements of search, 230-231
core tasks, identifying for SharePoint initiative, 44-52
Crawl component of search, 505-507
creating
custom SQL commands, 251-254
discussion boards, 166-168
document libraries, 147-148
library views, 160-162
linked data sources, 259-264
list templates, 145-147
lists
from built-in templates, 139-141
custom lists, 141-145
views, 160-162
SOAP service connections, 254-255
surveys, 168-169
cross-site publishing, 532-536
catalog configuration, 535
content types, 534-535
term set tagging, 535
CSOM (client-side object model), 450-452
CSS (Cascading Style Sheets), 547
custom actions (Workflow Manager), 485-486
custom branding, device channels, 545-546
custom designs, verifying, 404-405
custom development governance, 43
custom error/404 pages, 526-530
custom lists, creating, 141-145
custom SQL commands, creating, 251-254
customization governance, 313-317
Cutover Deadline, 405

D

Dashboard Designer, 243
data breaches, 212
Data layer, 61
data management architecture, 63
data sources, testing, 264-266
Database Tier installation, 415
databases
  Central Administration content database, 65
  configuration database, 64-65
  connections, 246-251
    connection string method, 249-251
    username and password method, 247-249
  content databases, 65
  custom SQL commands, creating, 251-254
  database administrators, 74
  external data sources, 245-247
  term store, 327
datasheet view, 165
default crawl accounts, 504
default permissions, 459
defining
  best practices for Communications Management Plan, 34
  mission statement, 270
  objectives for Communications Management Plan, 33
  site columns, 148-149
deleting
  libraries, 154-155
  list columns, 158
  list views, 162-163
  lists, 154-155
  sites, 291
deployment strategies, 4-6
  bottom-up implementation, 4, 5
  power users, identifying, 8-9
  top-down implementation, 5
deprecated features in SharePoint 2013, 370
Design Manager
  branding, 27-29
  UI customization, 548-549
developing
  roadmap, 2
power users, identifying, 8-9
questions to ask, 6-8
tailored curriculum for training, 609-610
training, 612-613
workflows, 481-495
development environment, 429-440
apps
  authentication, configuring, 445-447
  autohosted apps, 442
  cloud app model, 443-444
  configuring, 444-449
  CSOM, 450-452
  high-trust apps, configuring, 447-449
  licensing, 436-438
  low-trust apps, configuring, 447
  Office 365 API Tools, 452-454
  provider-hosted apps, 441
  REST APIs, 454-458
  server object model, 450
  SharePoint-hosted apps, 442
  authentication, 458-462
  adding permission requests, 459-460
  default permissions, 459
  external authentication, 459
  internal authentication, 458-459
  S2S, 460-462
configuring, 220
.NET Framework, 434-436
  features, 435-436
  programming language support, 435
preparing, 438-440
requirements gathering for new solutions, 440
tools
  Microsoft Azure, 475-479
  Microsoft InfoPath 2013, 481
  SharePoint Designer 2013, 474-475
  Visual Studio, 463-472
Visual Studio Online, 473
Windows PowerShell, 481
device channels, 70-71, 545-546
devices
BYOD best practices, 233-234
inventory of supported devices, initiating, 71
MDM, best practices, 546
mobile device administration, 582-583
SharePoint access, 68
diagnostics for SharePoint 2013 search, 515
digital asset management, 297
Directory Synchronization Server, 104
discussion boards, creating, 166-168
display templates, 520-521
Distributed Cache service, 600
DNS records, 104
Document IDs capabilities, 352
document libraries
  best practices, 81
  creating, 147-148
document life cycle management, 19
Document Sets feature, 352-353
Document Sets web parts, 191
downloading Command Builder, 579
DR (disaster recovery). See also backup and restore
  best practices, 623-624
  cloud-based, 215-216
preparing for
  content considerations, 625
  shared services considerations, 626-627
  support systems, 627-628
  web infrastructure considerations, 625-626
content type hubs, 341
eDiscovery, 355-360
  Microsoft Exchange/SharePoint 2013 integration, 358
  Site Mailbox, 358-360
folksonomy, 327
infrastructure, planning, 332-333
metadata, 327
MMS, 333-335
ontology, 327
organizational requirements, identifying, 18-20
taxonomy, 327
term set tagging, 327
term store, 327, 335-340
eDiscovery, 13, 85, 355-360
Microsoft Exchange/SharePoint 2013 integration, 358
Site Mailbox, 358-360
effectiveness of training, measuring, 616
Enable Reporting of Offensive Content option, 587-589
encryption, Office 365 use of, 115
end users
  roles in SharePoint Services team, 77
  SharePoint capabilities for, 71
enforcing governance strategies with acceptable usage policy, 319-322
ensuring successful training, 606-607
time constraints, 375-376
enterprise plans, Office 365, 102-104
Enterprise Search, 86, 304-305
evironments
  branding, 27-29
  content and configuration assessment, performing, 371-380
  IT communication strategy, 376-378
  planning for new architecture, 374-375
  PowerShell cmdlets, 372-373
time constraints, 375-376
training strategy considerations, 374
user base, reviewing, 373-374
governance, 42
hybrid cloud, preparing for, 216-218
off-premises environment, 12
on-premises environment
  future of, 67-68
  hardware/software recommendations, 219-227
  Office Web Apps server example, 223
  server topologies, 223-227
EU (European Union), security laws, 206
EU Model Clauses, Office 365 compliance, 113
event receivers, 498-499
Event Viewer, 557
examples
  of apps, 60
  of Office Web Apps server, 223
  of project plan template, 45-52
Excel Power View, 242-243
Excel Services, 13, 241
Exchange Admin Center, 569-573
evacutive community sponsor, 93
expertise search, 91-92
external authentication, 459
external data sources, 245-247
F
farm administrators, 72-73
FAST search, 229
features
  "Change the Look" feature, 29
  of community sites, 586-587
  comparing SharePoint Server 2013 and SharePoint Foundation 2010, 13
deprecated features in SharePoint 2013, 370
  of .NET Framework, 435-436
  of Office 365, 84-86
  eDiscovery, 85
  Enterprise Search, 86
  Guest Links, 85
  public websites, 85
  Site Mailbox, 85
  SkyDrive Pro, 84
  UI updates, 84
  Yammer, 84-86
  of Power BI, 266-267
  of private clouds, 199
  of SharePoint 2013, 10
  of Workflow Manager, 485
file plan, determining, 331
Filters web parts, 191-192
FISMA (Federal Information Security Management Act of 2002), Office 365 compliance, 112-113
folksonomy, 327
following, 598
Forms web parts, 192
free training resources, 620-622
Friendly URLs, 538
full branding efforts, 546
full farm backups, 632-635
future of SharePoint on-premises environment, 67-68
G
gathering requirements for development solutions, 440
General Settings, lists and libraries, 151-154
gifted badges, 90
governance, 9, 40-44
  acceptable usage policy, 319-322
  administrative and training governance, 43
  architecture governance, 285-291
  site collections, 285-286
  best practices, 269-284
  mission statement, defining, 270
How can we make this index more useful? Email us at indexes@samspublishing.com
principles for SharePoint usage, 273
roles and responsibilities, 273-275
custom development governance, 43
customization governance, 313-317
environment and security governance, 42
hybrid cloud governance, 311-313
infrastructure governance, 41
organizational support governance, 73-77
database administrators, 74
end user roles, 77
farm administrators, 73
granular operational roles, 76
high-level operational roles, 75
site collection administrators, 73-74
SSOs, 73
SST, 73
system administrators, 74
performance metrics, 43-44
preparing for, 71-77
public cloud governance, 311-313
roles
developers, 284
Governance Committee, 279
management groups, 276
operations team, 279-281
power users, 281-282
SharePoint Steering Committee, 276-278
site collection administrators, 282
site designers, 283
site owners, 282-283
scope of, 271-273
security
content management, 295-298
Office 365 compliance and standards, 295
Recycle Bin, 298-299
security governance, 292-293
permissions management, 293-294
site and site collection governance, 72-73
site governance, 286-287
social computing governance, 302-303
UI governance, 317-319
uptime and performance standards, 307-311
data recovery guidelines, 309-310
scheduled outages, 308, 310
unintended downtime procedures, 310-311
user requirement metrics, 43-44
workflow governance, 299-301
Governance Committee, 279
granted permissions, 459
Guest Links, 85

