

[Skip to content](#)

[Skip to search - Accesskey = s](#)

Footprint of IT

SharePoint Planning Worksheets in one place

Posted in [SharePoint 2007](#) by Jag on October 5th, 2007

I strongly believe that planning phase is the backbone for any SharePoint. If you fail to plan, than you plan to fail. During the planning phase, I always use various planning worksheets to sit with the client and fill them up. SharePoint solution is then put together on the basis of the content of the worksheets. Note that it is not mandatory to fill all worksheets. It's a mix and match game.

Use this worksheet	To do this
Administrators and owners worksheet (http://go.microsoft.com/fwlink/?LinkId=73126&clcid=0x409)	Record owners for each site collection and site.
Analyze document usage worksheet (http://go.microsoft.com/fwlink/?LinkId=73284&clcid=0x409)	Record information gathered when analyzing document usage.
Article pages worksheet (http://go.microsoft.com/fwlink/?LinkId=73316&clcid=0x409)	Plan fields for content pages.
Authentication methods worksheet (http://go.microsoft.com/fwlink/?LinkId=73278&clcid=0x409)	Plan and record authentication methods to be allowed in your environment.
Availability plan worksheet (http://go.microsoft.com/fwlink/?LinkId=73333&clcid=0x409)	Identify redundancy requirements and plan availability options for server roles.
Business data worksheet (http://go.microsoft.com/fwlink/?LinkId=73271&clcid=0x409)	Plan for information architecture based on the taxonomy of key concepts and business processes.
Content type worksheet (http://go.microsoft.com/fwlink/?LinkId=73288&clcid=0x409)	Plan a content type.
Crawl and query search features worksheet (http://go.microsoft.com/fwlink/?LinkId=73276&clcid=0x409)	Plan and record crawl and search settings.
Custom permission levels and groups worksheet (http://go.microsoft.com/fwlink/?LinkId=73134&clcid=0x409)	Record custom permission levels and groups that need to be created.
Data connections for form templates worksheet (http://go.microsoft.com/fwlink/?LinkId=73321&clcid=0x409)	Plan InfoPath Forms Services data connections.
Deploy administrator-approved form template (http://go.microsoft.com/fwlink/?LinkId=73322&clcid=0x409)	Record information to plan administrator-approved form templates.
Determine sites worksheet (http://go.microsoft.com/fwlink/?LinkId=73282&clcid=0x409)	Identify top-level sites needed for the solution and the features to investigate for each site.
Document libraries worksheet (http://go.microsoft.com/fwlink/?LinkId=73306&clcid=0x409)	Plan libraries based on sites and on document types.
Document library for retaining records worksheet (http://go.microsoft.com/fwlink/?LinkId=73298&clcid=0x409)	Plan a document library for retaining records.
Document management stakeholders and participants worksheet (http://go.microsoft.com/fwlink/?LinkId=73285&clcid=0x409)	Identify document management planning stakeholders and record document management practices.
Estimate data capacity requirement (http://go.microsoft.com/fwlink/?LinkId=73274&clcid=0x409)	Record information to help capacity planning.
Estimate peak throughput worksheet (http://go.microsoft.com/fwlink/?LinkId=73337&clcid=0x409)	Record each type of site access to determine peak throughput required.
External data connections worksheet (http://go.microsoft.com/fwlink/?LinkId=73323&clcid=0x409)	Plan for Excel Services by recording the names of .odc files and the locations of corresponding external data sources.
Information architecture worksheet (http://go.microsoft.com/fwlink/?LinkId=73273&clcid=0x409)	Plan information architecture based on the taxonomy of key concepts and business processes.
Layout pages worksheet (http://go.microsoft.com/fwlink/?LinkId=73317&clcid=0x409)	Plan layout pages for Web pages.
Master pages worksheet (http://go.microsoft.com/fwlink/?LinkId=73318&clcid=0x409)	Plan master pages for site collections.
People, profiles, and policies worksheet (http://go.microsoft.com/fwlink/?LinkId=73268&clcid=0x409)	Plan connections, sources, people features, and audiences.

