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ESSENTIAL SHAREPOINT® 2013

PRACTICAL GUIDANCE FOR
MEANINGFUL BUSINESS RESULTS

**SCOTT JAMISON
SUSAN HANLEY
CHRIS BORTLIK**

Forewords by **JEFF TEPER
and JARED SPATARO**

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ESSENTIAL SHAREPOINT® 2013

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PRACTICAL GUIDANCE FOR
MEANINGFUL BUSINESS RESULTS

Scott Jamison
Susan Hanley
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To my lovely wife, Sung, who supported me tremendously during the writing of this book, and to my team at Jornata—the smartest and hardest-working bunch of folks I’ve ever worked with.

—Scott

For my family, whose support and dedication and willingness to eat takeout made it possible for me to write, and for the incredible SharePoint community, from whom I have learned so much and who inspire me to pay it forward.

—Sue

To my wife, Marisa, our four daughters, and our parents: thank you for all of your support and encouragement during the past 18 months. My contributions to this book would not have been possible without you and the sacrifices you have all made on my behalf. Love you all!

—Chris

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CONTENTS

Foreword by Jeff Teperxxi

Foreword by Jared Spataroxxiii

Acknowledgments. xxv

About the Authors. xxvii

Chapter 1 Your Reading Journey 1

What Is This Book About?2

Reader’s Guide2

What You Will Learn from This Book4

Who Should Read This Book5

How This Book Is Organized5

What’s New in SharePoint 2013?6

Key Points7

Thank You7

PART I PLANNING 9

Chapter 2 Planning Your Solution Strategy. 11

SharePoint: What Is It?12

Is It an Application, a Platform, or a Framework?14

What’s New in SharePoint 2013?15

SharePoint Strategy Roadmap18

 What Is the Business Objective?20

 Who Are the Stakeholders?22

 Which Capabilities Are Relevant?25

Key Points29

Chapter 3 Introducing the SharePoint 2013 Platform 31

Microsoft’s Collaboration Evolution.33

 Exchange as a Collaboration Platform33

 Office Server Extensions and SharePoint

 Team Services.34

 SharePoint Portal Server 2001.34

 Windows SharePoint Services 2.035

 SharePoint Portal Server 2003.35

 Windows SharePoint Services 3.035

 Microsoft Office SharePoint Server 200736

 SharePoint Foundation 2010.36

 Microsoft SharePoint Server 201036

Current Versions of SharePoint Products and Technologies.36

 SharePoint Foundation 2013.37

 Microsoft SharePoint Server 201337

 SharePoint Server 2013: The Details37

Microsoft SharePoint Server 2013 and Office 201338

 Operating System Services: Windows Server39

 Database Services: Microsoft SQL Server39

 Workflow Services: Windows Workflow Foundation.39

 Web Page Services: ASP.NET39

 Collaboration Services40

 Portal40

 Enterprise Content Management40

 Search40

 Social Computing (Community)41

 Business Intelligence41

 Composite Applications41

What’s New in SharePoint 2013?42

Comparing SharePoint Versions43

SharePoint: The File Share Killer?50

SharePoint: The Access and Excel Killer?51

 Walkthrough52

Key Points58

Chapter 4 Planning for Business Governance 61

What’s New in SharePoint 2013?65

Why Is Governance Planning Important?67

When Should You Start Thinking about Governance?	68
What Is in a Governance Plan?	69
How Do You Create the Governance Plan?	71
Think about Governance during Design	71
Identify a Small but Inclusive Team	72
Have a Clear Vision	73
Develop Guiding Principles	74
Think about the Deployment Model	78
Plan and Schedule the Governance Conversations	80
Talk about Social	91
Define Roles and Responsibilities	92
Define Policies and Guidelines	97
Determine Your Delivery Model	98
Socialize, Promote, and Verify	99
Key Points	100

Chapter 5 Planning for Operational Governance 103

What's New in SharePoint 2013?	104
Planning for Operational Governance	105
Choose a Deployment Model (or It Will Choose You)	105
Correct Health Analyzer Issues	106
Monitor Network Connectivity	106
Manage Capacity and Disk Space Effectively	107
Manage Application Pools Effectively	107
Manage Accounts and Passwords Effectively	107
Manage Databases Effectively	108
Proactively Monitor the Health of Your SharePoint Environment	108
Maintaining Operational Governance	109
Planning for Application Governance	110
Account for the Three Categories of SharePoint Solutions	111
Choose a Customization Policy (or It Will Choose You)	111
Develop Governance Strategies for the New SharePoint Apps Model	113
Maintaining Application Governance	114
Establish Development and Test Environments	116
Key Points	116

Chapter 6 Planning Your Information Architecture 119

Why Is Information Architecture Important?	122
Understanding the Role of the Information Architect	122
What's New in SharePoint 2013?	124
Planning Your Information Architecture Strategy—Site	
Collections and Sub-sites.	128
Planning Your Information Architecture Strategy—Gathering	
the Right Information	131
Creating an Effective Site Architecture	134
Site Architecture Design Techniques	135
Site Architecture Best Practices.	137
Implementing Your Site Architecture	143
Managed Navigation.	144
Page Architecture.	145
Understanding Metadata Architecture.	154
Explaining Metadata	154
Basic Metadata Concepts for SharePoint.	161
Content Types	163
Columns	167
Managed Metadata	174
Metadata and Search.	181
Maintaining Your Information Architecture.	182
Key Points	184

Chapter 7 Planning Your Adoption Strategy. 187

What's New in SharePoint 2013?	188
Why Is Adoption of New Solutions So Hard?	192
Design a Solution That Delights	194
Provide Opportunities for Users to Give Feedback	195
Provide Contextual Help and Tips	195
Target Content Where It Makes Sense	196
Feature People and Faces	196
Provide Guidance and Use Cases for New Capabilities—but	
in the Context of How People Already Do Their Jobs	197
Create Different Views for Contributors and Consumers	
of Information.	197
Pay Attention to Search.	198
Create Delightful Content	199

Be Mindful of Feature Abuse: Just Because You Can, Doesn't Mean You Should	199
"Prime the Pump" by Predefining Keywords and Terms That Users Are Likely to Use in Their Profiles	200
Eliminate "Sharp Edges" by Carefully Managing User Permissions	200
Plan Your Deployment to Optimize Adoption Success	201
Deployment Strategies for Intranets	201
Deployment Strategies for Social Features	203
Deployment Strategies for Collaboration Solutions (Team Sites)	205
Plan Effective Training	208
Audience	211
Timing	212
Approach	215
Carefully Consider Incentives and Rewards	218
Try It, You'll Like It	218
Make the Launch Fun	218
Function Follows Food	219
Consider Game Dynamics	219
Design and Implement Persistent Communications	221
Key Points	225

Chapter 8 Developing a Value Measurement Strategy 227

What's New in SharePoint 2013?	229
Why Measure?	231
Measurement Process Overview	232
Question 1: What Are the Business Objectives?	233
Get SMART	234
Question 2: How Should the Solution Be Designed to Meet the Objectives?	235
Question 3: Who Are the Metrics Stakeholders?	236
Question 4: What Are the Metrics and How Should We Present Them?	238
SharePoint and Traditional ROI Analysis	238
User Adoption and Measurement	240
Types of Measurement	241
Telling the Measurement Story	249

Question 5: How Can We Collect the Metrics?	254
Usability Testing	254
User Feedback	255
Ongoing User Surveys	255
Question 6: What Do the Metrics Tell Us about How We Need to Change?	256
Key Points	257

Chapter 9 Understanding Architecture Fundamentals 259

What's New In SharePoint 2013?	259
A Functional Overview	260
Operating System	260
Database Services	260
SharePoint Foundation 2013	261
Application Features	262
Service Applications	263
Sites, Site Collections, Site Templates, and Service Applications	264
Sites and Site Collections	265
Site Templates	268
Service Applications	271
Understanding SharePoint Administration	272
Central Administration	272
Tenant Administration	275
Site Collection Administration	275
Site-Level Administration	276
Deployment Options	277
Zero-Server Deployment	278
Single-Server Deployment	279
Two-Server Deployment	279
Three-Server Deployment	279
Four-Server Deployment	280
Five-Server Deployment	280
N-Server Deployment	280
Deployment Examples	280
Key Points	283

Chapter 10 Planning Your Upgrade 285

What's New in SharePoint 2013?	286
In-Place Upgrade Is No Longer Supported.	286
Site Collection Upgrades Can Be Deferred	287
The Default Authentication Mode Has Changed to Claims	287
Master Page Customizations Have Changed	287
Search Is Now a Single, Consolidated Offering	287
SharePoint 2013 Can Host Sites in Both 2010 and 2013 Modes	288
Database-Attach Is Now Available for Some Service Application Databases	288
Planning for Upgrade or Migration	289
Governance Considerations	291
SharePoint-Driven Business Processes	291
Electronic Forms and Document Workflow.	293
Preparing for Social Computing and Yammer	294
Working with SharePoint Content Offline	295
Getting Your Timing Right: When Should You Upgrade?	296
Fixing Your SharePoint Structure.	297
Addressing New Features in SharePoint 2013	301
User Comfort, Skill Level, and Training	301
SharePoint 2010 Customizations	302
Understanding Upgrade and Migration Options	303
In-Place Upgrade	303
Database-Attach Upgrade	303
Selective External Migration	303
What Plan Is Best for You?	305
Upgrade Considerations	305
Additional Considerations	308
Key Points	309

Chapter 11 Taking SharePoint to the Cloud 311

What's New in SharePoint 2013?	312
Cloud Computing Concepts.	313
Private Clouds	313
Infrastructure as a Service	313
Platform as a Service	314
Software as a Service.	314
Key Differences	314

Office 365 Overview	315
Office 365 Licensing Considerations	317
Office 365 Identity Management	317
Office 365 Administration	318
Office 365 User Experience	320
SharePoint Online Functionality	322
Comparing SharePoint Online with SharePoint	
Server 2013	326
Capabilities Missing from SharePoint Online	327
Capabilities Available Only in SharePoint Online	329
Planning for SharePoint Online	334
Getting Started with SharePoint Online	335
Migrating to SharePoint Online	336
Understanding SharePoint Online Governance and	
Operational Implications	337
Other Online Options	338
Key Points	338

Chapter 12 Planning Security 341

What's New In SharePoint 2013?	343
Planning How Users Will Access SharePoint	348
Planning How You Will Share	349
Planning How You Will Share Internally	350
Planning How You Will Share Externally	354
Planning How You Will Secure SharePoint Sites	357
Securable Objects	358
Security Trimming	365
Security Exceptions	365
People (User or Group)	367
Permission Levels	375
Defining and Documenting Your SharePoint	
Security Plan	379
Step 1: List and Describe Where Unique Security Is Required	382
Step 2: List and Describe Who Needs Access	386
Step 3: List and Describe the Permission Levels	386
Step 4: Define and Create the SharePoint Security	
Groups You Need	386
Step 5: Apply Security Permissions	388

Maintaining Your Security Model	389
Checking Permissions for a Site	394
Checking Permissions Assigned to an Individual or Group	395
Displaying Permission Levels for an Object	395
Troubleshooting Security Applications	396
Key Points	398

PART II OPTIMIZING 401

Chapter 13 Managing Enterprise Content 403

Getting Started with ECM	404
What's New in SharePoint 2013?	405
Site Retention Policy	406
Site Mailbox	407
Document Drag and Drop	408
Shredded Storage	408
eDiscovery Center	409
SharePoint Online Feature Parity	410
Back to Basics: Document Management in SharePoint 2013	410
Document Libraries	410
Versioning Settings	411
Item-Level Security	417
Managed Metadata	418
Location-Based Metadata	420
Document Sets	421
Content Organizer	424
Document IDs	425
Workflow	426
Document Information Panel	427
Document Center	428
Records Management	429
Record Declaration	429
In-Place Records Management	430
Auditing	431
Information Management Policies	432
Key Points	435

Chapter 14 Managing Web Content 437

Why SharePoint for Internet-Facing Web Sites?	437
What's New in SharePoint 2013?	438
Additional Features	441
Web Content Management: The Basics.	446
Publishing Sites	448
Branding a SharePoint Site	452
Master Pages.	454
Page Layouts	456
Web Parts	458
Themes	458
Design Manager	459
The Content Editor Experience	463
Managed Navigation	466
Planning for Web Content Management	467
Putting It All Together: A WCM Strategy	469
Key Points	470

Chapter 15 Planning for Social Computing 471

What's New in SharePoint 2013?	472
Getting Started: Planning and Governing Your Social Strategy	479
Clearly Identify the Business Problem	479
Identify Use Cases	483
Be Prepared to Respond to Barriers	492
Define Your Governance Plan	495
Define a "Do-able" Pilot Project	505
Prepare a Launch and Communications Plan	505
Using Social Features to Engage Others and Get Work Done	506
Personal SharePoint 2013 Sites	507
Newsfeed	509
Ratings	513
Social Tagging.	514
Providing a Structure for Collaborating	516
Community Portals, Sites, and Community Features	517
Blogs	524
Wikis	525
Collaborative Authoring within Microsoft Office Documents	527

Understanding the Architecture for SharePoint Social	529
Preparing for Yammer Integration	530
Key Points	532

Chapter 16 Planning Enterprise Search. 535

What's New in SharePoint 2013?	535
Planning for Search	536
Why Does Search Matter?	537
What Are Some Common Enterprise Search Terms and Concepts?	538
How Does Content Management Affect Search?	540
Why Are Configuring and Managing SharePoint 2013 Search Important?	540
What Content Should You Expose Via SharePoint Search and How?	541
Understanding Search from a User Perspective	543
Search Tips and Syntax	547
Additional Search Options	548
SharePoint 2013 Search Administration	549
SharePoint 2013 Search Logical Architecture	550
SharePoint 2013 Search Physical Architecture	551
Capacity Planning Considerations	553
Upgrading to SharePoint 2013 Search	553
Managing SharePoint 2013 Search	554
Adding New Content Sources	554
Adding New Result Sources	555
Working with Query Rules	557
Customizing and Creating SharePoint 2013 Search Refiners	559
Exporting and Importing Search Settings	560
Comparing SharePoint Server 2013 to SharePoint Online Search	560
Search-Driven Applications	564
Video Search Results	564
New Search-Driven Content Web Parts	564
Key Points	565

Chapter 17 Planning Business Solutions 567

What's New in SharePoint 2013?	568
What Is a Composite Application?	570
Using Business Connectivity Services	570
Understanding BCS Components	572
External Content Types	573
Types of BCS Solutions	573
BCS Web Parts	575
Planning for BCS Solutions	576
Location of the Data	577
Access Protocols.	577
Security and Permissions.	577
Presentation Layer	578
Understanding Business Processes	579
Workflow	579
Understanding Workflow Terminology.	582
Templates, Associations, and Instances	584
Using the Standard Workflows.	584
Associating a Workflow with a List.	584
Creating Custom Workflows with SharePoint Designer 2013.	586
Introducing SharePoint Designer (for Workflow Development)	588
Workflow Types	588
Workflow Association Options.	591
Workflow Actions.	591
Designing Workflows with Visio 2013	592
Creating Electronic Forms	596
Introducing InfoPath 2013.	597
InfoPath Forms Services.	597
Key Points	598

Chapter 18 Planning for Business Intelligence 601

What's New in SharePoint 2013?	602
Planning for Business Intelligence	603
Reports	603
Charts.	605
Dashboards.	606
Scorecards	608

Key Performance Indicators	609
Which Presentation Tool Is Right for You?	611
Excel and Excel Services	611
Getting Started with Excel Services	614
How Does Excel Services Work?	614
What's New in Excel Services with SharePoint 2013?	616
Excel BI (Client Features)	616
Excel Services (Server Features)	617
PerformancePoint Services	618
How Does PerformancePoint Services Work?	618
Why Use PerformancePoint Services?	619
Visio Services	620
Why Use Visio Services?	620
Putting It All Together	621
Key Points	623

Chapter 19 Planning for Mobility 625

What's New in SharePoint 2013?	625
Planning for Mobile	626
Mobile User Personas	627
Mobile Device Management	628
Mobile Architectural Considerations	628
Mobile Usage Scenarios	630
The SharePoint Phone and Tablet Experience	631
SharePoint Newsfeed Mobile Applications	633
SkyDrive Pro Mobile Applications	636
Office Mobile and Web Apps	636
Third-Party Mobile Applications	640
Key Points	641

Chapter 20 Integrating Office Applications 643

What's New in Office 2013?	644
Office Client Applications That Connect with	
SharePoint 2013	652
SkyDrive Pro—Taking SharePoint Documents Offline	654
Using SkyDrive Pro	655

- SharePoint Workspace and Groove Features
 - No Longer Available658
- Migrating from SharePoint Workspace to SkyDrive Pro.659
- Documents and Data Caching660
 - Documents.660
 - Data Caching665
 - Recommendations668
- Backstage670
- Other Clients: Office Web Apps and Office
 - Mobile Applications672
 - Office Web Apps.673
 - Office Mobile Applications673
- Key Points674

Appendix Content You Can Reuse677

- Content for Your Governance and Training Plans678
 - Tips for Writing Great Content for SharePoint Sites678
 - Naming Conventions That Improve Findability680
 - Tips for Writing Better Search Queries684
 - Glossary of Social Terminology for SharePoint 2013687
- New or Different User Tasks in SharePoint 2013690
 - Creating and Displaying Views in Lists and Libraries690
 - Managing Copies of Documents (Send To and Manage Copies) . . .693
 - Following Documents, Sites, People, and Topics.697
 - Tips for Creating Posts in the Newsfeed702
- New or Different Site Owner Tasks in SharePoint 2013704
 - Sharing Sites and Documents with People Outside
 - Your Organization704
 - Adding an App to a Site.707
 - Using Promoted Links708

Index713

FOREWORD BY JEFF TEPER

We started the project that became SharePoint with an ambitious goal—bring together collaboration, content management, and portals into a single experience that connects people and teams inside and outside organizations. Amazingly, this same vision continues to drive us today—13 years later! We are fortunate that SharePoint has been one of the fastest-growing server products in Microsoft’s history. Over 80% of the Fortune 500 depend on SharePoint every day to achieve business goals, and we’re excited to deliver new releases of SharePoint to more customers every day through our Office 365 cloud service.

