Executive Summary

Microsoft® Office SharePoint® Server 2007 is a business productivity server that brings information management and access, collaboration and people-driven processes into the familiar environment where people do their work every day. People benefit from the familiarity and consistency of a single environment for all their information and collaboration tasks that is easy to learn, use and personalize. IT has a single platform and well-integrated set of technologies to manage and lower end-user support requirements. The business can rapidly customize and extend the deployment of SharePoint—Office SharePoint Server, Microsoft Windows® SharePoint Services, and Microsoft Office SharePoint Designer—by using powerful out-of-the-box integration to extend current investments, or choose from a wide ecosystem of Microsoft partners to develop innovative enterprise applications quickly and at lower cost. With SharePoint, organizations can more easily leverage their knowledge capital of enterprise data, human expertise, process knowledge, and content to operate with greater agility in a dynamic and complex world.
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Overview

In an interconnected, competitive global environment, organizations of all sizes and all industries face pressures to improve customer relationships, drive innovation, improve operations, and build high-value partnerships. Microsoft believes that the best way to achieve these goals is by empowering people to do more in their roles by connecting them better to the people, processes, and information they need to do their jobs.

Today, despite many organizations’ considerable investments in both information technology (IT) systems and human talent, results can still fall short of expectations. That’s because a gap exists between the types of structured, predictable processes that are supported by traditional IT solutions and the real work that people do day-to-day in terms of finding and sharing information, working together in teams, and performing routine tasks that rarely justify dedicated IT investments to automate.

*SharePoint is the foundation for a business productivity infrastructure that is optimized around people and the way they work.*

These sorts of unstructured activities are not as easy to measure as transaction-based work, so it can be hard to recognize how ineffective processes in these areas can slow innovation and customer-facing processes, produce errors, inhibit teamwork and information sharing, cloud visibility, reduce morale, and generally squander the organization’s investment in both people and systems. Also, because few IT systems have focused on trying to solve these problems in a strategic way, IT decision makers have been forced to view them as discrete processes to be solved with stand-alone systems such as portal sites, search engines, business intelligence (BI) systems, and content management solutions, rather than a single problem of organizational productivity requiring a comprehensive IT investment strategy.

Transforming IT into a Strategic Advantage: Business Productivity Infrastructure

Solving the productivity problems inherent in complex, collaborative information work is therefore both a business priority and a strategic IT challenge. Microsoft offers a solution that meets the needs of both the business and IT with a set of integrated software products, servers, and services that comprise a business productivity infrastructure. The business productivity infrastructure streamlines the way people do business with 2007 Microsoft Office System by providing capabilities to support unified communications, business intelligence, enterprise content management, and search, built on a secure, well-managed infrastructure, and offering an extensible platform for the rapid development of Office Business Application services. An optimized business productivity infrastructure also provides IT with a more flexible and easily adopted set of technologies to support the changing needs of business units and business users quickly and at lower cost, demonstrating the strategic value of IT as it relates clearly to the work people do every day.
Microsoft SharePoint Products and Technologies

SharePoint Products and Technologies (see sidebar for definition; referred to throughout the rest of this paper as “SharePoint”) is the foundation of an optimized business productivity infrastructure – the first comprehensive approach to solving the problems that people encounter in the unstructured world of work. Rather than treating information management and access, collaboration, and people-driven processes as isolated challenges, SharePoint encompasses the whole continuum of unstructured work as a single set of related issues that demand a single, strategic approach. This offers several significant benefits:

- **Simplicity** for end users, who can leverage their familiarity with Office-based applications and the browser environment for all their information-work activities, regardless of their role or task.

- **Value and governance** for IT, which only needs to support a single set of technologies to enable comprehensive capabilities across the enterprise.

- **Speed and flexibility** for the business, which can customize and extend the platform quickly and easily at a variety of levels from personalization to enterprise application development.

- The **security and scalability** of a platform built for the enterprise

**SharePoint integrates collaborative, information-centric, and process-oriented activities into a single, extensible platform that fits seamlessly into people’s natural work environment.**

At a basic level, SharePoint can address specific needs related to collaboration, information access, enterprise content management, capture of information through electronic forms, dissemination of business intelligence data, and enterprise application integration through portal sites.

The real value of SharePoint is the way that it integrates the whole spectrum of collaborative, information-centric, and process-oriented activities into a single, extensible platform that fits seamlessly into people’s natural work environment. This integration solves the business need for rapid responsiveness and IT’s need...
for governance, while giving people the right tools for their job in an easy, familiar context. As organizations deploy SharePoint for specific purposes, they will find that the unique combination of capabilities, accessibility, extensibility, and manageability opens up new vistas of potential for people and the business.