H

Hadoop, 210
hardware recommendations for on-premises
deployment, 219-227
development environment configuration, 220
production environment configuration, 221-222
QA environment configuration, 220
hashtagging, 598
health monitoring for SharePoint 2013 search, 515
health records, PHI, 129
high-level operational roles (SharePoint Services
team), 75
high-trust apps, configuring, 447-449
HIPAA (U.S. Health Insurance Portability and
Accountability Act)
Office 365 compliance, 113
PHI, 11
HTML-based master pages, 547
hybrid cloud

governance, 311-313
platform monitoring, 554-559
preparing for, 216-218
selecting for deployment, 82-84
hybrid farm topology, 226-227
hybrid Office 365 initiative, 105-109
identity providers, 108
Lync 2013, 105-106
MSOL, 108
Office 365 Secure Store, 108-109
reverse proxy, 108
security, 106-108
hybrid search integration, 515-517

IA (information architecture), 119-122
aligning with roadmap, 363-367
analysis process, 130
BI initiatives, 126
Content IA, 123
Context IA, 122-123
designing, questions to ask, 127-128
document libraries, creating, 147-148
libraries
deleting, 154-155
General Settings, 151-154
RSS Settings, 157
settings, modifying, 150-151
Workflow Settings, 157
list templates, creating, 145-147
lists, 138-147
creating from built-in templates, 139-141
custom lists, creating, 141-145
deleting, 154-155
General Settings, 151-154
permissions, 155-156
RSS Settings, 157
settings, modifying, 150-151
Workflow Settings, 157
logical architecture
service applications, 134
site collections, 136-137
URLs, 137
web applications, 134-136
zones, 136
performing administrative tasks, 134-136
PHI, 129
PII, 128
records management, 131
SBU information, 128
sensitive PII, 128-129
site columns, defining, 148-149
taxonomy, structuring, 130-131
technical components, 131-132
Users IA, 124-125, 130
IaaS (infrastructure as a service), 207-208
Windows Azure, 209-211
identifying
core tasks for SharePoint initiative, 44-52
ECM/RM requirements, 18-20
power users, 8-9
stakeholders for Communications Management Plan, 33
user base, 80-81
identity management
capabilities of SharePoint Server 2013, 26
Office 365 integration scenarios, 106-108
identity providers, 108
iFrames, 24
IM (information management), best practices
document libraries, 81
user base, identifying, 80-81
implementation strategy
Communications Management Plan, 33-36
best practices, 34
communication matrix, 34-35
communication schedule, 35-36
implementation strategy