Much of the success of SharePoint has to be attributed to the early adopters who saw the vision way back in the 2001 release. Three of those early adopters were Scott Jamison, Susan Hanley, and Chris Bortlik. They helped shape the product, provided critical feedback, and have worked roughly 30,000 hours each on projects involving SharePoint technology. Combined, they contribute over 40 years of experience with the product and its precursor offerings. More expertise and insight is hard to imagine.

I’m proud to recommend this book—you’ll find yourself reaching for it often; it will likely be one of the biggest factors in achieving your successful adoption of SharePoint.

—Jeff Teper
*Microsoft Corporate Vice President, Office Servers & Services Program
Management
Redmond, Washington
May 2013*

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FOREWORD BY JARED SPATARO

This book will become a mainstay in your SharePoint library and should be one of the first books you read on SharePoint—no matter what your role. You will find yourself reaching for it whenever you need guidance on how to use and—more important—how to plan for the new SharePoint 2013 and Office 365 capabilities. I’m particularly pleased to see the breadth of coverage of the new functionality with the characteristic depth, expertise, and real-world recommendations that have made Scott, Sue, and Chris leaders in the SharePoint community. Anyone with an interest in SharePoint will benefit from the experience and best practices that they’ve developed over the years.

Enjoy the book, and enjoy the product. Tremendous work has gone into both.

—Jared Spataro
Microsoft Senior Director, SharePoint
Redmond, Washington
May 2013

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First, I'd like to thank Pearson for giving me yet another opportunity to write a book, with special thanks to Joan Murray and the rest of the Pearson team for shaping the book into something great.

This book could not have come to fruition without the expertise of Susan Hanley and Chris Bortlik. Their experience and perspective are invaluable to projects like this; every team should be lucky enough to have members like them. Sue and Chris provided useful insight, fantastic writing, and real-world expertise to make this a high-quality book. Their passion is unmatched in the SharePoint and Office 365 space.

As an authoring team, we'd like to thank our early reviewers, including Andy Kawa, Shelley Norton, and Ken Heft, who all provided insightful feedback and went above and beyond the call of duty. And thanks to Donal Conlon, who was instrumental in contributing useful insight and writing to the Web content chapter, and Dan Casey, who provided a fantastic user interface for the same.

Thank you to Corey Hanley, Michele Jones, and Donal Conlon for testing the Office 365 and on-premises security user experience; Tom Byrnes for permission to be quoted in Chapter 4; and the team of Marisa Bortlik, Brian Hanley, Corey Hanley, and Jamie Hanley for tacitly agreeing to serve as our "pretend" users so that we could test various permissions without creating fake names.

Special thanks to my wife, Sung, who, with a smile, always cheered me on, even in the wee hours.

And a final thank-you to the SharePoint community, who have read our previous books, encouraged us to write another one, and without whom none of this would be possible.

—*Scott Jamison*
Boston, MA
May 10, 2013

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ABOUT THE AUTHORS

Scott Jamison is a world-renowned expert on collaborative, search, knowledge management, and ECM solutions and is an experienced leader with more than 20 years directing technology professionals to deliver a wide range of business solutions for customers. Scott is a strong strategic thinker, technologist, and operational manager. He is currently chief architect and CEO of Jornata (www.jornata.com), a premier SharePoint and Office 365 consulting firm.

Prior to joining Jornata, Scott was director of enterprise architecture at Microsoft and has held numerous leadership positions, including a senior management position leading a Microsoft-focused consulting team at Dell. Scott has worked with Microsoft teams at the local, regional, and international levels for years, often participating as an adviser to the Microsoft product teams.

Scott is a recognized thought leader and published author of several books and hundreds of magazine articles, and he has regular speaking engagements at events around the globe.

Scott received his M.A. in computer science from Boston University and did his postgraduate work at Bentley's McCallum Graduate School of Business. He is a Microsoft Certified Solution Master for SharePoint, a Microsoft SharePoint Server MVP, and a Microsoft Certified Architect for SharePoint.

Scott is on Twitter (@sjam) and hosts his blog at www.scottjamison.com. He lives in the Boston area with his wife, Sung.

Susan Hanley is an independent consultant specializing in the design, development, and implementation of successful knowledge management portal solutions based on the SharePoint platform, with a focus on information architecture, user adoption, governance, and business value metrics. She is an internationally recognized expert in knowledge management and has led hundreds of knowledge management, portal strategy, design, and

implementation engagements based on the SharePoint platform and other platforms in the course of a 30-year consulting career.

Immediately prior to establishing Susan Hanley LLC, Sue led the Portals, Collaboration, and Content Management practice for Dell. Sue joined Plural (which was acquired by Dell in 2003) after more than 18 years at American Management Systems. In 1995, she became the first director of knowledge management for AMS, a position she held for five years. Prior to establishing the AMS Knowledge Centers, she was a project executive and business analyst on a variety of information systems deployment engagements.

Sue is a frequent writer and speaker on the topic of implementing successful intranet portal solutions, SharePoint governance and adoption, and measuring the value of knowledge management investments. She has made top-rated presentations at conferences all over the world. Sue is the coauthor of *Essential SharePoint 2007* (Addison-Wesley, 2007) and *Essential SharePoint 2010* (Addison-Wesley, 2011) and is a featured author of four books on knowledge management.

Sue has an M.B.A. in information systems management from the Smith School at the University of Maryland at College Park and a B.A. in psychology from the Johns Hopkins University. Sue writes the Essential SharePoint blog for Network World at www.networkworld.com/community/sharepoint. Her Twitter handle is @susanhanley.

Sue and her husband live in Bethesda, Maryland, and are the proud parents of three young adults.

Chris Bortlik works at Microsoft as an Office 365 technology specialist, working with enterprise customers and partners in the northeast region of the United States. Chris is a SharePoint “Insider” within Microsoft and works closely with the SharePoint product team. He holds the SharePoint 2010 MCITP and MCTS certifications and has been working with SharePoint since 2001.

Chris speaks frequently at Microsoft events (including the SharePoint Conference), SharePoint Saturday, and user group meetings. Chris was a contributing author of the *Essential SharePoint 2010* book (Addison-Wesley, 2011). He also publishes a blog on TechNet at <http://blogs.technet.com/cbortlik>. Outside of blogging, Chris is active on social networking sites, including Twitter, where you can follow him at @cbortlik.

Prior to joining Microsoft in 2008, Chris was a customer for 14 years, working in technical IT architect, development, and management roles—

primarily leading .NET- and SharePoint-related projects for large enterprise customers, including FM Global and John Hancock.

Chris holds a B.S. in computer science from Wentworth Institute of Technology and an M.B.A. from the Bentley University McCallum Graduate School of Business.

Chris lives in Woburn, Massachusetts, with his wife, Marisa, and their four daughters: Kayla, Jessica, Liliana, and Sophia.

Donal Conlon, vice president of delivery at Jornata, is a technology expert with 20 years in the IT industry, working primarily on Microsoft and IBM technologies. The majority of his career has been spent providing collaboration solutions on many platforms, with a focus on Microsoft SharePoint. Donal has held leadership positions at several companies in his career and currently works as a senior consultant at Jornata, delivering solutions on SharePoint and Office 365.

Donal holds an engineering degree from the University of Ireland, Galway.

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PLANNING YOUR SOLUTION STRATEGY

According to Microsoft market research, nearly 80% of Fortune 500 companies are using SharePoint.¹ Adding educational institutions, government agencies, small businesses, and nonprofits means that a significant number of people who go to work have access to SharePoint. But what does that really mean? Are all of these millions of SharePoint users getting value from the investments their organizations have made in SharePoint? It doesn't take too much Internet research to find that the answer to this question is . . . "Not always."

Our goal for this book is to help ensure that your organization can deliver value with your investment in SharePoint. One of the most powerful lessons learned from all of the previous releases of SharePoint is that truly successful SharePoint solutions have a significant user focus: from design to implementation to training to persistent communications. With SharePoint 2013, Microsoft has truly embraced this learning and has even overhauled the way it positions SharePoint. Instead of focusing on what SharePoint *is*, Microsoft is now focusing on what you can *do* with SharePoint. Understanding what you can do with SharePoint and what organizational problems you want to solve or scenarios you want to enable are critical inputs to business success. The most effective way to think strategically about SharePoint is to first make sure you have a good understanding of the business² problem you want to solve. Start with an understanding of what you want to accomplish, and then evaluate the features and capabilities of SharePoint that are available to help achieve the desired outcome.

1. <http://technet.microsoft.com/en-us/magazine/gg981684.aspx>

2. Note that within this book, we will use the terms *business* and *organization* somewhat interchangeably. We know that not all organizations are businesses (e.g., governmental agencies) and that SharePoint is just as appropriate in these environments—but unless we specifically make a point related to a type of organization, when we use the term *business*, we mean any type of organization.

While Microsoft would like to position SharePoint by talking about what you can do with it, we assume there are people reading this book who need to frame their strategy by better understanding what SharePoint is all about. We begin this chapter with a discussion of what SharePoint *is* and clarify its role as an application, a platform, and a framework. The remainder of the chapter provides a roadmap for framing your SharePoint solution strategy.

SharePoint: What Is It?

In the past, a great deal of the confusion around SharePoint has related to the difficulty in defining what it is. SharePoint has been compared to a Swiss Army knife—multiple tools in a single package. The Swiss Army knife typically includes a blade as well as other tools, such as a screwdriver, can opener, nail file, and corkscrew. Similarly, SharePoint has some built-in capabilities such as file libraries, calendars, task lists, Web publishing tools, and blogs that can be used to solve a variety of organizational problems.

Just as the Swiss Army knife is not the right tool for constructing a house or making a complex recipe, SharePoint is not the tool that you will use to solve *all* organizational problems. SharePoint 2013 is positioned as the “new way to work together.”³ This simple definition helps put an appropriate lens on the classes of organizational problems that are appropriate for SharePoint—and on a way to answer the “What is it?” question. As stated earlier, rather than focus on what SharePoint *is*, Microsoft wants to change the question entirely and focus on how you can use SharePoint to *get work done*.

What does that mean? It means that there are *classes* of organizational problems that are well suited to SharePoint’s strengths, and those classes of problems are those that require collaborative work—both directly and indirectly. For example, SharePoint can be used to

- **Share information with your employees on your intranet:** because this is where you collaborate and communicate with your employees. Internally, the information that you share is about both people and content—and SharePoint enables both document-based and conversation-based internal collaboration.

3. <http://sharepoint.microsoft.com/en-us/preview/sharepoint-benefits.aspx>

- **Share information with trusted nonemployees on your extranet:** because this is where you collaborate with your current partners, suppliers, and even customers.
- **Share information with your organization's teams and communities:** because this is how day-to-day work gets done.
- **Share individual documents securely with people on an ad hoc basis:** because this is how to get some control over the myriad document-sharing methods that put your organization at risk.
- **Enable ad hoc and more permanent conversations:** because this is how people develop relationships and learn from one another.
- **Organize the information shared in each of these solution environments:** because this will make it easier to find information consistently.
- **Showcase key business data from operational systems:** because this will enable individual and collaborative decision making.
- **Manage the life cycle of the information in your organization:** because this will ensure that your content is compliant with the business rules and legal requirements of your organization or industry.
- **Discover enterprise information:** because this is how you can ensure that your users can get work done.
- **Share information about your organization on your public-facing Web site:** because this is the site where you collaborate and communicate with your external existing and prospective customers, partners, and suppliers. Of course, not all Web sites today are collaborative, but many of the most interesting and engaging sites have a collaborative component.

SharePoint includes features that make it particularly well suited to deliver information such as documents, videos, blogs, discussions, expertise, and even business data. But the overall goal for SharePoint solutions is to provide an environment in which this information can be used to solve organizational problems.

Not to leave the information technology (IT) community out of the conversation, SharePoint also includes capabilities for developers to use to *build* these applications and for IT professionals to use to *manage* the risk, cost, and time associated with the solutions that are enabled with SharePoint.

Is It an Application, a Platform, or a Framework?

In the world of information technology software, we often refer to the tools that we use as applications, platforms, or even frameworks:

- An *application* is computer software designed to help a user perform specific tasks.
- A computing *platform* includes a hardware architecture and a software framework that allow application software to run—for example, the operating system and programming languages.
- A software *framework* helps facilitate software development by providing generic capabilities that can be changed or configured to create a specific software application.

Are you confused yet? Well, so is the entire SharePoint community! For a long time, there has been a great deal of debate within the SharePoint community about whether SharePoint is an application or a platform or a framework. SharePoint has a little bit of functionality that could allow you to argue that it is all of these. In the past, SharePoint was positioned as a platform marketed to IT for businesses to build on to create the “center of gravity” for collaboration. Key elements of functionality were referred to as “workloads” that could be brought together to build solutions. The “workload” terminology never really caught on outside of Microsoft and the SharePoint consulting community—and has added to the confusion about “What is it?”

One of the reasons that the debate has raged for so long has to do with how easy it is to customize and configure SharePoint to do pretty much anything you want—that is, to use it as a framework. Unfortunately, by making things so easy to customize—by abstracting the details of the software code required to configure SharePoint enough so that business users can create complex custom solutions—Microsoft unintentionally introduced risk into many organizations because some of those user-created software solutions literally “brought the house down.”

Another reason for the debate has had to do with a general dissatisfaction with the SharePoint “look and feel.” There is probably no consultant or internal IT person responsible for SharePoint who has not heard a business sponsor say, “We’ll use it, but make it not look like SharePoint.” No business sponsors that we know of have ever told their IT folks or consultants, “We’ll use Microsoft Word, but don’t make it look like Word.”

Applying a custom look and feel to Microsoft Word would be a colossal waste of corporate money—and it's just wrong for so many reasons. But pretty much everyone wants to brand SharePoint. When you can completely change the look and feel of a software product, it doesn't "feel" like an application, especially because when you go from one company to another, you might not be able to easily tell whether the Web site you are using is based on SharePoint or not—until you look under the covers.

With SharePoint 2013, Microsoft appears to want to stop the debating and define SharePoint clearly as an application—but not necessarily as an application with a single purpose. Unlike the Microsoft Word application, which has basically one functional purpose—to create documents—Microsoft considers SharePoint a multipurpose application—one that can be used to create other, highly "personal" applications, one that can be used as is to solve some specific collaboration scenarios, and one that can actually be used as a delivery vehicle to expose other applications (apps within the app, if you will). For some business scenarios, such as your public-facing Web site, it makes good business sense to not just configure how you want to organize and manage your content, but to also customize the look and feel of SharePoint to align with your corporate identity and the purpose and intention of your Internet site. SharePoint 2013 makes this much easier than with any prior version by providing capabilities so that any Web designer or developer can design a SharePoint site without having to become a SharePoint expert. Web designers can create beautiful state-of-the-art Web sites using the tools with which they are already familiar—and SharePoint will convert their HTML files to work with SharePoint automatically. For other business scenarios, such as your internal team collaboration sites, it may make more sense to leverage SharePoint much as you leverage Microsoft Word—as an application for which you spend far more time configuring how you will *use* it and less time on completely rebranding the look and feel. Minor cosmetic changes to include corporate colors and logos may be sufficient to support internal branding.

What's New in SharePoint 2013?

Planning a strategy for SharePoint 2013 starts, as it always has, with an understanding of the business problem(s) you are trying to solve. However, while the basic scenarios that SharePoint enables are still fundamentally similar, the features and capabilities of SharePoint 2013 are different

enough that you will need to consider several key new areas when you are planning your strategy:

- Social collaboration
- Cloud computing
- Mobile
- Internet

SharePoint 2013 includes a rich new set of social collaboration capabilities enabling expertise discovery, conversations, and content evaluation that were previously supported only with additional third-party tools. Your users may hear about SharePoint 2013's new Twitter- and Facebook-style activity stream that supports familiar social capabilities like #hashtags, @mentions, following, and "likes." If you had previously considered internal social collaboration features to be of limited value in facilitating key moments of engagement within your organization, you should reevaluate these capabilities. Now would be the time to consider if these new social capabilities, which extend far beyond blogging and simple status updates, fit into your business strategy. For some organizations, these capabilities may be significant in driving an upgrade decision. Another new feature is the ability to introduce "gamification" attributes in SharePoint 2013 discussion lists. This new capability allows users to build "reputation points" toward up to five achievement levels by performing activities such as creating a post, replying to a post, achieving likes or a star rating of 4 or 5 for a post, or having a post marked as the "best reply." These features can be very effective in engaging users in some but not all scenarios, so it is important to think about the specific scenario you are enabling and the culture of the community in which the features will be leveraged.

Note If social is in your future, you will want to pay particular attention to Chapter 7, "Planning Your Adoption Strategy," and Chapter 15, "Planning for Social Computing."

Microsoft has made an even bigger bet on cloud computing with SharePoint 2013, going so far as suggesting that some new capabilities may be available in the online versions of SharePoint prior to the more traditional on-premises versions. (For example, opening up a site collection for easy access by users outside your organization is a feature that is available only in SharePoint Online.) There may be very valid business and

technical reasons why SharePoint in the cloud is not appropriate for your organization, but “cloudy with a chance of SharePoint” is a key theme of this release—and you shouldn’t act as if the cloud doesn’t exist—even if it doesn’t apply to your current strategy.

Note For more information about how using SharePoint in the cloud (SharePoint Online) might fit into your strategy, refer to Chapter 11, “Taking SharePoint to the Cloud,” which covers the pros and cons and capabilities of using SharePoint in a cloud-based environment.

