



Planning worksheets for Windows SharePoint Services 3.0

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This article provides links to worksheets that you can use to record information that you gather and decisions that you make as you plan your deployment of Windows SharePoint Services 3.0. Use these worksheets in conjunction with — not as a substitute for — [Planning and architecture for Windows SharePoint Services 3.0 technology](#) [[http://technet.microsoft.com/en-us/library/cc288426\(printer\).aspx](http://technet.microsoft.com/en-us/library/cc288426(printer).aspx)] .

Planning worksheets by task

For this task	Use this worksheet	To do this
Determine organization and user needs (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc287919(printer).aspx]	Site objectives and environments worksheet [http://go.microsoft.com/fwlink/?LinkID=73269&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkID=73269&clcid=0x409)	List sites to create, goals for each site, and environments in which sites will be used.
	Users and user types worksheet [http://go.microsoft.com/fwlink/?LinkID=73270&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkID=73270&clcid=0x409)	Record number of users, types of users, and user access requirements.
Plan Web site structure and publishing (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288423(printer).aspx]	Site hierarchy choices worksheet [http://go.microsoft.com/fwlink/?LinkID=73140&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkID=73140&clcid=0x409)	Identify shared or unique elements, and decide whether to create subsites or site collections.
	Site hierarchy planning tool [http://go.microsoft.com/fwlink/?LinkID=73144&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkID=73144&clcid=0x409)	Create a site hierarchy diagram in Microsoft Office Visio.
	Site paths worksheet [http://go.microsoft.com/fwlink/?LinkID=73149&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkID=73149&clcid=0x409)	Record managed paths that need to be created for hosting collaboration sites.
	Site objectives and environments worksheet	List sites to create, goals

	[http://go.microsoft.com/fwlink/?LinkID=73269&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkID=73269&clcid=0x409)	for each site, and environments in which sites will be used.
Plan for content and search (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc287863(printer).aspx]	Content type worksheet [http://go.microsoft.com/fwlink/?LinkId=73311&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73311&clcid=0x409)	Plan a content type.
	Document libraries worksheet [http://go.microsoft.com/fwlink/?LinkId=73312&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73312&clcid=0x409)	Plan libraries based on sites and on document types.
Plan site and content security (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288189(printer).aspx]	Administrators and owners worksheet [http://go.microsoft.com/fwlink/?LinkId=73128&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73128&clcid=0x409)	Record owners for each site collection and site.
	Custom permission levels and groups worksheet [http://go.microsoft.com/fwlink/?LinkId=73133&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73133&clcid=0x409)	Record custom permission levels and groups that need to be created.
	Site and content security worksheet [http://go.microsoft.com/fwlink/?LinkId=73136&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73136&clcid=0x409)	Record inherited and unique permissions; record which groups need what level of access.
Plan communication (Office SharePoint Server) [http://technet.microsoft.com/en-us/library/cc262647(printer).aspx]		
Plan for site creation and maintenance (Office SharePoint Server) [http://technet.microsoft.com/en-us/library/cc262608(printer).aspx]	Site creation worksheet [http://go.microsoft.com/fwlink/?LinkId=73139&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73139&clcid=0x409)	Record a plan for creating sites.
	Site maintenance worksheet [http://go.microsoft.com/fwlink/?LinkId=73145&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73145&clcid=0x409)	Record the plan for maintaining sites, including quota values and automatic deletion choices.

<p>Plan for and design security (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288547(printer).aspx]</p>		
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Planning worksheets by title