Avoiding the Pitfalls of "People As Middleware"
All businesses expect great things from their people and huge efficiencies from their enterprise IT investments. However, without a consistent and systematic solution for the middle layer of connected information work activities such as collaboration, information access, and workflow task automation, organizations essentially force their people to become the "middleware" that connects structured processes to business value outcomes, rather than agents who apply their unique talents to value creation. Figure 2 illustrates the plight of "people as middleware."

![Figure 2: People as middleware](image)

The people-as-middleware dilemma squanders the organization’s investments in human expertise by forcing people with valuable work skills to become gatherers of information, coordinators of processes, and connectors of people. It also reduces ROI on enterprise IT investments because data that could be useful to the business remains locked away behind complex interfaces, specialized systems, and poorly integrated repositories that the average worker cannot find or use when they need to take action. Finally, it forces IT into an uncomfortable role, having to satisfy the constant demands of the business and end users with an increasingly complex and incompatible set of technologies that were not necessarily designed to work together.

People must be empowered to realize their potential as value-creators and IT must break the vicious cycle of reacting to moving-target business needs.

As value creation and competitive differentiation become increasingly dependent on complex work skills and organizational agility, organizations need to solve the "people as middleware" problem. People must be empowered to realize their potential as value-creators and IT must break the vicious cycle of reacting to
moving-target business needs armed with inflexible, disconnected systems that the broad user base has difficulty adopting. Organizations need to find ways to combine the efficiencies and investments they’ve made in structured systems and business data with the flexibility and familiarity of desktop productivity tools. They need to unlock the value of business data so it is more useful to people across the entire organization while governed by secure and consistent IT practices. And they need to bring the familiarity and power of the information work productivity suite to bear on challenges like information search, content management, collaboration, task and project management, and access to enterprise data.

SharePoint enables organizations to transform the way they and their people operate without disrupting the underlying investments in IT systems.

Solving “People as Middleware”: Optimize Around People
SharePoint enables organizations to transform the way they and their people operate without disrupting the underlying investments in IT systems. They do this by providing a common point of integration for data and processes from enterprise systems and a single environment to support the collaboration and information management requirements of the business world, as illustrated in Figure 3.

In this view, people and the way they work are the starting points for optimization. The goal of the infrastructure is to provide broadly accessible connections to the people, processes, and information that people need, customized to their role, task, and personal workstyle.

These capabilities fit the needs of the unstructured world of work at the point where it intersects with existing investments in transactional systems and structured processes. In most enterprises, this is where the majority of information work gets done. It is the arena where ideas for new products and services are created and refined, where sales are won or lost, where relationships are strengthened, where data is analyzed for insights that can lead to the discovery of new opportunities.
SharePoint: Revolutionizing the Way People Work

By delivering integrated, people-centric solutions for information management and access, collaboration, and process automation, as well as a dynamic, easy-to-use, and personalized portal site framework for Internet, intranet, and extranet scenarios, SharePoint revolutionizes the way people work. SharePoint streamlines routine tasks and deliver unprecedented empowerment to create business value while positioning IT to be a responsive, strategic partner in the business. Additionally, with Microsoft ASP.NET 2.0 and Workflow Foundation built-in, organizations can leverage SharePoint to build mainstream applications and innovative collaborative applications, or to provide a user-friendly front-end interface to back-end transactional systems with Office Business Applications.

Information Management and Access

As data proliferates in the enterprise and in the world, people need better ways to find and manage information and organizations need better ways to keep track of their data assets. The capabilities that support these requirements include enterprise search, document lifecycle management, Web content management, and the ability to visualize business data in a widely accessible format.

“*In two and a half years of working here, I never found anything using the search feature that was in place before. Now I find 80% of what I am looking for on the first try.*”

Kristi Manor, Project Lead, Mary Kay

Complexity Diminishes Utility

Information is essential to solving business problems, but it is only useful when people know where to find it, how to interpret it, and how to easily integrate it into the work they are doing. In a typical environment, data is found in multiple locations – relational databases, document repositories, departmental file shares, individual PCs and storage devices, collaboration systems (such as e-mail and discussion databases), paper forms, and as “tacit knowledge” in the heads of individual experts. Organizations can only realize the value of their knowledge assets if people can find them quickly, manage them easily, and integrate the found knowledge naturally into their work.

Organizations will not solve the information management problem for their workers or their IT departments unless they address all these issues as part of an integrated, comprehensive solution. SharePoint uniquely provides both comprehensive capabilities and integration across the entire range of information management activities.

Find and Access Information

SharePoint has the out-of-the-box capabilities to provide simplified access to complex data sets across the entire enterprise, from the desktop to the data center, and present search results in a useful, intelligible format that respects security permissions and access policies. With SharePoint, people can search for data from enterprise applications such as Siebel and SAP by using a familiar and consistent interface accessible in any work context.