Another key area of enhancements in SharePoint 2013 is support for mobile computing. SharePoint 2013 provides new, optimized experiences for different mobile platforms. For smartphones, SharePoint 2013 offers a simplified view for navigating and accessing document libraries, lists, and Web Parts. SharePoint 2013 also includes the capability to define multiple device channels, which enables developers to render a single SharePoint site in multiple designs based on the user’s device. While users were typically able to access SharePoint sites from mobile devices in previous versions, SharePoint 2013 automatically enhances that experience in some instances and allows developers and designers to explicitly define the user experience for different types of devices to create an even more functional experience for users. The most important strategic consideration for supporting a mobile experience for your SharePoint users, however, is evaluating the specific types of scenarios that your users will want to enable on their mobile devices on a regular basis.

As an example, while users may want to read and review a document occasionally on their smartphones, detailed document reviewing and editing will rarely be a critical scenario for mobile users. On the other hand, one could imagine that looking up a phone number or quickly finding someone with expertise in a specific topic might be a high-priority scenario. For the occasional-use scenario, it may not make sense to design a specific mobile capability. However, for the people-lookup scenario, it might make sense to build a highly focused and targeted mobile application designed to run on a smartphone.

Note For additional information on thinking about mobile solutions and SharePoint 2013, be sure to read Chapter 19, “Planning for Mobility.”

While many organizations developed rich and engaging public-facing Web sites using SharePoint 2010—for example, ConocoPhillips (www.conocophillips.com), Dell Financial Services (<http://dfs.us.dell.com>), and Ferrari (www.ferrari.com)—making the commitment to using SharePoint for externally facing Web sites previously required a very deep knowledge of SharePoint in addition to expertise in Web user interface (UI) development. SharePoint 2013 allows Web designers to leverage familiar Web site tools to design a SharePoint site. It also includes other capabilities that support public Web site development, including

- Features that support capabilities to promote and recommend content that is relevant to and popular with visitors based on their activity
- Significant improvements to search that enable sites to aggregate and present content in new and flexible ways
- Improved capabilities to reuse content in multiple publishing environments with the cross-site publishing feature
- The ability to organize navigation based on managed metadata terms rather than physical location

If you haven't previously considered managing both your internal and external Web sites with the same technology tools, SharePoint 2013 makes that decision much easier. It may be time to think about moving your externally facing Web site to SharePoint 2013 so that you can consolidate around a focused solution set.

Note For more information about using SharePoint 2013 for Internet-facing sites, read Chapter 14, "Managing Web Content."

SharePoint Strategy Roadmap

There are several key questions you need to address as you plan your SharePoint strategy. We discuss the first three steps of the SharePoint strategy roadmap in this chapter and focus on the remaining topics in subsequent chapters of the book. The key questions are illustrated in Figure 2-1.

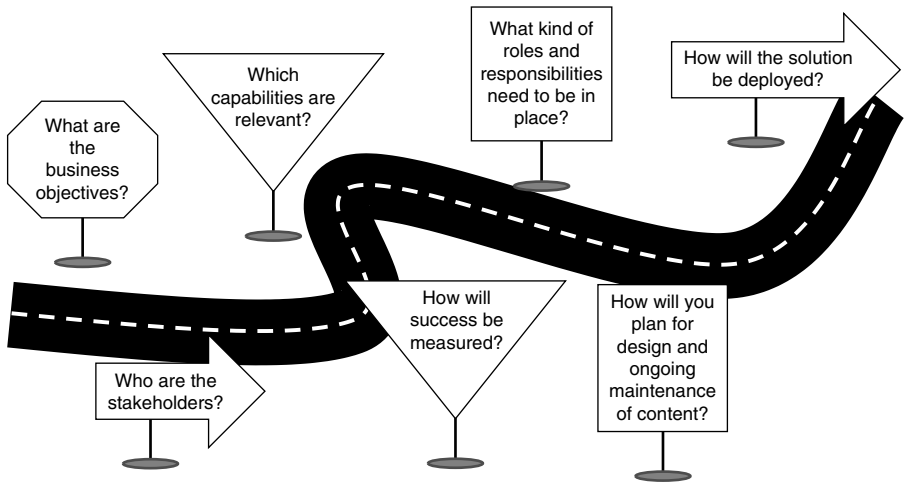


Figure 2-1 A SharePoint strategy roadmap

- What are the key business objectives or scenarios that you want to enable? How can SharePoint address these key business objectives? If the answers to these questions are unclear, the project should not proceed.
- Who are the primary stakeholders for these scenarios? These may include the CIO, the chief knowledge officer (CKO) or the person or team responsible for knowledge management, or business leaders in areas such as corporate communications, marketing, and human resources, among others. The stakeholders may be very different for different types of business problems.
- Which capabilities of SharePoint 2013 are relevant to the business problem?
- How will the organization measure the business success of the SharePoint initiative? In other words, which key business goals does the SharePoint solution address? Remember, technology solutions are not successful just because they are free of software defects. Successful solutions must be designed to have an impact on business objectives. The topic of planning how you will measure success is so important that we have given it a chapter of its own in this book. See Chapter 8, “Developing a Value Measurement Strategy,” for an overview of a practical approach that you can use to measure the

value of the investments that your organization has made and will make in SharePoint.

- What processes are needed to ensure that all of the SharePoint users are aware of and accept their roles and responsibilities with regard to the SharePoint solution? This topic is discussed in Chapter 4, “Planning for Business Governance,” and Chapter 5, “Planning for Operational Governance.” It is important to consider the type of technical resources, infrastructure, and overall IT support you have and what you will need to learn to implement the new technology and migrate your existing environment. You may want to consider getting outside help or at least make sure that your existing staff has adequate training to plan and support the new SharePoint 2013 environment.
- How will you plan for both the design and ongoing maintenance of the content in SharePoint? Accurate and relevant content is the foundation of your SharePoint solution. Your strategy needs to include a plan to ensure that content remains relevant over time. This topic is also discussed in Chapter 4.
- How will you launch and deploy to ensure successful adoption? What types of communications and training do you need to provide for users? How will you ensure that your solution is adopted? Your rollout strategy needs to prepare both users and content for the new SharePoint solution. The strategy needs to include a communications plan to make sure that users are aware of and, ideally, eagerly anticipate the business value of the new SharePoint solution or solution capabilities. In addition, the strategy needs to include a plan for launching the new solution and training users. These topics are discussed in Chapter 7, “Planning Your Adoption Strategy.”

What Is the Business Objective?

In the *Wizard of Oz*, Glinda the Good Witch says to Dorothy, “It’s always best to start at the beginning.” This advice is not just appropriate for starting out on the Yellow Brick Road; it also applies to SharePoint. The first step on the road to SharePoint success is making sure you have a good understanding of the business scenarios that you are trying to enable—and how important those scenarios are to the organization. In successful SharePoint implementations, business and IT stakeholders carefully frame

the SharePoint project with clearly defined business goals and objectives that are used to guide the decisions that need to be made during the solution design and ongoing operations. More often than not, the key issues influencing the success of a SharePoint solution are organizational and political. Technical issues rarely derail a SharePoint project. As a result, it's particularly important to document why you are building the SharePoint solution in the first place and to ensure that all key stakeholders agree on the objectives.

Every organization has a strategic plan, though some may be more formal than others. It is often extremely helpful to start your SharePoint planning effort with that documented plan because it can help guide your understanding of the relative importance and business value of the scenarios you can (or should) enable with SharePoint. Earlier in this chapter, we discussed the types of business scenarios for which SharePoint is particularly well suited. The relative importance of these business scenarios is different for different types of organizations and organizations of different sizes. It's worth reviewing your organizational strategic plan because this document will provide the clues you need to understand how to position SharePoint strategically in your organization. Why is this important? Because your goal should be to tie the specific objectives for your SharePoint solution to one or more strategic objectives of the organization. Doing so enables you to ensure that your SharePoint project stays front and center in the organizational agenda and to minimize the risk of becoming number 11 on the organizational top-10 priority list. In other words, you want to avoid becoming the project that gets done "in our spare time," pretty much ensuring that the SharePoint project is not a career-making experience for the people working on it.

In addition to the business objectives and scenarios described earlier, there are other common business drivers that encourage organizations to consider SharePoint. Some or all of the following business objectives will probably resonate for your organization. If you can tie these specific objectives to your overall enterprise strategic objectives, you will be in even better shape to ensure that the right amount of attention and focus is directed to your SharePoint project. Sample business objectives include:

- Provide an organized "one-stop shop" for information by making it easier to find authoritative information.
- Provide easier and timelier access to the information employees need to get their work done.

- Improve the ability to share and exchange information across the organization by providing an electronic publishing method that is easy for users to leverage and assures “one version of the truth” for shared documents.
- Improve the ability to find and leverage expertise.
- Improve organizational learning by providing easier access to critical information and organizational memory.
- Improve the “time to talent,” the speed with which new employees become productive.
- Reduce training costs for enterprise applications by providing a consistent user interface to all applications.
- Improve time to market for proposals and contracts by providing easier access to reusable assets.
- Improve decision making by providing an easy-to-use interface from which to review key business metrics.
- Improve project execution by providing an opportunity for work teams to collaborate and to electronically store project information in fully searchable, organized team sites.
- Maximize the reuse of best practices across the enterprise, enabling the organization to replicate successful business practices in all geographies.
- Provide more effective mechanisms to move work between business entities, such as self-service for customers or partners or enabling outsourcing by providing business partners with access to a collaboration environment or business data on an extranet.
- Improve customer service by providing direct access to the information customers need.

Note See Table 2-1 for examples of how SharePoint features can help address these business objectives.

Who Are the Stakeholders?

Who are your key stakeholders? As in most cases, the answer is that it depends on the specific business scenario you are enabling. Clearly, the executive for the sponsoring organization is an important key stakeholder. This individual will likely be your project sponsor. For intranet solutions, this is often the director of marketing or internal communications but can

and should also include the executive in charge of knowledge management or quality or human resources. Including stakeholders from business groups outside communications will ensure that your intranet is not just about communications but will also effectively enable your collaboration strategy. For extranet portals, the stakeholders may also include key executives from an operational business unit. When you look to identify stakeholders, recognize that there are different types of stakeholders, all of whom should be included in the development of your solution strategy and ongoing governance model. Business executives should be included in the stakeholder community to provide overall direction and validate that the SharePoint deployment is critical to achieving business objectives. IT managers should be included to ensure that the solution meets IT standards for operations and development. Content providers should be included since great content is the key to valuable solutions of pretty much any type. Users should be included to ensure that the SharePoint solution rollout addresses more than just executive objectives and concerns.

Remember that while the executive sponsor may have the “grand vision” for the solution, the solution’s users are critical to its ultimate success. Users need the solution to be easy to use in the context of their work and need to be able to see “What’s in it for me?” For example, the key stakeholders for an intranet project to support a university should include administrators, faculty, and students. If the solution is externally facing, the “customer” community might be represented by examining the perspective of applicants or prospective students.

Keep in mind that if you choose to enable the social computing functionality available in SharePoint 2013, everyone in the organization, and even potential guest users in some scenarios, is both a producer and a consumer of information. Social features provide a rich and engaging opportunity to improve the ability to break down organizational silos and enable expertise location scenarios. However, enabling these capabilities requires a greater understanding of your organizational culture and user stakeholder community than if you are not leveraging these capabilities.

As you think about your key stakeholders, it’s important to acknowledge the partnership that IT and the business will need to have in order to be successful with SharePoint. Because the success of SharePoint solutions is critically dependent on business user adoption, it is imperative that business stakeholders take an active role in solution design and governance planning and that IT staff fully understand how the solutions they build address business needs. A successful

implementation often includes both process reengineering and culture change. A well-coordinated business and technical approach is essential to adoption.

In many organizations, the IT group is separated both physically and “emotionally” from the organization it is designed to serve. SharePoint projects provide an important opportunity for IT and business owners to collaborate.

One way to ensure that your SharePoint project will fail is to have IT build the solution without engaging a broad spectrum of potential users. In the past, technology projects were primarily driven by IT organizations. Many of these early solutions failed to gain user acceptance because they were essentially IT-only projects—driven by IT with limited user input. Today, more and more SharePoint projects are driven (and funded) by business users, though they are clearly dependent on IT. Many intranet projects are sponsored by the corporate department responsible for internal communications (though this may have the not-so-positive impact of the intranet being too communications-focused and less about enabling getting work done). One or more business units may fund and drive an external or customer portal or Web site initiative. As a result, it is critically important for IT to work with the sponsoring business unit as well as all key stakeholders to ensure that the inevitable trade-off decisions that will be made during solution design and development are made in favor of the business stakeholders as often as possible.

IT managers who fail to take advantage of this opportunity put their projects, and potentially their careers, at risk.

Take Action

Be inclusive rather than exclusive as you identify key stakeholders. It's important to gather as much business user support for your solution as possible.

Be sure to include users as key stakeholders. At the end of the day, these are the people who will help make your solution successful (or not).

In addition to traditional department or business executives, try to include employees who may not have the title but who are influential in your business. These people tend to have broad networks across the enterprise and can help drive your success because many people trust them.

Which Capabilities Are Relevant?

It is critically important to document business objectives at the start of your SharePoint initiative and to keep these objectives top of mind as you design and build your solution. Use the business objectives to guide your decisions about which features should go in each release of the solution and which features might not be relevant for your organization. Ask stakeholders to prioritize their business objectives so that you understand how to make trade-offs between alternative design approaches.

Stakeholders often have a very difficult time articulating requirements for SharePoint solutions, especially solutions that enable new ways of working together such as the capabilities enabled in the new SharePoint 2013/Yammer Newsfeed. This is because it is virtually impossible to envision how the solution will help solve business problems until users see the solution with “real” data or try the solution for a personal scenario. When users do express requirements, they may express them in very specific ways, which could require a significant amount of custom coding. However, if you understand the objectives or outcomes users are trying to achieve, you may be able to accomplish them using out-of-the-box or minimally customized functionality. To accomplish this, you will need SharePoint experts, both business analysts and developers, who know what you can and can’t do easily. You may also need to create a small demo of some specific capabilities or features that you can show your stakeholders as part of the discussion about business scenarios. You really can’t gather user requirements for SharePoint solutions the same way you do for a traditional software development project. Instead, solicit and try to understand business objectives. You can then, as a design team, *derive* requirements based on the business objectives and outcomes, and based

on the feedback you get from providing a demo of the capabilities that are particularly important. It is critical to ensure that you understand the strategic objectives for the organization, the business objectives for SharePoint in general, and the specific business scenarios for the solutions you will enable with SharePoint.

Take Action

Identify three or four main features that will produce the most business impact and implement them exceptionally well.

Articulate, well in advance of launch, the long-term vision associated with your solution and how the first delivery sets the stage.

Set clear and reasonable expectations for business users—encourage them to focus on the business outcomes they want to achieve. In your requirements- (objectives-) gathering meetings, explain how you can accomplish the business outcomes using SharePoint's out-of-the-box capabilities so that you can get a feel for whether this will be acceptable to your users. Use statements such as “This is how we might accomplish what you are asking for in SharePoint 2013.” Your goal is to rapidly deploy a first release of your solution so that your stakeholders can see the solution “in action” with their content. Develop and implement prototypes so that users can get a feel for SharePoint 2013, and alleviate any anxieties they may have about the new ways SharePoint enables work. You will probably find that it is only when users “meet SharePoint” with their own content that they can start to envision additional functionality that will add value to the business.

For each possible business objective, there are numerous SharePoint features you can implement to help enable that objective. Table 2-1 presents some of the features of SharePoint 2013 that you can leverage to explicitly accomplish your business objectives with indications where a feature is either new or significantly enhanced from SharePoint 2010. Use this table with great caution, however. Just because a feature can *help* achieve a business objective

doesn't mean it *will*. People achieve business objectives, not software. While well-designed software solutions can *enable* people to achieve business objectives, simply implementing the features in this table will not guarantee that you will achieve the desired business outcomes.

Table 2-1 Mapping of General Business Objectives to SharePoint 2013 Features

Business Objective	Enabling Feature or Functionality
Provide an organized “one-stop shop” for information by making it easier to find authoritative information.	Search and search results refinement (for people and content) (ENHANCED) Integration with line-of-business systems Metadata Community discussion lists with “best reply” indicators (Where appropriate, the “best reply” helps users quickly filter information. However, the concept of a single “best reply” is not always appropriate in all contexts.) (NEW)
Provide easier and timelier access to the information employees need to get their work done.	Search (ENHANCED) Alerts Activity feeds with likes, follows, @mentions, and #hashtags (NEW) Blogs and wikis Mobile access (ENHANCED)
Improve the ability to share and exchange information across the organization by providing an electronic publishing method that is easy for users to leverage and assures “one version of the truth” for shared documents.	Document versioning Records retention (ENHANCED) Document sets Unique document IDs Default storage for documents attached to newsfeeds and discussions is a document library (rather than a list attachment) (NEW)
Improve the ability to find and leverage expertise.	People and expertise search (ENHANCED) Hashtag search (NEW) Follow people (NEW) Activity feeds with likes, follows, @mentions, and #hashtags (NEW) Community sites (NEW) Blogs and wikis

(continues)

Table 2-1 Mapping of General Business Objectives to SharePoint 2013 Features (*continued*)

Business Objective	Enabling Feature or Functionality
Improve organizational learning by providing easier access to critical information and organizational memory.	Search and search results refinement (ENHANCED) People and expertise search (ENHANCED) Follow people, documents, tags, and sites (NEW) Document repositories with metadata (both user and organizationally defined) Community sites (NEW) Blogs and wikis
Improve the “time to talent,” the speed with which new employees become productive.	Search and search results refinement (ENHANCED) People and expertise search (ENHANCED) Follow people, documents, tags (NEW) Activity feeds with likes, follows, @mentions, and #hashtags (NEW) Community sites (NEW)
Reduce training costs for enterprise applications by providing a consistent user interface to all applications.	Search and search results refinement (ENHANCED) Integration with line-of-business systems Site templates Third-party solutions designed for integrating with SharePoint
Improve time to market for proposals and contracts by providing easier access to reusable assets.	Search and search results refinement (ENHANCED) People and expertise search (ENHANCED) Document repositories with metadata (both user- and organizationally defined)
Improve decision making by providing an easy-to-use interface from which to review key business metrics.	Dashboards with Excel Services Integration with line-of-business systems
Improve project execution by providing an opportunity for work teams to collaborate and to electronically store project information in fully searchable, organized team sites.	Team sites with enhanced project task tracking and monitoring features (ENHANCED) Document repositories with metadata (both user- and organizationally defined) Announcements and events (team calendar) Simple security model that users can administer

Business Objective	Enabling Feature or Functionality
Maximize the reuse of best practices across the enterprise, enabling the organization to replicate successful business practices in all geographies.	Site templates Search and search results refinement (ENHANCED) People and expertise search (ENHANCED) Follow people, documents, tags (NEW) Activity feeds with likes, follows, @mentions, and #hashtags (NEW) Document repositories with metadata (both user- and organizationally defined) Community sites (NEW) Blogs and wikis
Provide more effective mechanisms to move work between business entities, such as self-service for customers or partners or enabling outsourcing by providing business partners with access to a collaboration environment or business data on an extranet.	Extranets Ability to easily and securely share an individual document with an authorized external (or internal) user (NEW) Security model that business users can administer (ENHANCED)
Improve customer service by providing direct access to the information customers need.	Extranets Mobile access (ENHANCED) Public-facing Web sites managed with state-of-the-art Web content management features (ENHANCED) Search and search results refinement (ENHANCED) Integration with line-of-business systems Simple security model that users can administer

Key Points

Getting started with SharePoint 2013 means thinking about your strategy—not just your SharePoint strategy, but also your business strategy and the business outcomes that you want to enable with the SharePoint solutions you build. Remember:

- If you want to build a successful SharePoint 2013 solution, you need a carefully defined strategy focused on business outcomes and features that enable business outcomes.