Use this worksheet	For this task	To do this
<p>Administrators and owners worksheet [http://go.microsoft.com/fwlink/?LinkId=73128&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73128&clcid=0x409)</p>	<p>Plan site and content security (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288189(printer).aspx]</p>	<p>Record owners for each site collection and site.</p>
<p>Content type worksheet [http://go.microsoft.com/fwlink/?LinkId=73311&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73311&clcid=0x409)</p>	<p>Plan for content and search (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc287863(printer).aspx]</p>	<p>Plan a content type.</p>
<p>Custom permission levels and groups worksheet [http://go.microsoft.com/fwlink/?LinkId=73133&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73133&clcid=0x409)</p>	<p>Plan site and content security (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288189(printer).aspx]</p>	<p>Record custom permission levels and groups that need to be created.</p>
<p>Document libraries worksheet [http://go.microsoft.com/fwlink/?LinkId=73312&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73312&clcid=0x409)</p>	<p>Plan for content and search (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc287863(printer).aspx]</p>	<p>Plan libraries based on sites and on document types.</p>
<p>Site and content security worksheet [http://go.microsoft.com/fwlink/?LinkId=73136&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73136&clcid=0x409)</p>	<p>Plan site and content security (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288189(printer).aspx]</p>	<p>Record inherited and unique permissions; record which groups need what level of access.</p>
<p>Site creation worksheet [http://go.microsoft.com/fwlink/?LinkId=73139&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73139&clcid=0x409)</p>	<p>Plan for site creation and maintenance (Office SharePoint Server) [http://technet.microsoft.com/en-us/library/cc262608(printer).aspx]</p>	<p>Record a plan for creating sites.</p>
<p>Site hierarchy choices worksheet [http://go.microsoft.com/fwlink/?LinkId=73140&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73140&clcid=0x409)</p>	<p>Plan Web site structure and publishing (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288423(printer).aspx]</p>	<p>Identify shared or unique elements, and decide whether to create subsites or site collections.</p>

<p>Site hierarchy planning tool [http://go.microsoft.com/fwlink/?LinkId=73144&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73144&clcid=0x409)</p>	<p>Plan Web site structure and publishing (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288423(printer).aspx]</p>	<p>Create a site hierarchy diagram in Microsoft Office Visio.</p>
<p>Site maintenance worksheet [http://go.microsoft.com/fwlink/?LinkId=73145&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73145&clcid=0x409)</p>	<p>Plan for site creation and maintenance (Office SharePoint Server) [http://technet.microsoft.com/en-us/library/cc262608(printer).aspx]</p>	<p>Record the plan for maintaining sites, including quota values and automatic deletion choices.</p>
<p>Site objectives and environments worksheet [http://go.microsoft.com/fwlink/?LinkId=73269&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73269&clcid=0x409)</p>	<p>Determine organization and user needs (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc287919(printer).aspx]</p> <p>Plan Web site structure and publishing (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288423(printer).aspx]</p>	<p>List sites to create, goals for each site, and environments in which sites will be used.</p>
<p>Site paths worksheet [http://go.microsoft.com/fwlink/?LinkId=73149&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73149&clcid=0x409)</p>	<p>Plan Web site structure and publishing (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc288423(printer).aspx]</p>	<p>Record managed paths that need to be created for hosting collaboration sites.</p>
<p>Users and user types worksheet [http://go.microsoft.com/fwlink/?LinkId=73270&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73270&clcid=0x409)</p>	<p>Determine organization and user needs (Windows SharePoint Services) [http://technet.microsoft.com/en-us/library/cc287919(printer).aspx]</p>	<p>Record number of users, types of users, and user access requirements.</p>
<p>Workflows worksheet [http://go.microsoft.com/fwlink/?LinkId=73315&clcid=0x409] (http://go.microsoft.com/fwlink/?LinkId=73315&clcid=0x409)</p>		<p>Record workflow name, type, purpose, and details.</p>

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Determine organization and user nee... ▶



Determine organization and user needs (Windows SharePoint Services)

Each organization is looking for a solution that meets its unique requirements. This chapter helps you identify your organization's requirements and determine which capabilities within Windows SharePoint Services 3.0 can help you meet those requirements.

Whether you are a small business or department-level organization that wants to quickly set up a place to share ideas or information, or a hosting company that wants to sell services to other organizations, the information in this chapter helps you determine the specific objectives for your sites, which capabilities to enable, and how to plan for your specific sets of users.

Determine organization and user needs by using the following articles:

- [Determine objectives for sites](#) helps you identify some primary objectives for your SharePoint sites and consider the environments in which the sites will be used.
- [Determine user needs and features to use](#) helps you identify user needs and then map those user needs to features that you want to use in your sites.
- [Determine number of users and user](#)

[types](#) helps you determine server capacity and any special features or settings you need to incorporate into your sites.

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