

SOLUTION **ACCELERATORS**

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Infrastructure Planning and Design

Microsoft® SharePoint® Online—
Evaluating Software-plus-Services

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The Planning and Design Series Approach

This guide is one in a series of planning and design guides that clarify and streamline the planning and design process for Microsoft® infrastructure technologies.

Each guide in the series addresses a unique infrastructure technology or scenario. These guides include the following topics:

- Defining the technical decision flow (flow chart) through the planning process.
- Describing the decisions to be made and the commonly available options to consider in making the decisions.
- Framing the decision in terms of additional questions to the business to ensure a comprehensive understanding of the appropriate business landscape.

The guides in this series are intended to complement and augment the product documentation.

Feedback

Please direct questions and comments about this guide to satfdbk@microsoft.com.

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We value your feedback. Please fill out this survey and help us build better guidance and tools, including the Infrastructure Planning and Design Guides.

Introduction to the Microsoft SharePoint Online—Evaluating Software-plus-Services Guide

Software-plus-services combines cloud-based services delivery, where an application is hosted as a service and provided to customers across the Internet, with the interactivity and high performance that can be achieved by an on-premises installation.

The benefits of using this model include a reduction in the up-front expense of software purchases through the use of on-demand pricing. It can also help by freeing up valuable capital, IT staff, and other costly resources for more effective, strategic use within the organization. As a trade-off, customers may relinquish some control over software versions or changing requirements. They may also need to more carefully manage compliance with regulations because of their additional dependency on Microsoft Online Services.

The choice of a deployment model depends on several factors, including the level of on-premises expertise, the need for control and customization, and the overall priorities of the IT group. Because organizations have the flexibility to deploy Microsoft SharePoint® as either a server or a service, the choice can be driven by business needs, rather than technology constraints.

This guide will lead readers through an evaluation of three methods of providing SharePoint services: on-premises deployment, the Microsoft SharePoint Online Standard offering, and the Microsoft SharePoint Online Dedicated offering. The guide addresses the following fundamental decisions and tasks:

- Weighing the effects of each option on the SharePoint end user's experience.
- Comparing the impacts of the options on each of the workload areas for which SharePoint is typically deployed.
- Evaluating the three solutions with respect to how they will affect the business, including data management, security, and compliance as well as business continuity.
- Determining which option is most appropriate for the business.

Using this guide will enable readers to make the right selection for their businesses, resulting in the most cost-effective delivery of SharePoint technology to their end users.

On-Premises Deployment

On-premises deployment is a model where software is installed and runs on servers that are in a data center under the control of the organization using the software. The on-premises model provides organizations with the flexibility to perform maintenance, upgrades, and customization at their convenience. However, this model requires considerable up-front capital for such expenses as hardware, software, licenses, IT personnel for maintenance, and physical building space. This document considers the on-premises option to include the full capabilities of all the SharePoint product family. The features available in each product within that family are documented in the Microsoft Office SharePoint Server 2007 products comparison download, available at <http://office.microsoft.com/en-us/help/HA101978031033.aspx>.

Microsoft SharePoint Online

SharePoint Online is a hosted collaboration solution that is based on Microsoft Office SharePoint Server 2007. It is available as two offerings: Standard and Dedicated. Both offerings provide SharePoint services at a per-user monthly fee, but each offers different degrees of customization and feature availability. Further information is available at <http://www.microsoft.com/online/sharepoint-online.mspx>.

Standard Offering

The SharePoint Online Standard offering provides the core business capabilities of Microsoft SharePoint Server as a hosted service delivered from a shared-server, multi-tenant environment. It is delivered across a direct link to the customer's enterprise environment, where it can be accessed by users within the intranet. End-user access from the public Internet is available only through a VPN connection.

Note At the time of this writing, SharePoint Online Standard is only available to companies that are based in the United States. The service can be accessed by users working for those companies outside the United States. It is currently in beta for other countries/regions. Use the Microsoft Online Customer Portal at <https://mocp.microsoftonline.com/site/default.aspx> to check the current availability of SharePoint Online in different countries or regions.

Dedicated Offering

The SharePoint Online Dedicated offering provides dedicated servers at Microsoft data centers to support a business's collaboration needs. It offers more flexibility in features and capabilities than the Standard offering and is designed for businesses having more than 5,000 SharePoint users.

About Microsoft Online Services

Microsoft Online Services is part of a software-plus-services delivery model designed by Microsoft to provide secure, reliable, and scalable hosted communication and collaboration software solutions. The availability of another option in addition to on-premises solutions allows customers to make deployment decisions that best fit the needs of their organizations. Available Microsoft Online Services include Microsoft Office Live Meeting, SharePoint Online, Exchange Online, Office Communications Online, and Dynamics CRM Online.

Assumptions

To limit the scope of material in this guide, the following assumptions have been made:

- The SharePoint capabilities that are available on-premises include the full capabilities of Windows® SharePoint Services (WSS), Microsoft Office SharePoint Server (MOSS) 2007 Standard, and MOSS Enterprise products.
- SharePoint Online service is available in the country or region where the enterprise is based and can be used from the locations where its users work.
- Microsoft Active Directory® directory service is already designed, and can be extended into the Microsoft Online environment, should SharePoint Online Dedicated be selected.
- Software requirements for the relevant features are met.

Who Should Use This Document

This guide is written to help Microsoft partners, technical decision makers, business decision makers, and IT professionals evaluate SharePoint Online for their organizations. For the full picture on the SharePoint Online approach to software-plus-services, read both this guide and the *Planning for Software-plus-Services: A MOF Companion Guide* at <http://technet.microsoft.com/en-us/library/dd727715.aspx>.

SharePoint Online—Evaluating Software-plus-Services Process

This guide evaluates the Microsoft SharePoint Online Standard and Dedicated and on-premises solution offerings in 50 different areas of interest to technical decision makers, including client options, the “six workloads of SharePoint,” operational impacts, and security concerns. This evaluation is made only for topics where the capabilities of the offerings differ; if the capabilities are the same across all three offerings, the topic is not presented. The organization’s needs will be rated in terms of importance, and the advantages and disadvantages of each offering will be evaluated against business requirements to provide a quantitative view of which offering will be best suited to serve the business’s collaboration needs.

Decision Flow

The following figure provides a graphical overview of the steps in evaluating SharePoint Online.

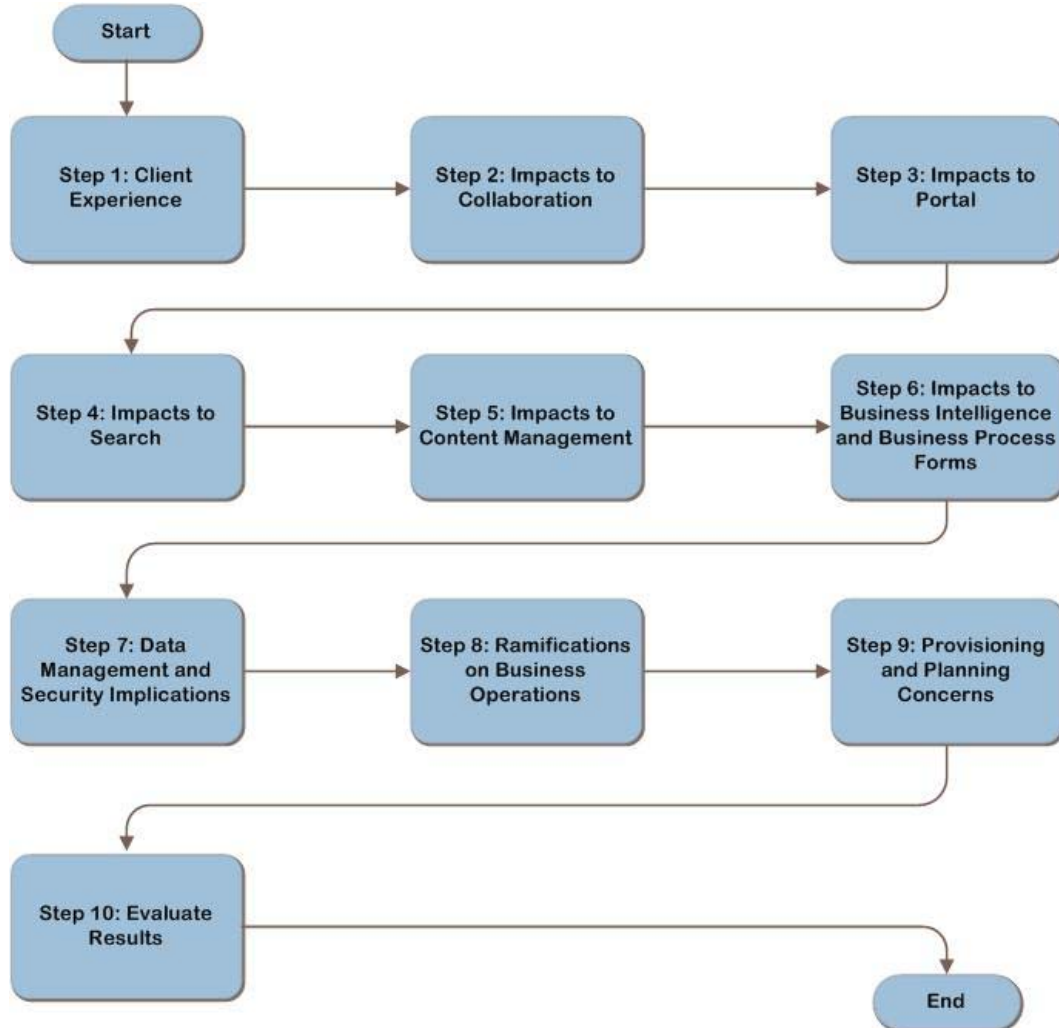


Figure 1. SharePoint Online—Evaluating Software-plus-Services decision flow

Steps

This document contains ten steps designed to guide the reader through the decision-making process about whether to use an on-premises collaboration service or the Microsoft SharePoint Online Standard or Dedicated offering. The content of the steps is aligned to the workloads for which SharePoint is commonly used so that the guide may be used to evaluate the available offerings on a workload-by-workload basis, if preferred.