- Identify and engage key stakeholders. Make sure they are involved as core members of your project team.
- Ensure that the SharePoint solutions you develop have a clear connection to business goals and objectives. Create a matrix to map your solution elements to your business strategy to ensure that you are focused on the right things.
- High-impact collaboration involves culture changes blended with the right technology. It is a small part technology and a large part business process change.
- Software does not achieve business objectives—people do. Just because a feature can help achieve a business objective doesn't mean it will.
- Not all content needs to be stored in SharePoint, but all business-critical data should be accessible through your portal.
- SharePoint 2013 provides a single application from which you can create modern, user-friendly solutions for many work scenarios, including intranet, extranet, collaboration, and Internet solutions. This allows you to engage not only employees, but also clients, partners, and prospects—the entire extended enterprise. A well-thought-out SharePoint strategy can make a significant contribution to enabling critical organizational results.

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INDEX

A

“About” sections

- new personal features in SharePoint 2013, 474
- in site architecture, 138–139

Access control

- default access groups, 346
- enterprise policies in governance plan, 86
- listing access requirements, 386
- operational implications of SharePoint Online, 337
- planning user access, 348–349
- protocols for connecting to external data, 577
- troubleshooting security applications, 397–398

Access (Microsoft)

- Access Services, 568–569
- enterprise edition features, 46
- features provided by shared service applications, 264
- new database features in Office 2013, 650
- recommendations for working with SharePoint documents and data, 670
- SharePoint 2013 and, 51–52
- working with SharePoint data, 652
- working with SharePoint data offline, 668–669

Access Services, 568–569

Account management, 107–108

Active Directory (AD) Groups, 367–368

Activities

- auditing, 431–432
- in glossary of social computing terms, 687
- grouping in site architecture, 139–140

AD (Active Directory) Groups, 367–368

Add-ons, upgrade issues and, 302

Administration

- Admin sites, 82
- central administration, 272–274
- of external sharing, 355

in Office 365, 318–320

site collection administration, 275–277

of sites, 142

tenant administration, 274–275

tiers, 272

Administration database, in physical search architecture, 551

Administration, of searches

- adding new content sources, 554–555
- adding new result sources, 555–557
- comparing SharePoint Online with SharePoint Server 2013, 560–563
- customizing and creating search refiners, 559–560
- exporting/importing search settings, 560
- logical search architecture, 550–551
- managing searches, 554
- overview of, 549–550
- physical search architecture, 551–552
- query rules in, 557–558
- upgrading to SharePoint 2013 search from SharePoint 2010, 553–554

Administrators

- enabling/disabling external sharing, 355
- role and responsibilities of, 93
- SharePoint Designer and, 587
- as special SharePoint groups, 373

Adoption

- avoiding feature abuse, 199–200
- basing training needs on roles, 211–212
- business value and, 187
- content that delights and, 199
- contextual help and tips in, 195–196
- creating differing views for contributors and consumers, 197
- deployment strategies for collaboration solutions, 205–208

- deployment strategies for intranets, 201–203
- deployment strategies for social features, 203–205
- designing and implementing persistent communications, 221–224
- difficulties in, 192–193
- guidance and use case examples for new capabilities, 197
- human faces and stories and, 196–197
- incentives and rewards in, 218–221
- information architecture role in solution adoption, 122
- key point review, 225–226
- key topics in book, 3
- not sufficient as sole measure of success, 228, 240
- overview of, 187–188
- planning training program, 208–211
- predefining keywords and terms for user profiles, 200
- search effectiveness and, 198–199
- solutions that delight, 194
- tailoring training to how jobs are performed, 215–217
- targeting content to specific audiences, 196
- timing training programs, 212–215
- upgrades and, 292
- usability testing improving, 134
- user feedback and, 195
- user permissions and, 200–201
- what's new, 188–192

Alerts

- newsfeeds vs., 688–690
- reports and, 605
- search alerts, 548

Amazon, online hosting options, 338

Analytics

- in Excel Services, 618
- in logical search architecture, 551
- in PerformancePoint Services, 619

AND operator. *see* Logical (Boolean) operators (AND/OR/NOT)

Android devices

- Office applications and, 639
- SharePoint support for, 625–626

Application development team, 94

Applications

- building for SharePoint, 337
- capabilities not available in SharePoint Online, 327–328
- capabilities provided by SharePoint Foundation 2013, 262
- collaborative application example, 52–58
- composite. *see* Composite applications
- configuring searches as, 128
- feature architecture, 262–263
- maintaining governance of, 114–116
- managing application pools, 107
- Office mobile and Web apps and, 636–640
- planning governance of, 110–114
- search-driven, 564–565
- server roles in SharePoint, 278
- SharePoint as application, platform, or framework, 13–15
- SharePoint Newsfeed application, 633–635
- SkyDrive Pro mobile applications, 636
- third-party mobile applications, 640
- troubleshooting security applications, 396–398

Approve permissions, default permissions for publishing sites, 377

Apps

- adding to sites, 707
- Apps model, 104–105, 113–114
- managing with SharePoint Online, 325
- Web apps, 636–640

Architect, role and responsibilities of, 94

Architecture

- administrative tiers, 272
- application features and, 262–263
- central administration, 272–274
- common to portals, sites, and pages, 264–265
- database services, 260
- deployment examples, 281–283
- deployment options, 278–281
- information architecture. *see* IA (Information architecture)
- key point review, 283
- key topics in book, 3
- logical searches, 550–551
- metadata architecture. *see* Metadata architecture

- mobile computing, 628–630
- OSs (operating systems), 260
- overview of, 259
- physical searches, 551–552
- service applications, 263–264, 271–272
- SharePoint Foundation 2013, 261–262
- site collection administration, 275–277
- site-level administration, 277–278
- site templates, 268–271
- sites and site collections, 265–268
- social computing, 529–530
- tenant administration, 274–275
- what's new in SharePoint 2013, 259–260
- “Ask the Experts” discussion forums, 215
- ASP.NET, 39–40
- Associations
 - binding templates to lists or libraries, 584–586
 - workflow options, 591
- Audience
 - addressing training needs to, 211–212
 - features in standard and enterprise editions, 45
 - targeting content to, 196
 - targeting specific, 622–623
- Auditing, regulatory compliance and, 431–432
- Authentication
 - accessing sites and, 397
 - BCS authentication models, 578
 - mobile computing and, 629
 - options, 287, 348
 - sharing with/without, 347
- Authorization. *see also* Access control, 397
- AvePoint
 - migration tool, 286, 336, 490
 - security analysis tools, 364
 - security management tool, 342
- Axceler
 - migration tools, 286, 336
 - security analysis tools, 364
 - security management tool, 342
- Azure
 - online hosting options, 338
 - SharePoint Online integration with, 313
 - SQL Azure, 313, 577–578
 - Windows Azure, 313, 315, 531

B

- Backstage, 671–672
- Balanced scorecards, 250–254
- Balsamiq templates (from Fluidicidty), for page layout, 152
- Bar graphs, 605
- Baselines, in measurement strategy, 249–250
- BCS (Business Connectivity Services)
 - access protocols, 577–578
 - comparing SharePoint versions, 574
 - components, 572–573
 - data location, 577
 - enterprise edition features, 46
 - function of, 567
 - improvements in Office 2013, 651
 - managing with SharePoint Online, 324
 - overview of, 570–572
 - planning solutions, 576–577
 - Presentation layer and, 578–579
 - security and permissions, 577–578
 - solutions, 573
 - SPW capabilities not available in SkyDrive Pro, 659
 - types of solutions, 575
 - Web Parts for, 575–576
 - what's new in SharePoint 2013, 568
- BDC (Business Data Catalog), 570
- BI (business intelligence)
 - application features in SharePoint Server, 263
 - benefits of technologies for, 621–622
 - capabilities in SharePoint Server 2013, 41
 - capabilities not available in SharePoint Online, 328
 - charts, 605–606
 - dashboards, 606–608
 - Excel client features, 616
 - Excel Services components, 614
 - Excel Services server features, 617–618
 - how Excel Services works, 614–616
 - how PerformancePoint Services works, 618–619
 - key point review, 623
 - KPIs (Key Performance Indicators), 609–611
 - mobile usage scenarios, 631
 - overview of, 601–602
 - PerformancePoint Services, 618

- planning for, 603
 - presentation tools, 611–613
 - reasons for using PerformancePoint Services, 619–620
 - reasons for using Visio Services, 620–621
 - reports, 603–605
 - scorecards, 608–609
 - Visio Services, 620
 - what's new in Excel Services, 616
 - what's new in SharePoint 2013, 602–603
- Binary data, 655
- Bing, 541
- BLOBs, in database services, 260–261
- Blogs
- capabilities provided by SharePoint Foundation 2013, 262
 - managing, 501
 - microblogging, 476
 - overview of, 524–525
 - risk of exposing inaccurate information, 492
 - social computing features in SharePoint 2013, 472
 - upgrades and, 294
- Boolean operators. *see* Logical (Boolean) operators (AND/OR/NOT)
- BPOS (Business Productivity Online Services), 311–312
- Brainstorming, in identifying stakeholders, 236
- Branch Cache, 665, 670
- Branding
- governance plan considerations, 87
 - planning for, 468
 - what's new in SharePoint 2013, 230
- Branding sites
- Design Manager, 459–463
 - master pages, 454–4546
 - overview of, 440, 452–454
 - page layouts, 456–458
 - themes, 458
 - Web Parts for, 458–459
- Bring-your-own-device (BYOD), 625, 628
- Business Connectivity Services. *see* BCS (Business Connectivity Services)
- Business Continuity, provided by shared service applications, 264
- Business Data Catalog (BDC), 570
- Business governance. *see* Governance, business
- Business intelligence. *see* BI (business intelligence)
- Business Intelligence Center, 618
- Business objectives
- designing solutions to meet, 235–236
 - documenting, 25–26
 - governance plan based on, 68–69
 - identifying, 19–22
 - mapping to SharePoint features, 27–29
 - measurement strategy and, 233
 - outcome metrics, 243–245
 - relating metrics to desired outcomes, 235–236, 240
 - scorecards indicating performance against, 608
 - scorecards measuring performance against, 608
 - for SharePoint solutions, 234
 - SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives, 234–235
 - for social computing, 479–482
- Business owner role, 93
- Business processes
- application features in SharePoint Server, 263
 - electronic forms. *see* Forms, electronic
 - Excel Services and, 615
 - understanding, 579
 - upgrades and, 291–293
 - workflow. *see* Workflows
- Business Productivity Online Services (BPOS), 311–312
- Business solutions
- access protocols, 577
 - associating workflows with lists, 584–586
 - BCS (Business Connectivity Services), 570–572
 - BCS components, 572–573
 - BCS solutions, 573–575
 - BCS Web Parts, 575–576
 - business objectives for, 234
 - composite applications, 570
 - creating custom workflows, 586–588
 - creating electronic forms, 596
 - custom-coded, 111, 114–115
 - data locations, 577

- deployment options, 281–283
 - deployment strategies for collaboration solutions, 205–208
 - designing, 235–236
 - designing workflows with SharePoint Designer, 588–589
 - designing workflows with Visio 2013, 592–595
 - InfoPath forms services, 597
 - key point review, 598–599
 - overview of, 567–568
 - planning BCS solutions, 576–577
 - presentation layer and, 578–579
 - security and permissions, 577–578
 - SharePoint categories of, 78
 - standard workflows, 584
 - templates, associations, and instances, 584
 - types of workflows, 588, 590–591
 - understanding business processes, 579
 - what's new in SharePoint 2013, 568–569
 - workflow association options and actions, 591–592
 - workflow terminology, 582–584
 - workflows in, 579–581
- Business value, solution adoption and, 187
- BYOD (bring-your-own-device), 625, 628
- ## C
- Calendars
- accessing from Office 365, 321
 - capabilities provided by SharePoint Foundation, 262
 - taking offline, 666–668
- CamelCase, naming conventions and, 683
- Capabilities, determining relevance of, 25–29
- Capacity planning, searches and, 553
- Card sorting
- approach to IA design, 135–136
 - tree testing compared with, 137
- Catalogs, 439
- Category pages, 127
- CBT (computer-based training), 214
- Center of excellence model
- coaching and training and, 123
 - coaching team in, 207–208
 - information architects in, 121
 - organizing resources in, 96
 - role in compliance, 100
- Central administration
- administering service applications, 276
 - not available in SharePoint Online, 327
 - overview of, 272–274
- CEWP (Content Editor Web Part), 463–466
- Changes/change management
- adoption strategy overcoming resistance to change, 188
 - continuous nature of change management, 203
 - social computing considerations, 203
 - tendency to overvalue status quo, 192–193
- Chart Web Part, 605
- Charts
- in dashboards, 606
 - overview of, 605–606
 - for presenting quantitative and qualitative measures, 253
- Check out, Require Check Out setting, 416–417
- Check Permissions option, 362
- Claims authentication, 287, 578
- Classification
- content types and, 540
 - domain knowledge and, 131
 - of information, 336
 - metadata and, 158
- Client Side Object Model (CSOM), 327
- Cloud computing
- administering Office 365, 318–320
 - capabilities available only in SharePoint Online, 329–334
 - capabilities missing in SharePoint Online, 327–329
 - Cloud-versus-on- premises decisions, 228–229
 - comparing SharePoint Online with SharePoint Server 2013, 326–327
 - concepts, 313–315
 - getting started with SharePoint Online, 335–336
 - identity management and, 317–318
 - key point review, 338–340
 - key topics in book, 3
 - licensing Office 365, 317
 - location of external data, 577
 - migrating to SharePoint Online, 336–337
 - Office 365, 315–316

- online options, 338
 - operational governance considerations, 104, 337–338
 - overview of, 311–312
 - planning for SharePoint Online, 334–335
 - SharePoint Online, 322–326
 - as tier-one architecture, 260
 - upgrades and, 285
 - user experience with Office 365, 320–322
 - what's new in Office 2013, 646
 - what's new in SharePoint 2013, 16–17, 312–313
- Coaches
- coaching team in center of excellence model, 207–208
 - on IA team, 123
 - importance of, 97
 - role and responsibilities of, 94
- Code Compatibility Inspector, in Microsoft Office, 650
- Collaboration. *see also* Sharing
- collaborative authoring within Office documents, 527–528, 648–649
 - deployment strategies for collaboration solutions, 205–208
 - document capability provided by SharePoint Foundation, 262
 - good practices for, 206
 - platforms, 33–36
 - SharePoint categories of solutions, 78
 - SharePoint Foundation and, 40
 - social computing providing structure for, 516
 - what's new in Office 2013, 648–649
- Columns
- associated with Content Types, 164
 - best practices for, 171–172
 - central management of, 169
 - defining at site collection or site level, 168
 - as descriptive attributes, 167–168
 - enterprise keywords and, 173–174
 - managed metadata and, 168–169
 - in metadata architecture, 120
 - overview of, 162–163
 - planning, 169–170
- Communication
- in delivery model for governance, 98–99
 - deployment strategies and, 201
 - dimension of governance plan, 64–65
 - of governance plan, 69
 - of metrics, 250–254
 - performance measures supporting, 231
 - persistence of, 221–224
 - of social computing, 505–506
 - upgrades and, 294–295
- Communities
- governance model for sample deployment, 82
 - incorporating gamification into community features, 503–504
 - key topics in book, 3
 - social computing and, 41, 477–478
 - support for, 474
 - support for online communities, 490–491
 - tailoring training to how jobs are performed, 215
- Community Portal, 129
- Community Site template, 347, 474, 476–477
- Community sites
- joining, 517–522
 - members, 523
 - permissions, 374–375
- Company administrators group, 373
- Compliance
- auditing and, 431–432
 - enterprise policies and, 86
 - reducing compliance risks, 122
 - reports, 605
- Composite applications
- BCS Web Parts for building, 575–576
 - defined, 567
 - features in SharePoint Server, 41, 263
 - key topics in book, 3
 - overview of, 570
- Computer-based training (CBT), 214
- Conflict resolution, capabilities of SkyDrive Pro, 655
- Consistency, design principles for page layout, 145–146, 149
- Consulting sessions, as training tool, 215
- Consumability (communication)
- delivery model for governance, 98–99
 - dimensions of governance plan, 64–65
 - of governance plan, 69

