

# Automating the SharePoint 2010 Site Creation Process While Enforcing Governance

Site Creation Automation

How will YOUR company use all the extra time and money?

## Bringing you today's webinar:



**Randy Moody**

Customer Service and Marketing  
SharePoint Solutions



**Jeremy Luerkens**

Software Product Manager and  
Architect and Creator of SPGA  
SharePoint Solutions

## What's Ahead:

- The joys and sorrows of creating SharePoint sites from scratch
  - Letting the users (or non-IT people) do it
  - IT does all the provisioning and governance themselves
- The problem with manual site creation – one site at a time
- Introducing an automated approach to SharePoint site creation
- How our automatic site creation tool (SPGA) works
- How one company is saving \$260,000 and 3,500+ man hours
- Our newest feature, SharePoint Site Lifecycle Management
- How you can see SPGA in action
- How you can test drive SPGA in your own test environment
- SharePoint Solutions – the company behind SPGA
- Purchasing the product
- Answering your questions

The webinar agenda.

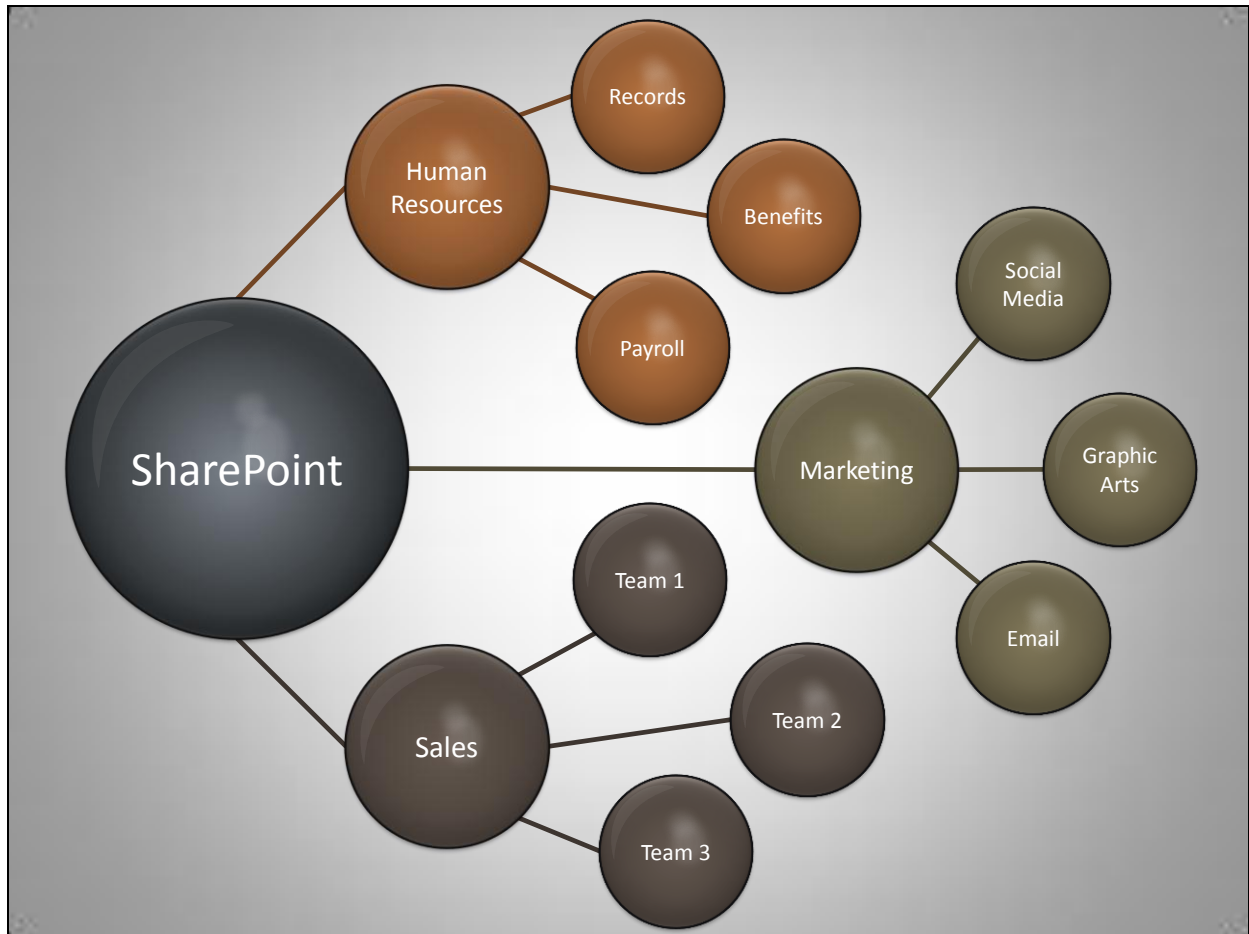
## A Quick Poll

In terms of the needs of your organization, how many new sites are required to be created each month?

- a. Not many at all
- b. A few
- c. Pretty many
- d. A lot
- e. Tons of sites!



Does your organization require that a lot of new sites be created each month?



Once SharePoint 2010 really catches on in an organization, every department, every team, everybody wants their own SharePoint site. Right?

Organizations with lots of SharePoint sites (or a need for lots of SharePoint sites) tend to take one of two approaches to creating new sites.

## The Anarchy Approach



Everybody “Does Their Own Thing.”

Some organizations empower their users to **create their own sites** and design, configure, and use them as they see fit (The Anarchy Approach)

Under the Anarchy Approach, sites are randomly created by users as needed without regard to standards or guidelines of any kind. They spring up like weeds, and like weeds, they quickly grow out of control.

These random, autonomous sites are characterized by:

- a lack of order
- a lack of uniformity and consistency
- a lack of cohesiveness
- a tendency to be used for a period of time and then abandoned

We call this condition “Site Sprawl” and it is every CIO’s nightmare. Hundreds or even thousands of unique sites without governance of any kind.