Step 1: Client Experience

- Web browsers and authentication
- Mobile device support
- Vanity domains
- Available storage
- Microsoft Office client integration
- Deleted item recovery

Step 2: Impacts to Collaboration

- Templates available
- Presence status indicator
- Social networking
- Mail-enabled lists

Step 3: Impacts to Portal

- Audience creation and targeting
- Using SharePoint Designer for site backup and restore
- Site Aggregator Web part
- Importing user profiles

Step 4: Impacts to Search

- Cross-site collection search
- Search across enterprise content sources
- People search
- Search federation
- Business data search

Step 5: Impacts to Content Management

- Content staging and deployment
- Integration with Microsoft IRM
- Enterprise content-management site templates
- Retention and Auditing policies
- Records Repository and legal holds
- E-mail content as records
- Visual Studio Team Foundation Server integration for workflow creation
- Site variations

Step 6: Impacts to Business Intelligence and Business Process Forms

- Business intelligence dashboards
- Filtering Web parts
- Report Center templates
- Excel Services
- Data connection libraries
- Business Data Catalog
- Business Data Web parts and Business Data Actions Web parts
- Out-of-the-box workflows
- Browser-based InfoPath forms
- Workflows built from custom code

Step 7: Data Management and Security Implications

- Network security
- Network connectivity
- Data isolation
- Auditing

Step 8: Ramifications on Business Operations

- Service continuity
- Disaster recovery testing
- Service level agreements (SLAs)
- Adoption rate for new releases
- Scheduled maintenance

Step 9: Provisioning and Planning Concerns

- Active Directory integration
- Capacity and performance planning

Step 10: Evaluate Results

The last step will assist the reader in evaluating the results of the preceding nine steps.

The first nine steps are not sequential and can be performed in any order, but all should be completed to obtain the fullest picture of the suitability and importance of the various technologies.

Within each step, each topic is subdivided into four areas:

- Definition of the topic.
- A rating of the importance of the topic to the organization.
- A comparison of the functionality available with the SharePoint Online Standard and Dedicated offerings and the on-premises technology. Where the functionality is not available in an offering, that is simply stated.
- A rating of how well each offering addresses the business's requirements for the topic.

Additional context may also be included where relevant to help the decision maker evaluate the impact associated with the decision.

How to Use This Document

For each step, technical decision makers should perform the following actions in the order given:

1. Read the introduction to the step for a list of the topics covered within the section.
2. For each topic in the step, read the description of the topic and its function in the business.
3. In the "Importance Rating" section, determine how important the topic is to the organization by answering the question and recording the score in the table provided at the end of the section. (See Table 1 for a sample.)

The importance rating options are 1–5:

1 = not important

2 = somewhat important

3 = important

4 = very important

5 = extremely important (must have)

4. In the "Solutions Rating" section, compare the functionalities of the SharePoint Online Standard and Dedicated offerings and the on-premises solution. Rate each on its potential effectiveness in meeting the organization's needs, and record the scores in the table provided at the end of the topic. (See Table 1 for a sample.)

Note that in some cases, the Standard and Dedicated offerings have been combined to avoid redundancy in the reading, but they should still be scored individually so that the formula in Appendix A: "Tally Sheet Job Aid" (explained below) works effectively.

The solution rating score options are 0–3:

0 = doesn't apply/provides no benefit

1 = somewhat provides

2 = adequately provides

3 = exceeds expectations

- Repeat the above process for the remainder of the steps, and record the scores for each topic. Table 1 is a sample showing a completed table in which the results of numbers 3 and 4 in this section have been entered.

Table 1. Sample Rating Table

Topic	Importance rating	Standard	Dedicated	On-premises
<Topic>	<1–5>	<0–3>	<0–3>	<0–3>
Example: Social networking	4	0	2	3

- In Appendix A, the “Tally Sheet Job Aid” lists all the steps and their respective topics. Transfer each of the raw scores from the table in each topic section to this table, and determine the weighted score for each topic. The weighted score is generated by multiplying the importance rating by each offering's original (raw) rating score. The weighted scores provide a comprehensive view of the comparisons between offerings, which will assist with the decision whether to stay with an on-premises solution or to migrate to either the SharePoint Online Standard or Dedicated solution. Summing each vertical column will reveal which offering has been rated to best meet the organization's needs.

Out of Scope

The guide does not discuss:

- Microsoft Online Services, other than SharePoint Online.
- The Windows Live™ network of Internet services or other consumer-oriented, cloud-based services. Windows Live includes Office Live Workspace and Office Live Small Business. These services do not include SharePoint collaboration software.
- Utility service providers offering cloud computing, cloud computing platforms, cloud-based platform services, or cloud infrastructure services.
- Microsoft Forefront™ Security for SharePoint provided as an online service. This online service provides software that is locally installed on an organization's servers, as well as ongoing updates and signatures for that software.

Additional Reading

- Planning for Software-plus-Services: A MOF Companion Guide at <http://technet.microsoft.com/en-us/library/dd727715.aspx>.
- Microsoft Online Services Team Blog at <http://blogs.technet.com/msonline/default.aspx>.
- Microsoft SharePoint Online Dedicated Service Description at <http://www.microsoft.com/downloads/details.aspx?FamilyID=cf7d4db8-4e7c-4077-87ea-b64c57e4c98c&displaylang=en>.
- Microsoft SharePoint Online Standard Service Description at <http://www.microsoft.com/downloads/details.aspx?familyid=1BEF6A35-9785-4A0B-B227-387C0EE85A36&displaylang=en>.

Step 1: Client Experience

This step addresses the collaboration capabilities that most significantly influence the client experience. The topics covered in this step are:

- Web browsers and authentication.
- Mobile device support.
- Vanity domains.
- Available storage.
- Microsoft Office client integration.
- Deleted item recovery.

For each topic in this step, record the importance and solutions rating scores in the appropriate boxes in the table at the end of each topic.

Web Browsers and Authentication

The Web browser is used to authenticate with SharePoint sites. Versions 6, 7, and 8 of Microsoft Internet Explorer® are supported, and limited function is available with Firefox 2 and Firefox 3, as well as Safari 3.1.2 (with Macintosh OS X 10.5). Details of Web browser support are available in *Plan browser support (Office SharePoint Server)* at <http://technet.microsoft.com/en-us/library/cc263526.aspx>.

In computers running Windows, single sign-on (SSO) allows a user to sign on once to his or her Windows device and then obtain access to all authorized resources without entering additional credentials.

Importance Rating. Do users need to be able to read sites and fill out forms using Web browsers other than the most recent version of Internet Explorer? Record the importance of this functionality in the table below.

How important is it to use SSO to provide transparent sign-on to SharePoint? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** The Microsoft Online Services Sign In application is installed on end users' computers to provide a single sign-in point for Microsoft Online Services. When using a supported version of Internet Explorer with the Microsoft Online Services Sign In application, the browser is automatically configured to pass a user's credentials. If a different browser is used, the user will be prompted to enter credentials every time he or she accesses a different SharePoint site.
- **Dedicated offering.** Once the user has authenticated with their Active Directory domain, his or her credentials are passed between sites by all the supported browsers listed above. This provides single sign-on.
- **On-premises solution.** Same as Dedicated.

Additional Context. On-premises is the only offering that can be used to provide anonymous access for Web hosting without authentication.

Evaluate how well each of the offerings addresses the business's requirements given the Web browsers that are in use within the organization, and record the ratings in Table 2.

Table 2. Ratings for Web Browsers and Authentication

Topic	Importance rating	Standard	Dedicated	On-premises
Web browsers and authentication	<1-5>	<0-3>	<0-3>	<0-3>

Mobile Device Support

Mobile devices such as smartphones and PDAs enable users to access information from SharePoint sites without using a computer. A mobile Web page with a unique URL is automatically generated for each SharePoint site to provide access for mobile device users. The URL is optimized for display on mobile devices; it removes pictorial content and renders pages in a basic list format.

Importance Rating. Does the organization need to provide SharePoint access from mobile devices like smartphones and PDAs? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** The Nokia E series and Nokia N series devices and the Apple iPhone 3G provide a Web browser implementation that supports the Online Standard authorization process. Internet Explorer Mobile, which is provided as the default browser for Windows Mobile, does not provide this support.
- **Dedicated offering.** Any mobile device browser that supports basic Windows authentication can be used, including Internet Explorer Mobile.
- **On-premises solution.** Supports the following, on any mobile hardware that supports them:
 - Internet Explorer Mobile or Pocket Internet Explorer in Windows Mobile for Pocket PC and in Smartphone
 - The Nokia WAP 2.0 browser (xHTML only)
 - Motorola Mobile Information Browser 2.2 or later

Additional Context. In order to access SharePoint Dedicated or on-premises, a network connection will be required for the smartphone to connect to and authenticate with the on-premises environment.

For additional details, see [http://download.microsoft.com/download/E/F/9/EF975018-61DE-4AE8-8442-E834B1FCE09C/Microsoft Online Services Mobility Solutions Description 0409.doc](http://download.microsoft.com/download/E/F/9/EF975018-61DE-4AE8-8442-E834B1FCE09C/Microsoft%20Online%20Services%20Mobility%20Solutions%20Description%200409.doc).

Evaluate how well each of these offerings addresses the business's requirement to support mobile devices, and record the ratings in the table below.

Table 3. Ratings for Mobile Device Support

Topic	Importance rating	Standard	Dedicated	On-premises
Mobile device support	<1-5>	<0-3>	<0-3>	<0-3>

Vanity Domains

Users may prefer to access SharePoint sites by typing an easy-to-remember URL. This can be provided by mapping this URL to the underlying SharePoint site URL.

Importance Rating. How important is it to provide initial access to sites through an easy-to-remember URL? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available. URL redirection through IIS can be used instead.
- **Dedicated offering.** Not available. URL redirection through IIS can be used instead.
- **On-premises solution.** Available.