- Consumers, creating views for consumers of information, 197
- Contacts/contact management
 - accessing contacts from Office 365, 321
 - capabilities provided by SharePoint Foundation, 262
- Content
 - adding content sources to searches, 554–555
 - adding result sources to searches, 555–557
 - adding to information repositories, 481
 - classification of, 134
 - creating delightful, 199
 - duplicating in more than one location, 140
 - enterprise content management. *see* ECM (enterprise content management)
 - exposing to searches, 541–542
 - governance plan and, 88
 - guiding principles, 77–78
 - information assurance and, 62–63
 - key topics in book, 3
 - in logical search architecture, 550
 - mobile usage scenarios, 630–631
 - naming conventions for site owners, 681–683
 - naming conventions for users with document contribution permissions, 683–684
 - organizing, 131
 - planning, 467
 - repurposing, 438
 - search-driven Content Web Parts, 564–565
 - searches for structured and unstructured data sources, 537
 - targeting to specific audiences, 196
 - training, 209–211
 - transitional deployment planning and, 202
 - types requiring governance, 65
 - upgrades and, 285, 292
 - Web content management. *see* WCM (Web content management)
 - working with offline, 295–296
 - writing great content for sites, 678–680
- Content approval
 - Draft Item Security and, 415
 - planning for, 468
 - versioning and, 411–412
- Content authoring, 438–439
- Content by Search Web Part, 560
- Content Editor Web Part (CEWP), 463–466
- Content management
 - application features in SharePoint Server, 262
 - searches and, 540
 - system, 134
- Content Organizer, 424–425, 442–443
- Content ownership, 142, 150
- Content Query Web Part, 267
- Content Search Web Part, 440
- Content sources
 - adding new content sources to searches, 554–555
 - in logical search architecture, 550
- Content Types
 - association options, 591
 - defining, 165–166
 - elements of, 164–165
 - examples of, 166–167
 - external, 573
 - features that do not work across site collections, 267
 - hierarchical organization of, 165
 - in metadata architecture, 120, 163–164
 - multiple vs. single, 170
 - overview of, 162
 - planning, 166
 - search management and, 540
 - storing, 457–458
- Contextual help and tips, 195–196
- Contribute permissions, default permissions for team sites, 376
- Contributors, creating views for contributors of information, 197
- Conversations
 - enabling online conversations, 484–486
 - in glossary of social computing terms, 687
 - moving beyond e-mail, 481
 - options in SharePoint 2013, 486–489
 - as search result source, 544, 547
 - social computing features in SharePoint 2013, 474–476
- CoPilot, Jornata, 108
- Corporate Intranet deployment solution, 282
- Crawl database, in physical search architecture, 552
- Crawled properties, 539

Crawlers. *see* Search engines
Crawling. *see* Indexes/indexing
Created/Created By, metadata attributes, 156
Credentials-based authentication, 578
CRM (customer relationship management), 337, 530
Cross-site publishing, 439
CSOM (Client Side Object Model), 327
Custom-coded solutions
 accounting for, 111
 maintaining application governance, 114–115
Customer relationship management (CRM), 337, 530
Customers group, activity groupings, 140
Customization
 of entity extractors, 560, 563
 of groups, 374–375
 of master pages, 287
 out-of-the-box customizations, 111, 114–115
 of page layout, 456–458
 of permissions, 378
 of policies in operational governance, 112
 of search refiners, 559–560
 upgrades and, 301–302, 304, 306
 of workflows, 586–588

D

Daily maintenance, of operational governance, 109
DAM (Digital Asset Management), 404–405, 441
Dashboards
 administering, 318–319
 overview of, 606–608
 presenting quantitative and qualitative measures, 253
 reasons for using PerformancePoint Services, 619
 strategic/appropriate use of, 622
 what's new in Office 2013, 649
Data
 improvements to data exploration in Excel Services, 617
 quality and timeliness of, 601
 working with offline, 665–666
Data loss prevention (DLP), 629

Data sources
 access protocols for connecting to, 577
 External Content Type, 573
 location of, 577
 Presentation layer for user interaction with, 578–579
 search capacity for structured and unstructured, 537
 Visio diagrams and, 620
Database administration, in site architecture diagram, 142
Database-attach upgrade method
 overview of, 302–304
 selecting upgrade strategy, 305
 support for service application databases, 288–289
Databases
 capacity of, 107
 managing, 108
 in physical search architecture, 552
 separating database upgrade from site upgrade, 288
 server roles in SharePoint, 278
 SQL Server, 39, 260
Datasheet view, 174–175
Decisions making
 governance plan and, 89–90
 performance measures supporting, 231
Declarative solutions, in application governance, 111, 114
Delivery model, for governance plan, 98–99
Departmental deployment solution, 281
Deployment
 business governance and, 78–81
 capabilities provided by SharePoint Foundation, 261
 examples, 81–84, 281–283
 operational governance and, 105–106
 options, 279–281
 server roles and, 278
 social computing and, 203
Deployment strategies
 for collaboration solutions, 205–208
 early adopters and evangelists and, 204–205
 enterprise vs. controlled/ top down vs. bottom up, 204

- for intranets, 201–203
- for social features, 203
- Design
 - of governance plan, 71–72
 - governance plan as framework for design standards, 69
 - of metadata architecture, 161–163
 - page layout principles, 149–151
- Design Manager
 - branding sites, 458
 - creating custom master pages, 455–456
 - creating design package, 463
 - editing master pages, display templates, page layouts, 462–463
 - managing device channels, 460–461
 - overview of, 459–460
 - publishing and applying design elements, 463
 - uploading design files, 462
- Design permissions, default permissions for team sites, 376
- Desktop search, SkyDrive Pro, 655
- Developer Site template, 331
- Development environment, 116
- Device channels, 460–461
- Device targeting, 440
- Devices. *see also* Mobile devices
 - operational governance considerations, 104
 - planning for, 467
 - working with content across, 491
- Diagrams
 - reasons for using Visio Services, 620–621
 - site architecture, 141–143
- Dictionaries, search, 559–560
- Digital Asset Management (DAM), 404–405, 441
- DIP (Document Information Panel), 427
- Discussions
 - discussion lists vs. newsfeeds, 688
 - managing, 502–505
 - reward and recognition capabilities and, 192
 - risk of exposing inaccurate information, 492
- Disk space, 107
- Display templates, 463
- DLP (data loss prevention), 629
- DM (Document Management)
 - check out settings, 416–417
 - content approval, 411–412
 - Content Organizer, 424–425
 - DIP (Document Information Panel), 427
 - Document Center, 428–429
 - Document ID service, 425–426
 - document libraries, 410–411
 - document sets, 421–424
 - Draft Item Security, 415
 - item-level security, 417–418
 - location-based metadata, 420–421
 - Managed metadata services, 418–420
 - overview of, 404, 410
 - version history, 413–415
 - version settings, 411
 - workflows, 426
- Document Center, 428–429
- Document ID service, 423, 425–426
- Document Information Panel (DIP), 427
- Document libraries
 - overview of, 410–411
 - SkyDrive Pro and, 129
 - Web pages in, 411
- Document Management. *see* DM (Document Management)
- Document sets
 - activating, 422–423
 - overview of, 421–422
 - when to use, 423–424
- Document workflows
 - overview of, 426
 - upgrades and, 293–294
- Documentation
 - governance plan, 69–70
 - of security plan, 379–380
 - of strategic plan, 21
- Documents
 - assigning attributes to, 173–174
 - capability provided by SharePoint Foundation, 262
 - classification of, 158–161
 - collaborative authoring within Office documents, 527–528
 - following, 699
 - libraries, 410–411
 - managing together with e-mail, 407–408
 - metadata architecture, 154–159
 - monitoring copies of, 693–697

- naming conventions for, 683–684
- recommendations for working with, 669–670
- sets, 421–424
- sharing externally, 355, 357
- sharing internally, 350–351
- sharing link to, 511
- sharing online vs. on-premises, 345–346
- sharing outside organization, 705–706
- synchronizing/managing changes, 665
- taking offline with Outlook 2013, 662–663
- taking offline with SkyDrive Pro, 654–655
- tools in Office 2013, 660
- unique identifiers for, 425–426
- version history, 413–415
- version settings, 411

Domain groups, 367–368

Domains, administering Office 365, 319

Draft Item Security, in versioning, 415

Dragging and dropping documents, 408–409

Dreamweaver, 459

Duet Online, 312, 316

Dynamic reports, 604

E

E-mail

- capabilities provided by SharePoint Foundation, 262
- info-glut related to, 244
- managing together with documents, 407–408
- moving beyond limitations of, 481
- newsfeed notifications, 511
- preparing for upgrades and, 294–295
- social computing and, 203

Early adopters, deployment strategies and, 204–205

ECM (enterprise content management)

- auditing, 431–432
- check out settings, 416–417
- content approval, 411–412
- Content Organizer, 424–425
- DIP (Document Information Panel), 427
- Document Center, 428–429
- Document ID service, 425–426
- document libraries, 410–411
- document management, 410
- document sets, 421–424

Draft Item Security, 415

dragging and dropping documents, 408–409

eDiscovery Center, 409–410

feature parity between SharePoint Server and SharePoint Online, 410

getting started with, 404–405

information management policies, 432–435

item-level security, 417–418

key point review, 435

location-based metadata, 420–421

Managed metadata services, 418–420

overview of, 403–404

in-place records management, 430–431

records declaration, 429–430

records management, 429

SharePoint Server 2013 and, 40

shredded storage, 408–409

Site Mailbox app, 407–408

site retention policies, 406–407

version history, 413–415

version settings, 411

what's new in SharePoint 2013, 405–406

workflows, 426

eDiscovery

eDiscovery Center, 312, 409–410

integrated search platform and, 536

overview of, 405

risks related to social computing, 494

Edit permissions, default permissions for team sites, 376

Electronic forms. *see* Forms, electronic

Employees, recruiting and retaining, 481

Enterprise keywords, 173–174, 176

Enterprise policies, in governance plan, 86–87

Enterprise processes, in governance plan, 87

Entity extraction

creating custom extractors, 560, 563

defined, 539–540

Evangelists. *see* Power users/evangelists

Everyone except external users groups, default access groups, 346

Everyone group, default access groups, 346

Excel

business intelligence capabilities, 41

charts, 605

client features, 616

- collaborative authoring, 528, 648–649
- enterprise edition features, 46
- features provided by shared service applications, 263
- Office Mobile Applications, 644, 674–675
- Office on Demand, 647–648
- Office Web Apps, 639, 644, 674
- recommendations for working with SharePoint documents and data, 670
- SharePoint 2013 and, 51–52
- spreadsheet features, 650
- Windows Phone applications, 636
- working with SharePoint data, 652–653
- working with SharePoint data offline, 668–669

Excel Calculation Engine, 614

Excel Services

- benefits of, 621
- components of, 614
- function of, 616
- how it works, 614–616
- overview of, 611–613
- server features, 617–618
- what's new in SharePoint 2013, 616

Excel Web Access, 614

Excel Web Services, 614

Exchange Online

- accessing from Office 365, 321
- components of Office 365, 315
- SharePoint Online integration with, 312

Exchange Server 2000, 33–34

Exchange Server 2013, 42

Executive Sponsor role, 93

Expertise, improving access to internal experts, 480

Exporting/importing search settings, 560

Extensibility, capabilities provided by SharePoint Foundation, 261

External Content Type, 573

External data sources. *see* Data sources

External sharing

- capabilities available in SharePoint Online, 329–330
- planning for, 354–356
- support for, 335

Extranets, 78

F

Facebook. *see also* Social computing

- popularity of social networking, 471
- preparing for upgrades and, 294
- social features of SharePoint 2013 and, 190

Farm administrators group, 373

Farms

- central administration, 272–274
- corporate intranet, 282
- fundamentals common to portals, sites, and pages, 264
- hosting sites in SharePoint 2010 and 2013 modes simultaneously, 288
- upgrades and, 285

FAST search engine, 40–41, 190–191, 260

Feature abuse, 199–200

Federation, 538

Field controls, improved in SharePoint 2013, 464, 466

Fields, improvements in Excel Services, 617

Files

- managing capacity of, 107
- metadata attributes, 156
- moving between SharePoint and other file systems, 663–664
- naming, 156, 210, 683
- sharing, 49–51
- storing, 50
- uploading design files, 462

Filters

- in dashboards, 606
- fast filtering, 420

Five-server deployment, 280

Flucidity Balsamiq templates, 152

Folders

- assigning permissions, 362
- document organization and, 156–157
- metadata vs., 158–161
- naming conventions, 684
- vs. views, 197

Following

- documents, 699
- overview of, 697–698
- people, 699–701
- sites, 699
- topics, 701–702

Forms, electronic

- creating, 596
- InfoPath forms services, 597
- mobile usage scenarios, 630
- upgrades and, 293–294
- workflows, 293–294

Forms Management, in ECM, 404

Four-server deployment, 280

Fpweb online hosting option, 338

Framework, SharePoint as, 13–15

FrontPage Server Extensions, 34

Full Control permissions

- default permissions for team sites, 376
- managing site security, 350
- sharing documents externally, 357, 705–706
- sharing sites externally, 704–705

Functional groupings, in site architecture, 139

G

Game dynamics, incentives and rewards in adoption, 219–221

Gamification

- feature abuse and, 199
- game dynamics and, 219–221
- incorporating into community features, 503–504
- recognition and rewards and, 192

Global term sets, describing managed metadata, 175

Goals. *see* Business objectives

Good Technology, 628

Google, 541

Governance

- aligning training with governance plan, 209
- implications of using SharePoint Online, 337–338
- key topics in book, 3–4
- naming conventions for site owners, 681–683
- naming conventions for users with document contribution permissions, 683–684
- operational implications of SharePoint Online, 337
- social computing and, 495, 687–690
- tips for writing great content for sites, 678–680
- tips for writing search queries, 684–686

Governance board, role and responsibilities of, 93

Governance, business

- branding considerations in, 87
- consumability (communication) dimension of, 64–65
- content considerations in, 88
- defining policies and guidelines, 97–98
- defining roles and responsibilities, 92–97
- deployment or delivery model for, 78–84, 98–99
- design phase and, 71–72
- enterprise policies, 86–87
- enterprise processes, 87
- guidance dimension of, 63–64
- guiding principles in, 74–78
- importance of plan for, 67–68
- information assurance dimension of, 62–63
- key point review, 100–101
- newsfeed policies, 92
- operational decisions in, 89–90
- overview of, 61
- planning and scheduling conversations about, 80, 84–85
- planning based on desired outcomes, 68–69
- roles and responsibilities in, 88–89
- site-specific decisions in, 90
- social computing considerations, 91
- socializing and monitoring, 99–100
- team approach to, 72–73
- technology assurance dimension of, 62
- upgrades and, 291
- user profile in, 91–92
- vision statement for, 73–74
- visioning and overview in first meeting, 85
- what to include in plan for, 69–71
- what's new, 65–67

Governance, operational

- analyzing operational health, 106
- deployment model for, 105–106
- key point review, 116–117
- maintaining, 109–110
- maintaining application governance, 114–116
- managing accounts and passwords, 107–108
- managing application pools, 107
- managing capacity and disk space, 107
- managing databases, 108
- monitoring network connectivity, 106–107

- monitoring operational health, 108–109
- overview of, 103–104
- planning application governance, 110–114
- planning for, 105
- what's new, 104–105

Governance, social computing

- configuring user profiles, 495–499
- managing blogs and wikis, 501
- managing discussions, 502–505
- managing newsfeed posts, 500
- overview of, 495
- understanding likes and ratings, 501–502
- understanding social tags, 502

Graphical user interface (GUI), 189

Groove. *see also* SkyDrive Pro; SPW (SharePoint Workspace), 651, 659

Groups

- checking permissions, 395
- custom, 374–375
- default access groups, 346
- default SharePoint groups, 368–372
- defining, 386–388
- naming conventions, 682
- security and, 367–368
- special SharePoint groups, 372–374

GUI (graphical user interface), 189

Guidance/guiding principles

- for adoption of new capabilities, 197
- content, 77–78
- developing, 74, 78
- dimensions of governance plan, 63–64
- general principles, 74–75
- key elements in governance plan, 70
- security, 75
- site design, 76–77

Guidelines

- defining, 97–98
- key elements in governance plan, 71

GUIDs, for Columns, 163

H

Hashtags

- adding to newsfeed posts, 510
- creating posts in newsfeeds, 703
- new features related to social computing, 128

HBI (high business impact)

- classification of information, 336
- mobile computing and, 629

Health

- analyzing operational health, 106
- monitoring operational health, 108–109

Health Analyzer, 106

Help Desk, 94

Help systems, aids to adoption, 195–196

High business impact (HBI)

- classification of information, 336
- mobile computing and, 629

Home page

- governance model for sample deployment, 81
- organization of, 126–127
- page layout template for, 146

HTML

- CEWP (Content Editor Web Part) and, 464
- converting to SharePoint master page, 455–456
- managing, 446
- mobile device support for HTML5, 631

Human faces and stories, featuring in adoption strategy, 196–197

Hyperlinks, adding to posts, 511, 703

I

IA (Information architecture)

- “About” sections of sites, 138–139
- activity groupings, 139–140
- best practices for Columns, 171–172
- best practices for page layout, 146
- best practices for site architecture, 137–138
- card sorting approach to design, 135–136
- Columns in metadata design, 167–170
- consistency of page layout, 145–146
- Content Types in metadata design, 163–167
- creating effective site architecture, 134–135
- design principles for page layout, 149–151
- design techniques, 135
- designing metadata architecture, 161–163
- diagramming site architecture, 141–142
- duplicating content in more than one location, 140
- enterprise policies and, 87
- fixing structural issues prior to upgrades, 297
- functional groupings, 139