objectives, defining, 33
scope, 33
stakeholders, identifying, 33
core tasks, identifying, 44-52
governance. See also governance
  administrative and training governance, 43
  content-related governance, 43
  custom development governance, 43
  environment and security governance, 42
importance of, 40
information management governance, 41
infrastructure governance, 41
user requirement metrics, 43-44
IM, identifying user base, 80-81
international law, implications of, 213-216
mobility, device channels, 70-71
for Office 365, 104-105
project plan template examples, 45-52
public relations
  awareness campaign, 39
  objectives, 37-39
questions to ask, 32
implementing BI, 238-239
importance of SharePoint roadmap, 6
increasing user adoption, 616-618
information management governance, 41
infrastructure
  data management architecture, 63
  for ECM/RM, planning, 332-333
governance, 41
IA, 119-121
  BI initiatives, 126
  Content IA, 123
  Context IA, 122-123
technical components, 131-132
  Users IA, 124-125
layers, 61
RBS, 63
security, 63
server farms, 61-62
shredded storage, 63
tracking deployed elements, 367-370
initiating supported device inventory, 71
in-place records management, 353-355
installing
  SharePoint farms
    Application Tier installation, 415-416
    Database Tier installation, 415
    Web Front End Tier installation, 416
SharePoint software, 418
instructor-led training, 607
intended audience for this book, xv
internal authentication, 458-459
international law, 213-216. See also regulatory compliance
inventory of SharePoint 2013 components, 628-630
ISO 27001, Office 365 compliance, 112
IT SLAs, 61
iterative migration versus "big bang" migration, 366-367

J-K

joining data sources, 259-264
JQuery Mobile framework, 25
Kemp, Chris, 203
key features
  of Office 365, 84-86
eDiscovery, 85
Enterprise Search, 86
Guest Links, 85
public websites, 85
Site Mailbox, 85
SkyDrive Pro, 84
UI updates, 84
Yammer, 84-86
logging 661

of SharePoint 2013, 10
KM (knowledge management), 87
knowledge community, 93-97
  community coordinator, 94
  community core team members, 94-97
  community leader, 93-94
  community sponsor, 93
  executive community sponsor, 93
KQL (Keyword Query Language), 504
Kundra, Vivek, 203

L

language packs
  multilingual sites, 538-541
  translation services, 541
large farm topology, 225-226
laws, international law, 213-216
layers
  of SharePoint security, 63
layers of SharePoint infrastructure, 61
legislation, international law, 213-216
libraries, 56
  best practices, 81
  content types, 57-58
  deleting, 154-155
document libraries, creating, 147-148
permissions, 155-156
settings
  modifying, 150-151
  RSS Settings, 157
  Workflow Settings, 157
views
  creating, 160-162
datasheet view, 165
standard view, 164
web parts, 56-57

licensing
  apps, 436-438
  ECM/RM, 324
  Office 365, available plans, 102-104
limited deployments topology, 223
linked data sources, 259-266
links to free training resources, 621-622
list columns, reordering, 159
list templates, creating, 145-147
lists, 56
columns
  deleting, 158
content types, 57-58
creating from built-in templates, 139-141
custom lists, creating, 141-145
deleting, 154-155
logical architecture, sites, 138-147
permissions, 155-156
RSS feeds, viewing, 165
settings
  Columns, 350
  Communications, 349
  General Settings, 151-154, 347-348
  modifying, 150-151
  Permissions and Management, 348-349
  RSS Settings, 157
  Views, 350
  Workflow Settings, 157
views
  creating, 160-162
datasheet view, 165
deleting, 162-163
standard view, 164
web parts, 56-57
LOBs (lines of business), 72, 496-499
local sites, 72
locations of user base, mapping, 69
logging, 232-233

How can we make this index more useful? Email us at indexes@samsublishing.com
logical architecture, 131-138
  service applications, 134
  site collections, 136-137
  site planning for upgrade or migration initiative, 379-380
  sites, 137-138
  URLs, 137
  web applications, 134-136
  zones, 136
low-level branding efforts, 547
low-trust apps, configuring, 447
Lync 2013, 105-106
Lync Admin Center, 573-574