Evaluate how well each of the offerings addresses the business's requirements for vanity domains, and record the ratings in Table 4.

Table 4. Ratings for Vanity Domains

Topic	Importance rating	Standard	Dedicated	On-premises
Vanity domains	<1-5>	<0-3>	<0-3>	<0-3>

Available Storage

As users create new sites and add content to those sites, storage usage can grow quickly.

Importance Rating. How important is it to provide an average of more than 250 MB of storage per user? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** 250 MB is allocated per end user. The storage is aggregated among users so that, for example, an organization with 1,000 users will have 250 GB of storage, which the service administrator can distribute among site collections in the most appropriate manner. The maximum available storage per company is 1 terabyte, which would be provided for a 4,000-user organization.

The maximum storage available for any site collection is 50 GB, and the storage can be assigned to a maximum of 20 site collections. This may require careful planning of site collections, and possibly reorganization of site collections before they can be migrated to the online service.

- **Dedicated offering.** Same as Standard, with the following differences:
 - Customers may purchase additional storage in 1-terabyte increments.
 - When SharePoint Online Dedicated is configured for a customer, the default storage quota for team site collections is set between 2–5 GB. Site owners can increase their storage quota in 1-GB increments up to 5 GB.
 - Customers can exceed the team site collection storage quota of 5 GB by doing one of two things:
 - Submit a service request to Microsoft to increase the storage quota for a site from 5 GB to up to 10 GB. Requests must be submitted on a site-by-site basis.
 - Submit a standard configuration change request to Microsoft that enables up to 10 site collections to have a storage capacity up to 100-GB capacity each.
- **On-premises solution.** Available storage and storage allocations are limited only by the organization's available infrastructure.

Evaluate how well each of the offerings addresses the business's requirements for available storage, and record the ratings in the table below.

Table 5. Ratings for Available Storage

Topic	Importance rating	Standard	Dedicated	On-premises
Available storage	<1-5>	<0-3>	<0-3>	<0-3>

Microsoft Office Client Integration

Microsoft Office users can interact with SharePoint sites without leaving an Office program.

Importance Rating. How important is integration with Microsoft Office applications? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** All of the Office 2007 programs integrate with SharePoint Online. Office 2003 can be used, with the following exceptions:
 - Microsoft Outlook[®] 2003 messaging and collaboration client cannot be used.
 - Microsoft Access[®] 2003 database software creates files with the .mdb extension, which are blocked for upload by SharePoint Online Standard. The list of blocked file extensions cannot be changed.
- **Dedicated offering.** Integrates with all of the Office 2007 programs. Integrates with all of the Office 2003 programs, with the following exception:
 - Office InfoPath[®] 2003 information gathering program cannot be used.
- **On-premises solution.** Organizations can use all of the integration features that are explained at *Microsoft SharePoint Products and Technologies Document: Microsoft Office Programs and SharePoint Products and Technologies Integration – Fair, Good, Better, Best*, available at <http://www.microsoft.com/downloads/details.aspx?FamilyID=e0d05a69-f67b-4d37-961e-2db3c4065cb9&DisplayLang=en>. A summary of those capabilities is shown in the following table.

- = Limited or no access to features
- ◐ = Partial access to features
- = Full access to features

Table 6. Microsoft Office Client Integration Features

Office and SharePoint Integration Feature	2003 Clients	2007 Clients
Enterprise Content Management Publish documents to server to enable content management tasks in the client (for example, start and/or participate in approval or review workflows from within the Office client), access content management features from within client (for example, auto-generated document properties).	◐	●
Information Rights Management Protect documents from unauthorized access or distribution from within the Office client applications. For more information, go to http://blogs.msdn.com/ecm/archive/2006/06/09/624520.aspx .	◐	●

Office and SharePoint Integration Feature	2003 Clients	2007 Clients
Microsoft PowerPoint® Slide Libraries Publish slides to a server where they can be easily shared; access slides on Slide Library from within PowerPoint; receive notification if a slide on the server changes.	○	●
Microsoft Excel® Services Publish Excel spreadsheets to server for centralized management, browser-based spreadsheet viewing, and access control.	◐	●
Electronic Forms Publish forms to a server to enable browser-based access for data collection. Initiate workflows and forms management tasks from an InfoPath client.	◐	●
Outlook and SharePoint Integration Keep synchronized copies of SharePoint calendars, tasks, and contacts and offline access to SharePoint document libraries in Outlook.	◐	●
Access and SharePoint Integration Move Access data to a SharePoint site where it can be centrally managed and accessible by the client or a browser.	○	●
Microsoft Groove® and SharePoint Integration Take a synchronized copy of SharePoint document libraries offline in a Groove Workspace.	○	●
Microsoft OneNote® and SharePoint Integration Store a Shared Notebook in a SharePoint document library, which enables collaborative content editing by multiple OneNote users. For more information, go to http://office.microsoft.com/en-us/onenote/HA101726991033.aspx .	○	●

Additional Context. The members of Microsoft Office Ultimate 2007 client suite of programs are listed in Appendix B. The members of Microsoft Office 2003 client suite of programs are listed in Appendix C.

Evaluate how well each of the offerings addresses the business's requirements for Microsoft Office client integration, and record the ratings in the table below.

Table 7. Ratings for Microsoft Office Client Integration

Topic	Importance rating	Standard	Dedicated	On-premises
Microsoft Office client integration	<1-5>	<0-3>	<0-3>	<0-3>

Deleted Item Recovery

The ability for users to restore SharePoint server content that they previously deleted can prevent many calls to the help desk and improve end-user productivity and satisfaction.

Importance Rating. Does the organization want to provide end users with the ability to restore content that they have inadvertently deleted from the SharePoint server environment? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** End users have a recycle bin that stores deleted content. Items are retained for 30 days. Items that are between 31 and 60 days old are stored in a second-stage recycle bin. The site collection administrator can restore items from this recycle bin for the user. Items in a user's recycle bin count against the user's storage quota; items in the second-stage recycle bin do not.

The following data types are captured by the recycle bin, and are counted against the user's storage quota:

- Lists
- Libraries
- Folders
- List items
- Documents
- Web part pages

The following data types are not captured by the recycle bin:

- Deleted Web pages
- Deleted SharePoint sites or site collections
- **Dedicated offering.** Same as Standard.
- **On-premises solution.** There is a two-stage recycle bin that operates in the same way as the recycle bin in the Online Standard and Dedicated offerings. However, the site collection administrator is able to set policies to determine how long items are held in each of the recycle bins before they are permanently deleted.

Evaluate how well each of the offerings addresses the business's requirements for deleted item recovery, and record the ratings in the table below.

Table 8. Ratings for Deleted Item Recovery

Topic	Importance rating	Standard	Dedicated	On-premises
Deleted item recovery	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

This step covered some of the major client experience features provided by SharePoint Online Standard and Dedicated, and compared them with the functionality available through an on-premises system. The features were rated according to their effectiveness in fulfilling the business's needs. The scores will help guide decision makers in objectively evaluating the impact of a change to SharePoint Online from a client's perspective.

In the next step, impacts to collaboration will be evaluated.

Step 2: Impacts to Collaboration

This step addresses some of the impacts to collaboration resulting from changing to a SharePoint Online environment. The topics covered in this step are:

- Templates available.
- Presence status indicator.
- Social networking.
- Mail-enabled lists.

Different offerings provide different features; an on-premises environment will offer the greatest level of customization, and SharePoint Online Standard the least. The following sections will present the functionality of each solution so that the needs of the organization can be measured against them.

Templates Available

Templates provide a variety of ready-to-use, pre-built solutions for business applications, role-based portals, site look and feel, and so forth.

Site templates provide several important benefits for site administrators:

- They give the organization a consistent, professional look throughout the portal site.
- They provide an efficient way to create sub-sites and site collections. Individual groups within the organization don't need to design their sites from the ground up, which can be costly and time-consuming.

Site administrators and designers can create a site template by customizing a site and then saving it as a site template. The site template can be used by others to create sites with the same look and feel. Site collection administrators can also import a site template created by another administrator or designer and add the new template to the available site templates in the site collection.

The SharePoint product family includes the following types of templates:

- **Standard Site templates.** Used to quickly create sites for basic collaboration.
- **Meeting Site Workspaces.** Help facilitate the creation of a Meeting Workspace site.
- **40 Application templates.** Provide out-of-the-box business applications:
 - **20 Site Admin templates.** Custom templates (*.stp files) that are easy for any SharePoint site administrator to install into the template gallery without requiring server administration access.
 - **20 Server Admin templates.** Site definitions (*.wsp files) that enable tighter integration and enhanced functionality within the Windows SharePoint Services platform. They require a server administrator for installation.

These templates are available at <http://technet.microsoft.com/en-us/windowsserver/sharepoint/bb407286.aspx>.

Importance Rating. Does the organization need to provide an efficient way to create sites with a consistent look and feel, and does the organization need to have the ability to reuse site templates? Record the importance of these functionalities in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** The following templates are *not* available:
 - Standard Site templates:
 - **My Site Host.** Used to create a new My Site Host when the My Site Host location must be changed from its default location in the portal site, such as for performance, storage capacity, or security reasons.
 - **News Home.** Used to create a site for publishing news articles and links to news articles. It includes a sample news page and an archive for storing older news items.
 - **Internet Presence Web site.** Used to create an Internet presence Web site based on Microsoft Office SharePoint Server. SharePoint Online Standard does not permit the use of Internet-hosted sites.
 - Standard Meeting Site templates:
 - **Blank meeting.** Creates a blank Meeting Workspace site that can then be customized.
 - **Decision meeting.** Designed for reviewing documents and recording meeting information, including objectives, attendees, agenda, document library, tasks, and decisions.
 - **Social meeting.** Used to plan social occasions. The template includes attendees, directions, image/logo, things to bring, discussions, and photos (picture library).
 - **Multipage meeting workspace.** Used to create a site to plan, organize, and track meetings. It contains the following lists for objectives, attendees, and agenda, along with their associated Web parts.
 - Templates that require server-side custom code cannot be used. No custom code is allowed in the Online Standard environment.
- **Dedicated offering.** The Server Admin application templates are not available. Templates requiring server-side custom code are allowed, but the customer must demonstrate that acceptable levels of quality and stability have been met.
- **On-premises solution.** All of the default templates are available.