It also extends traditional data search capabilities into a true knowledge search by including the expertise of people. SharePoint enables rapid dissemination of best practices by making it easy for people to contribute knowledge through blogs, wikis, personalized My Sites, and communities of practice. This tacit
knowledge then becomes discoverable through search, so it can be reused for business value.

The real utility of search in SharePoint comes from its integration with collaboration and process. That means people can use search from within the context of any information work activity – document creation, online meetings, team workspaces, enterprise applications running within portal sites – and take action based on the information they have discovered. Business outcomes and business decisions will rest on the best and most current information because the breadth and depth of search capabilities of SharePoint helps people find the knowledge they need quickly, and in the form that is most useful to them.

SharePoint extends traditional data search capabilities into a true knowledge search by including the expertise of people.

Manage the Entire Document Lifecycle
Most document creation in the enterprise is done using Microsoft Office-based applications such as Microsoft Office Word, Microsoft Office Excel®, and Microsoft Office PowerPoint®, either by individual authors or small teams. Documents are then passed around to team members for review and comment (usually through e-mail), then possibly on to other points in a structured process, such as legal review, proofreading, and design. As nearly anyone involved in document creation can affirm, it is challenging to manage version control throughout this process, so that reviewers are looking at the most recent iterations of the document and authors receive feedback that can be incorporated in a systematic way without duplication of effort.

SharePoint makes it easy to create and manage workflow processes around document review. People can check documents out of a repository on the team site, make changes, and assign review as a workflow task to another member of the team. The processes around document creation are embedded in the familiar Microsoft Office interface so people working on a document do not have to leave the application to participate in collaborative activities. After documents have been finalized, process owners can manage successive stages of the content lifecycle (publication, expiration, retention) using the same platform and toolset used during the creative and collaborative stages of the process, as in Figure 4.
From an IT perspective, that means managing one set of technologies rather than two or three to cover the entire document lifecycle from creation through retention. When document management becomes a natural extension of the document lifecycle process, it is much easier for organizations to promote the mass use of document repositories to support compliance.

**Effectively Manage Web Content**

Over the last several years, organizations have created a huge volume of unstructured content. Content management policies make Web content, rich media files, discussion threads, archived online meetings, and workspaces discoverable by search engines, so they can be re-used for business value and retained as part of compliance policies. Teams and workgroups can benefit from content management at a local level to avoid duplication of effort and publication of out-of-date materials.

Microsoft Office SharePoint Server 2007 now includes the content management capabilities that build on earlier versions of Microsoft Windows Content Management Server. For some customers, these capabilities alone will justify investment and deployment of Office SharePoint Server. Microsoft combined the two products because it no longer makes sense to view content management in isolation from search, collaboration, document management, and workflow. Organizations need all these things to meet the challenges of a dynamic and complex world.

**Make Business Intelligence Broadly Accessible**

SharePoint enables organizations to derive greater value from their investments in data warehouse and business intelligence (BI) and analytics systems by making the insights from enterprise data more broadly and easily accessible across the entire organization. People can build query and visualization tools, scorecards, and dashboards that expose real-time enterprise data within SharePoint workspaces. Creating these powerful tools for business insight and action is as easy as highlighting regions of an Office Excel spreadsheet connected to Microsoft SQL Server™ data through Microsoft Office Excel Services, and using drag-and-drop Web Parts to display the data graphically on a SharePoint site as a KPI or dashboard, as shown in Figure 5.

![Figure 5: Accessing an Excel workbook by using Excel Services and a Web browser](image)
SharePoint provides a simplified view of real-time enterprise data to everyone from front-line customer service and operations workers to executive decision makers so they can take action based on their role and task. Because the data is presented in a SharePoint site, teams can collaborate around a consistent and up-to-date view of BI data so they can have more productive discussion and make more confident decisions. This “BI for the masses” approach extends business data beyond the “expert view” of traditional BI portal sites, such as those in Microsoft Dynamics Business Portal and other business applications, while retaining the value that those systems provide for people in specialized roles.

Microsoft Office SharePoint Server: Integrated Information Management
SharePoint provides solutions to each facet of the information management challenge with capabilities for information search and access, document lifecycle management, Web content management, tacit knowledge dissemination, and simple visualization of enterprise data for BI. But the unique advantage that only SharePoint provides is the integration of all these capabilities into a single, consistent experience for people and a single, integrated environment for IT. The simplicity of SharePoint helps reduce the burdens on people to be the point of coordination for multiple sources of information, and increases the utility of knowledge within the organization.