M
Machine Translation Service, 13, 541
main functional areas of My Sites, 598-599
maintenance, SQL Server 2012/2014, 576-577
Managed Metadata Service, 13, 305-306
managed navigation, 536-538
management groups, 276
managing
  metadata, 297
  permissions, 293-294
mapping locations of user base, 69
MDM (mobile device management), best practices, 546
MDS (minimal download strategy), 332
measuring training ROI, 616
Media and Content web parts, 192-194
medical records
  PHI, 129
medical records, PHI, 11
medium branding efforts, 547
medium farm plus Office Web Apps topology, 225
medium farm topology, 224
metadata, xv, 327
  content types, 340
  Managed Metadata Service, 305-306
  managing, 297
  MMS, 333-335
  term store, 335-340
methodologies, 3-4
metrics, user requirement metrics, 43-44
microblogging, 22, 598
Microsoft Azure, 67, 475-479
  ACS, 461
  development environment, 429-440
Microsoft BI stack, 237
  Excel Power View, 242-243
  Excel Services, 241
  PerformancePoint, 243-244
  PowerPivot, 241-242
  Visio Services, 244
Microsoft InfoPath 2013, 481
Microsoft Office, integration with SharePoint 2013, 101-102
Microsoft SharePoint Foundation Subscription Settings Service, 13
Microsoft updates, 408-409
migrating
  best practices, 361-363
  tracking deployed infrastructure elements, 367-370
  content verification, performing, 404
  iterative migration versus “big bang” migration, 366-367
PowerShell tasks
  content database upgrades, 392-393
  review authentication impacts, 401
  service application database upgrades, 394-397
  site collection health checks, 397-398
  site collection upgrades, 399-400
from SharePoint 2007 to SharePoint 2013, 381-386, 410-414
hardware/software requirements, 411-414
server farms, 420-423
SharePoint 2010 to SharePoint 2013, 386-391
site planning, 379-380
strategy overview, 380-381
troubleshooting procedures, 405-406
minimum server requirements for SharePoint 2013 deployment, 218-219
mission statement, defining, 270
MMS (managed metadata service), 333-335
content types, 340
mobile devices administration, 582-583
mobility, capabilities of SharePoint Server 2013, 25
moderators, 89, 594-595
modifying
  list and library settings, 150-151
  list columns, 158
monitoring, 232-233
MoReq, 326
most liked search features, 229-230
MSOL (Microsoft Online), 108
multilingual sites, 538-541
  translation services, 541
  Variations feature, 541
multipurpose topology, 224
multitenant systems, 104
My Site, 22, 90-92
  architectural configuration, best practices, 90-91
  expertise search, 91-92
  people search, 91-92
My Sites, 595-602
  acceptable usage limits, 596-598
  governance, 302-304
main functional areas, 598-599
policies, 597-598
underlying system architecture, 598-602
  Distributed Cache service, 600
  User Profile service application, 600-602

N
.NET Framework, 434-436
  features, 435-436
  programming language support, 435
network security, Office 365, 114
newsfeeds, 597
  Yammer, 602-603

O
objectives
  defining for Communications Management Plan, 33
  for public relations strategy, 37-39
OData (Open Data), 29, 456-457
OffCAT (Microsoft Office Configuration Analyzer Tool), 559
offensive content, reporting, 587-589
Office 365. See also SharePoint Online
  Admin Center, 557-559, 566-569
  administration, 553-554
  API Tools, 452-454
architecture
  data management architecture, 63
  layers, 61
  RBS, 63
  server farms, 61-62
  shredded storage, 63
BI, 235-239
  Excel Power View, 242-243
  Excel Services, 241
  PerformancePoint, 243-244
Power BI, 266-267
PowerPivot, 241-242
REST service connections, 256-257
SOAP service connections, 254-255
SSBI, 239-240
Visio Services, 244
XML data connections, 257-259
business continuity SLAs, 578
compliance, 111-113, 295
development environment, 429-440
Exchange Admin Center, 569-573
features, 84-86
eDiscovery, 85
Enterprise Search, 86
Guest Links, 85
public websites, 85
Site Mailbox, 85
SkyDrive Pro, 84
UI updates, 84
Yammer, 84-86
governance. See governance
hybrid Office 365 initiative, 105-109
identity providers, 108
Lync 2013, 105-106
reverse proxy, 108
security, 106-108
hybrid search integration, 515-517
implementation strategy, 104-105
Lync Admin Center, 573-574
online branding, 543-544, 546-547
plans, 102-104
privacy issues, 115
search UI, 519-523
security, 113-116
anti-spam, 114
cipher, 115
network security, 114
physical hardware, 114
"Prevent Breach," 115-116
social computing, capabilities, 585-586
workflows, developing, 481-495
Office 365 Secure Store, 108-109
Office Store, submission process for apps, 436-438
Office Web Apps server, 223
medium farm plus Office Web Apps topology, 225
off-premises environment, 12
OneDrive for Business, 86
online branding, 543-544, 546-547
on-premises environment, 67-68
comparing with Office 365/SharePoint Online, 16-17
future of, 67-68
hardware/software recommendations, 219-227
development environment configuration, 220
production environment configuration, 221-222
QA environment configuration, 220
Office Web Apps server example, 223
platform monitoring, 554-559
private clouds, 198-200
server topologies, 223-227
ontology, 327
OOTB (out-of-the-box) web parts, 171
Blog web parts, 171-173
Business Data web parts, 173-177
Community web parts, 177-179
Content Rollup web parts, 180-190
Document Sets web parts, 191
Filters web parts, 191-192
Forms web parts, 192
Media and Content web parts, 192-194
Search web parts, 194
Search-Driven Content web parts, 195
Social Collaboration web parts, 195
open communities, 590
operational community, 99
operations team, 279-281
organizational support governance, 73-77
database administrators, 74
end user roles, 77
farm administrators, 73
granular operational roles, 76
high-level operational roles, 75
site collection administrators, 73-74
SSOs, 73
SST, 73
system administrators, 74