Evaluate how well each of these offerings addresses the business's requirement to support the templates available, and record the ratings in the table below.

Table 9. Ratings for Templates Available

Topic	Importance rating	Standard	Dedicated	On-premises
Templates available	<1-5>	<0-3>	<0-3>	<0-3>

Presence Status Indicator

For organizations that use instant messaging services, such as Microsoft Windows Messenger or Microsoft Office Communicator, a presence status indicator can appear next to a user's name throughout the SharePoint site. Clicking the status indicator enables the user to send an e-mail message, schedule a meeting, make a phone call, send an instant message, or add a person to the address book in the user's e-mail program.

Importance Rating. Does the organization need to integrate presence into a site collection? Record the importance of this functionality in Table 10.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Available, but must be used with Office Communications Server Online.
- **Dedicated offering.** Presence is an option that is available upon request. It requires integration with either Office Communications Server 2007 on-premises or Office Communications Online Dedicated service. Integration with Windows Messenger is not supported.
- **On-premises solution.** Presence functionality is available, provided the organization has implemented one of the supported instant messaging services.

Additional Context. When an on-premises presence solution is used with SharePoint Online Dedicated, the customer session initiation protocol (SIP) addresses must be available through Active Directory or another LDAP directory, and the SIP addresses must be imported into the Office SharePoint Server profile database.

Evaluate how well each of these offerings addresses the business's requirement to support presence, and record the ratings in the table below.

Table 1. Ratings for Presence Status Indicator

Topic	Importance rating	Standard	Dedicated	On-premises
Presence status indicator	<1-5>	<0-3>	<0-3>	<0-3>

Social Networking

Office SharePoint Server enables users to publish their individual profiles, including skills and experience, group memberships, and their position and role in the organization, so that everyone can access that information. This can be used to increase productivity among information workers by providing quick access to teams and appropriate resources, cutting across organizational boundaries by using loose links between people.

Social networking includes the following Web parts:

- **My Sites.** A site specific to each user that can be populated with customized information such as connections with colleagues, positions within the organization, documents that the user wants to publish to others, pictures, and skills information. My Site pages are used to help establish connections between colleagues with common interests.
- **Colleagues.** Presentation of other organization members with whom the user works.
- **Colleague Tracker.** Customized presentation of a user's colleagues that is dynamically updated to reflect changes to their profiles, such as joining a new group or authoring a blog post.

- **SharePoint Sites links and Memberships.** Allows a view of site, group, and mail list memberships, as well as those items they have in common with other colleagues.
- **In Common.** A view of items such as memberships, organizational managers, and colleagues that a user has in common with others in the organization.

Importance Rating. Does the organization need to provide users with information that enables them to quickly build virtual teams that cut across organizational boundaries? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support social networking, and record the ratings in the table below.

Table 2. Ratings for Social Networking

Topic	Importance rating	Standard	Dedicated	On-premises
Social networking	<1-5>	<0-3>	<0-3>	<0-3>

Mail-Enabled Lists

In order to integrate the corporate information held in e-mail with the collaboration environment, SharePoint lists can be enabled to receive e-mail.

Importance Rating. Does the organization need to integrate e-mail into the collaboration environment? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Not available.
- **On-premises solution.** Available.

Additional Context. Mail-enabled lists can be configured in an on-premises SharePoint solution so that users can receive e-mail alerts and workflow notifications when documents or other items have been changed or added to a site.

Evaluate how well each of these offerings addresses the business's requirement to support mail-enabled lists, and record the ratings in the table below.

Table 3. Ratings for Mail-Enabled Lists

Topic	Importance rating	Standard	Dedicated	On-premises
Mail-enabled lists	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

This step addressed some of the collaboration considerations involved in adopting SharePoint Online. The features were rated according to their effectiveness in fulfilling the business's needs. The decision makers in the organization can use this scoring to help evaluate whether SharePoint Online will be compatible with their needs.

The next step will discuss the portal impacts of moving to SharePoint Online.

Step 3: Impacts to Portal

This step addresses the impacts to a user portal resulting from changing to a SharePoint Online environment. The topics covered in this step are:

- Audience creation and targeting.
- Using SharePoint Designer for site backup and restore.
- Site Aggregator Web part.
- Importing user profiles.

Different features are available depending on which offering is chosen. An on-premises environment will offer the greatest level of customization.

Audience Creation and Targeting

Audience targeting can be used to display such content as list or library items, navigation links, and entire Web parts only to specific users or groups of users. This is useful when there is a need to present information that is relevant only to a particular group of users. For example, a Web part can be added to the legal department's portal site that contains a list of legal contracts that is visible only to members of that department.

Importance Rating. Does the organization need to deliver specific content only to certain users? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support audience creation and targeting, and record the ratings in the table below.

Table 4. Ratings for Audience Creation and Targeting

Topic	Importance rating	Standard	Dedicated	On-premises
Audience creation and targeting	<1-5>	<0-3>	<0-3>	<0-3>

Using SharePoint Designer for Site Backup and Restore

SharePoint Server 2007 provides a number of backup and restore capabilities, which are described at <http://technet.microsoft.com/en-us/library/cc263427.aspx>. SharePoint Designer 2007 also includes backup and restore functionality, but that is not its primary focus, and it does have scale and function limitations.

Importance Rating. Does the organization use the SharePoint Designer backup and restore function to back up or move sites? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to use SharePoint Designer for site backup and restore, and record the ratings in the table below.

Table 5. Ratings for Using SharePoint Designer for Site Backup and Restore

Topic	Importance rating	Standard	Dedicated	On-premises
Using SharePoint Designer for site backup and restore	<1-5>	<0-3>	<0-3>	<0-3>

Site Aggregator Web Part

The Site Aggregator Web part enables content from multiple sites within the same site collection to be displayed together. It creates a tab for each site, similar to the tabbed browsing functionality in Internet Explorer.

Importance Rating. Does the organization need to aggregate sites of interest into a single Web part? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Not available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support the Site Aggregator Web part, and record the ratings in the table below.

Table 6. Ratings for Site Aggregator Web Part

Topic	Importance rating	Standard	Dedicated	On-premises
Site Aggregator Web part	<1-5>	<0-3>	<0-3>	<0-3>

Importing User Profiles

SharePoint user profiles are a combination of user-supplied personal information and data imported from the following sources:

- Active Directory domain services
- Lightweight directory access protocol (LDAP)
- Corporate line-of-business (LOB) systems

Profile data is first synchronized with Active Directory, and then supplemental data is added to the profile either from LDAP or LOB systems, or is supplied by the user.

Importance Rating. Does the organization need to import and then synchronize user profile data from Active Directory and LOB systems? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Can be synchronized periodically with the enterprise's Active Directory Import Profile. Import from other sources is not available.
- **Dedicated offering.** Supports import of core user profile information from Active Directory only. Supplemental data can be imported either through LDAP-compliant directories/sources or through the use of the Business Data Catalog (BDC) to connect to a database or Web service.
- **On-premises solution.** User profile data can be imported from and synchronized with any of the supported sources.

Additional Context. SharePoint Online Dedicated will run a differential import weekly and will not update, alter, or process the information imported from the systems. It is the customer's responsibility to ensure that the source is accurate and complete. Any changes to the data must be made by the customer on the source systems. SharePoint Online Dedicated should not be the authoritative source for content also found in Active Directory or an LDAP directory.

Evaluate how well each of these offerings addresses the business's requirement to support importing user profiles, and record the ratings in the table below.

Table 7. Ratings for Importing User Profiles

Topic	Importance rating	Standard	Dedicated	On-premises
Importing user profiles	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

This step addressed some of the user portal considerations involved in adopting SharePoint Online. The features were rated according to their effectiveness in fulfilling the business's needs. Decision makers can use this scoring to help evaluate whether SharePoint Online will be compatible with their needs.

The next step will discuss the search impacts of moving to SharePoint Online.

Step 4: Impacts to Search

This step addresses the impacts to search resulting from changing to a SharePoint Online environment. The topics covered in this step are:

- Cross-site collection search.
- Search across enterprise content sources.
- People search.
- Search federation.
- Business data search.

Different features are available depending on which offering is chosen. An on-premises environment will offer the greatest level of customization.

Cross-Site Collection Search

Using SharePoint Search, end users can locate content that is stored in lists, document libraries, and other locations in a SharePoint collection.

Basic searches are performed from any location in the portal by using the **Search** box in the upper-right corner of the screen.

Importance Rating. Does the organization need to provide users with the ability to search across site collections? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Searches are limited to a single site collection. Searches across site collections cannot be made.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support cross-site collection search, and record the ratings in the table below.

Table 8. Ratings for Cross-Site Collection Search

Topic	Importance rating	Standard	Dedicated	On-premises
Cross-site collection search	<1-5>	<0-3>	<0-3>	<0-3>

Search Across Enterprise Content Sources

SharePoint provides the capability to extend search beyond SharePoint sites to Web sites, Exchange public folders, file shares, and Lotus Notes databases. Users do this by indexing content from these sources.

Importance Rating. Does the organization need to provide search capabilities across enterprise content? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available, with the following limitations:
 - Support for up to 25 million items within the search index.
 - Supports the indexing of content from Office SharePoint Server, Windows SharePoint Services, and Web sites via HTTP and Exchange public folders.
 - External content sources outside of the SharePoint Online environment can have a maximum latency of 100 milliseconds.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to provide search across enterprise content sources, and record the ratings in the table below.