Collaboration
Collaboration is the heart of SharePoint. While collaboration is sometimes scheduled or agenda-driven, it is as likely to arise spontaneously from the context of a task – the quintessential unstructured work scenario. The vast majority of knowledge tasks are collaborative in some way, relying on the transfer of knowledge between people. People meet to share ideas, coordinate their actions, review plans and documents, and notify one another of project status. For example, a manager sends an e-mail to one of her direct-reports to get clarification on a financial summary, or a customer service representative escalates a help-desk call to a product specialist. In such cases, both the format of collaboration and the outcome of the collaborative process are not defined at the outset. This is why a truly comprehensive collaboration solution must provide complete capabilities for people to work together in sequence, in real time, in ad hoc situations, or as part of a structured process.

Only SharePoint provides both the breadth of coverage across the full spectrum of collaboration modes and the depth of integration with business processes and enterprise applications necessary to fully address the challenge of collaboration for business value. And only SharePoint brings the collaboration experience to the familiar environment where people actually do information work, rather than making people go to another application or portal site to collaborate.

Multi-Dimensional Collaboration, One Collaboration Platform
Since the 1990s, the technology to enable people to work together in a computer-mediated environment has become more sophisticated and its applications – from e-mail to instant messaging to richer kinds of online meetings and content sharing – have become commonplace in many organizations. Figure 6 below shows the different types of collaboration, ranging from ad hoc to structured, and from asynchronous to real-time:
Any enterprise collaboration solution should integrate all these collaborative activities (including the ability to expose data from dedicated messaging and real-time communication servers in a single view) to provide value for people and the business. Point solutions designed to provide one or two free-standing collaborative capabilities, but lacking consistency and integration with enterprise platforms and applications, can create complexity and duplication of IT investments, confuse end users, increase training and support requirements, and contribute to compliance problems by complicating auditing and retention of collaboration data.

Collaboration and Business Process
Collaboration is valuable in and of itself, but can provide even greater benefits when it is integrated with structured processes and enterprise application data. For example, executives may need to collaborate around real-time ERP data exposed in a portal site, or a product development team may want to schedule a spontaneous online meeting to modify the design outputs of a CAD system. Process-based collaboration provides groups of people with a common point of access to complex information, so they can arrive at insights that pool their collective expertise. It also allows people to coordinate their actions across the multitude of small undefined tasks that fall in between the defined process steps of a structured workflow. It does so by creating a common shared space for collaboration within the context of the business process, so participants do not need to switch between different applications to view, analyze, and discuss shared data.

Integrating collaboration deeply into business processes has been problematic from an IT perspective. Some enterprise applications now include their own collaboration services as part of their technology offering. This may solve a very specific problem of collaboration in a limited, vertical, role-based way (for example, the ability to share CRM data within a CRM application or portal site) but ends up reinforcing the rigid model of knowledge silos and complexity that
inhibits agility, drives up costs, complicates compliance and governance, and shackles workers to low-value middleware tasks. Yet this remains the strategy of some organizations who take a reactive, uncoordinated IT approach to solving the problems of the connected information work.

The solution to this paradox is to view collaboration as a strategic capability, addressed by a technology platform designed specifically to integrate collaboration with information management and structured process.

"With [Office] SharePoint Server 2007, we’ve been able to take the experience of going into a Ziba office and turn it into an online experience."

— Dieter Reuther, Director of Information Technology, Ziba Design

Microsoft Office SharePoint Server: Collaboration in Context
SharePoint addresses collaboration as one part of the larger issue of business productivity. The ability to share documents in workspaces, invoke real-time communication services, schedule appointments, publish and subscribe to content, and other collaborative activities exists side-by-side with tools for information management and structured workflow. This has several benefits.

Consistent Collaboration Experience
For end users, there is a single, consistent experience of collaboration, regardless of the person’s role or task. Someone in accounting uses the same basic workspace environment to collaborate with colleagues on billing and receivables as a manager in operations uses to distribute project reports and BI data to his team. The content, context, and underlying data systems are different, but the basic software skills each person needs in order to collaborate are the same. In both cases, one familiar environment provides a comprehensive set of collaboration tools (including views of documents, people, workflow tasks, and information from other systems such as presence data from Microsoft Office Communication Server 2007, or e-mail, calendars, and contact lists from Microsoft Exchange Server) and information management tools (search, document workflow, and content management) alongside role-based access to data from specialized enterprise applications, with easy access to familiar Microsoft Office-based productivity applications.

Agility for the Business
This familiarity and consistency allows people to easily transfer their software knowledge from one business context to another, giving people and the business more flexibility in distributing expertise to meet new challenges. It also lowers the friction of collaboration by making it a natural extension of each person’s unique work environment, integrated tightly with the tasks they already perform and the applications they already know and use. Also, pervasive collaboration through a consistent experience can help organizations achieve genuine cultural transformations by helping to break down the traditional functional silos within organizations. For example, R&D can share information easily and naturally with marketing and customer service to refine and improve product development and improve service delivery for higher customer satisfaction.