## The Lockdown Approach



The only way to ensure that it's done right and up to standards is for IT to do it.

Other organizations establish a 'controlled' SharePoint environment, requiring that their users request a new site, and then have **the IT department** approve, create, and provision the site, manually configuring each site's features, limitations, and security according to its intended purpose and use. (The Lockdown Approach).

The second approach, the Lockdown Approach, places a huge burden on the IT staff as site requests accumulate, and the lengthy process of manual site creation and provisioning ensues, one site at a time. The IT staff has to approve and create each site individually, making sure it:

- is plugged into the right place in the organizational hierarchy and taxonomy
- has all the right functionality for the team which is requesting it
- maintains the company's look and feel
- adheres to the organization's standards of governance and compliance
- etc., etc., etc.

The burden on the IT department, for organizations using the Lockdown Approach, can seem overwhelming.

But there's a problem with that approach too.



Site requests accumulate, causing a staggering backlog of work, unhappy and impatient users, and a load of stress on the IT staff as they struggle to try and keep up.

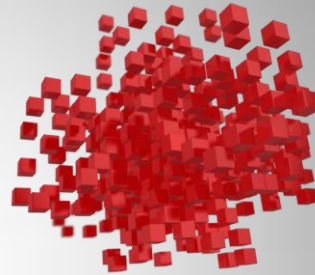
The load on the IT department can seem overwhelming and the workload insurmountable.



Those seem to be the only two alternatives.



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OR



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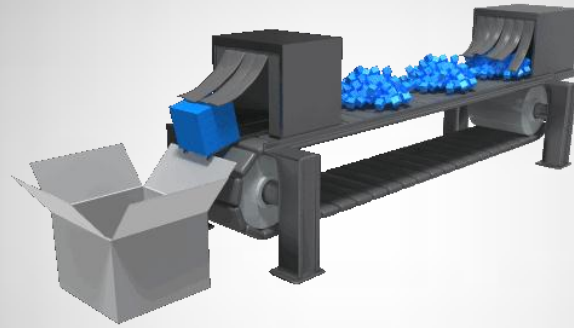


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1. The Anarchy Approach results in a disjointed, chaotic accumulation of hundreds or even thousands of autonomous sites strewn randomly across the SharePoint landscape.
2. The Lockdown Approach results in a seemingly insurmountable mountain of backlogged work for the IT department, and also ends up making a lot of people angry and unhappy – both the IT people who are constantly laboring to try to catch up with the work, and the users who are often waiting weeks for their sites to be provisioned so they can use them.

What is needed is an automated SharePoint Site manufacturing machine.