Table 9. Ratings for Search Across Enterprise Content Sources

Topic	Importance rating	Standard	Dedicated	On-premises
Search across enterprise content sources	<1-5>	<0-3>	<0-3>	<0-3>

People Search

People search capabilities enable users to find people not only by department or job title, but also by expertise, social distance, and common interests.

Importance Rating. Does the organization need to provide people search capabilities to users? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support people search capabilities, and record the ratings in the table below.

Table 19. Ratings for People Search

Topic	Importance rating	Standard	Dedicated	On-premises
People search	<1-5>	<0-3>	<0-3>	<0-3>

Search Federation

Search federation enables end users to issue one query that runs against multiple search engines and then to display results from each search engine in a separate Web part on a single search results page. The searched sources can be enterprise content repositories, other search engines, or portions of the content index.

Importance Rating. Does the organization need to integrate search results from multiple content sources? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available, but queries will be submitted using service accounts only as Kerberos is not supported.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support search federation, and record the ratings in the table below.

Table 10. Ratings for Search Federation

Topic	Importance rating	Standard	Dedicated	On-premises
Search federation	<1-5>	<0-3>	<0-3>	<0-3>

Business Data Search

The business data search feature extends search to include server-side LOB applications that are connected to SharePoint by the Business Data Catalog.

Importance Rating. Does the organization need to search across data that resides in LOB applications? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Not available.
- **On-premises solution.** Business data search is available in SharePoint Server 2007 for applications that are connected by the Business Data Catalog.

Evaluate how well each of these offerings addresses the business's requirement to support business data search functionality, and record the ratings in the table below.

Table 11. Ratings for Business Data Search

Topic	Importance rating	Standard	Dedicated	On-premises
Business data search	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

This step addressed some of the search considerations involved in adopting SharePoint Online. The features were rated according to their effectiveness in fulfilling the business's needs. The technical decision makers in the organization can use this scoring to help evaluate whether SharePoint Online will be compatible with their needs.

The next step will discuss the content management impacts of moving to SharePoint Online.

Step 5: Impacts to Content Management

This step addresses the impacts to content resulting from changing to a SharePoint Online environment. The topics covered in this step are:

- Content staging and deployment.
- Integration with Microsoft IRM.
- Enterprise content-management site templates.
- Retention and Auditing policies.
- Records Repository and legal holds.
- E-mail content as records.
- Microsoft Visual Studio® Team Foundation Server integration for workflow creation.
- Site variations.

Different features are available depending on which offering is chosen. An on-premises environment will offer the greatest level of customization.

Content Staging and Deployment

Content deployment to production sites can be scheduled by setting up jobs, and a live time period for each page can be specified to indicate when that page is viewable.

Importance Rating. Does the organization need to be able to manage content deployment through staging?

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support content staging and deployment, and record the ratings in the table below.

Table 12. Ratings for Content Staging and Deployment

Topic	Importance rating	Standard	Dedicated	On-premises
Content staging and deployment	<1-5>	<0-3>	<0-3>	<0-3>

Integration with Microsoft IRM

Information rights management (IRM) enables an organization to limit the actions that users can take on files that have been downloaded from SharePoint lists or libraries. IRM encrypts the downloaded files and limits the set of users and programs that are allowed to decrypt these files. IRM can also limit the rights of the users who are allowed to read files so that they cannot perform actions such as printing copies of the files or copying text from them.

This helps ensure that access rights applied to Microsoft Office documents in a central library travel with the documents, even when they are downloaded from the library. IRM can thus help the organization to enforce corporate policies that govern the control and dissemination of confidential or proprietary information.

Importance Rating. Does the organization have a need to disseminate confidential or proprietary information requiring encryption to certain individuals? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support integration with Microsoft IRM, and record the ratings in the table below.

Table 13. Ratings for Integration with Microsoft IRM

Topic	Importance rating	Standard	Dedicated	On-premises
Integration with Microsoft IRM	<1-5>	<0-3>	<0-3>	<0-3>

Enterprise Content-Management Site Templates

Enterprise content-management site templates provide an efficient way to set up site collections that are tailored to the needs of enterprise content managers.

Importance Rating. Does the organization have a need to quickly create specialized sites for enterprise content managers? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** The following templates are not available:
 - Document Center
 - Records Center
 - Site Directory
 - Report Center
 - Personalization Site
 - Search Center
- **Dedicated offering.** All templates are available except Records Center.
- **On-premises solution.** All templates are available.

Evaluate how well each of these offerings addresses the business's requirement to support enterprise content-management site templates, and record the ratings in the table below.

Table 14. Ratings for Enterprise Content-Management Site Templates

Topic	Importance rating	Standard	Dedicated	On-premises
Enterprise content-management site templates	<1-5>	<0-3>	<0-3>	<0-3>

Retention and Auditing Policies

Policies can be implemented to help an organization comply with policy-mandated requirements, such as the need to retain records. For example, a Human Resources policy, used in an organization to ensure that employee records are handled in accordance with legally recommended guidelines, could include the following policy features:

- Auditing, to record the editing and viewing history of each employee-related document. Auditing policies can be created for site collections and for different content types.
- Retention, to ensure that content is not kept for an unnecessarily long period of time.

Policy features are implemented as programs that run on Office SharePoint Server 2007. They can be enabled and configured by a server administrator; once enabled, they can be used by site administrators to define policies.

Importance Rating. Does the organization require document retention and the availability to highly customize policies with roles and permissions? Record the importance of this topic in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Available, but does not support:
 - Logging of actions on sites, content, or workflows. There is no audit logging.
 - Audit log reporting.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to implement Retention and Auditing policies, and record the ratings in the table below.

Table 15. Ratings for Retention and Auditing Policies

Topic	Importance rating	Standard	Dedicated	On-premises
Retention and Auditing policies	<1-5>	<0-3>	<0-3>	<0-3>

Records Repository and Legal Holds

The Records Repository, or records center, provides a set of services that facilitate records collection.

- **Records Repository.** This is the storage location for official or master copies of all records. It should be installed in a separate Web application, with a separate database, to ensure security and separation from all other sites; and only a small number of users should have edit permissions.
- **Legal holds.** This functionality makes it possible for records to be searched and placed on a holds list during litigation, or if they are relevant to an audit or investigation. When records are placed on a hold, they are suspended from any expiration policies that may be in effect and are thus protected from destruction.

Importance Rating. Does the organization need to keep the Records Repository in the same environment as other Web applications? Does the organization need to be able to place a legal hold on copies of records? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Not available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support the Records Repository and legal holds, and record the ratings in the table below.

Table 16. Ratings for Records Repository and Legal Holds

Topic	Importance rating	Standard	Dedicated	On-premises
Records Repository and legal holds	<1-5>	<0-3>	<0-3>	<0-3>

E-Mail Content As Records

Exchange Server 2007 can be set up to copy message folders automatically to SharePoint, providing consistent, policy-based solutions for managing e-mail content across Microsoft Office Outlook 2007, Microsoft Exchange Server 2007, and Office SharePoint Server 2007.

Importance Rating. Does the organization need to retain e-mail messages as records? Record the importance of this topic in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Not available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support e-mail content as records, and record the ratings in the table below.

Table 27. Ratings for E-Mail Content As Records

Topic	Importance rating	Standard	Dedicated	On-premises
E-mail content as records	<1-5>	<0-3>	<0-3>	<0-3>

Visual Studio Team Foundation Server Integration for Workflow Creation

SharePoint Designer 2007 enables creation of no-code workflows using standard SharePoint activities. Visual Studio Team Foundation allows workflows to be built using custom C# or Visual Basic® code and custom activities.

Importance Rating. Does the organization need the additional customization that Visual Studio can provide when creating workflows? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support Visual Studio Team Foundation integration to create workflows, and record the ratings in the table below.

Table 28. Ratings for Visual Studio Team Foundation Server Integration for Workflow Creation

Topic	Importance rating	Standard	Dedicated	On-premises
Visual Studio Team Foundation Server integration for workflow creation	<1-5>	<0-3>	<0-3>	<0-3>

Site Variations

This feature allows organizations to create site content once, and then to display that same content in a variety of different ways, depending on the user or device that is accessing it. For example, a site can be displayed in a simplified form for viewing on a mobile device, and one set of content can be displayed in multiple different languages.

Importance Rating. Does the organization need to deploy variations of sites for different users? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Not available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support site variations, and record the ratings in the table below.

Table 29. Ratings for Site Variations

Topic	Importance rating	Standard	Dedicated	On-premises
Site variations	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

This step addressed the impacts to content management involved in adopting SharePoint Online. The features were rated according to their effectiveness in fulfilling the business's needs. The technical decision makers in the organization can use this scoring to help evaluate whether SharePoint Online will be compatible with their needs.

The next step will discuss the business intelligence and business process impacts of moving to SharePoint Online.

Step 6: Impacts to Business Intelligence and Business Process Forms

This step addresses the impacts to business intelligence and business process forms resulting from changing to a SharePoint Online environment. The topics covered in this step are:

- Business intelligence dashboards.
- Filtering Web parts.
- Report Center template.
- Excel services.
- Data connection libraries.
- Business Data Catalog.
- Business Data Web parts and Business Data Actions Web parts.
- Out-of-the-box workflows.
- Browser-based InfoPath forms.
- Workflows built from custom code.

Different features are available depending on which offering is chosen. An on-premises environment will offer the greatest level of customization.

Business Intelligence Dashboards

Business intelligence (BI) is the process of aggregating, analyzing, storing, and reporting on data from different sources in order to make informed business decisions. SharePoint enables creation of rich, interactive business intelligence dashboards that assemble and display business information by using built-in Web parts such as dynamic key performance indicators (KPIs), Excel spreadsheets, Microsoft SQL Server® Reporting Services reports, or a collection of business data connectivity Web parts that can assemble information residing in server-side LOB applications.

Importance Rating. Does the organization have a need to aggregate and view data from a variety of sources in order to enable business decision making? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support business intelligence dashboards, and record the ratings in the table below.