- gathering information for, 131–134
- governance plan as framework for, 69
- implementing site architecture, 143–144
- importance of, 122
- key point review, 184–185
- maintaining, 182–184
- managed metadata for hierarchical navigation, 174–175
- Managed Metadata Services, 176–181
- managing site navigation, 144–145
- metadata architecture, 154
- metadata related to documents, 155–159
- metadata related to songs/ music, 154–155
- metadata vs. folders, 158–161
- methods for assigning attributes to documents, 173–174
- multiple Content Types vs. single Content Type, 170
- overview of, 119–121
- role of information architect, 122–124
- searches and metadata, 181–182
- site administration and, 142
- site collections and subsites, 128–130
- templates and starters for page layout, 146–148
- terminology describing managed metadata, 175
- three-click-rule myth, 153
- top links in site architecture, 145
- tree testing approach to design, 136–137
- what's new, 124–128
- wire framing templates, 152–153
- IAAS (Infrastructure as a service), 313–314, 338
- Identity management, Office 365, 317–318, 531
- Images
 - adding to posts, 511, 703
 - design principles for page layout, 150–151
 - image renditions, 441–442
- IMBI (In-Memory BI Engine), 616
- Importing/exporting search settings, 560
- In-place upgrades, not supported in SharePoint 2013, 286, 302
- Incentives, in adoption strategy, 218–221
- Indexes/indexing
 - defined, 538
 - in logical search architecture, 551
 - managed metadata and, 420
- InfoPath
 - electronic forms and document workflows, 293–294
 - enterprise edition features, 46
 - integration with SharePoint, 653
 - managing with SharePoint Online, 323
 - overview of, 597
 - SPW capabilities not available in SkyDrive Pro, 659
- Information
 - accidental or inappropriate disclosure, 493
 - adding content to information repositories, 481
 - in architecture of social computing, 529
 - information architecture role in reducing, 122
 - literacy competencies, 217
 - management policies, 165, 432–435
 - managing/retaining, 267
 - mobile usage scenarios, 631
 - overload, 244
 - quality and timeliness of data in business intelligence, 601
 - risk of inaccurate, 492–493
- Information architect role, 94, 122–124
- Information architecture. *see* IA (Information architecture)
- Information assurance, dimensions of governance plan, 62–63
- information technology. *see* IT (information technology)
- Information Worker products, 32
- Infrastructure as a service (IAAS), 313–314, 338
- Infrastructure maintenance, 69
- Infrastructure support team, 94
- Inheritance
 - Content Types and, 165
 - permissions and, 360
 - securable objects and, 385
- Instances, workflow, 584
- Internet
 - deployment, 282–283
 - Internet-facing sites, 18, 437–438
 - solutions, 78
- Intranet
 - deployment, 201–203, 282

- sharing information via, 12
- solutions, 78
- iOS devices (iPads/iPhones)
 - mobile device support, 478
 - Newsfeed application and, 634–635
 - Office applications for, 639
 - operational governance considerations, 104–105
 - SharePoint support for, 625
 - SkyDrive Pro support for, 636
 - upgrades and, 296
 - user experience of SharePoint with, 631–633
 - what's new in SharePoint 2013, 625–626
- IRM (Information Rights Management)
 - components of Office 365, 316
 - mobile computing and, 629
 - securing items stored in SharePoint, 365–366
- IT (information technology)
 - information literacy competencies, 217
 - IT group governance model, 105
 - planning upgrades and, 292
 - reducing costs of, 122
 - technology assurance dimension of governance, 62
- IT owner role, 93
- Items
 - assigning permissions to, 362
 - fundamentals common to portals, sites, and pages, 265
 - item-level auditing, 432
 - item-level security, 417–418
 - unique identifiers, 156
- J**
- Jornata's CoPilot, 108
- Just-in-time help, 195–196
- Just-in-time training, 213–215
- K**
- Key Performance Indicators. *see* KPIs (Key Performance Indicators)
- Keywords
 - enterprise keywords, 173–174
 - new features related to social computing, 128
 - predefining, 176, 200
- Knowledge sharing, 480

- KPIs (Key Performance Indicators)
 - business intelligence capabilities and, 41
 - overview of, 609–611
 - in scorecards, 608

L

- Launch plan, for social computing, 505
- Layout. *see* Page architecture
- LCS (Live Communications Server), 34
- Leadership, activity groupings in site architecture, 140
- Legal holds, 405
- Libraries
 - binding templates to (associations), 584
 - contribution rights to, 398
 - creating/displaying views in, 690–693
 - designating as catalog, 439
 - of documents, 410–411
 - dragging and dropping documents to, 408–409
 - fundamentals common to portals, sites, and pages, 265
 - metadata for organizing, 160
 - naming conventions, 683
 - SkyDrive Pro, 656
 - workflows and, 579
- Licensing
 - apps use and, 114
 - Office 365, 317
- Lifecycle management, 112
- Likes/ratings
 - getting feedback via, 513–514
 - in glossary of social computing terms, 687
 - identifying meaningful content, 480
 - understanding, 501–502
- Limited Access permissions, default permissions for team sites, 377
- Link database, in physical search architecture, 552
- LinkedIn, 294
- Links
 - adding hyperlinks to posts, 511, 703
 - design principles for page layout, 150
 - persistent navigation links (Suite Bar), 124–125
 - Promoted Links app, 189–190, 708–711
 - Quick Launch links, vs. Web Parts, 151–152
 - top links in site architecture, 145

List workflows, 588, 590

Lists

- binding templates to (associations), 584
- creating/displaying views, 690–693
- designating as catalog, 439
- discussion lists vs. newsfeeds, 688
- fundamentals common to portals, sites, and pages, 265
- leveraging list data for content presentation, 438
- libraries compared with, 410–411
- metadata for organizing, 160–161
- naming conventions for, 683
- workflow feature and, 579

Live Communications Server (LCS), 34

Local term sets, describing managed metadata, 175

Location-based metadata, 420–421

Logical architecture, 550–551

Logical (Boolean) operators (AND/OR/NOT)

- in contextual help systems, 196
- in searches, 548
- tips for writing search queries, 685–686

Logs, monitoring operational health, 108

Lync

- client, 42
- integration with SharePoint, 653
- Windows 8 applications for, 644
- Windows Phone applications for, 639

Lync Online, 316

Lync Server 2013, 34, 42

M

Mac computers, 104–105

Machine Translation Service, 439

Maintenance

- of Excel files, 615
- of information architecture, 182–184
- of operational governance, 109–110
- of security, 389, 394

Manage Copies, 693–697

Manage Hierarchy permissions, 377

Manage Permissions, 343, 378

Managed metadata

- configuring metadata navigation, 419–420

creating/adding to term sets, 178–179

defining terms, 180–181

for hierarchical navigation, 174–175

interacting with, 127–128

managing terms/term sets, 176

overview of, 418–419

planning term sets, 177

provided by shared service applications, 263

searches and, 181–182, 540

site navigation with, 440

as special type of Column, 168–169

Managed Metadata Services, 703

Managed properties

- defined, 539
- search schema and, 559
- tips for writing search queries, 686

Management

of accounts, 107–108

capabilities provided by SharePoint Foundation, 261

of changes. *see* Changes/change management

of contacts. *see* Contacts/contact management

of content. *see* Content management

CRM (customer relationship management), 337, 530

DAM (Digital Asset Management), 404–405, 441

of documents. *see* DM (Document Management)

of enterprise content. *see* ECM (enterprise content management)

of forms, 404

identity management, 531

of information rights. *see* IRM (Information Rights Management)

lifecycle management, 112

MDM (mobile device management), 628

of projects, 335

of records. *see* RM (Records Management)

of searches, 554

of tasks. *see* Task management

version management, 659

of video, 444

of web content. *see* WCM (Web content management)

Master Page Gallery, 457–458

Master pages

- associating with Content Type, 457–458
- branding sites and, 454–456
- customization of, 287
- editing, 462–463

MDM (mobile device management), 628

Measurement/metrics

- analyzing metrics and making changes based on, 256–257
- baselines in, 249–250
- business objectives and, 233–234
- collecting metrics, 254
- communicating measurement stories, 249
- dashboards using, 606, 608
- designing solutions, 235–236
- determining metrics stakeholders, 236–237
- keeping it simple, 622
- key point review, 257
- key topics in book, 3
- KPIs (Key Performance Indicators), 609–611
- overview of, 227–229
- packaging and presenting metrics, 250–254
- process of, 232–233
- qualitative metrics, 245–249
- quantitative metrics, 241–245
- reasons for measuring, 231–232
- reasons for using PerformancePoint Services, 619
- relating metrics to desired outcomes, 240
- ROI analysis, 238–240
- scorecards using, 608
- SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives, 234–235
- types of metrics, 241
- usability testing, 254–255
- user feedback for collecting metrics, 255–256
- what's new, 229–231

Medical benefits, incentives and rewards in adoption, 219

Meetings, as training tool, 214–215

Members

- community sites, 523
- user roles, 216

Mentions, social computing terminology, 688

Mentors, social computing and, 480

Metadata architecture

- assigning attributes to documents, 173–174
- best practices for Columns, 171–172
- Columns, 167–170
- Content Types, 163–167
- designing, 161–163
- documents, 155–159
- location-based metadata, 420–421
- managed metadata for hierarchical navigation, 174–175
- Managed Metadata Services, 176–181
- metadata vs. folders, 158–161
- multiple Content Types vs. single Content Type, 170
- overview of, 120, 153–154
- searches and metadata, 181–182
- songs/ music, 154–155
- SPW capabilities not available in SkyDrive Pro, 659
- terminology describing managed metadata, 175

Metalogix migration tool, 286, 336, 490

Metrics. *see* Measurement/metrics

Microsoft

- BizTalk Server, 42
- commitment to Cloud computing, 311
- Excel. *see* Excel
- Office 2013. *see* Office 2013
- OneNote. *see* OneNote
- Outlook. *see* Outlook 2013
- PerformancePoint Services. *see* PerformancePoint Services
- PhoneFactor from, 629–630
- PowerPoint. *see* PowerPoint
- Project, 654
- Project Online, 312, 316
- SQL Server. *see* SQL Server
- Surface, 631, 636
- Translator, 439
- Visio. *see* Visio
- Word. *see* Word

Microsoft Office SharePoint Server (MOSS) 2007

- in history of collaboration services, 36
- services grouped within SSP (Shared Services Provider), 271

Migration

- planning for, 289–291

- selective external migration, 303–304
 - to SharePoint Online, 336–337
 - third-party tools for, 286, 336
- Mind maps, in documenting site architecture, 141
- MindManager, 141
- Mobile computing
- architectural considerations, 628–630
 - device management, 628
 - key point review, 641
 - Office mobile and Web apps, 636–640
 - overview of, 625
 - phones and tablets, 631–633
 - planning for, 626–627
 - SharePoint Newsfeed application, 633–635
 - SharePoint Online support, 335
 - SkyDrive Pro mobile applications, 636
 - third-party applications, 640
 - usage scenarios, 630–631
 - user personas/scenarios, 627–628
 - what's new in SharePoint 2013, 17, 230, 625–626
- Mobile device management (MDM), 628
- Mobile devices
- HTML5 support, 631
 - managing, 628
 - phones and tablets, 631–633
 - planning for, 626–627
 - support for, 478, 625
 - user experience of SharePoint with, 631–633
 - what's new in SharePoint 2013, 625–626
- Mobile Entree, 640
- Moderation/moderators
- Community Tools for, 520–522
 - managing discussions, 502–503
 - supporting online communities, 490–491
- Modified/Modified By, metadata attributes, 156
- Monitoring
- apps use, 114
 - document copies, 693–697
 - governance plan and, 99–100
 - network connectivity, 106–107
 - operational health, 108–109
- Monthly maintenance, of operational governance, 110
- MOSS (Microsoft Office SharePoint Server) 2007
- in history of collaboration services, 36
 - services grouped within SSP (Shared Services Provider), 271
- Multilingual sites, 439, 467–468
- My Sites
- site collections and, 129
 - social computing and, 41
 - social computing features in SharePoint 2013, 472
- N**
- N-server deployment, 280–281
- Naming conventions
- for site owners, 681–683
 - for users with document contribution permissions, 683–684
- Napa Office 365 Development Tools, 569
- Navigation
- configuring metadata navigation, 419–420
 - defining site navigation, 126
 - managed metadata for hierarchical, 144–145
 - managing site navigation, 144–145
 - persistent links (Suite Bar), 124–125
 - planning for, 467
 - in site architecture diagram, 141–142, 144
 - site navigation with managed metadata, 440
 - upgrades and, 297
- Navigation bar, in Office 365, 321
- NaviSite online hosting option, 338
- .NET Framework
- access protocols for connecting to SharePoint, 577–578
 - providing Web page services, 39–40
 - technologies in SharePoint, 260
- Network connectivity, monitoring, 106–107
- News, standard and enterprise edition features, 43
- Newsfeeds
- accessing from Office 365, 321
 - alerts vs., 688–690
 - creating posts, 702–703
 - discussion lists vs., 688
 - following documents, 699
 - following people, 699–701
 - following topics, 701–702
 - managing posts, 500

- personal features in SharePoint 2013, 472–473
- policies in governance plan, 92
- replacing with Yammer, 125
- risk of exposing inaccurate information, 492
- SharePoint Newsfeed application, 633–635
- SharePoint Online supporting, 335
- tips for working with, 509–513
- NewsGator's Social Sites, 294
- 9X Problem (Gourville), 193
- NOT operator. *see* Logical (Boolean) operators (AND/OR/NOT)

O

- Objectives. *see also* Business objectives
 - as focus of design, 135
 - for performance measures, 231–232
 - SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives, 234–235
- Objects, displaying permissions levels of, 395–396
- OData access protocol, 577–578
- OEAT (Office Environment Assessment Tool), 650
- Office 2013
 - client applications that connect with SharePoint, 652–654
 - collaborative authoring, 527–528
 - description of, 42
 - document-related tools, 660
 - features for integration of Office clients with SharePoint Online, 333
 - Information Worker products, 32
 - integration capabilities provided by SharePoint Foundation, 262
 - keeping document content current with SkyDrive Pro, 660
 - key point review, 675–676
 - migrating from SPW to SkyDrive Pro, 659–660
 - mobile applications, 626, 636–640, 674–675
 - Office Upload Center and, 660–662
 - operational governance considerations, 104–105
 - Outlook 2013 and, 662–663
 - Outlook for taking SharePoint calendars offline, 666–668

- overview of, 643–644
- recommendations for working with documents and data, 669–670
- SPW features not available in SkyDrive Pro, 658–659
- synchronizing/managing document changes, 665
- taking SharePoint documents offline with SkyDrive Pro, 654–655
- UI (user interface) innovations, 670–672
- Web apps. *see* Office Web Apps
- what's new, 644–651
- Windows Explorer and, 663–664
- working with SharePoint data offline, 665–666, 668–669
- working with SkyDrive Pro, 655–658
- Office 365
 - administering, 318–320
 - BPOS (Business Productivity Online Services) rebranded as, 312
 - building collaborative applications, 52–58
 - comparing cloud computing services, 315
 - description of, 42
 - identity management with, 317–318, 531
 - Information Worker products, 32
 - integration with SharePoint and, 333
 - licensing, 317
 - monitoring network connectivity, 107
 - Napa Office 365 Development Tools, 569
 - operational governance and, 103
 - search engine in, 535
 - services of, 315–316
 - sharing sites and documents outside organization, 704
 - updates for Office from, 644
 - user experience, 320–322
 - what's new in Office 2013, 646–647
- Office Environment Assessment Tool (OEAT), 650
- Office Marketplace, 645
- Office Migration Planning Manager (OMPM), 650
- Office Mobile Applications
 - overview of, 674–675
 - support for mobile devices, 626
 - types of, 636–640

- Office on Demand, 333, 647–648
 - Office Professional Plus, 316
 - Office Server Extensions, 34
 - Office Store, 321
 - Office Upload Center
 - overview of, 660–662
 - recommendations for working with SharePoint documents and data, 669
 - working with SharePoint, 653
 - Office Web Apps
 - components of Office 365, 316
 - overview of, 673–674
 - as stand-alone service in SharePoint 2013, 260
 - support for mobile devices, 626
 - types of, 636–640
 - what's new in Office 2013, 644–645
 - Offline access
 - in Access and Excel, 668–669
 - to calendars, 666–668
 - to content, 295–296, 491
 - to data, 665–666
 - to documents, 662–663
 - to files, 664
 - SPW capabilities not available in SkyDrive Pro, 659
 - OMPM (Office Migration Planning Manager), 650
 - OneNote
 - collaborative authoring, 528, 648–649
 - improvements in Office 2013, 651
 - on iOS devices, 639
 - Office Mobile Applications and, 644, 674–675
 - Office Web Apps and, 639, 644
 - Windows Phone applications, 636
 - working with SharePoint, 653
 - Online options, cloud computing, 338
 - Operating systems. *see* OSs (operating systems)
 - Operational decisions, 89–90
 - Operational governance. *see* Governance, operational
 - Operational procedures, 337
 - Operators
 - logical. *see* Logical (Boolean) operators (AND/OR/NOT)
 - tips for writing search queries, 686
 - Optimal Workshop
 - card sorting program, 136
 - tree testing program, 137
 - OR operator. *see* Logical (Boolean) operators (AND/OR/NOT)
 - Organizational structure, not basing site architecture on, 137
 - OSs (operating systems)
 - architecture, 260
 - Windows Server providing base services, 39
 - Out-of-the-box customizations, 111, 114–115
 - Outcomes. *see also* Business objectives
 - business or outcome metrics, 243–245
 - as focus of design, 135
 - relating metrics to desired outcomes, 240
 - working backwards to determine appropriate measures of success, 237
 - Outlook 2013
 - accessing Web-based version, 321
 - integration with SharePoint, 653
 - recommendations for working with SharePoint documents and data, 670
 - taking calendars offline, 666–668
 - taking documents offline, 662–663
 - Windows Phone and, 639
 - OWA (Outlook Web Application), 321
 - Owners role, 216–217
- P**
- PAAS (platform as a service), 314
 - Page architecture
 - best practices, 146
 - consistency of layout, 145–146
 - customizing page layout, 456–458
 - design principles for, 149–151
 - editing page layouts, 463
 - new page layout options, 127
 - overview of, 120
 - templates for, 126, 146–148
 - wire framing templates, 152–153
 - Passwords, managing, 107–108
 - Patches, 62
 - People
 - featuring human faces and stories in adoption strategy, 196–197
 - following, 699–701