An automated solution which takes all the capabilities and limitations that **you** specify, and turns out site after site with all the functionality the users need, but with your governance and uniformity standards strictly enforced.

What is lacking in both of these approaches is **an automated site manufacturing process** which addresses the problems with both of the previous approaches, and empowers and frees both the users and the IT department.

An automated solution which takes all the capabilities and limitations that you specify, and turns out site after site with all the functionality the users need, but with your governance and uniformity standards strictly enforced. The kind of a machine which is capable of creating large numbers of sites, with every site, every time, provisioned just the way you want it, and just the way your users need it – uniformly and automatically! Set it and forget it!

Allow us to introduce that machine:



Site Provisioning and Governance Assistant  
for SharePoint 2010

**SPGA**

From SharePoint Solutions

Ta-da!

## How SPGA Works

### **Administrators:**

create site Request Profiles for different kinds of SharePoint sites, with all the appropriate settings (both functionality and limitations) “baked” in.

### **Users:**

select the appropriate Request Profile for the kind of site they need, and fill out a short request form which sets into motion the process. Workflows then automate both the approval of the request, and the creation and provisioning of the site, enforcing compliance, governance, and uniformity.

There are two sides to the SPGA process: the administrators’ side and the users’ side.

## The Magic is in the Request Profiles

- Request Profiles allow **you**\* to pre-configure sites in advance, instead of after their creation
- **You** determine what functionality a particular site type needs and pre-provision it accordingly
- **You** determine where it should fit into the site hierarchy, how it should look and feel, how its security should be set, and other standards you wish to stipulate.
- **Your** Profile settings determine exactly how the site will be provisioned.

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\*The administrator

With Request Profiles, your administrator is doing all the provisioning work which would normally be done as the site is being created and afterwards. But **he's doing that all up front**, so that when a Request Profile is chosen by a user, it will already be pre-configured with all the capabilities you want to allow and all the limitations you want to impose.

The user will be able to have the exact site they need, with everything set up just like they need it, but the site will be forced to adhere to the organization's taxonomy, governance standards, look and feel, and other uniform characteristics which **you** have specified in the Profile beforehand. And all of that is rolled out **automatically**, at the user's request.

There **IS** an investment of time on the front end, to make sure you have all the settings for a given type of site just the way you want them. But the payoff for that investment is that once complete, that type of site will be created and provisioned automatically from that point forward. Every site, every time, just the way you want it. A site manufacturing machine.

## Three Important Benefits

1. No more **manually** approving, creating, and securing SharePoint sites. Hours of labor and stress are lifted off of IT. ➡ Time and money saved.
2. No more backlog of site requests waiting to be approved and created. ➡ Happy users, reduced IT stress.
3. No more worrying about sites being created outside of your control and the resulting chaos. Uniformity, consistency, and your governance standards are strictly and automatically enforced. ➡ Peace of mind.

The advantage of using SPGA to grow your SharePoint landscape is three-fold:

- first, your IT staff is relieved of the burden of having to ***manually*** approve, create, and provision every site that's requested, which can take several hours per site, because **now** it's all done ***automatically***.  
That saves you time and money.
- secondly, because site requests are being handled more promptly and efficiently, there is no backlog of site requests piling up, and users are happier and able to start using their sites more quickly.  
That results in happy users and reduced IT stress.
- and finally, you don't have to worry that sites are being created outside of your control, and without the uniformity and consistency that is important to you, because every limit you include in the Request Profile is automatically strictly enforced in the automated provisioning process.  
That gives you peace of mind.

SPGA makes for a very elegant way to grow your SharePoint landscape, and scale it as large as you like.

If you think of it as a neighborhood, there will be no “SharePoint shacks” so to speak, because “codes” are strictly enforced automatically.