Table 17. Ratings for Business Intelligence Dashboards

Topic	Importance rating	Standard	Dedicated	On-premises
Business intelligence dashboards	<1-5>	<0-3>	<0-3>	<0-3>

Filtering Web Parts

Users find filtering Web parts particularly useful when working with BI information because they enable the display of a dynamically filtered set of data. Organizations use these Web parts to optimize the display KPIs in dashboards.

Importance Rating. Does the organization have a need to display filtered business data? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to support KPI via filtering Web parts, and record the ratings in the table below.

Table 18. Ratings for Filtering Web Parts

Topic	Importance rating	Standard	Dedicated	On-premises
Filtering Web parts	<1-5>	<0-3>	<0-3>	<0-3>

Report Center Template

This site template speeds the creation of KPI dashboard displays. It can be used to display multiple sets of data together or to integrate data from disparate sources in a dashboard. The out-of-the-box site is optimized for report access and management; it includes a report library, a data connection library, and a dashboard template.

Importance Rating. Does the organization want to use the Report Center template to facilitate the creation of KPI dashboards? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to use Report Center templates, and record the ratings in the table below.

Table 19. Ratings for Report Center Template

Topic	Importance rating	Standard	Dedicated	On-premises
Report Center templates	<1-5>	<0-3>	<0-3>	<0-3>

Excel Services

With Office SharePoint Server 2007, Excel Services, and Microsoft Office Excel 2007, users can publish a workbook to a server, lock it down, and then make it available in a document library, a Report Center, a dashboard, and/or a scorecard. Users can view and interact with the workbook in their browsers, even if they do not have Excel installed on their workstation.

Importance Rating. Does the organization need to provide Excel Services in a standardized manner from a centralized server? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available. User-defined functions that extend the calculation capabilities of Excel are subject to code access and security review prior to implementation in the Microsoft Online Dedicated environment.
- **On-premises solution.** Full Excel Services functionality is available.

Additional Context. Customers using the Online Dedicated offering must provide a service account that can be granted permissions to the data sources shown in Excel Services. The service account must be a member of the customer domain. Performance of the features and Web parts associated with the solution are dependent on the connection and speed of the data storage repository.

Evaluate how well each of these offerings addresses the business's requirement to support Excel Services, and record the ratings in the table below.

Table 20. Ratings for Excel Services

Topic	Importance rating	Standard	Dedicated	On-premises
Excel Services	<1-5>	<0-3>	<0-3>	<0-3>

Data Connection Libraries

Data connection libraries are centralized Office SharePoint Server 2007 document libraries that store Office data connections (ODCs). ODCs describe connections to external data. Centralizing ODCs makes it easier to share, manage, and discover data connections that can be used by any Microsoft Office program.

Data connections connect worksheets to data providers. One common use for data connection files stored in data connection libraries is the transfer of a worksheet or a set of worksheets from a staging database to a production database. For worksheets that use the same data connection, changing the data connection file is all that is necessary to switch from one database to another; changing the individual worksheets is not necessary.

Importance Rating. Does the organization have a need to centralize and standardize connections to data sources? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to centralize and standardize connections to data sources in data connection libraries, and record the ratings in the table below.

Table 21. Ratings for Data Connection Libraries

Topic	Importance rating	Standard	Dedicated	On-premises
Data connection libraries	<1-5>	<0-3>	<0-3>	<0-3>

Business Data Catalog

The Business Data Catalog (BDC) integrates external data into the Office SharePoint Server 2007 user experience, providing access to external data residing within server-side LOB applications and enabling the display of and interaction with external data through a set of business data Web parts.

Organizations can add and connect business data Web parts on a Microsoft Office SharePoint Server 2007 site to display business data from an external database such as Microsoft SQL Server, SAP, or Siebel.

Importance Rating. Does the organization need to integrate data from external LOB applications into SharePoint? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** BDC-based crawling and indexing is not supported.
- **On-premises solution.** Available

Evaluate how well each of these offerings addresses the business's requirement to support the Business Data Catalog, and record the ratings in the table below.

Table 22. Ratings for Business Data Catalog

Topic	Importance rating	Standard	Dedicated	On-premises
Business Data Catalog	<1-5>	<0-3>	<0-3>	<0-3>

Business Data Web Parts and Business Data Actions Web Parts

Business Data Web parts are a set of out-of-the-box Web parts that can be used to display information retrieved through the BDC without requiring any customization.

Business Data Actions Web parts are used to automate or create actions that open Web pages, display the user interfaces of business applications, open Microsoft Office InfoPath 2007 forms, and perform other frequently used tasks.

Importance Rating. Does the organization need to use the out-of-the-box Web parts to display data from the BDC? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to use Business Data Web parts and Business Data Actions Web parts, and record the ratings in the table below.

Table 23. Ratings for Business Data Web Parts and Business Data Actions Web Parts

Topic	Importance rating	Standard	Dedicated	On-premises
Business Data Web parts and Business Data Actions Web parts	<1-5>	<0-3>	<0-3>	<0-3>

Out-of-the-Box Workflows

Workflows can streamline the cost and time required to coordinate common business processes, such as project approval or document review, by managing and tracking the human tasks involved with these processes.

Office SharePoint Server 2007 ships with the following workflows:

- **Approval.** This workflow is used to route a document from person to person, requiring approval from each of them.
- **Collect feedback.** This workflow is used to route a document to a number of reviewers, in parallel, to solicit their feedback.
- **Collect signatures.** This workflow is used to route a document to one or more people for their signatures.
- **Disposition approval.** This workflow is designed to support records management needs within an organization. This workflow manages the document expiration and retention process by allowing participants to decide whether to retain or delete expired documents or items.
- **Three-state workflow.** This workflow supports business processes that require organizations to track the status of an issue or item through three different states and two transitions between the states. With each transition between states, the workflow assigns a task to a person and sends that person an e-mail alert about the task. When this task is completed, the workflow updates the status of the item and progresses to the next state.

Importance Rating. Does the organization want to use workflows for the business processes listed above, but not have the resources to customize the workflows? Conversely, does it want to create custom workflows? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Only the three-state workflow is available.
- **Dedicated offering.** Available.
- **On-premises solution.** Available.

Evaluate how well each of these offerings addresses the business's requirement to use out-of-the-box workflows, and record the ratings in the table below.

Table 24. Ratings for Out-of-the-Box Workflows

Topic	Importance rating	Standard	Dedicated	On-premises
Out-of-the-box workflows	<1-5>	<0-3>	<0-3>	<0-3>

Browser-Based InfoPath Forms

The InfoPath Forms Services server technology in Office SharePoint Server 2007 can be used to create browser-based forms and gather data from organizations that do not use the Microsoft Office InfoPath 2007 client. Users can fill out forms in a Web browser or HTML-enabled mobile device with no download or client components needed.

Importance Rating. Does the organization need to deliver InfoPath forms that users can fill out from a browser, without requiring the InfoPath client on the browser? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available. InfoPath forms are supported if the InfoPath client is installed.
- **Dedicated offering.** Available.
- **On-premises solution.** InfoPath forms can be delivered and filled out in a Web browser.

Evaluate how well each of these offerings addresses the business's requirement to support browser-based InfoPath forms, and record the ratings in the table below.

Table 25. Ratings for Browser-Based InfoPath Forms

Topic	Importance rating	Standard	Dedicated	On-premises
Browser-based InfoPath forms	<1-5>	<0-3>	<0-3>	<0-3>

Workflows Built from Custom Code

New workflow actions can be created using SharePoint Designer or from custom code built in Visual Studio.

Importance Rating. Does the organization need to use custom code in workflows? Does the organization have the expertise to create the custom code? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Server-side custom code is supported. The customer must follow the published custom-code deployment process and demonstrate that acceptable quality and stability levels have been achieved before the code can be deployed in the Online Dedicated environment.
- **On-premises solution.** Custom code can be created and integrated into workflows.

Evaluate how well each of these offerings addresses the business's requirement to support workflows built from custom code, and record the ratings in the table below.

Table 39. Ratings for Workflows Built from Custom Code

Topic	Importance rating	Standard	Dedicated	On-premises
Workflows built from custom code	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

This step addressed the business intelligence and business process considerations involved in adopting SharePoint Online. The features were rated according to their effectiveness in fulfilling the business's needs. Technical decision makers in the organization can use this scoring to help evaluate whether SharePoint Online will be compatible with their needs.

The next step will discuss the data management and security impacts of moving to SharePoint Online.

Step 7: Data Management and Security Implications

This step explores some of the data management and security implications of storing data either on-premises or under someone else's control.

The topics covered in this step are:

- Network security.
- Network connectivity.
- Data isolation.
- Auditing.

Network Security

Network security is the safeguarding of electronic information owned by an organization as it is transported across a network, keeping it safe from loss (including corruption) and ensuring that access is restricted to authorized people and systems.

Importance Rating. How important is the confident and consistent application of security standards to the organization? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard and Dedicated offerings.** Microsoft SharePoint Online provides the following to protect data on the network:
 - **Security assessment.** A variety of security assessment processes are performed to protect the SharePoint Online environment, as well as to ensure that any changes to that environment comply with such established policies and regulatory standards that are commercially reasonable to provide.
 - **Security compliance audit.** This audit is a continuous process in the SharePoint Online environment. This assessment of the entire Microsoft Online Services infrastructure ensures that the latest compliance policies are in place and antivirus signatures and required security updates are installed.
 - **Quarterly third-party security audits.** These help ensure that the security measures are up to date and effective.
 - **Regular penetration testing.** This testing provides an additional level of feedback to administrators.
 - **Physical access security.** Multifactor logon security is required for administrators, and physical access to the servers is controlled.
 - **Intrusion detection system.** An intrusion alert system is set up behind the firewalls and is tracked 24 hours a day.
 - **Separate data networks.** All of the servers are on separate, non-routable subnets so that content within a server is not Internet-facing.
 - **Transport security.** All traffic transported within the SharePoint Online infrastructure is encrypted with transport layer security (TLS). The Standard offering requires that all client-to-server communication be also protected with SSL.
- **On-premises solution.** From a security perspective, each on-premises environment is unique. All of the measures listed above can be implemented if the company so chooses. The business needs to have sufficient depth of knowledge to properly configure and maintain network security measures for its collaboration system.