P
PaaS (platform as a service), 207
page layout, 547
people search, 91-92
performance, 307-311
metrics, capturing, 43-44
Performance and Diagnostics Hub (Visual Studio), 468-470
PerformancePoint, 13, 243-244
performing
content and configuration assessment, 371-380
IT communication strategy, 376-378
planning for new architecture, 374-375
PowerShell cmdlets, 372-373
time constraints, 375-376
training strategy considerations, 374
user base, reviewing, 373-374
content verification, 404
IA administrative tasks, 134-136
permissions
for lists and libraries, 155-156
managing, 293-294
requests, adding to apps, 459-460
Permissions and Management settings (lists), 348-349
phases of public relations strategy, 37-39
PHI (protected health information), 11, 129
physical architecture minimums, 218-219
physical hardware, Office 365 security, 114
PII (personally identifiable information), 10-11, 128
security issues, 82
sensitive PII, 128-129
plans, Office 365, 102-104
platforms, monitoring, 554-559. See also environments
policies
acceptable usage policy, enforcing governance strategies, 319-322
for My Sites, 597-598
Power BI, 266-267
power users, 8-9, 281-282
training, 613-614
power user/super user community, 98-99
PowerPivot, 241-242
PowerShell
migration tasks
content database upgrades, 392-393
review authentication impacts, 401
service application database upgrades, 394-397
site collection health checks, 397-398
site collection upgrades, 399-400
performing backups with, 634
restores, performing, 646
preparing
for BCM/DR
content considerations, 625
shared services considerations, 626-627
support systems, 627-628
web infrastructure considerations, 625-626
development environment, 438-440
  for governance, 71-77
    organizational support governance, 73-77
    site and site collection governance, 72-73
  for hybrid cloud, 216-218
"Prevent Breach," 115-116
principles for SharePoint usage, 273
privacy
  concerns regarding Office 365, 115
  PII, security issues, 82
private clouds, 198-200
  features, 199
private communities, 589
Product Catalog, 536
production environment configuration, 221-222
programming language support (.NET Framework), 435
project plan template, examples, 45-52
promoting user interaction, 591-593
provider-hosted apps, 441
providing reference materials for team members, 9
provisioning sites, 289-290
public cloud governance, 311-313
public relations strategy
  awareness campaign, 39
  objectives, 37-39
public websites, 85

Q

QA (quality assurance), QA environment configuration, 220
query suggestions (search), 521-522
questions to ask
  for BI initiative, 237
  for IA design, 127-128
  for SharePoint roadmap development, 6-8
  for user base identification, 80-81

R

ratings, 598
RBS (remote BLOB storage), 63
receiving triggered events, 498-499
recommendations for SharePoint 2013
  scalability, 228
record center, 353-355
records management, identifying organizational requirements, 18-20
recovering data, guidelines, 309-310
Recycle Bin, 298-299
reference materials
  providing for team members, 9
  for Windows PowerShell, 580-581
regulatory compliance
  Office 365, 111-113
  PHI, 11
  PII, 10-11, 82
reordering list columns, 159
reporting offensive content, 587-589
Reporting tool, 556
reputation, 89
requirements
  account requirements for upgrades or migration, 378-379
  ECM/RM requirements, identifying, 18-20
  gathering for new development solutions, 440
  minimum server requirements for SharePoint 2013 deployment, 218-219
  SharePoint 2007 migration to SharePoint 2013, 411-414
  user requirement metrics, 43-44
responsibilities within governance strategy, 273-275
  developers, 284
  Governance Committee, 279
  management groups, 276
  operations team, 279-281
power users, 281-282
SharePoint Steering Committee, 276-278
site collection administrators, 282
site designers, 283
site owners, 282-283

REST
APIs, 454-458
OData, 456-457
and search, 457-458
service connections, 256-257
restores, performing, 642-647
with Central Administration, 645-646
complete catastrophic restores, 643-645
content-only restoration, 647
with PowerShell, 646
result types (search), 520
retention policies
data breaches, 212
ECM/RM, 18-20
reverse proxy, hybrid Office 365 initiative, 108
reviewing
authentication impacts, 401
server farm configuration, 424-425
user base, 373-374
ribbon, 55
RM (records management), 323-328
best practices, 328-333
core team, building, 329
initiative, implementing, 329-330
challenges to, 330-331
comparing with ECM, 325-326
Content Organizer, 341-345
content type hubs, 341
Document IDs capabilities, 352
Document Sets feature, 352-353
folksonomy, 327
governance, 295-296
infrastructure, planning, 332-333
in-place RM, 353-355
metadata, 327
MMS, 333-335
ontology, 327
taxonomy, 327
term set tagging, 327
term store, 327, 335-340
versioning, 350-351
roadmap
aligning system and information architectures with, 363-367
Communications Management Plan, 33-36
best practices, 34
communication matrix, 34-35
communication schedule, 35-36
objectives, defining, 33
scope, 33
stakeholders, identifying, 33
core tasks, identifying, 44-52
developing, 2
power users, identifying, 8-9
questions to ask, 6-8
governance
administrative and training governance, 43
content-related governance, 43
custom development governance, 43
environment and security governance, 42
information management governance, 41
infrastructure governance, 41
user requirement metrics, 43-44
IM, identifying user base, 80-81
importance of, 6
international law, implications of, 213-216
project plan template examples, 45-52
public relations
awareness campaign, 39
objectives, 37-39
roles

in communities, 593-595
  community owners, 593-594
  members, 594
  moderators, 594-595
in governance strategy, 273-275
  developers, 284
  Governance Committee, 279
  management groups, 276
  operations team, 279-281
  power users, 281-282
  SharePoint Steering Committee, 276-278
  site collection administrators, 282
  site designers, 283
  site owners, 282-283
of knowledge community members, 93-97
of SharePoint Services team
  end user roles, 77
  granular operational roles, 76
  high-level operational roles, 75
RSS feeds, viewing, 165
RSS Settings (lists and libraries), 157
RWD (Responsive Web Design), 69, 543