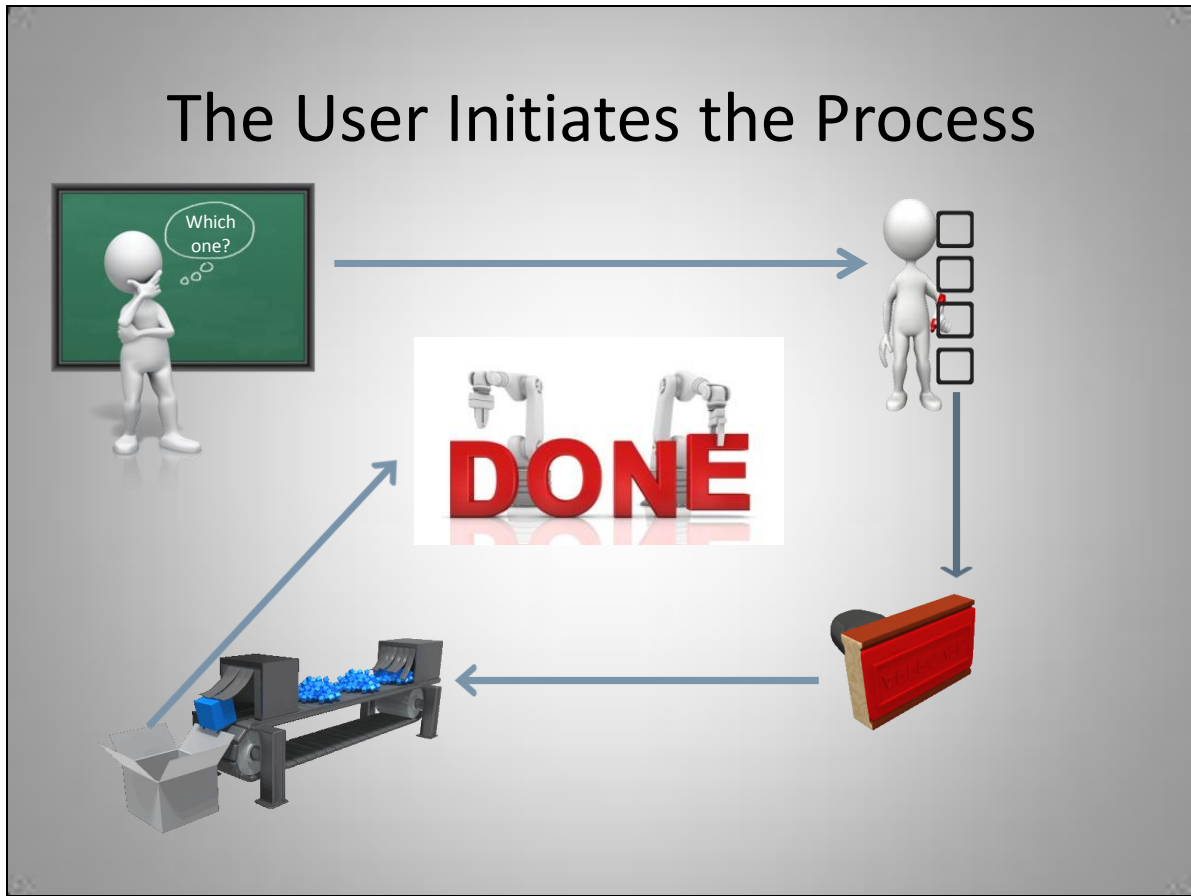


After installing SPGA, an administrator creates a Provisioning Management site and sets up Request Profiles. Each Site Request Profile has three elements: input fields, an Activity Plan and Workflow Initialization definitions.

- The input fields determine what questions a user must fill out before making the request.
- The Activity Plan defines the instructions for creating and configuring new sites.
- The Approval Workflow contains instructions for approving the site request.

So the whole process is ready to unfold automatically.





At that point, the user can then browse to the Provisioning Management site and view the list of Request Profiles. Then:

- The user selects the Request Profile most appropriate for the site they want to request.
- The user is presented with a series of questions which are defined by the Request Profile's input fields.
- Once each question is answered, the request is submitted and saved to the Provisioning Management site.
- The Approval Workflow launches to begin the automated approval process.
- Once the request is approved, the new site is automatically created and configured according to the Activity Plan specified beforehand by the administrator.
- The result is a ready-to-use SharePoint site, built according to the user's needs, and limited by the boundaries set in advance by the administrator. Governance and uniformity enforced; and the site created and provisioned in a timely and efficient manner. Everybody wins!

## A real-life case

Plante Moran, the 12<sup>th</sup> largest CPA and business advisory firm in the country:

- over \$260,000 and about 3,500 man-hours saved by implementing SPGA!