Greater Value for IT
The greater ease and integration of SharePoint simplifies end-user training and support for IT. Data from multiple enterprise systems is integrated through a consistent presentation layer that puts significant customization capabilities within easy reach of non-technical users. Individuals and business units can create and deploy their own solutions for ad hoc collaborative processes and build simple workflow tools to automate tasks specific to their unique needs and
preferences without incurring the costs of custom development. IT can deploy its resources more effectively while the business realizes greater value from both people and systems.

People-Driven Processes

Structured processes rely on standardization, predictability and economies of scale. Organizations deploy them in a number of areas, from customer relationship management to enterprise resource planning to accounting as a means of lowering transaction costs, driving consistent outcomes and reducing dependence on the variable knowledge and discretion of individual workers. However, beneath this level of macro-processes (order taking, supply chain, and so on), there are numerous micro-processes that individual workers perform as part of their job.

Until now, creating and deploying those kinds of micro-processes has required the participation of IT, with all the costs and development lead times that entails. Because it was hard to justify ROI to optimize for a single role, task, or person, few organizations were willing to invest in that level of development, despite the fact that the aggregate return on automating multiple micro-processes across the entire organization is likely to be considerable. Consequently, the hidden costs of structured task work constitute a significant source of friction in many organizations.

The Hidden Costs of Structured Task Work

The difficulty with structured processes is that they require a multitude of activities that fall between the defined steps, as illustrated by Figure 6.

![Figure 6: Unstructured collaboration between defined process steps](image)

Most of the real work gets done in these intermediate steps, requiring ad hoc collaboration, open-ended information search, and other people-driven processes with unpredictable outcomes. However, because the outputs of these activities are less regimented and more difficult to measure, few organizations have invested systematically in IT solutions to simplify or automate them.
People end up filling in the gaps using ad hoc practices and uncoordinated technology like e-mail, thereby defeating at least some of the efficiency and predictability that the process is supposed to provide.

Another factor in structured processes is exception-handling. Exceptions require workers to leave the process and seek other means of resolving the problem at hand. If workers do not have useful tools and practices at their disposal in these cases, the cost of handling process exceptions can not only create inefficiencies, but also unintended consequences that can adversely impact customer relationships, consistency of service, and brand value.

Organizations that depend on structured processes need to find good answers for these “unstructured world” problems. SharePoint can help organizations enrich transactional systems with flexibility, speed, and responsiveness, without displacing their existing investments in enterprise applications. It does this in several ways:

- Enables people and organizations to easily design and deploy electronic forms through the server, automating data capture and providing visibility into form-driven processes in real-time.
- Puts tools for creating, deploying, and modifying processes in the hands of business users so they can rapidly build their own structured processes to fill in the gaps missed by larger workflow systems.
- Integrates tools for ad hoc communication, collaboration, and information management into the structured work environment, empowering people to solve problems that fall outside the specifications of a process.

With SharePoint, organizations can unlock the hidden potential of all workers, even those assigned to structured tasks, with significantly lower IT cost and management. Also, collaborative and information management capabilities are already available out-of-the-box from the same platform that provides portal site-based access to enterprise data and applications. It’s not necessary to invest in a parallel IT infrastructure for collaboration, search, or productivity that sits side-by-side with the structured work application on the worker’s desktop (or in the data center), or train people to use multiple technologies to solve a single business problem.

"This solution looks phenomenal. With this solution, our field teams will be more productive and efficient. They will spend more time selling and less time creating reports."

Sales District Manager, Ortho-Clinical Diagnostics

Easily Design and Deploy Forms and Templates

Forms enable organizations to efficiently gather structured information that they can later access and analyze for business value. Office SharePoint Server 2007 and Microsoft Office InfoPath® 2007 make it easy to design, deploy, and manage server-based electronic forms and templates for all kinds of applications. Data and metadata from these forms is then immediately accessible so people can take action. For example, a company could deploy a questionnaire form on an external Web site, and internal marketing analysts could see the results updated in real time, for example, the zip codes of participants could be represented visually on a map displayed in their SharePoint portal site workspace.
Non-technical users can streamline approval, review, and archiving processes using built-in collaborative workflow templates, or can create their own custom workflows with Microsoft Office SharePoint Designer 2007. These applications will automatically route documents for reviews or approval, send e-mail notifications to participants, and archive documents to meet retention policy requirements, freeing people from low-value coordination tasks to focus on areas where they can contribute knowledge and passion.