S

S2S (Server-to-Server) Trust authentication
  architecture, 460-462
SaaS (software as a service), 207
sandboxed solutions, 314
SBU (sensitive but unclassified) information, 128
scalability
  best practices, 24
  recommendations, 228
  in SharePoint architectures, 227-229
    SQL Server 2012 scalability, 228-229
scheduling backups, 634-635

SCOM (System Center 2012 Operation Manager), 556
scope
  of Communications Management Plan, 33
  of governance strategy, 271-273
search, 13, 20-21, 502-523
  administration tasks, 564-565
  Analytics Processing component, 509-511
  Content Processing component, 507-509
  core elements, 230-231
  Crawl component, 505-507
  default crawl accounts, 504
diagnostics and health monitoring, 515
Enterprise Search, 304-305
expertise search, 91-92
most liked features, 229-230
Office 365, Enterprise Search, 86
people search, 91-92
refiners, 230
REST, 457-458
result sources, 503
Search Admin component, 512-513
search architecture, 229-233
Search Index component, 514
Search Query component, 514-515
UI, 519-523
  display templates, 520-521
  query suggestions, 521-522
  result types, 520
  thumbnail preview, 523
web parts, 517-519
Search Admin component of search, 512-513
Search Host Controller service, 503
Search Index component of search, 514
Search Query and Site Settings service, 503
Search Query component of search, 514-515
Search web parts, 194
Search-Driven Content web parts, 195
Secure Store Service, 13

security
administration tasks, 562
authentication, 458-462
adding permission requests, 459-460
external authentication, 459
granted permissions, 459
internal authentication, 458-459
data breaches, 212
DR, cloud-based, 215-216
governance, 42, 292-301
content management, 295-298
Office 365 compliance and standards, 295
permissions management, 293-294
Recycle Bin, 298-299
hybrid Office 365 initiative, 106-108
laws regarding, 206. See also regulatory compliance
layers, 63
Office 365, 113-116
anti-spam, 114
encryption, 115
network security, 114
physical hardware, 114
"Prevent Breach," 115-116
viruses, 114
PII, 82
in Visual Studio, 470-472
selecting
architecture, 199-200
cloud-based DR, 215-216
compliance policies, 211-212
international law, implications of, 213-216
hybrid cloud deployment strategy, 82-84
sensitive PII, 128-129
SEO optimization tools, 530-531

