



Governmental Centralized Collaboration and Training

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BACKGROUND

Since 2008, an Executive Branch agency of the U.S. Government with decentralized facilities around the nation has sought the aid of EPC Group for SharePoint consultations, specifically centering around creating a centralized SharePoint Service and to integrate the training between the various centers as each of them have a specific role within the overall agency hierarchy. EPC Group, with its proven track record of successful interactions with government agencies and institutes, possessed the expertise necessary to handle each facility's unique organizational requirements to help them integrate not only best practices between the agencies using a centralized SharePoint Collaboration platform but to update the agencies centralized training centers with updates curriculums, specifications, and agency employee and contractor training and certification tracking.

Beginning with Facility No. 1, the facility required an assessment and health check on its SharePoint environment and training curriculum tracking mechanism within SharePoint, making any necessary modifications to ensure a best practices and highly available SharePoint platform, troubleshooting possible existing issues within the environment, and the creation of a SharePoint Site Provisioning Solution to properly govern, track, and create new SharePoint Sites and training labs.

At Facility No. 2, personnel desired hosting and participation in a SharePoint Governance workshop, an assessment and Health Check on its SharePoint environment, and charge-back recommendations to support the resource expenditures for the agency's global customer base and integration with the established centralized training center.

Next, EPC Group worked with Facility No. 3, which necessitated a full blown migration from SharePoint 2003 (WSS 2.0, SPS, MOSS) to Microsoft Office SharePoint Server 2007 to be utilized internally as a central collaboration Intranet tool and to manage their day-to-day documents, content and training on newly constructed space vehicles and related projects. EPC Group proposed a needs assessment of the current Windows SharePoint Services 2.0, SharePoint Portal Server 2003, and MOSS 2007 pilot portal environment, a best practices Microsoft Office SharePoint Server 2007 deployment based on the results of the assessment and, then, a migration of the existing SharePoint 2003 content over to SharePoint Server 2007.

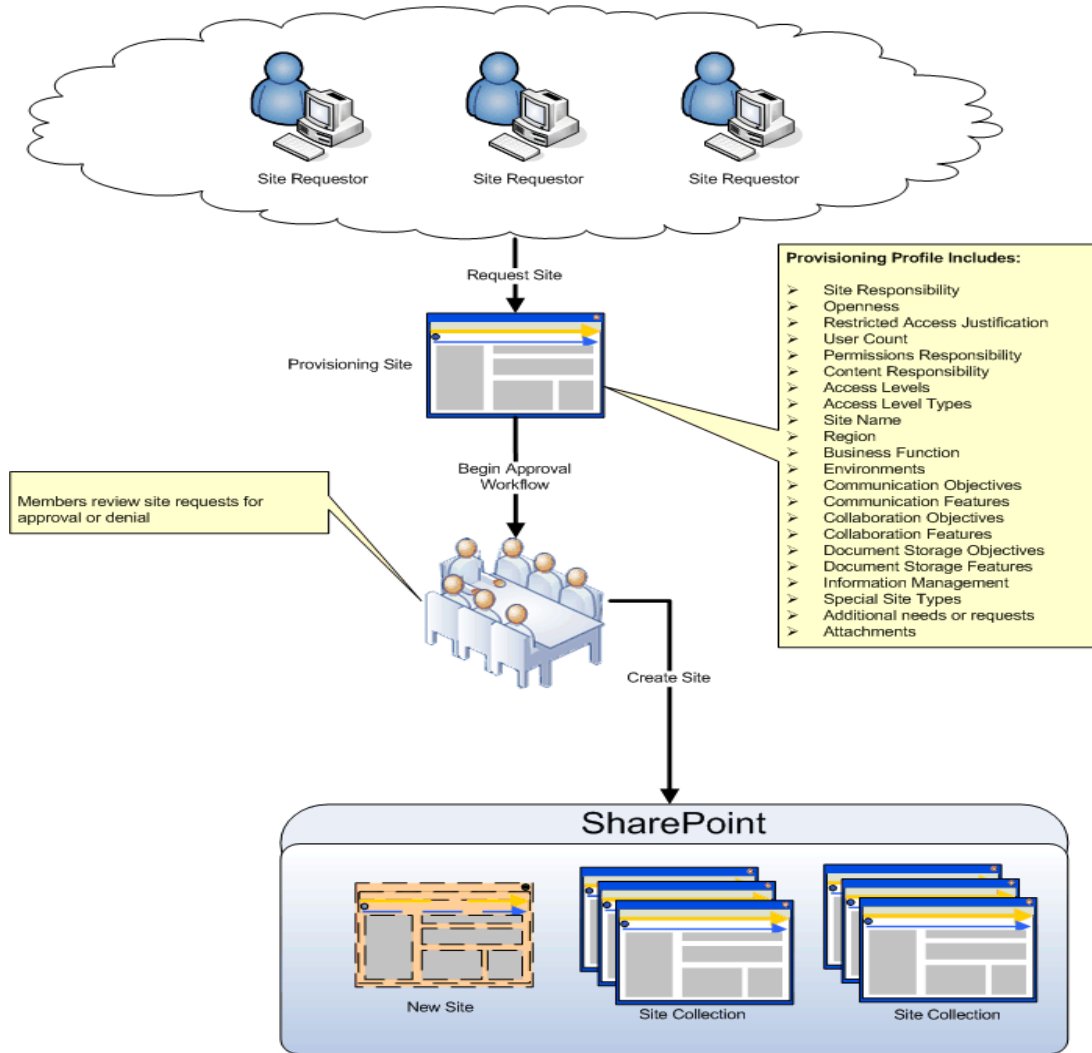
THE PHASED APPROACH

In order to provide an efficient and cost effective program of services to each of the agency's facilities, EPC Group structured its solutions in accordance with a phased approach to achieve the previously outlined goals. Each phase had specific deliverables to provide functionality and ensure a successful implementation.