Integrating Collaboration and Structured Work
Even workers in highly structured, task-driven roles sometimes need to step outside the process to resolve an exception. Often, this will involve collaborating with a colleague, escalating to a supervisor, or consulting an expert or information source. These types of capabilities can be added to custom-built proprietary systems – at a cost, of course. And when the process changes or some other requirement emerges, additional resources need to be spent to modify the application functionality. These kinds of change orders can be painful and slow for people, IT, and the business.

SharePoint solves this problem by providing access to all the enterprise-wide collaboration resources in the same environment as the structured data. E-mail, contacts, and schedules from a messaging system like Microsoft Exchange can be exposed in the workspace, as well as real-time communication functionality and presence data from Office Communication Server or similar technology. In this way, ad hoc communication and project tasks that are not part of the IT-driven structured process (such as notifications driven through Microsoft Office Project or mini-processes designed and implemented through Microsoft Office Visio®) can flow easily back and forth between the structured environment of the task worker and the rich desktop environment of the information worker, using the same technology and the same familiar application experience. The integration of collaboration within the structured environment not only prevents duplication of investment and complexity in the data center, but makes it much faster and easier to accommodate process changes at the speed that the business requires.

“The software allowed us to move away from a labor-intensive process with significant duplication of work to a streamlined formula management system.”

Michael Hayes, Director of Quality Assurance, Del Monte Foods

Microsoft Office SharePoint Server: Cost-Effective Simplification
Office SharePoint Server provides integrated information access, collaboration and workflow capabilities, access to enterprise data and systems, and a platform for rapid application development and customization, so it is both possible and cost-effective for organizations to drive the efficiencies of structure and optimization deep into the range of unstructured work activities and information tasks. This makes it possible for people and management to use structured processes where it is valuable to do so, while at the same time working more productively at high-value information work tasks like knowledge creation, knowledge sharing, innovation, and personalized service delivery.

Portal Sites: The Integration Point

The traditional view of portal sites is that they are simply informational or transactional. People check their accrued vacation time on the HR portal site or submit weekly sales reports on the sales force portal site. This segmented
approach may make sense from an IT perspective, but in practice, it creates unwanted complexities for the people who need to use these tools in their job, leading to well-documented problems with adoption and utilization.

In SharePoint, portal sites are not rigidly designed spaces for application integration or publishing, but rich collaborative workspaces that each person can customize to provide a complete, fully functional environment for their work. Portal sites are the glue that connects the information management, collaboration, and process capabilities of Office SharePoint Server together and delivers them to people in a single, consistent, and broadly-accessible location. For an example, see Figure 7.

Figure 7: Portal site home page showing personalized navigation

SharePoint portal sites, whether on intranets, extranets, or the Internet, are easy for anyone to design, deploy, and manage without extensive IT participation. Even complex application functionality and custom views of business data can be displayed in the portal site using simple drag-and-drop Web parts and easy-to-build key performance indicators (KPIs). This approach to portal sites exemplifies the unique way that SharePoint enables businesses to optimize around people rather than forcing people to conform to rigid IT specifications.

("The SharePoint Server 2007] portal, security, and content management features give us the tools to expand our operations with the business insight to work more efficiently.")

Director, Business Systems Development, Starbucks Coffee Company

Personalized Information Delivery
SharePoint bring a new flexibility to the portal site concept by combining the utility of application integration with the ability to customize and personalize information delivery by role, task, and personal workstyle. SharePoint has robust out-of-the-box capabilities to bring application data into workspaces, and are extensible through back-end integration software such as Microsoft BizTalk®.
Personalized information delivery increases the relevance and value of information. The extensibility of the SharePoint environment through standard development tools and practices means that the portal site experience can be rapidly and cost-effectively customized based on role and task, and even personalized to the worker’s individual workstyle. Personalization settings can also be centrally administered by IT in conjunction with security and identity management policies.

Increased Utility of Business Data
Enterprise data exposed in SharePoint portal sites is not only accessible and transactional in the portal site environment; it is also easily transferable into productivity applications such as Microsoft Excel for detailed analysis, or viewable in user-created dashboards and gadgets. It can be made broadly accessible to employees, partners, and customers through intranet, extranet, and Internet deployment.

Precise Audience Targeting
Audience targeting features allow information owners to decide how, when, and where specific audiences consume their information. The My Site personal site pulls together summary views of personal information, providing full control over information "for me, by me, and about me." Personalized information rollup allows users to create customized summaries of important information in the portal site.

Microsoft Office SharePoint Server: Wide Reach, Multiple Applications
SharePoint enables organizations to rapidly deploy Web-based environments for any application using the same platform, the same set of management tools, and the same development environment. Individuals can easily design and deploy My Sites that provide them with a personalized view of the people, data, and processes they need in their specific jobs and roles. They can share knowledge and practices using blogs, wikis, and discussion forums, both internally and externally. Organizations can share both data and application functionality with partners and customers to improve performance, coordinate forecasting and procurement, simplify billing, and provide value-added services that deepen the relationship. Developers can use SharePoint to create collaborative and transactional Web sites for defined business requirements such as knowledge bases or order-tracking, or integrate business data in unique ways as internal composite applications or innovative external Web sites.

