


WINDOWS SHAREPOINT SERVICES
For Collaboration at the University of Liverpool
Low Cost, High Impact!

Janet Stam
Computing Services



SET THE SCENE

- November 2008 – launched collaborative environment based on Windows SharePoint Services (WSS).
- Called VOCAL – Virtual Online Collaboration at Liverpool.
- Why we chose WSS.
- Outline our WSS implementation.
- Costs involved versus impact on institution and users.



INSTITUTIONAL REQUIREMENTS

Institutional need for a collaborative environment.

- Primary requirement – research collaboration.
 - Key requirement to enable collaboration with non-University colleagues.
- International partnerships and strategies.
- Institutional project management and collaborative working.
 - Users needed an easier way for users to share files.
 - Users to be able to easily set up ad hoc work groups themselves and manage membership/permissions of these groups.
- User demand for Web 2.0 features.



ABOUT SHAREPOINT

Brief summary of Microsoft SharePoint.

- Two versions available:
 - Windows SharePoint Services 3.0 (WSS).
 - Microsoft Office SharePoint Services 2007 (MOSS).
- WSS is free as part of Windows Server.
 - Foundation on which MOSS is built.



WHY WINDOWS SHAREPOINT SERVICES?

Windows SharePoint Services (WSS) selected as pilot platform.

- WSS is free ... more about licences later.
 - MOSS has more built-in functionality but WSS features met our requirements:
 - Document collaboration
 - Discussion boards
 - Calendars
 - Contacts
 - Blogs/Wikis/RSS
- Integration with users' everyday tools – Microsoft Office.
 - Recently moved to Microsoft Exchange and then Office 2007.
- We had skill base in .NET to be able to extend out-of-the-box version.



OUR APPROACH


- Setup a low cost trial and pilot.
 - Ran as a trial in Computing Services department.
 - Launched pilot system with small number of academic and administrative colleagues.
- Pilot hosted on machines of a fairly low specification.
- Limited customisation of the interface in order to tap into existing Microsoft support and documentation.
- Did not tie the structure of the environment into the organisational structure, i.e. no in-built relationships to Faculties or Departments.
 - Any member of staff can request one or more workspaces and add any colleagues they choose.
- Staff who "own" the collaborative workspaces responsible for management and maintenance – both content and permissions.



USER PROCESS

- 1
- 2
- 3

- Member of staff goes to <http://vocal.liv.ac.uk/>, clicks the link **Request New VOCAL workspace** and completes online form.




NON-UNIVERSITY PARTNERS

- Allowing non-University partners was a key requirement
- .NET solution using Forms Authentication
 - Member of staff who is a Site Owner steps through a wizard which is accessed from the standard administrative tools within SharePoint.
 - Site Owner creates a username and password for external partner and adds them to permission group.
 - Email is sent to external partner with login details.
 - External partner logs in – first login has to change their password.
 - Provided tools for Site Owners to manage external accounts themselves, e.g. Password resets – NOT via our Helpdesk ☺

Please select which Permission Group you wish the user to be in:

Example Members

Example Owners

Example Visitors

Confirm Password:

E-mail:

Confirm E-mail:



WHAT DOES IT LOOK LIKE?




WHAT DOES IT LOOK LIKE?

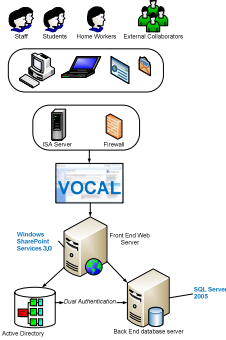


COSTS AND RESOURCES

- Front-end server:
 - Hardware – new hardware purchased for production system.
 - Microsoft Windows Server licence purchased. CALs covered by Enterprise CAL.
 - Microsoft Windows SharePoint Services – included with Windows Server.
 - Forefront Anti-Virus licence purchased.
- Back end server:
 - Hardware – new hardware purchased for production system.
 - Microsoft Windows Server licence purchased. CALs covered by Enterprise CAL.
 - Microsoft SQL Server licence purchased.
- Resilience and Recovery
 - Microsoft Data Protection Manager (DPM) licence purchased.
 - As yet, no mirrored service for resilience.
- Support and Development
 - Approximately equivalent 1.5 FTE.



SYSTEM ARCHITECTURE



IMPACT ON INSTITUTION

- Successfully met strategic need of allowing external collaborators to access secure area.
- Staff can create their own workspace and manage content and access themselves.
- Supports University Global strategy.
 - More reliable access to documents than email.
- Easier to track research/project contributions with basic document management features.
- Supports University Green initiatives – reducing travel.
 - Marketed Web Conferencing services as part of Collaborative suite.
- Met demand for Web 2.0 facilities in managed environment.



IMPACT ON INSTITUTION

- Timely launch just before institution-wide work on University strategic plan – high profile project groups all had VOCAL sites.
- Other strategic sites include:
 - Estates Management capital projects.
 - Communications / administration between partner University in China.
- Latest statistics...

Sites	482 sites
User access Oct 2009	942 University users 218 External users 1160 Total
Database size	49.8 GB

Statistics for October 2009



ISSUES

- Archiving content
 - Initially had many questions from users about what would happen to their data after a project was completed – archive content/extract to CD.
 - Two options:
 - Leave site where it is and access it when needed.
 - Export documents and save locally. Save blogs/wikis/discussions to pdf.
- SharePoint Site Structure
 - Site Collection per project proved flexible and successful option.



THE FUTURE

- Currently working on a number of projects with workflow.
 - Project Management.
 - Research Governance document management.
- Portal technology under review.
 - Potential for WSS or MOSS solution.
- Office Communications Server (OCS) 2007 currently in trial.
 - Integration with WSS includes presence indication next to users within the site, ability to initiate instant messaging or live meeting from within WSS.
- SharePoint / Office / Exchange / OCS 2010 on the horizon.



CONCLUSION

- Doesn't have out-of-the-box functionality of MOSS but has the essentials to be able make a difference.
- ASP.NET skills open opportunities for customisation.
- Integration with Microsoft Office 2007 is huge benefit for users and shouldn't be underestimated.



For more information:
<http://www.liv.ac.uk/csd/vocal/>
Janet Stam
janet.stam@liverpool.ac.uk