- as search result source, 544
- social computing in SharePoint 2013, 229–230, 472–474
- People Picker, 355–356
- PerformancePoint Services
 - benefits of, 621
 - business intelligence capabilities in SharePoint Server 2013, 41
 - creating KPIs (Key Performance Indicators), 610–611
 - enterprise edition features, 46
 - features provided by shared service
 - applications, 264
 - function of, 616
 - how it works, 618–619
 - overview of, 618
 - reasons for using, 619–620
- Permissions
 - accessing external data and, 577–578
 - for app use, 113
 - applying, 388–389
 - applying to securable objects, 358–364
 - checking individual or group, 395
 - checking site, 394–395
 - for community sites, 374–375
 - for default SharePoint groups, 369
 - displaying permissions levels of objects, 395–396
 - item-level security and, 417–418
 - levels of, 375–379
 - listing permission levels, 383–386
 - maintaining security model and, 389, 394
 - Manage Permissions feature, 343
 - managing user permissions, 200–201
 - reports and, 604
 - sharing document outside organization and, 705–706
 - sharing sites outside organization and, 704–705
 - user roles and, 216–217
- Personal sites, 507–509
- PhoneFactor, from Microsoft, 629–630
- Physical architecture, searches and, 551–552
- Pie charts, 605
- PivotCharts, Excel reports, 616
- PivotTables, Excel reports, 616
- Platform as a service (PAAS), 314
- Platforms, SharePoint as, 13–15
- Policies
 - apps use, 113–114
 - automating, 98–99
 - central site for, 99
 - customization policies in operational governance, 112
 - defining, 97–98
 - enterprise policies in governance plan, 86–87
 - information management, 165, 432–435
 - key elements in governance plan, 71
- Portals
 - application features in SharePoint Server, 262
 - benefits of effective site architecture, 134
 - capabilities in SharePoint Server 2013, 40
 - Community Portal site template, 517
 - standard and enterprise edition features, 43
- Posts
 - adding hyperlinks to, 703
 - creating, 702–703
 - in glossary of social computing terms, 687
- Power users/evangelists
 - deployment strategies and, 204–205
 - on IA team, 123
 - importance of, 97
 - role and responsibilities of, 94
- Power View, Excel add-in, 616
- PowerPoint
 - collaborative authoring, 528, 648–649
 - features provided by shared service
 - applications, 264
 - integration with SharePoint, 653–654
 - mind maps in documenting site architecture, 141
 - Office Mobile Applications and, 644, 674–675
 - Office on Demand, 647–648
 - Office Web Apps and, 639–640, 644, 674
 - Windows Phone applications, 636
- Preferences, search preferences, 549
- Presentation layer, for user interaction with external data, 578–579
- Presentation tools
 - benefits of technologies, 621–622
 - charts, 605–606
 - choosing, 611–612
 - components of Excel Services, 614

- dashboards, 606–608
- Excel BI client features, 616
- Excel Services, 611–613, 615
- Excel Services server features, 617–618
- how Excel Services works, 614–616
- how PerformancePoint Services works, 618–619
- KPIs (Key Performance Indicators), 609–611
- PerformancePoint Services, 618
- reasons for using PerformancePoint Services, 619–620
- reasons for using Visio Services, 620–621
- reports, 603–605
- scorecards, 608–609
- Visio Services, 620
- what's new in Excel Services, 616
- Privacy, privacy/relevance mix in online conversations, 484–485
- Private clouds, 313
- Productivity, 122, 230
- Project (Microsoft), integration with SharePoint, 654
- Project Online
 - components of Office 365, 316
 - SharePoint Online integration with, 312
- Projects
 - activity groupings in site architecture, 139
 - managing, 335
 - project sites, 83
 - task tracking, 191
- Promoted Links app, 189–190, 708–711
- Promoted results, 539, 557
- Properties, of Content Types, 164
- Provisioning, enterprise policies in governance plan, 87
- Public Web site, capabilities only available in SharePoint Online, 330–331
- Publishing
 - application features in SharePoint Server, 262
 - planning for, 467
- Publishing sites
 - capabilities available in SharePoint Online, 330–331
 - creating and managing Web content, 448–452
 - customizing page layout, 456–458
 - default permissions, 377

- default SharePoint groups and permissions, 370–371

- Design Manager and, 459
- master page options for, 454

Q

- Qualitative metrics

- collecting, 254
- examples of serious anecdotes, 246–247
- future scenario example, 247–249
- overview of, 245–246
- user feedback for collecting, 255
- user surveys for collecting, 255–256

- Quantitative metrics

- business or outcome metrics, 243–245
- overview of, 241
- system metrics (usage analytics), 241–243
- usability testing for collecting, 254–255

- Quarterly maintenance, of operational governance, 110

- Queries

- applying query rules to searches, 557–558
- defined, 538
- in logical search architecture, 551
- tips for writing search queries, 684–686

- Quest/Dell

- migration tools, 286, 336, 490
- security analysis tools, 364
- security management tool, 342

- Quick Edit view, for editing managed metadata, 127, 174–175

- Quick Launch

- in page layout, 146–147

- Quick Launch links, vs. Web Parts, 151–152

- Quotas, features that do not work across site collections, 268

R

- Rackspace online hosting option, 338

- Ratings/Likes

- getting feedback via, 513–514
- in glossary of social computing terms, 687
- identifying meaningful content, 480
- understanding, 501–502

- RBS (Remote BLOB Storage), in database services, 261

- Read permissions, 376
 - Really Simple Syndication (RSS), 262
 - Recommendations clicked, usage analytics, 243, 444
 - Recommendations displayed, usage analytics, 243, 444
 - Records Management. *see* RM (Records Management)
 - Regression testing, 112
 - Relationship capital, building through social computing, 480
 - Relevance, privacy/relevance mix in online conversations, 484–485
 - Remote BLOB Storage (RBS), in database services, 261
 - Replies, social computing terminology, 687
 - Report Center, 41
 - Reports
 - overview of, 603–605
 - PivotCharts and Pivot Tables, 616
 - reasons for using PerformancePoint Services, 619
 - Require Check Out setting, in versioning, 416–417
 - Responsibilities
 - defining, 92–97
 - governance plan considerations, 88–89
 - key elements in governance plan, 70
 - Restricted Contributor permissions, 378
 - Restricted Read permissions, 377
 - Result blocks
 - defined, 539
 - query rules in defining, 558
 - Result sources
 - adding new, 555–557
 - defined, 539
 - what is included in, 543–544
 - Retention policies, sites, 406–407
 - Reusable Workflows, 588, 590–591
 - Rewards
 - in adoption strategy, 218–221
 - discussion lists with reward and recognition capabilities in SharePoint 2013, 192
 - Ribbon, Office UI innovations, 670–671
 - Risks, related to social computing
 - accidental or inappropriate disclosure, 493
 - distraction, 495
 - e-discovery, 494
 - exposing inaccurate information, 492–493
 - losing stature, 493–494
 - RM (Records Management)
 - auditing, 431–432
 - declaring records, 429–430
 - elements of Content Types, 165
 - information management policies, 432–435
 - overview of, 405, 429
 - In-place management, 430–431
 - with SharePoint Online, 324–325
 - standard and enterprise edition features, 45
 - ROI (return on investment)
 - applying ROI analysis, 238–239
 - as measure of success of project, 227
 - ROI-lite, 239–240
 - Roles
 - defining, 92–97
 - governance plan considerations, 88–89
 - information architect, 122–124
 - key elements in governance plan, 70
 - user roles, 216–217
 - RSA SecurID, 629–630
 - RSS (Really Simple Syndication), 262
- S**
- SAAS (Software as a service), 314, 338
 - SCOM (Systems Center Operations Manager), 107–108
 - Scorecards
 - balanced scorecards, 250–254
 - in dashboards, 606
 - overview of, 608–609
 - reasons for using PerformancePoint Services, 619
 - strategic/appropriate use of, 622
 - Scrolling, design principles for page layout, 149
 - SDP (SkyDrive Pro)
 - accessing from Office 365, 321
 - in architecture of social computing, 529
 - document library in, 129
 - integration with SharePoint, 654
 - keeping document content current with, 660
 - migrating from SPW to, 659–660
 - mobile applications, 636

- new features in SharePoint 2013, 473
 - Office on Demand and, 647–648
 - offline access with, 296
 - offline synchronization with, 191–192
 - providing ability to work with content across devices and offline, 491
 - recommendations for working with SharePoint documents and data, 669
 - SharePoint Online support, 312, 335
 - SPW features not available in, 658–659
 - taking SharePoint documents offline, 654–655
 - working with, 655–658
 - working with files offline, 664
- Search alerts, 548
- Search Center, 129, 538
- Search dictionaries, 559–560
- Search-driven applications
- overview of, 564
 - search-driven Content Web Parts, 564–565
 - video search results, 564
- Search-driven Content Web Parts, 564–565
- Search engine optimization (SEO), 443–444, 446
- Search engines
- improvements to SharePoint 2013, 190–191
 - in logical search architecture, 550
 - reports and, 604
 - SEO (search engine optimization), 443–444, 446
- Search refiners
- customizing and creating, 559–560
 - defined, 538–539
 - search results pages providing, 545–547
- Search results
- adding new sources, 555–557
 - defined, 538
 - search refiners and, 546–547
 - video search results, 564
- Searches
- adding content sources, 554–555
 - adding result sources, 555–557
 - administering, 549–550
 - adoption and, 198–199
 - application features in SharePoint Server, 262
 - capabilities in SharePoint Server 2013, 40–41
 - capabilities not available in SharePoint Online, 328–329
 - capacity planning, 553
 - comparing SharePoint Online with SharePoint Server 2013, 560–563
 - configuring and managing, 540–541
 - configuring as application, 128
 - consolidating FAST search engine with SharePoint search, 287
 - content management and, 540
 - Content Search Web Part, 440
 - customizing and creating search refiners, 559–560
 - deciding what content to expose to, 541–542
 - exporting/importing search settings, 560
 - features of enterprise edition, 46
 - features provided by shared service applications, 263
 - features that do not work across site collections, 268
 - importance of, 537
 - key point review, 565
 - keyword matches, 438
 - logical architecture, 550–551
 - logical operators and wildcards in, 196
 - managing, 554
 - managing with SharePoint Online, 325
 - metadata and, 121, 160, 181–182
 - options for, 548–549
 - overview of, 535
 - physical architecture, 551–552
 - planning for, 468, 536–537
 - query rules in, 557–558
 - search-driven applications, 564
 - search-driven Content Web Parts, 564–565
 - SEO (search engine optimization), 443–444
 - site architecture and, 134
 - SkyDrive Pro and, 655
 - standard and enterprise edition features, 45
 - teaching users how to create effective queries, 209–210
 - terms and concepts, 538–540
 - tips and syntax, 547–548
 - upgrades and, 297
 - upgrading to SharePoint 2013 search, 553–554
 - user perspective on, 543–547
 - video search results, 564
 - what's new in SharePoint 2013, 230, 535–536
 - writing search queries, 684–686

- Securable objects
 - applying permissions, 388–389
 - applying permissions to, 358–364
 - inheritance and, 385
- Secure Store, 325
- SecurID, RSA, 629–630
- Security
 - access controls, 348–349
 - applying permissions, 388–389
 - checking permissions, 394–395
 - custom SharePoint groups, 374–375
 - default SharePoint groups, 368–372
 - defining groups, 386–388
 - displaying object permissions, 395–396
 - documenting, 379–380
 - Draft Item Security, 415
 - example security model, 390–393
 - Excel Services and, 615
 - exceptions, 365–366
 - of external data, 577–578
 - folders and, 161
 - of groups, 367–368
 - guiding principles, 75
 - item-level, 417–418
 - key point review, 398–400
 - listing access requirements, 386
 - listing permission levels, 386
 - listing security requirements, 382–386
 - maintaining, 389, 394
 - overview of, 341–343
 - permissions, 375–379
 - securable objects, 358–364
 - security trimming, 365
 - sharing externally and, 354–357
 - sharing internally and, 350–354
 - in site architecture diagram, 142
 - of sites, 357–358
 - special SharePoint groups, 372–374
 - troubleshooting security applications, 396–398
 - of users, 367
 - what's new in SharePoint 2013, 343–348
- Security exceptions, 365–366
- Security trimming, 365
- Selective external migration, 304–305
- Send To command, managing document copies and, 693–697
- SEO (search engine optimization), 443–444, 446
- Serious anecdotes
 - collecting good value stories, 255–256
 - examples of, 246–247
 - in qualitative metrics, 245–246
- Servers. *see also* by individual types
 - deployment strategies, 279–281
 - Excel Services server features, 617–618
 - server roles in SharePoint, 278
- Service applications
 - architecture of, 271–272
 - features provided by shared service applications, 263–264
- Service level agreements (SLAs)
 - governance plan as framework for, 69
 - technology assurance dimension of governance and, 62
- Settings, managing with SharePoint Online, 325–326
- Shared Service Providers (SSPs), 271
- SharePoint 2003, migrating to SharePoint 2013, 286
- SharePoint 2007, migrating to SharePoint 2013, 286
- SharePoint 2010, migrating to SharePoint 2013, 286
- SharePoint 2013
 - as application, platform, or framework, 13–15
 - comparing versions of, 43, 45–49
 - current versions and technologies, 36–37
 - determining relevant capabilities, 25–29
 - how SharePoint is used, 12–13
 - identifying the business objectives, 20–22
 - identifying the stakeholders, 22–24
 - key point review, 29–30
 - overview of, 11
 - as replacement for Access and Excel, 51–52
 - as replacement for file sharing, 49–51
 - strategy roadmap, 18–20
 - technologies and capabilities, 38
 - walking through example build of collaborative application, 52–58
 - what's new, 15–18, 42–45
- SharePoint administrator role, 93
- SharePoint architect role, 94
- SharePoint coaches

- importance of, 97
- role and responsibilities of, 94
- SharePoint Designer 2013
 - customizing workflows, 586–588
 - designing workflows, 588–589
 - integration with SharePoint, 654
 - working with workflow actions, 592–595
- SharePoint Foundation
 - in history of collaboration services, 34, 36
 - Windows Server 2008/2012 as basis for, 260
- SharePoint Foundation 2013
 - application capabilities provided by, 262
 - collaboration services, 40
 - description of, 42
 - overview of, 37
 - platform capabilities provided by, 261
- SharePoint Groups
 - custom, 374–375
 - default, 368–372
 - defining, 386–388
 - special, 372–374
 - types of, 368
- SharePoint Health Analyzer, 106
- SharePoint Online
 - capabilities missing in, 327–329
 - capabilities only available in, 329–334
 - comparing with SharePoint Server 2013, 326–327, 560–563
 - components of Office 365, 315
 - ease of sharing and, 66
 - feature parity with SharePoint Server, 410
 - getting started with, 335–336
 - migrating to, 336–337
 - operational governance and, 103, 337–338
 - overview of, 322–326
 - planning for, 334–335
 - sharing sites and documents outside organization, 704
 - SQL Azure and, 577
 - technology assurance dimension of business governance and, 62
 - what's new, 312–313
- SharePoint Online administrators group, 373
- SharePoint Portal Server (SPS), 34–36
- SharePoint Server 2010, 580
- SharePoint Server 2013
 - capabilities/services, 40–41
 - ECM (enterprise content management), 40
 - Enterprise CAL, 37, 42, 46
 - options for working with workflows, 580
 - Standard CAL, 37, 42, 43, 45
 - technologies and capabilities, 38
- SharePoint Team Services (STS), 34
- SharePoint Workspace. *see* SPW (SharePoint Workspace)
- Sharing. *see also* Collaboration
 - authentication and, 347
 - documents externally, 343, 357, 705–706
 - documents internally, 343, 350–351
 - externally, 329–330, 354–356
 - improvements to SharePoint 2013, 191
 - internally, 350
 - online vs. on-premises, 345–346
 - reviewing what has been shared, 706–707
 - sites externally, 356–357, 704–705
 - sites internally, 351–354
- Single-server deployment, 279
- Site architecture
 - “About” sections, 138–139
 - activity groupings, 139–140
 - administration, 142
 - best practices, 137–138
 - best practices for page layout, 146
 - consistency of page layout, 145–146
 - creating effective, 134–135
 - design principles for page layout, 149–151
 - design techniques, 135
 - diagramming, 141–142
 - duplicating content in more than one location, 140
 - functional groupings, 139
 - implementing, 143–144
 - managing navigation, 144–145
 - overview of, 120
 - templates and starters for page layout, 146–148
 - three-click-rule myth, 153
 - top links in, 145
 - wire framing templates, 152–153
- Site collection administrators group, 372
- Site collections