Adaptive Development Platform

All organizations require some level of custom development to make solutions directly relevant to their business needs. This is especially true for solutions designed to meet the needs of workers involved in value-creation (service delivery, innovation, and so on), where requirements are more complex, change happens more quickly, and the level of personalization needs to go deeper to fit the real needs and workstyles of individuals. Consequently, decision makers need to consider both the ability of a technology solution to provide necessary capabilities and the speed and cost of customization.

Many vendors offer what appear to be robust and functional technologies for integrated, collaborative solutions. Customers then discover that implementing them in a real-world setting requires costly, open-ended commitments to professional services organizations and ongoing IT resources to keep them up-to-date with business requirements. The Microsoft business model does not depend on professional services revenue, which is why SharePoint is built to provide both rich out-of-the-box capabilities and features designed to enable
rapid, low-cost extensibility based on standard technologies and readily available development skills and tools.

SharePoint comprises an adaptive development platform that offers tools for any skill level. Everyone from individual users to designers and analysts to professional developers can use standard tools to customize SharePoint to the needs of their role, business task, or organizational requirement. Development is expedited by the integration of SharePoint with other components of the business productivity infrastructure such as messaging servers, databases, and directory services, while power users and designers can create customized sites without writing code, as shown in Figure 8.

![Tools for Any Skill Level](image)

Figure 8: Adaptive development platform

Based on the Microsoft .NET framework, SharePoint comprises a platform for the development of powerful custom applications. This allows professional developers to use their current skills and knowledge to create everything from standard business solutions (for example, help desk automation, expense reporting) to innovative composite applications that leverage all the collaborative and information-management capabilities of SharePoint to address specific industry-vertical and horizontal requirements.

Rapid Application Development
As a development platform, SharePoint is optimized for speed, flexibility, interoperability, and low cost. Microsoft Visual Studio .NET provides professional developers with the richest tools for the rapid development of applications. Finally, organizations benefit from the worldwide ecosystem of Microsoft Certified Partners and the wide availability of developer skills.

Integration and Interoperability
Office SharePoint Server 2007 is built on a scalable architecture, with support for Web services and interoperability standards including XML and Simple Object Access Protocol (SOAP). Office SharePoint Server 2007 also has rich, open application programming interfaces (APIs) and event handlers for lists and documents. This enables integration with existing systems and provides the flexibility to incorporate new non-Microsoft IT investments. LDAP integration support for other pluggable authentication providers makes it easier to work
with non-Active Directory sources. Out-of-the-box the WSRP Consumer Web Part enables integration with other WSRP-compliant portal site solutions. Microsoft BizTalk can facilitate even greater interoperability with legacy systems and data models.

Leverages Existing IT Skills
Because of these built-in extensibility features, SharePoint offers an attractive alternative to costly professional services organizations, long lead times, and complex, specialized IT skills to deploy and manage. Many organizations will find they already have the expertise in-house to build useful custom applications on SharePoint, or that the necessary skills are easily available at competitive cost from local vendors.

"The solution makes Elite far more productive and efficient. It’s a great time saver.”
Neal Hamil, Elite Model Management

Microsoft Office SharePoint Server: Customization and Personalization
Almost anyone can use SharePoint to create and personalize My Sites and custom workspaces and automate common business activities such as document review and approval, issue tracking, and signature collection, using familiar tools with drag-and-drop simplicity. Functionality is available from within a Web browser, an e-mail application such as Microsoft Office Outlook®, or from within Microsoft Office.

Power users can achieve even greater personalization using Microsoft SharePoint Designer, the successor to the popular Microsoft Office FrontPage® Web design tool. Teams and departments can build and manage their own team sites and workflow applications, create custom processes to support specific needs, and manage their own content policies without extensive IT participation.

Deployment Scenarios: Points of Entry
SharePoint comprises a comprehensive solution that addresses a number of business and IT issues, but organizations do not need to perform an extensive, full-scale deployment immediately to start realizing benefits. SharePoint was designed to enable organizations to begin deployment on any tactical project where they see immediate value, then broaden the deployment to address multiple horizontal or vertical scenarios at their own pace, with no additional software to buy and little incremental IT resources necessary to enable a new set of capabilities.