Evaluate how well each of these offerings addresses the business's network security requirements, and record the ratings in the table below.

Table 26. Ratings for Network Security

Topic	Importance rating	Standard	Dedicated	On-premises
Network security	<1-5>	<0-3>	<0-3>	<0-3>

Network Connectivity

Network connectivity is defined for this guide as the physical and logical path that the client devices use to connect to the collaboration system.

Importance Rating. How sensitive is the organization to changing the network topology? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Clients connect to SharePoint Online through the Internet using 128-bit secure socket layer (SSL) encryption.
- **Dedicated offering.** A dedicated circuit from the corporate network to SharePoint Online is established.
- **On-premises solution.** Clients connect to SharePoint through the corporate network.

Evaluate how well each of these offerings addresses the business's requirements based on how much change to the network topology would be required, and record the ratings in the table below.

Table 27. Ratings for Network Connectivity

Topic	Importance rating	Standard	Dedicated	On-premises
Network connectivity	<1-5>	<0-3>	<0-3>	<0-3>

Data Isolation

Data isolation is the ability to secure the access to data to only those people with the appropriate authorization to read, edit, or delete it. Certain regulatory requirements may specify the logical and/or physical protections needed.

Importance Rating. How important is the isolation of data to the organization? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** The Standard offering uses a multi-tenant model where multiple organizations' data are hosted together. Each organization is logically isolated from other organizations so that one cannot access another's data. The ability to isolate different groups of users within the organization is not available.
- **Dedicated offering.** Because customers are on different servers, customer data will automatically be isolated. However, the ability to isolate different groups of users within the organization is not available.
- **On-premises solution.** Physical data isolation can be invoked down to the site collection level, but this would require that separate infrastructures be deployed.

Evaluate how well each of these offerings addresses the business's requirements for data isolation, and record the ratings in the table below.

Table 28. Ratings for Data Isolation

Topic	Importance rating	Standard	Dedicated	On-premises
Data isolation	<1-5>	<0-3>	<0-3>	<0-3>

Auditing

Auditing is the ability to identify when systems were accessed and when logical or physical changes were made to systems. Details typically include who made the change and when it was made. Items commonly audited are user permissions and system access.

Importance Rating. Does the organization require that documents be audited regularly? Record the importance of this functionality in the table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** Auditing is completed through service requests and tracked through the event log.
- **On-premises solution.** Auditing can be implemented as needed.

Evaluate how well each of these offerings addresses the business's requirements for auditing, and record the ratings in the table below.

Table 29. Ratings for Auditing

Topic	Importance rating	Standard	Dedicated	On-premises
Auditing	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

This step assisted technical decision makers in evaluating the risks associated with storing the organization's data both on-premises and under someone else's control. Because providing protection from accidental compromise and from predators both within and outside the organization is an essential IT priority, this step addressed some of the considerations involved in ensuring information security in today's highly networked business environment.

The features were rated according to their effectiveness in fulfilling the business's needs. The scores will help guide the technical decision makers in objectively evaluating the data management and security impacts of a change to SharePoint Online.

The next step will discuss the ramifications of moving to SharePoint Online for business operations.

Step 8: Ramifications on Business Operations

Before deciding whether to use SharePoint Online, SharePoint on-premises, or a combination of both, it is important to carefully examine the ramifications of this decision on business operations.

The topics covered in this step are:

- Service continuity.
- Disaster recovery testing.
- Service level agreements.
- Adoption rate for new releases.
- Scheduled maintenance.

These topics will be used in evaluating the business operations concerns in this step, but they do not necessarily represent a comprehensive list. Each organization must consider its unique environment and needs.

Service Continuity

SharePoint service continuity is the ability of an organization to continue to deliver access to content stored on SharePoint in the event of infrastructure component failure.

Importance Rating. How important is service continuity to the organization? Record the importance of this topic in the rating table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** The SharePoint Online Services design incorporates the following resiliency features:
 - **Data protection.** Multiple copies of customer data are stored within the data center and also remotely at a separate geographic location. Backups are performed every 12 hours, so the recovery point objective (RPO) is 12 hours or less. The recovery time objective (RTO) is 24 hours.
 - **Data center redundancy.** Microsoft data centers are able to transfer operations to alternative, geographically separate data centers if necessary. The failover process is managed by Microsoft and requires no intervention from customers when service is resumed.
- **Dedicated offering.** Same as Standard except for the following:
 - The RPO is 8 hours.
 - In the event of a failover, the customer will need to update DNS entries.
- **On-premises solution.** Service continuity in an on-premises environment depends on the level of hardware and data center redundancy that the organization chooses to deploy. Many organizations have deployed clustering inside the data center but do not have geographic redundancy of their SharePoint services and data.

Additional Context. In all three offerings, the business will still need to evaluate its exposure in other areas:

- Consider service continuity of other integrated services, such as antivirus. The Microsoft Online offerings use Forefront security.
- From a user's perspective, service continuity can be affected by failures in client systems, network connectivity, or Internet availability.

Evaluate how well each of these offerings addresses the business's requirements for service continuity, and record the ratings in the table below.

Table 30. Ratings for Service Continuity

Topic	Importance rating	Standard	Dedicated	On-premises
Service continuity	<1-5>	<0-3>	<0-3>	<0-3>

Disaster Recovery Testing

Disaster recovery is the ability to restore services and data after a catastrophic failure. Disaster recovery testing is the ability to prove that disaster recovery is possible.

Importance Rating. How important is disaster recovery testing? Record the importance of this topic in the rating table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Not available.
- **Dedicated offering.** The Dedicated offering provides for one disaster recovery test per year with 180 days prior written notice from the customer.
- **On-premises solution.** With on-premises, the regularity of disaster recovery testing depends on the priorities and capabilities of the organization's IT department.

Evaluate how well each of these offerings addresses the business's requirements for disaster recovery testing, and record the ratings in the table below.

Table 31. Ratings for Disaster Recovery Testing

Topic	Importance rating	Standard	Dedicated	On-premises
Disaster recovery testing	<1-5>	<0-3>	<0-3>	<0-3>

Service Level Agreements

A service level agreement (SLA) is a written agreement that documents the target percentage of time a service must be available and assigns penalties if it is not.

Importance Rating. How important are SLAs to the organization? Record the importance of this topic in the rating table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** SharePoint Online offers 99.9 percent scheduled uptime. Organizations will be financially compensated when this uptime is not met. Further details are available at <http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=069df92a-4f58-45e3-bbf8-93ed6bcb61d1>.
- **Dedicated offering.** Same as Standard.
- **On-premises solution.** The business and end users have expectations about the availability of their messaging service. Most organizations, however, don't formalize these expectations in the form of actual SLAs, in particular because penalties are not paid for downtime.

Evaluate how well each of these offerings addresses the business's requirements for SLAs, and record the ratings in the table below.

Table 32. Ratings for Service Level Agreements

Topic	Importance rating	Standard	Dedicated	On-premises
Service level agreements	<1-5>	<0-3>	<0-3>	<0-3>

Adoption Rate for New Releases

Periodically, new versions of SharePoint become available. Some companies need and want to be among the first to adopt the latest available technology. Other companies prefer to wait for the product to mature before making the decision to upgrade.

Importance Rating. How important is it for the organization to move to the newest release? Record the importance of this topic in the rating table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Organizations have a window of up to 12 months following a product's release to move to the new version, and the SharePoint Online data center team performs the system upgrade. Notification will be provided, along with relevant information for the end users about the new release. Customers may need to upgrade their client software, including Web browsers and Microsoft Office.
- **Dedicated offering.** Same as Standard. The customers are responsible for the testing and readiness of any custom code that they have deployed, with Microsoft's guidance.
- **On-premises solution.** In an on-premises environment, the customers are responsible for deciding whether to adopt a new version, and when. Customers are also responsible for provisioning any additional prerequisites for the new release, which may include new hardware.

Evaluate how well each of these offerings addresses the business's goals for product adoption, and record the ratings in the table below.

Table 33. Ratings for Adoption Rate for New Releases

Topic	Importance rating	Standard	Dedicated	On-premises
Adoption rate for new releases	<1-5>	<0-3>	<0-3>	<0-3>

Scheduled Maintenance

Scheduled maintenance windows are defined as the period of time during which administrators will deploy changes that may affect the customer-facing services in the production environment.

Importance Rating. Does the organization need to control and schedule its own maintenance windows? Record the importance of this topic in the rating table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Changes occur during windows approximately every other weekend, generally on Saturdays from 16:00–20:00 Pacific Time (UTC-8).
- **Dedicated offering.** Same as Standard. The schedule may be subject to change.
- **On-premises solution.** Businesses can set standard maintenance windows that work for their specific needs.

Additional Context. Customers may need to adapt their business practices to the pre-established SharePoint Online schedule.

Evaluate how well each of these offerings addresses the business's requirements for managing maintenance windows, and record the ratings in the table below.

Table 34. Ratings for Scheduled Maintenance

Topic	Importance rating	Standard	Dedicated	On-premises
Scheduled maintenance	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

In this step, some of the business-level concerns of a migration to SharePoint Online were evaluated. The features were rated according to their effectiveness in fulfilling the business's needs. The scores will help guide the technical decision makers in objectively evaluating the impact of a change to SharePoint Online.

The next step will discuss the provisioning and planning concerns associated with moving to SharePoint Online.

Step 9: Provisioning and Planning Concerns

Capacity and performance planning can be a challenge for IT departments as they try to balance future needs with budget limitations. *Provisioning* is the creation, modification, and deletion of distribution groups and contacts within a system to address those needs. Provisioning can happen through automation, delegated administrative portals, or manually with tools like Active Directory Users and Computers.

The topics covered in this step are:

- Active Directory integration.
- Capacity and performance planning.