- architecture, 265–268
- central administration, 272–274
- deferring upgrades, 287
- eDiscovery Center, 409–410
- features that do not work across, 267
- fundamentals common to portals, sites, and pages, 265
- grouping sites into, 128–129
- listing security requirements for, 382–386
- managing, 322–323
- multiple collections vs. single collection with sub-sites, 130
- planning upgrades, 292
- separating software or database upgrade from site upgrade, 288
- site collection administration, 275–277
- tenant administration, 274–275
- Site designer role, 94
- Site Mailbox app, 407–408, 662–663
- Site Mailboxes, 295
- Site models, 261
- Site owners
 - access issues and, 398
 - adding apps to sites, 707
 - naming conventions for, 681–683
 - new tasks in SharePoint 2013, 703
 - reviewing what has been shared, 706–707
 - sharing documents outside organization, 705–706
 - sharing sites outside organization, 704–705
 - using Promoted Links, 708–711
- Site sponsor role, 94
- Site steward role, 94
- Site workflows, 588, 590
- Sites
 - accessing from Office 365, 321
 - accessing permissions, 361
 - adding apps to, 707
 - architecture of, 265–268
 - branding, 452–454
 - central administration, 272–274
 - checking permissions, 394–395
 - design principles, 76–77
 - following, 699
 - fundamentals common to portals, sites, and pages, 265
 - governance model for sample deployment, 81–84
 - governance plan considerations, 90
 - hosting in SharePoint 2010 and 2013 simultaneously, 288
 - key topics in book, 3
 - listing permission levels for, 383–386
 - managing security of, 350
 - mobile usage scenarios, 631
 - naming conventions for, 683
 - new site development features in SharePoint 2013, 18
 - personal sites, 507–509
 - reasons for using SharePoint for Internet-facing sites, 437–438
 - retention policies, 406–407
 - as search result source, 543
 - securing, 357–358
 - sharing externally, 354, 356–357, 704–705
 - sharing internally, 351–354
 - sharing online vs. on-premises, 345–346
 - site-level administration, 277–278
 - starter templates, 126, 146–148, 450
 - Web Parts for building, 458–459
 - writing great content for, 678–680
- Sites page (or hub), 125–126
- SkyDrive Pro. *see* SDP (SkyDrive Pro)
- SLAs (service level agreements)
 - governance plan as framework for, 69
 - technology assurance dimension of governance and, 62
- SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives, 234–235
- Smartphones. *see also* Mobile devices, 625–626
- Social computing
 - architecture of, 529–530
 - blogs, 524–525
 - capabilities in SharePoint Server 2013, 41
 - collaboration structure provided by, 516
 - collaborative authoring within Office documents, 527–528
 - community sites, 517–522
 - configuring user profiles, 495–500
 - conversation concepts, 474–476
 - deployment strategies for, 203–205

- enabling online conversations, 484–490
- engaging others and getting work accomplished, 506–507
- governance plan for, 91, 495
- identifying business objectives related to, 479–482
- identifying stakeholders in, 23
- identifying use cases, 483–484
- key point review, 532–533
- likes and ratings and, 501–502, 513–514
- managing blogs and wikis, 501
- managing discussions, 502–505
- managing newsfeed posts, 500
- mobile device support, 478
- mobile usage scenarios, 630–631
- new personal features in SharePoint 2013, 472–474
- newsfeeds, 509–513
- overview of, 471
- personal sites, 507–509
- pilot project for, 505
- planning and governing, 479
- preparing for, 294–295
- preparing launch and communication plans for, 505–506
- risk of accidental or inappropriate disclosure, 493
- risk of distraction, 495
- risk of e-discovery, 494
- risk of exposing inaccurate information, 492–493
- risk of losing stature, 493–494
- SharePoint Newsfeed application and, 633–635
- SharePoint Online supporting, 335
- social content types requiring governance, 65
- social tags, 502, 514–516, 688
- standard and enterprise edition features, 45
- supporting online communities, 474, 490–491
- terminology, 687–690
- what's new in SharePoint 2013, 16, 190, 229–230
- wikis, 525–527
- working with content across devices and offline, 491
- Yammer and, 530–531
- Social Sites, NewsGator's, 294
- Social tags
 - adding, 514–516
 - in glossary of social computing terms, 688
 - understanding, 502
- Software as a service (SAAS), 314, 338
- Software, separating software upgrade from site upgrade, 288
- Solutions
 - adopting. *see* Adoption
 - business solutions. *see* Business solutions
- Songs/ music, metadata architecture, 154–155
- Specific, Measurable, Achievable, Realistic, Time-bound (SMART) objectives, 234–235
- Speed, design principles for page layout, 149
- SPS (SharePoint Portal Server), 34–36
- SPW (SharePoint Workspace)
 - features not available in SkyDrive Pro, 658–659
 - migrating to SkyDrive Pro, 659–660
 - replaced by SkyDrive Pro, 651, 654
- SQL Azure
 - access protocols for connecting to SharePoint, 577–578
 - making data accessible in cloud, 577
 - SharePoint Online integration with, 313
- SQL Reporting Services, 41
- SQL Server
 - access protocols for connecting to SharePoint, 577–578
 - managing database capacity, 107
 - managing databases, 108
 - providing database services, 39, 260
- SSPs (Shared Service Providers), 271
- SSRS (SQL Server Reporting Services), 604
- Stakeholders
 - identifying, 19, 22–24
 - in metrics, 236–237
- Standards, having central site for, 99
- Starter templates, 126, 146–148, 450
- Static reports, 604
- Steering committee role, 93
- Storage
 - platform capabilities provided by SharePoint Foundation 2013, 261

- shredded storage saving space and bandwidth, 408–409
- of social information, 529
- Stories
 - collecting good value stories, 255–256
 - communicating measurement stories, 243–244, 249
 - examples of serious anecdotes, 246–247
 - qualitative metrics and, 245–246
- Strategic goals, scorecards indicating performance against, 608
- Strategic plan, documenting, 21
- Strategy roadmap
 - determining relevant capabilities, 25–29
 - identifying the business objectives, 20–22
 - identifying the stakeholders, 22–24
 - overview of, 18–20
- STS (SharePoint Team Services), 34
- Subsites, 128–130
- Suite Bar, persistent navigation links, 124–125
- Synchronization
 - capabilities of SkyDrive Pro, 655
 - keeping document content current, 660
 - of Office document changes, 665
- Synonyms, 176, 180
- System metrics. *see* Usage analytics
- Systems Center Operations Manager (SCOM), 107–108
- T**
- Tablets
 - user experience of SharePoint with, 631–633
 - what's new in SharePoint 2013, 625–626
- Tags. *see* Social tags
- Task management
 - application capabilities provided by SharePoint Foundation 2013, 262
 - mobile usage scenarios, 630
 - new personal features in SharePoint 2013, 474
 - tracking projects, 191
- Tasks, site owner
 - adding apps to sites, 707
 - overview of, 703
 - reviewing what has been shared, 706–707
 - sharing documents outside organization, 705–706
 - sharing sites outside organization, 704–705
 - using Promoted Links, 708–711
- Tasks, user
 - creating/displaying views in lists and libraries, 690–693
 - creating posts in newsfeeds, 702–703
 - following documents, sites, people, and topics, 697–702
 - monitoring copies of documents, 693–697
 - overview of, 690
- Taxonomy
 - domain knowledge and, 131
 - navigation issues and, 297
- Team sites
 - default permission levels, 376–377
 - default SharePoint groups and permissions, 370–372
 - deployment strategies for collaboration solutions, 205–208
 - SharePoint Online support, 335
- Teams
 - activity groupings in site architecture, 140
 - coaching team in center of excellence, 207–208
 - elements of team “compact,” 206–207
 - governance planning and, 72–73
 - in IA design, 123
 - providing initial and ongoing support, 208
 - sharing newsfeed posts with, 510
- Technology assurance, in governance plan, 62
- Templates
 - binding to lists or libraries, 584–586
 - Business Intelligence Center, 618
 - Community Portal site template, 517
 - Community Site template, 347, 474, 476–477
 - Developer Site template, 331
 - elements of Content Types, 164
 - naming conventions, 682
 - out-of-the-box, 269–271
 - for page layout, 146–148
 - for project teams, 205–206
 - Publishing Site template, 330–331, 448
 - for sites, 268–269
 - starter templates, 126, 146–148, 450
 - workflow templates, 582–584
- Tenant administration, 274–276, 322–326

- Tenants, fundamentals common to portals, sites, and pages, 265
- Tenant_Users group, 373–374
- Term Set Planning Worksheet, 176
- Term Store, 324
- Term Store Management Tool, 176
- Terms/Term sets
 - creating/adding to, 178–179
 - defining terms in, 180–181
 - describing managed metadata, 175
 - managing, 176
 - planning, 177
 - predefining keywords and terms for user profiles, 200
- Test environment, establishing, 116
- Themes, branding sites and, 458
- Third-party tools
 - for migration, 286, 336
 - for security analysis, 364
 - for security management, 342
- Three-click-rule myth, site architecture and, 153
- Three-server deployment, 280
- Timeline controls, in Excel Services, 618
- Title property
 - search tips and, 548
 - what it is/ how it works, 210–211
- Top-left visual area, design principles for page layout, 149–150
- Top links, in site architecture, 145
- Topics, following, 701–702
- Training
 - addressing audience needs, 211–212
 - best practices, 99–100
 - in governance plan, 99
 - operational implications of SharePoint Online, 337
 - planning effective, 208–209, 211
 - tailoring to how jobs are performed, 215–217
 - timing programs for, 212–215
 - tips for training content, 209–211
 - upgrades and, 292
- Training manager role, 94
- Transitions, deployment planning and, 202
- Tree-jack tree testing program, from Optimal Workshop, 137
- Tree testing, approach to IA design, 136–137
- Tree view, configuring metadata navigation, 419–420
- Troubleshooting security applications, 396–398
- “Try It, You’ll Like It,” incentives and rewards in adoption, 218
- Twitter. *see also* Social computing
 - preparing for upgrades and, 294–295
 - social features of SharePoint 2013
 - similar to, 190
- Two-server deployment, 280
- U**
- UI (user interface), innovations in Office, 670–672
- ULS (Unified Logging Service), 108
- Unique identifiers, for SharePoint items, 156
- Updates
 - administering Office 365, 319
 - operational governance policies, 112
- Upgrades
 - business process capabilities and, 291–293
 - customization and, 301–302, 304, 306
 - electronic forms and document workflows and, 293–294
 - fixing structural issues prior to, 297
 - governance considerations related to, 291
 - key point review, 309–310
 - overview of, 285–286
 - planning for, 289–291
 - post-upgrade tasks, 307
 - pre-upgrade tasks, 306–307
 - preparing for, 308–309
 - to SharePoint 2013 search, 553–554
 - social computing and Yammer and, 294–295
 - strategies/options for, 302–305
 - technology assurance dimension of governance and, 62
 - timing, 230–231, 296–301
 - what’s new in SharePoint 2013, 286–289
 - working with SharePoint content offline, 295–296
- URLs
 - %20 characters in, 680–681
 - adding hyperlinks to posts, 703
 - readability and usability of, 441
- Usability, balancing with security, 364

- Usability testing
 - for improving solution adoption, 134
 - measurement strategy, 254–255
- Usage analytics
 - in logical search architecture, 551
 - in physical search architecture, 551–552
 - quantitative metrics, 241–243
 - WCM (Web content management) and, 444–445
- Usage reports, capabilities not available in SharePoint Online, 329
- Usage scenarios, mobile computing, 630–631
- Use cases
 - for adoption of new capabilities, 197
 - for mobile computing, 630–631
 - for online communities, 490–491
 - for online conversations, 484–490
 - for social computing, 483–484
 - for working with content across devices and offline, 491
- User documentation, as training tool, 214
- User feedback
 - aids to adoption, 195
 - for collecting qualitative metrics, 255
- User interface (UI), innovations in Office, 670–672
- User profiles
 - configuring, 495–500
 - features provided by shared service applications, 263–264
 - in governance plan, 91–92
 - managing, 323–324
 - predefining keywords and terms for, 200
 - standard and enterprise edition features, 45
- User surveys, for collecting qualitative metrics, 255–256
- Users
 - administering user accounts in Office 365, 319
 - checking individual or group permissions, 395
 - managing permissions of, 200–201
 - naming conventions for, 683–684
 - new types and governance, 66
 - perspective on searches, 543–547
 - role and responsibilities of, 94
 - security of, 367
 - solution adoption and, 122
 - as stakeholders, 23–24
 - targeting specific, 622–623
 - understanding needs and capabilities of, 131–132
 - upgrades and, 292
 - user personas/scenarios in mobile computing, 627–628
 - user roles, 216–217
- UX (user experience)
 - branding and, 452–454
 - online features of SharePoint 2013, 482
- V**
- Value, measuring. *see* Measurement/metrics
- Versions/version management
 - content approval and, 411–412
 - Draft Item Security, 415
 - of images (image renditions), 441–442
 - metadata attributes and, 156
 - of reports, 604
 - Require Check Out setting, 416–417
 - settings, 411
 - in SharePoint 2013, 43, 45–49
 - SharePoint product line and, 36–37
 - SPW capabilities not available in SkyDrive Pro, 659
 - version history, 413–415
- Video
 - adding to posts, 703
 - managing, 442, 444
 - posting link to, 511
 - search results, 564
- Video Content Type, 442, 444
- View permissions, for publishing sites, 377
- Views
 - creating differing views for contributors and consumers of information, 197
 - creating/displaying in lists and libraries, 690–693
 - inability to secure, 366
- Views (visits), system metrics (usage analytics)
 - capturing, 243, 444
- Visio
 - designing workflows, 592–595
 - enterprise edition features, 46

- features provided by shared service
 - applications, 264
- mind maps in documenting site
 - architecture, 141
- Visio Online, components of Office 365, 316
- Visio Services
 - overview of, 620
 - reasons for using, 620–621
 - working with SharePoint, 654
- Vision statement
 - clarity of, 73–74
 - envisioning process in governance plan, 85
 - key elements in governance plan, 70
- Visitors role, 216

W

- WACs (Web Application Companions), 527–528
- WCF endpoints, access protocols for connecting to SharePoint, 577–578
- WCM (Web content management)
 - basic capabilities of, 446–448
 - branding sites, 452–454
 - CEWP (Content Editor Web Part), 463–466
 - Content Organizer, 442–443
 - creating strategy for, 468–469
 - Design Manager, 459–463
 - image renditions, 441–442
 - Internet deployment solution and, 282–283
 - key point review, 469
 - master pages, 454–4546
 - overview of, 404, 437
 - page layouts, 456–458
 - planning, 467–468
 - publishing sites and, 448–452
 - reasons for using SharePoint for Internet-facing sites, 437–438
 - SEO (search engine optimization), 443–444, 446
 - SharePoint capabilities for, 632
 - standard and enterprise edition features, 45
 - themes, 458
 - usage analytics, 444–445
 - video management, 442
 - Web Parts for building sites, 458–459
 - what's new in SharePoint 2013, 438–441
- Web analytics, 440
- Web Application Companions (WACs), 527–528
- Web applications, 264–265
- Web-based forms, 293–294
- Web browsers
 - drag and drop functionality of, 408
 - operational governance considerations, 104–105
 - SharePoint Newsfeed application accessed from, 635
- Web content management. *see* WCM (Web content management)
- Web pages
 - architecture of. *see* Page architecture
 - ASP.NET service for, 39–40
 - changes to master page customization in SharePoint 2013, 287
 - in document libraries, 411
 - page layout template for, 146
- Web Parts
 - in ASP.NET, 39–40
 - BCS Web Parts, 575–576
 - for building sites, 458–459
 - CEWP (Content Editor Web Part), 463–466
 - Chart Web Part, 605
 - Content by Search Web Part, 560
 - Content Query Web Part, 267
 - customization issues when upgrading, 301–302
 - home page organization and, 126–127
 - inability to secure, 366
 - page architecture and, 121
 - search-driven Content Web Parts, 564–565
 - vs. Quick Launch links, 151–152
- Web sites. *see* Sites
- Weekly maintenance, of operational governance, 109–110
- WF (Windows Workflow Foundation) 4, 39, 580–581
- WFE (Web front end)
 - corporate intranet farms, 282
 - server roles in SharePoint, 278
- Wikis
 - application capabilities provided by SharePoint Foundation 2013, 262
 - managing, 501
 - overview of, 525–527
 - preparing for upgrades and, 294

- risk of exposing inaccurate information, 492
 - Wildcard characters (*)
 - in contextual help systems, 196
 - in searches, 548
 - tips for writing search queries, 686
 - Windows 8, 644
 - Windows application logs, 108
 - Windows authentication, 287
 - Windows Azure
 - Active Directory, 531
 - comparing cloud computing services, 315
 - SharePoint Online integration with, 313
 - Windows Explorer
 - integration with SkyDrive Pro, 655, 658
 - moving files between SharePoint and other file systems, 663–664
 - recommendations for working with SharePoint documents and data, 670
 - working with SharePoint, 654
 - Windows Intune, 628
 - Windows Phone
 - Office applications, 636, 639
 - SkyDrive Pro support for mobile applications, 636
 - support for mobile devices, 478
 - what's new in SharePoint 2013, 626
 - Windows Server
 - as basis for SharePoint Foundation, 260
 - comparing cloud computing services, 315
 - providing base operating system services, 39
 - Windows SharePoint Services. *see* WSS (Windows SharePoint Services)
 - Windows Workflow Foundation (WF) 4, 39, 580–581
 - Wire frames, templates for, 152–153
 - Word
 - collaborative authoring, 528, 648–649
 - enterprise edition features, 46
 - features provided by shared service applications, 264
 - Office Mobile Applications and, 644, 674–675
 - Office on Demand and, 647–648
 - Office Web Apps and, 639, 644, 673–674
 - pasting content from, 465
 - Windows Phone applications, 636
 - working with SharePoint, 654
 - Work Management Service, 569
 - Workflow Manager, 569, 580–581
 - Workflows
 - associating with lists, 584–586
 - association options and actions, 591–592
 - Content Types and, 165
 - creating custom, 586–588
 - designing with SharePoint Designer, 588–589
 - designing with Visio 2013, 592–595
 - features that do not work across site collections, 267
 - function of, 567
 - mobile usage scenarios, 630
 - overview of, 426, 579–581
 - as stand-alone service in SharePoint 2013, 260
 - standard, 584
 - templates, associations, and instances, 584
 - terminology, 582–584
 - types of, 588, 590–591
 - upgrades and, 293–294
 - Windows Workflow Foundation, 39
 - WSS (Windows SharePoint Services)
 - cloud computing and, 312
 - in history of collaboration services, 34, 35–36
- Y**
- Yammer
 - acquisition by Microsoft, 471
 - integration with SharePoint 2013, 530–531
 - integration with SharePoint Online, 334
 - licensing models, 333–334
 - for microblogging, 476
 - policies in governance plan, 92
 - preparing for, 294–295
 - replacing Newsfeed with, 125
 - SharePoint Online support, 335
 - social computing and, 41
- Z**
- Zero-server deployment, 279