Below are some examples of how customers are implementing SharePoint to address common business scenarios. These are not meant to be sequential. Organizations can start with any project; often, next steps will suggest themselves based on the way people within the organization begin to use the capabilities of SharePoint. Points of entry include:

- **Replacement of file and print shares with enterprise content repository and managed document lifecycles.** Often the first application of SharePoint in an enterprise, replacing legacy file and print shares can enable organizations to gain control and visibility over content, simplify searches, and support compliance policies that require access and auditability of knowledge assets.

- **Enterprise search and content management for productivity and compliance.** Bringing unstructured data assets under enterprise-wide...
management increases discoverability and utility of unstructured data, supports compliance requirements, simplifies IT administration, and enables protection of information assets through security and access policies.

- **Workspaces for team and project work.** Deploying team workspaces, an out-of-the-box capability of SharePoint (in conjunction with Windows SharePoint Services), speeds and streamlines collaborative processes, makes team productivity more transparent for management, facilitates easy knowledge transfer to new team members, and enables management and retention policies for collaborative data in support of compliance.

- **Consolidation of enterprise data in a consistent presentation layer.** Using the out-of-the-box application integration capabilities of SharePoint, organizations can rapidly build and deploy portal sites for intranet, extranet, and the Internet that increase value and utility of enterprise data assets by combining them in a single, customizable view.

- **Automation and integration of workflow.** Building workflow management and information visualization tools streamlines processes, disseminates real-time business intelligence, and enables people and teams to operate efficiently and confidently.

- **Development of custom composite applications.** This phase signals the beginning of the emergence of the dynamic knowledge environment, enabled by custom-developed applications that span multiple information management, collaboration, and workflow capabilities.

**Built for the Enterprise**

Microsoft Office SharePoint Server not only delivers the complete set of capabilities that organizations can use to empower people in their roles through information management, collaboration, and people-driven processes, but it does so in a way that supports IT governance, manageability, and efficiency.

**Secure and Interoperable**

SharePoint exclusively belongs to the site administrator right out of the box. A wizard-based approach to site permissions makes it very easy for site administrators to add the appropriate levels for intranets, extranet, Internet, and remote access scenarios. SharePoint is designed on Microsoft .NET 2.0 and use Microsoft Windows Authentication with Microsoft Active Directory® directory services out of the box, but take advantage of the pluggable authentication and membership provider for flexibility addressing extranet security policies. Web Application policies allow IT administrators the ability to govern security policies to explicitly deny or allow access, governing all business use-case scenarios involving SharePoint. Users benefit from the simplicity and convenience of single sign-on (SSO), making it easier to access external resources within the Web interface without having to present multiple sets of credentials.

**Manageable and Scalable**

SharePoint scales to support terabytes of content for the most demanding enterprise environments. Managing a Web server farm, deploying new pieces of content, and managing synchronization across those sites is now much simpler. Deployment can be done in top-down or bottom-up fashion. Simplify site staging through out-of-the-box Site Starter templates for common Web sites, with Area and Page Layout templates and preconfigured navigation.
SharePoint provides a consistent administrative interface that is extensible and accessible remotely. Shared services enable IT management to simplify and delegate administration, helping to maximize the skills and availability of IT resources. The architecture of SharePoint also supports high availability scenarios for mission-critical applications, with support for redundant data stores, scheduled content retention, multisite backup policies, and replication.

Compliant
SharePoint supports compliance by enabling the enforcement of information policies with auditing reporting and rights management capabilities. Organizations can manage corporate records through scalable records repositories that include policy-driven expiration, workflows, and DOD 5015 certification. The robust central management and security capabilities of SharePoint are extensible to work with industry- and country-specific security and compliance solutions with greater flexibility and lower cost.

Summary
The problem of “people as middleware” can be seen in the faces of overwhelmed information workers forced to coordinate disconnected processes, in the frustration of IT departments stuck with sprawling technologies in the data center or “shelfware” that solves a theoretical process problem but doesn’t fit the needs of real people, and in the balance sheets of organizations that cannot mobilize their investments in people and systems for breakthrough performance.

These problems demand a new approach – a product that was designed from its inception to optimize everyday work processes and connect people to the data, expertise, and processes they need to be productive.

SharePoint uniquely provides a comprehensive solution for connected information work that enables business and people to transform the way they work while preserving the benefits of structured processes and existing IT investments. Specifically, Office SharePoint Server 2007 is a business productivity server optimized for the way people work, providing people with a familiar, consistent view of information, collaboration, and process; IT with a comprehensive, easily-managed and integrated platform to meet the needs of the business; and developers with an adaptive, extensible environment to build new applications.

With SharePoint providing the foundation for an organizational commitment toward optimizing around the way people work, that organization is positioned to achieve a genuine transformation into a “People-Ready business”, able to fully mobilize the talent of people and systems to drive high-value relationships, rapid innovation, and operational excellence.

For more information, go to http://office.microsoft.com/sharepointserver or contact your Microsoft account manager.