server farms, 61-62
adding servers by role, 419
base OS configuration, 417
full farm backups, 632-635
installing
Application Tier installation, 415-416
Database Tier installation, 415
Web Front End Tier installation, 416
large farm topology, 225-226
medium farm topology, 224
restoring, 642-647
complete catastrophic restores, 643-645
reviewing configuration, 424-425
SharePoint 2007, migrating to SharePoint 2013, 420-423
SQL Server configuration, 417
UAT, 423
server object model, 450
servers
minimum server requirements for SharePoint 2013 deployment, 218-219
Office Web Apps server, 223
topologies, 223-227
service application databases, upgrading, 394-397
Service Application layer, 61
service applications, 134
settings for lists and libraries
Columns, 350
Communications, 349
General Settings, 151-154, 347-348
modifying, 150-151
Permissions and Management, 348-349
Views, 350
Workflow Settings, 157
shared services provider backups, 637-638
SharePoint 2007
migrating to SharePoint 2013, 410-414
hardware/software requirements, 411-414
server farms, migrating to SharePoint 2013, 420-421
SharePoint 2007, migrating to SharePoint 2013, 381-386
SharePoint 2010, migrating to SharePoint 2013, 386-391
SharePoint 2013
administration, 553-554
App Catalog, 109-111
architecture
data management architecture, 63
layers, 61
RBS, 63
server farms, 61-62
shredded storage, 63
BI, 235-239
Excel Power View, 242-243
Excel Services, 241
PerformancePoint, 243-244
PowerPivot, 241-242
REST service connections, 256-257
SOAP service connections, 254-255
SSBI, 239-240
Visio Services, 244
XML data connections, 257-259
branding
online branding, 546-547
branding, online branding, 543-544
cloud initiatives, 204-205
coauthoring, 344-345
composed looks, 549-550
Content Organizer feature, 341-345
core databases, 64
databases
Central Administration content database, 65
configuration database, 64-65
content databases, 65
deprecated features, 370
Developer Dashboard, 557
features, 10
implementation strategy
  Communications Management Plan, 33-36
core tasks, identifying, 44-52
governance, 40-44
  project plan template examples, 45-52
public relations strategy, 36-39
questions to ask, 32
Microsoft Office integration, 101-102
MMS, 333-335
Product Catalog, 536
search, 502-523
  Analytics Processing component, 509-511
  Content Processing component, 507-509
  Crawl component, 505-507
default crawl accounts, 504
diagnostics and health monitoring, 515
hybrid search integration, 515-517
result sources, 503
  Search Admin component, 512-513
  Search Index component, 514
  Search Query component, 514-515
UI, 519-523
web parts, 517-519
social computing, 87-99
themes, 549-550
user base, 68-69
Variations feature, 541
web parts, 171
  Blog web parts, 171-173
  Business Data web parts, 173-177
  Community web parts, 177-179
  Content Rollup web parts, 180-190
  Document Sets web parts, 191
  Filters web parts, 191-192
Forms web parts, 192
Media and Content web parts, 192-194
Search web parts, 194
Search-Driven Content web parts, 195
Social Collaboration web parts, 195
SharePoint 2013 P.P.H (Private, Public, and Hybrid) Decision Framework, 205
SharePoint app model, 440-442
SharePoint Designer 2013, 474-475, 489-491
SharePoint Foundation 2010, comparing with SharePoint Server 2013, 13
SharePoint Health Analyzer, 554-555
SharePoint Online
administration, 553-554
coauthoring, 344-345
implementation strategy. See also implementation strategy
Communications Management Plan, 33-36
core tasks, identifying, 44-52
governance, 40-44
project plan template examples, 45-52
public relations strategy, 36-39
questions to ask, 32
online branding, 543-544, 546-547
social computing capabilities, 585-586
workflows, developing, 481-495
SharePoint Root backups, 639
SharePoint Server Search service, 502
SharePoint Steering Committee, 276-278
shredded storage, 63
site collection administrators, 282
site collections, 52, 136-137
governance, 72-73, 285-286
health checks, 397-398
Managed Metadata Service, 13
site collection administrators, 73-74
upgrading, 399-400
site columns, 159-160
defining, 148-149
site designers, 283
Site Mailbox, 85, 358-360
site owners, 282-283
training, 614-615
site planning for upgrade/migration initiative, 379-380
sites, 52, 137-138
auditing, 291
community sites, features, 586-587
deleting, 291
device channels, 70-71
governance, 72-73, 287
local sites, 72
multilingual sites, 538-541
provisioning, 289-290
training sites, 619-620
SkyDrive Pro, 84
SLAs (service level agreements), 61
backup and restore SLAs, 578
Snippet Gallery, 550-551
Snowden, Edward, 212
SOAP service connections, 254-255
Social Collaboration web parts, 195
social computing, 13, 87-99
capabilities, 585-586
communities, 88
best replies, 90
closed communities, 590
communities for social interaction, 589
communities of interest, 589
communities of practice, 589
communities of purpose, 589
community owners, 593-594
gifted badges, 90
moderator, 89
moderators, 594-595

How can we make this index more useful? Email us at indexes@samspublishing.com
open communities, 590
operational community, 99
power user/super user community, 98-99
private communities, 589
promoting user interaction, 591-593
reputation, 89
visitors, 594
Community Portal, 87-90, 590
Community Sites, 87, 89-90
features, 586-587
Community web parts, 177
Enable Reporting of Offensive Content option, 587-589
governance, 302-303
KM, 87
microblogging, 22
My Sites, 22, 90-92, 595-602
acceptable usage limits, 596-598
expertise search, 91-92
main functional areas, 598-599
people search, 91-92
policies, 597-598
underlying system architecture, 598-602
SharePoint Server 2013 capabilities, 22-23
Yammer, 602-603
software recommendations for on-premises deployment, 219-227
development environment configuration, 220
production environment configuration, 221-222
QA environment configuration, 220
Spataro, Jared, 197
SQL
creating custom commands, 251-254
SSIS, 254
XML data connections, 257-259
SQL Server 2012
administration best practices, 575-577
configuring, 417
maintenance, 576-577
scalability, 228-229
SQL Server 2014, administration best practices, 575-577
SSBI (self-service business intelligence), 239-240
SSIS (SQL Server Integration Services), 254
SSOs (SharePoint Services Operations) teams, 73
SST (SharePoint Services Team), 73
stakeholders, identifying for Communications Management Plan, 33
standard view, 164
State Service, 13
storage, 201
international law, implications of, 213-216
linked data sources, 259-266
shredded storage, 63
structuring taxonomy, 130-131
submission process for apps, 436-438
subsites, 52
successful training, ensuring, 606-607
super users, training, 613-614
supported device inventory, initiating, 71
surveys, creating, 168-169
system administrators, 74
system architecture, 218-227
aligning with roadmap, 363-367
minimum server requirements for SharePoint 2013 deployment, 218-219
System Center 2012, 581-582
System State backups, 639-640
T
tagging, 598
Tahoe, xv, 1
task feature (My Sites), 599
tasks (administration), 559-561
Application Management, 561-562
search administration, 564-565
security administration, 562
taxonomy, 327
  structuring, 130-131
Team Foundation Server, 479-480
team members
  community core team members, 94-97
  farm administrators, 72-73
  granular operational roles, 76
  high-level operational roles, 75
  operations team, 279-281
  reference materials, providing, 9
  SSO teams, 73
  SST, 73
TechNet website, 106
technical architecture design process, 201-202
technical components of IA, 131-132
technology updates, Workflow Manager, 12
templates
  Community Portal, 89-90
  community site template, 591
  display templates, 520-521
  list templates, creating, 145-147
  lists, creating, 139-141
tenants, 104
term set tagging, 535
term store, 327, 335-340
Term Store Management tool, 335
testing
  data sources, 264-266
  UAT, 423
themes (SharePoint 2013), 549-550
thumbnail preview (search), 523
timer jobs, 555
top-down implementation approach, 5
topologies, 223-227
  virtual topology (sample scenario), 420-421
tracking deployed infrastructure elements, 367-370
training, 605-606
  business cases, 618-619
  change management integration, 615-616
  developing tailored curriculum, 609-610
  driving user adoption, 616-618
  empowering end users, 609
  ensuring success, 606-607
  free training resources, 620-622
  goals of, 608-609
  ROI, measuring, 616
topics
  for administrators, 610-611
  for developers, 612-613
  for power users, 613-614
  for site owners, 614-615
training sites, 619-620
  types of, 607-608
  use cases, 609
translation services, 541
triggered events, receiving, 498-499
troubleshooting migrations and upgrades, 405-406