Active Directory Integration

Active Directory is a Microsoft directory service. It is used to provision, store, and manage users, groups, passwords, and contacts, among other objects.

Importance Rating. How important is integrating Active Directory with the SharePoint Online system? Record the importance of this topic in the rating table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** Online Standard has its own separate Active Directory instance that can be synchronized with the customer's Active Directory environment, but the two are completely separate instances. Online Standard uses a single, multi-tenant instance of Active Directory.
- **Dedicated offering.** The customer's Active Directory is extended into the Microsoft Online environment through the placement of customer domain controllers in a Microsoft data center.
- **On-premises solution.** In an on-premises environment, there may be a single Active Directory environment, in which case no integration is necessary.

Evaluate how well each of these offerings addresses the business's requirements for Active Directory integration, and record the ratings in the table below.

Table 49. Ratings for Active Directory Integration

Topic	Importance rating	Standard	Dedicated	On-premises
Active Directory integration	<1-5>	<0-3>	<0-3>	<0-3>

Capacity and Performance Planning

Capacity planning is the process of ensuring that sufficient resources exist to meet the demands of the collaboration system (for example, having enough memory, disk space, and so on). Performance planning refers to the process of ensuring that the responsiveness of the system meets business requirements (for example, how quickly data travels through the system).

Importance Rating. How important is it to ensure that the collaboration system meets the speed, storage, and growth needs of the organization? Record the importance of this topic in the rating table below.

Solutions Rating. The list below compares the specific functionalities of each solution:

- **Standard offering.** SharePoint Online data center administrators monitor hardware usage and plan for the installation of additional hardware, when needed, to meet capacity and performance requirements. When these thresholds are exceeded, Microsoft will automatically make the necessary adjustments to maintain the resources.
- **Dedicated offering.** Same as Standard.
- **On-premises solution.** The organization is responsible for determining capacity and performance limits, as well as scaling the hardware and support organization accordingly.

Evaluate how well each of these offerings addresses the business's requirements for capacity and performance planning, and record the ratings in the table below.

Table 35. Ratings for Capacity and Performance Planning

Topic	Importance rating	Standard	Dedicated	On-premises
Capacity and performance planning	<1-5>	<0-3>	<0-3>	<0-3>

Step Summary

In this step, the importance of Active Directory integration was determined, and each solution's Active Directory integration capabilities were rated. In addition, capacity and performance planning differences were noted and evaluated. The features were rated according to their effectiveness in fulfilling the business's needs. The scores will help guide the technical decision makers in objectively evaluating the impact of a change to SharePoint Online from a provisioning and planning perspective.

The next step will tally the results of the evaluation process.

Step 10: Evaluate Results

In this step, users will tally the comparison ratings for each topic in order to reach a logical decision about which solution will best fit the needs of their organization. At this point, each of the topics has been rated in terms of its importance to the business, and each offering has been rated in its effectiveness to meet the business's needs.

Weighted Scoring

The "Tally Sheet Job Aid" in Appendix A lists all of the steps and their respective topics. Transfer each of the raw scores from the table in each topic section to this table, and determine the weighted score for each topic. The weighted score is generated by multiplying the importance rating by each offering's original (raw) rating score. The weighted scores provide a comprehensive view of the comparisons between offerings, which will assist in deciding whether to choose an on-premises solution or to migrate to either the SharePoint Online Standard or Dedicated solution.

Summing each column will reveal which offering has been rated to best meet the organization's needs.

Analyze the Results

If one offering's score is significantly higher than that of the others, then this offering obviously best meets the needs of the organization. However, a set of similar scores may indicate that a particular offering does not necessarily fit the needs of the business better than other offerings. In this case, it may be prudent to focus on the results of the topics that were rated to be most important to the business.

During the course of evaluation, decision makers may also realize that there is a capability that the organization simply must have, and that one of the offerings does not provide it. This also can make the decision fairly obvious.

Note that this analysis provides only a technical assessment of the decision to move a SharePoint Online environment, and that there may be other factors influencing the business's decision.

Next Steps

Although it is outside the scope of this document, a cost-benefit analysis may be helpful as the organization determines which offering is the best fit from a financial standpoint.

If it was determined that SharePoint Online will meet the needs of the organization, the Microsoft Assessment and Planning Toolkit, available at <http://www.microsoft.com/MAP>, can be used to provide an assessment of the client computers in the organization, as well as of the IT environment as a whole, to determine readiness for Microsoft Online Services.

Trial SharePoint Online

A 30-day trial of the Business Productivity Online Suite, including SharePoint Online, is available to U.S. customers. Go to <http://microsoft.com/online> to sign up.

Coexistence with SharePoint On-Premises

SharePoint Online allows the organization the flexibility to choose a deployment model that combines on-premises and online functionalities by geography, workload, or roles. For example, customers can decide to deploy SharePoint Server in their own data centers for users in their headquarters and have their branch office users subscribe to SharePoint Online.

If there is an existing local SharePoint Server collaboration environment, it is possible to continue to use that environment while evaluating SharePoint Online.

Conclusion

The software-plus-services strategy designed by Microsoft is about choice, creating freedom in functionality and delivery. If a company is to choose a best fit, it needs to weigh the advantages and disadvantages of each mode of delivery against its organization's priorities. This guide was designed to provide technical decision makers with information about the available offerings and a means to document their organization's requirements and goals when making the decision whether to use on-premises SharePoint services or to migrate either in full or partially to the SharePoint Online solution.

If the decision is to use an on-premises solution, the next step will be to determine which edition, or editions, of SharePoint to implement. A good starting point for that is the feature comparison matrix available at <http://office.microsoft.com/en-us/help/HA101978031033.aspx>.

Feedback

Please direct questions and comments about this guide to satfdbk@microsoft.com.

Solution Accelerators Satisfaction Survey

We value your feedback. Please fill out this survey and help us build better guidance and tools, including the Infrastructure Planning and Design Guides.

Additional Reading

- Microsoft Online Services Customer Portal at <https://mocp.microsoftonline.com/>.
- Microsoft Online Services Administration Center at <https://admin.microsoftonline.com/>.
- Microsoft SharePoint Online at <http://www.microsoft.com/online/SharePoint-online.aspx>.
- Microsoft Online Customer Portal at <http://technet.microsoft.com/en-us/library/bb981188.aspx>.
- Microsoft SharePoint Server 2007 at <http://www.microsoft.com/SharePoint/>.
- SharePoint Server 2007 on TechNet at <http://technet.microsoft.com/en-us/library/cc303422.aspx>.
- Microsoft SharePoint Online Standard Service Description at <http://www.microsoft.com/downloads/details.aspx?familyid=1BEF6A35-9785-4A0B-B227-387C0EE85A36&displaylang=en>.
- Microsoft SharePoint Online Dedicated Service Description at <http://www.microsoft.com/downloads/details.aspx?FamilyID=cf7d4db8-4e7c-4077-87ea-b64c57e4c98c&displaylang=en>.
- Planning for Software-plus-Services: A MOF Companion Guide at <http://technet.microsoft.com/en-us/library/dd727715.aspx>.

Appendix A: Tally Sheet Job Aid

Step 1: Client Experience

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Web browsers and authentication							
Mobile device support							
Available storage							
Microsoft Office client integration							
Deleted Item Recovery							
Section Subtotals							

Step 2: Impacts to Collaboration

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Templates available							
Presence status indicator							
Social networking							
Mail-enabled lists							
Section Subtotals							

Step 3: Impacts to Portal

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Audience creation and targeting							
Using SharePoint Designer for site backup and restore							
Site Aggregator Web part							
Importing user profiles							
Section Subtotals							

Step 4: Impacts to Search

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Cross-site collection search							
Search across enterprise content sources							
People search							
Search federation							
Business data search							
Section Subtotals							

Step 5: Impacts to Content Management

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Content staging and deployment							
Integration with Microsoft IRM							
Enterprise content-management site							
Retention and Auditing policies							
Records Repository and legal holds							
E-mail content as records							
Visual Studio Team Foundation Server integration for workflow creation							
Site variations							
Section Subtotals							

Step 6: Impacts to Business Intelligence and Business Process Forms

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Business intelligence							
Filtering Web parts							
Report Center templates							
Excel Services							
Data connection libraries							
Business Data Catalog							
Business Data Web parts and Business Data Actions Web parts							
Out-of-the-box workflows							
Browser-based InfoPath forms							
Workflows built from custom code							
Section Subtotals							

Step 7: Data Management and Security Implications

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Network security							
Network connectivity							
Data isolation							
Auditing							
Section Subtotals							

Step 8: Ramifications on Business Operations

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Service continuity							
Disaster recovery testing							
Service level agreements							
Adoption rate for new releases							
Scheduled maintenance							
Section Subtotals							

Step 9: Provisioning and Planning Concerns

Feature	Importance rating	Raw			Weighted		
		Standard	Dedicated	On-premises	Standard	Dedicated	On-premises
Active Directory integration							
Capacity and performance planning							
Section Subtotals							

Step 10: Evaluate Results

	Weighted		
	Standard	Dedicated	On-premises
Cumulative Totals			

Appendix B: Microsoft Office Ultimate 2007 Client Suite

The Microsoft Office Ultimate 2007 client suite includes the following programs:

- Word 2007
- PowerPoint 2007
- Excel 2007
- OneNote 2007
- Outlook 2007 with Business Contact Manager
- Access 2007
- Accounting Express 2007
- Publisher 2007
- Groove 2007
- InfoPath 2007

Details of the suite are available at “Which 2007 Office Suite is right for you?” at <http://office.microsoft.com/en-us/products/FX101635841033.aspx>.

Appendix C: Microsoft Office 2003 Professional Enterprise Edition

The Microsoft Office Professional Enterprise Edition suite comprises the following programs:

- Word 2003
- PowerPoint 2003
- Excel 2003
- Outlook 2003 with Business Contact Manager
- Access 2003
- Publisher 2003
- InfoPath 2003

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