Before SPGA



After SPGA



Plante Moran, one of the nation's largest CPA and business advisory firms, has saved over \$260,000 and about 3,500 man-hours by implementing SPGA.

Brian Dunat, Plante Moran's SharePoint \ Database Architect explains, "Based on our requirements, to **manually** create a Client site we average about two hours and another two hours to build an engagement site—plus there's always opportunity for human error." By using SPGA Brian estimated that the team invested about 500 hours on the front end to design the automated provisioning process. To date, Plante Moran has provisioned roughly 500 client sites and 1,500 engagement sites. SPGA has saved about 3,500 man-hours. In terms of actual dollars, Brian said the firm so far has saved more than \$260,000 by using SPGA—and that doesn't count time saved creating customized My Site, Team and Project provisioning profiles. He says, "We've definitely seen a huge return on investment."

\$260,000 so far? That's huge all right!

## Where would ***your*** IT Department be with 3,500 more man hours?

- Free of a load of SharePoint stress?
- Able to concentrate on IT work instead of a backlog of SharePoint busywork?
- A whole lot happier and less pressured?



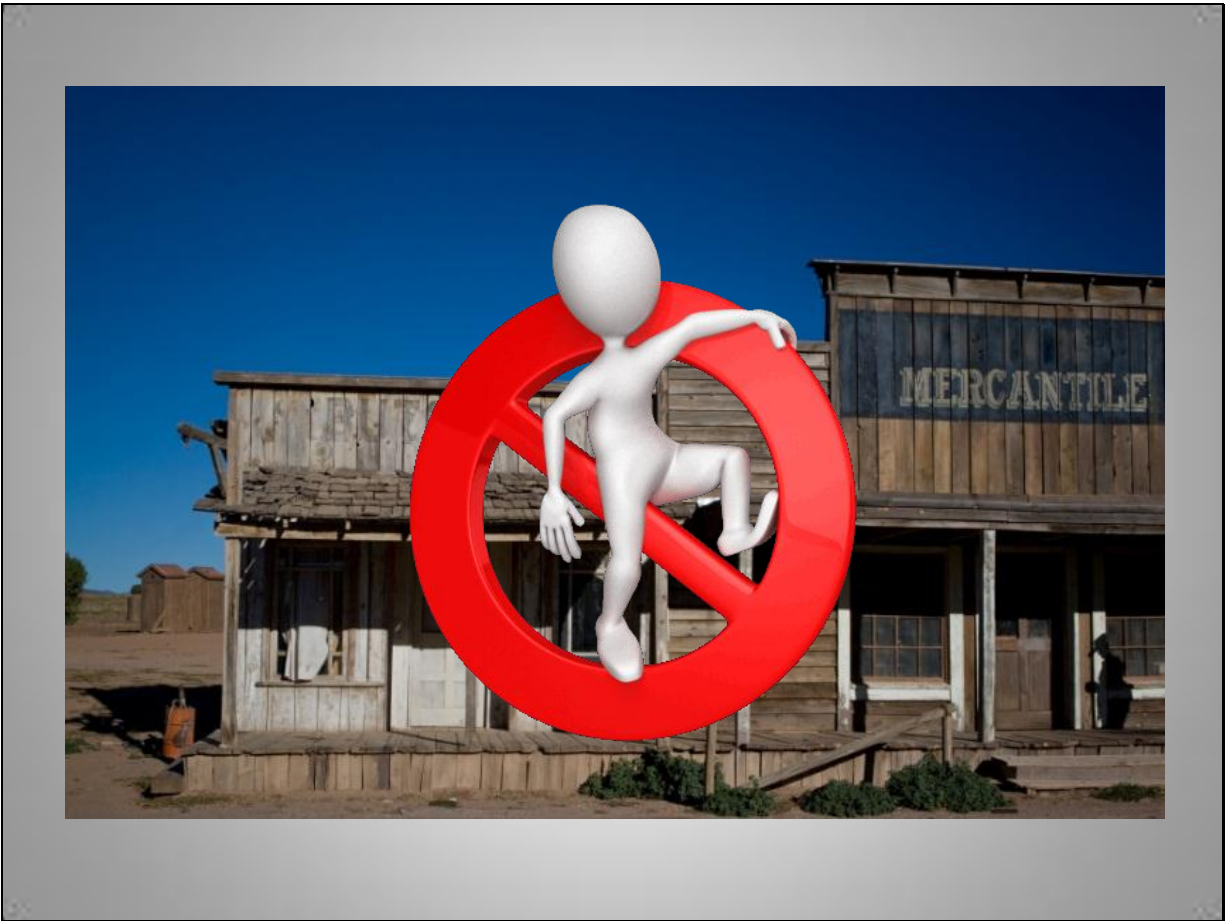
I'll bet you're IT department could find a way to use 3,500 more hours.