U

UAT (user acceptance testing), 423
UI (user interface)
  customizing
    using Design Manager, 548-549
    using Visual Studio, 548
governance, 317-319
underlying system architecture of My Sites, 598-602
  Distributed Cache service, 600
  User Profile service application, 600-602
unintended downtime procedures, 310-311

How can we make this index more useful? Email us at indexes@samspublishing.com
upgrading, 26-27
  best practices, 361-363
  content databases, 392-393
  service application databases, 394-397
SharePoint 2007 to SharePoint 2013, 381-386
SharePoint 2010 to SharePoint 2013, 386-391
  site collections, 399-400
  site planning, 379-380
  strategy overview, 380-381
  troubleshooting procedures, 405-406
uptime and performance standards, 307-311
  scheduled outages, 308, 310
  unintended downtime procedures, 310-311
URLs
  architecting, 137
  Friendly URLs, 538
U.S. Department of Defense 5015.2 standard, 326
use cases, including in training, 609
user adoption, increasing, 616-618
user authentication, 13
user base, 68-69
  device channels, 70-71
  identifying, 80-81
  locations, mapping, 69
  reviewing, 373-374
  SharePoint access, 69
user experience, 69
User Profile service application, 306-307, 600-602
user requirement metrics, 43-44
username and password connection method, 247-249
Users IA, 124-125, 130

V
  Variations feature, 541
  verifying custom designs, 404-405
  versioning, 350-351
  video, 620-622
    capabilities of SharePoint Server 2013, 23
    WCM, 531-532
  viewing RSS feeds, 165
  views
    creating, 160-162
    datasheet view, 165
    deleting, 162-163
    standard view, 164
  Views settings (lists), 350
  virtual topology (sample scenario), 422-423
  viruses, Office 365 security, 114
  Visio 2013, 491-492
  Visio Graphics Service, 13
  Visio Services, 244
  visitors (communities), 594
  Visual Studio, 463-472, 493-495
    CodeLens, 466-467
    Performance and Diagnostics Hub, 468-470
    security, 470-472
    Team Foundation Server, 479-480
    UI customization, 548
  Visual Studio Online, 473

W
  WBS (work breakdown structure), 44
  WCM (Web Content Management), 23-24, 524-538
    category pages, 535-536
cross-site publishing, 532-536

catalog configuration, 535

content types, 534-535

term set tagging, 535
custom error/404 pages, 526-530

Friendly URLs, 538

image renditions, 531-532

managed navigation, 536-538

Product Catalog, 536

SEO optimization tools, 530-531

video improvements, 531-532

web applications, 134-136

App Catalog, configuring, 111

web content management, 13

Web Front End Tier installation, 416

Web layer, 61

web parts, 56-57, 171

Blog web parts, 171-173

Business Data web parts, 173-177

Community web parts, 177-179

Content Rollup web parts, 180-190

Document Sets web parts, 191

Filters web parts, 191-192

Forms web parts, 192

Media and Content web parts, 192-194

Search web parts, 194

Search-Driven Content web parts, 195

Social Collaboration web parts, 195

web services

REST service connections, 256-257

SOAP service connections, 254-255

web-based training, 607

websites

AWS, 211

public websites, 85

TechNet, 106

Windows Azure, 108

Windows Azure, 209-211

CDN, 210

website, 108

Windows PowerShell, 481, 557

administration, 579-583

cmdlets, 372-373, 401-404

Command Builder, 579

resources, 580-581

Word Automation Services, 13

Workflow Manager, 12, 61, 483

configuring, 486-489

custom actions, 485-486

features, 485

Workflow Settings (lists and libraries), 157

workflows, 13, 481-495

authoring tools, 489-495

SharePoint Designer 2013, 489-491

Visio 2013, 491-492

Visual Studio, 493-495

governance, 299-301

WSDL (Web Service Description Language), 254

WSFC (Windows Server Failover Clustering), 229

WSRP (Web Services for Remote Portals), 190

X

XML, data connections, 257-259

XML Viewer web part, 190

xVelocity engine, 242-243

Y-Z

Yammer, 23, 84-86, 602-603

zones, 136