- **Phase I - Perform Envisioning and Assessment:** This phase outlines the findings and recommendation for moving toward a successful implementation and to better understand the current business, training, and technical landscape. This effort would include assessment of organizational and project structure, project management processes and resource allocations, infrastructure analysis, system notification, Health Check diagnosis, requirements, gap analysis, user group definition and design, and system and organization requirements, all depending on the needs of the client.

- **Phase II – Design and Plan:** EPC Group conducted a needs assessment review within each facility around the overall Information Architectural Design of MOSS 2007 and ensured the overall high level design of their MOSS implementations to also facilitate federation between their central training labs and the different centers. Additionally, EPC Group conducted requirements gathering sessions to work with the clients to identify all the detailed requirements needed. Based on the recommendations from the Health Check findings for specifically Facility No. 1 and Facility No. 2 that were requested, detailed requirements would be documented and a design of the system and project management processes and templates would be created.
- **Phase III – Build and Deploy:** EPC Group used appropriate Microsoft Windows, Office, SharePoint 2007, Silverlight, ASP.net, and SQL Server, or other technologies as needed to provide a sound solution or recommendation, as appropriate.

- **For Facility No. 1:** After the facility’s Health Check assessment, EPC Group implemented its proven SharePoint Site Provisioning Solution. This was to ensure proper growth of the SharePoint Training and Collaboration Sites and enforce the “one version of the truth” methodology. Below is an example of a SharePoint Site Provisioning process:



- **For Facility No. 2:** After a 7-day SharePoint Governance workshop was held and a Health Check was performed, consulting services recommended 5 separate chargeback models for cost recovery planning and activity. A detailed cost/benefit analysis evaluated the most effective and economical method for the needs of the agency and made recommendations based on the findings. This also helped provide a proof-of-concept to centralize all related Facility No. 2 training into the agency’s centralized training facility and to establish guidelines for newly created training material (videos, documentation, etc).
- **For Facility No. 3:** EPC Group implemented SharePoint Server 2007 utilizing document libraries as the primary file storage location for the facility’s existing documents and content. SharePoint

Team Sites and Training Sites were also redesigned to work with SharePoint 2007 functionality, and a top-level “landing area” was created within the new SharePoint Server 2007 Portal for each of the existing sites. Additionally, EPC Group developed and implemented a custom navigation solution so that users would be able to easily navigate the new SharePoint 2007 environment across all 100 site collections.

EPC Group created facility specific templates also for Team, Training, and Project Sites so that all future Sites would maintain the same look and feel and so all future projects or initiatives could utilize the same standard site layout as well as document libraries and other customized lists to maximize SharePoint’s collaboration capabilities.

- **Phase IV – Transfer and Operate:** EPC Group provided knowledge transfer services to each appointed team members. This was not formal training but on the job knowledge transfer for administrator type activities. Business and IT Leadership and Core-End Users began benefiting from different phases of the knowledge transfer process, respectively. This training synced up with the overall curriculums created by the centralized training labs in conjunction with EPC Group’s best practices.
- **Plan V – Nurture and Improve:** Implementations and knowledge transfer initiatives are not one-time events. The needs of an organization are constantly evolving. Each facility was advised on how it could not only utilize its current solutions, but continually improve upon them through Best Practices.

POSITIVE IMPACT

The new SharePoint solution assisted Facility No. 1 with achieving the following:

- Ensuring a best practices collaboration platform is configured into the facility’s environment.
- Ensured a centralized managed training element for which all the agency’s centers could store their content in a specific format for not only continued training but as all agency employees moved into possible new roles within their existing facility or one of the other facilities across the U.S.
- Increased document security and compliance.
- Ensuring the facility’s SharePoint environment is architected following both EPC Group and Microsoft Best Practices.
- Ensuring all SharePoint Site requests are centrally managed and that all new Sites would be properly approved by designated Site approvers to eliminate issues related to non-governed site proliferation.

The Governance Workshop, Health Check and Assessment, and the recommended Charge Back Models aided Facility No. 2 by providing the following:

- Better understanding of the information management landscape and EPC Group and Microsoft Best Practices to realize the full scope of the recommendations and models put forth to effectively leverage the SharePoint platform.
- Detailed analysis and report on hardware configuration, SharePoint environment with recommendations for revisions.

- A selection of 5 chargeback models and a comprehensive analysis of the most appropriate resource expenditure model with regards to the needs of the agency's global customer base as a variable.

The site assessment and migration from SharePoint 2003 to a SharePoint 2007 environment assisted Facility No. 3 with achieving the following goals:

- Increased document security and search.
- Improved usability.
- Achieved true enterprise metadata.
- Assisted the facility in the classification and enterprise management of all new and existing documents.
- Developed custom and best practices navigation to assist users in browsing content.

This hands-on administrative training guide and the related training labs through Microsoft SharePoint2007 architecture including how it works with the OS, the difference between it and SharePoint 2003, and its many new features. Hands-on training included installing and configuring Microsoft SharePoint 2007 as well as application management, portals, content types, searches, workflows, document management and disaster recovery. This assisted the agency's SharePoint Administrators in order to:

- Understand SharePoint's New Administrative Interface.
- Better Manage SharePoint Web Applications, Site Collections and Sites.
- How to automate business processes with SharePoint's expanded workflow system.
- Understanding and comfort with utilizing SharePoint's built-in workflow and templates.
- Understanding the best backup and recovery techniques for SharePoint.
- Understanding the application services available through Shared Provider Service.
- The best ways to work with User Profiles to facilitate collaboration.