## And Now, Announcing a Brand New Addition

### SharePoint 2010 Site Lifecycle Management



We've just added a new feature to SPGA – SharePoint Site Lifecycle Management. Lifecycle Management allows you to provide for the eventual expiration and decommissioning of a SharePoint 2010 site from the moment of its inception.



Site Lifecycle Management provides the answer to these questions:

- What are you currently doing to ensure that your SharePoint sites are not being abandoned and “left to decay?”
- How are you being alerted when a site has “outlived its usefulness” and needs to be deactivated?
- How do you keep from accumulating “SharePoint ghost towns?”
- Do you have a mechanism in place to monitor and plan for the lifecycle of your SharePoint 2010 sites?

We have found that an organization with many orphaned team and personal sites, as well as inactive document and meeting workspaces, may experience:

- Wasted time as employees struggle trying to find information
- Diminished usability as searching through abandoned sites produces less and less relevant search results
- Legal vulnerabilities due to outdated or inaccurate information and
- Security threats

Often the negative impact of these areas overlap, creating problems and disruptions across departments or entire divisions.

**The only way to prevent this kind of unpleasant fallout** is to anticipate and plan for a site’s

expiration from the point of its creation. SPGA's Lifecycle Management features allow you to do just that.

## SharePoint Site Lifecycle Management

- Plan for a site's expiration from the point of its creation
- SPGA monitors the site for you
- SPGA alerts you when a site should be considered for expiration
- All conditions are under your control
- Sites never outlive their usefulness
- No more orphaned or abandoned sites
- No more SharePoint "ghost towns"



SPGA monitors the site for you automatically and alerts you when it should be considered for expiration.

When the content or purpose of a site renders it no longer relevant, the site can be expired and taken out of commission.

And the conditions for all of this are completely under your control.

Sites can serve their purpose, run their course, and never have to outlive their usefulness.

No more orphaned or abandoned sites, no more SharePoint "ghost towns."

## Could SPGA Be Saving You Money?

We have devised an easy way for you to find out.

Our ROI calculator tool can estimate the return you'll receive on your investment.

You'll find it at:

<http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SPGA-ROI-Calculator.aspx?productKey=SPGA2010>



You may be wondering if SPGA could be saving YOUR company money. We have devised an easy way for you to find out.

Our ROI calculator tool can estimate the return you'll receive on your investment. You'll find it at:

<http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SPGA-ROI-calculator.aspx?productKey=SPGA201>.



## You can see SPGA in action

- Jeremy's recorded demo of SPGA is available to watch on demand at your discretion
- We will send you the URL in an email after today's presentation
- After today's presentation, you can address any questions you may have to [softwaresales@sharepointsolutions.com](mailto:softwaresales@sharepointsolutions.com)  
They will be answered promptly by our team.

Jeremy has recorded a detailed demonstration of the product which you can access on demand.

## Test Drive SPGA for Yourself



Request a key for a fully functional 30-day trial license at  
<http://sharepointsolutions.com/SharePoint-Add-ons/Pages/Request-Licensing-Key.aspx?productKey=SPGA2010>  
and test drive the product for yourself in your own test environment.

We don't want you to simply take our word for what SPGA can do for your organization. We want you to test drive it and see for yourself in your own test environment. You can request a key for a fully functional 30-day trial license at <http://sharepointsolutions.com/SharePoint-Add-ons/Pages/Request-Licensing-Key.aspx?productKey=SPGA2010>.



- A SharePoint-focused company – a one-stop SharePoint shop
- Located in Nashville, Tennessee
- One of the largest providers of custom-written SharePoint training.
- Creator of award-winning SharePoint add-on software to extend and enhance SharePoint's functionality
- Provider of SharePoint consulting services
- Our list of satisfied software clients includes IBM, Best Buy, NASA, the US Army, the US Air Force, FedEx, and Microsoft.

SharePoint Solutions, the creator of Site Provisioning and Governance Assistant for SharePoint 2010.

## How to Purchase SPGA

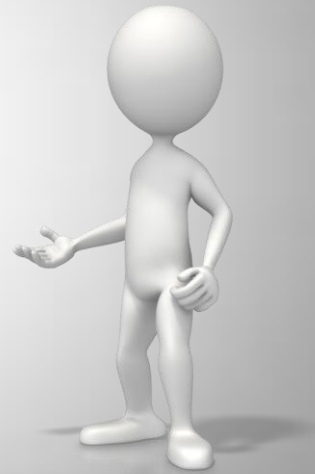
- Get a quote online using our self-service quote generator:  
<http://sharepointsolutions.com/SharePoint-Add-ons/Pages/Get-A-Quote.aspx?productKey=SPGA2010>
- Get a quote through a sales representative:  
**[softwaresales@sharepointsolutions.com](mailto:softwaresales@sharepointsolutions.com)**
- Call to speak to a sales representative  
**615-810-8390**
- Shop our online store:  
<https://store.sharepointsolutions.com/products/123-site-provisioning-and-governance-assistant-for-sharepoint-2010.aspx>

We offer lots of options to move through the purchase process at the level you've comfortable with.

## Another Quick Poll

Based on what you've seen here today, what step are you likely to take next?

- a. Review the slide deck
- b. Watch the demo
- c. Take this to the boss
- d. Request a trial license key
- e. Get a quote



What's next?

# Answering Your Questions



## Links and Resources

- SPGA product page: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SharePoint-Site-Provisioning-and-Governance-Assistant.aspx?productKey=SPGA2010>
- SPGA features page: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SharePoint-Site-Provisioning-and-Governance-Assistant-2010-Key-Features.aspx?productKey=Spga2010>
- SPGA Product Documentation and Help: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SharePoint-Site-Provisioning-and-Governance-Assistant-Support.aspx?productKey=SPGA2010>
- Plante Moran Case Study: <http://sharepointsolutions.com/request/Assets/Plante%20%20Moran%20SPGA%202010%20Case%20Study.pdf>
- SPGA demo: <http://aws-software-s3.sharepointsolutions.com.s3.amazonaws.com/videos/Spga2010-Demo.wmv>
- SPGA ROI Calculator Tool: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SPGA-ROI-Calculator.aspx?productKey=SPGA2010>
- SPGA Trial License Key: <http://sharepointsolutions.com/SharePoint-Add-ons/Pages/Request-Licensing-Key.aspx?productKey=SPGA2010>
- Self-Service SPGA Quote: <http://sharepointsolutions.com/SharePoint-Add-ons/Pages/Get-A-Quote.aspx?productKey=SPGA2010>
- SPGA Online Store: <https://store.sharepointsolutions.com/products/123-site-provisioning-and-governance-assistant-for-sharepoint-2010.aspx>

Some additional SPGA links and resources for you to use and explore.

- SPGA product page: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SharePoint-Site-Provisioning-and-Governance-Assistant.aspx?productKey=SPGA2010>
- SPGA features page: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SharePoint-Site-Provisioning-and-Governance-Assistant-2010-Key-Features.aspx?productKey=Spga2010>
- SPGA Product Documentation and Help: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SharePoint-Site-Provisioning-and-Governance-Assistant-Support.aspx?productKey=SPGA2010>

- Plante Moran Case Study:  
<http://sharepointsolutions.com/request/Assets/Plante%20%20Moran%20SPGA%202010%20Case%20Study.pdf>
- SPGA demo: <http://aws-software-s3.sharepointsolutions.com.s3.amazonaws.com/videos/Spga2010-Demo.wmv>
- SPGA ROI Calculator Tool: <http://sharepointsolutions.com/SharePoint-Add-ons/2010-products/Pages/SPGA-ROI-Calculator.aspx?productKey=SPGA2010>
- SPGA Trial License Key: <http://sharepointsolutions.com/SharePoint-Add-ons/Pages/Request-Licensing-Key.aspx?productKey=SPGA2010>
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Thanks for taking the time to find out about Site Provisioning and Governance Assistant for SharePoint 2010 from SharePoint Solutions.