Policy worksheet (http://go.microsoft.com/fwlink/?LinkID=73307&clcid=0x409)	Plan information management policies for content types.
Record categories worksheet (http://go.microsoft.com/fwlink/?LinkID=73300&clcid=0x409)	Plan record categories.
Records management stakeholders and participants worksheet (http://go.microsoft.com/fwlink/?LinkID=73330&clcid=0x409)	Identify records management planning stakeholders and analyze records management practices.
Records routing table worksheet (http://go.microsoft.com/fwlink/?LinkID=73303&clcid=0x409)	Design the records routing table.
Search properties worksheet (http://go.microsoft.com/fwlink/?LinkID=73272&clcid=0x409)	Plan properties for search, mapping crawled properties to managed properties.
Single sign-on enterprise application definition worksheet (http://go.microsoft.com/fwlink/?LinkID=73335&clcid=0x409)	Plan settings for individual enterprise application definitions (used with single sign-on).
Single sign-on server farm settings worksheet (http://go.microsoft.com/fwlink/?LinkID=73336&clcid=0x409)	Plan farm-level single sign-on settings.
Site and content security worksheet (http://go.microsoft.com/fwlink/?LinkID=73135&clcid=0x409)	Record inherited and unique permissions; record which groups need what level of access.
Site creation worksheet (http://go.microsoft.com/fwlink/?LinkID=73138&clcid=0x409)	Record a plan for creating sites.
Site hierarchy planning tool (http://go.microsoft.com/fwlink/?LinkID=73143&clcid=0x409)	Create a site hierarchy diagram in Microsoft Office Visio.
Site maintenance worksheet (http://go.microsoft.com/fwlink/?LinkID=73146&clcid=0x409)	Record the plan for maintaining sites, including quota values and automatic deletion choices.
Site paths worksheet (http://go.microsoft.com/fwlink/?LinkID=73148&clcid=0x409)	Record managed paths that need to be created for hosting collaboration sites.
Trusted data connection libraries worksheet (http://go.microsoft.com/fwlink/?LinkID=73324&clcid=0x409)	Record the names of trusted data connection libraries.
Trusted data providers worksheet (http://go.microsoft.com/fwlink/?LinkID=73325&clcid=0x409)	Record the names of trusted data providers.
Trusted file locations worksheet (http://go.microsoft.com/fwlink/?LinkID=73327&clcid=0x409)	Record the names of trusted SharePoint sites, Universal Naming Convention paths, and Web sites.
Web application authentication settings worksheet (http://go.microsoft.com/fwlink/?LinkID=73334&clcid=0x409)	Plan authentication settings for individual Web applications.
Welcome pages worksheet (http://go.microsoft.com/fwlink/?LinkID=73320&clcid=0x409)	Plan fields for welcome pages.

Courtesy: SharePoint Architecture and Planning Guides Part 1

« [links for 2007-09-29](#)
[SharePoint Footer Custom Control - Last Modified Date](#) »

3 Responses to 'SharePoint Planning Worksheets in one place'

Subscribe to comments with [RSS](#) or [TrackBack](#) to 'SharePoint Planning Worksheets in one place'.

-  **kartickapur** said, on October 22nd, 2007 at [3:47 am](#)

That is great help Jag. Do you come up with Functional specification based on these planning worksheets?

These Worksheets look quite complete with Design, Architecture and Security modules covered in detail.

Are you able to judge the .net customisation requirements better by following this method? I also feel that this could help us reduce the customisation and suggest OOB functionality where possible!!

Great going mate!

Good to see that you are going to hit 20,000 mark soon.

-  **Jag** said, on October 22nd, 2007 at [4:26 am](#)

Hey Kartic

First of all, thanks for reading my blog mate.

Yes I use them extensively in the planning phase. They are of great help in documenting the functional specs.

They can also be used to educate the client during the planning phase by getting him to filling certain worksheets like document content types.

In one of the projects, client was able to find the holes in the business practice relating to document management, when they used these worksheets to identify the document content types.

Ta
Jag



3. **techdhaan** said, on May 10th, 2008 at [8:43 am](#)

Using these documents helps to make sure that the implementation doesnt go south. I have blogged about some of the main reasons for a sharepoint project failure here

<http://techdhaan.wordpress.com/2008/05/08/top-10-pitfalls-for-a-sharepoint-implementation/>

Leave a Reply

Name (required)

Mail (will not be published) (required)

Website

About Jag



Name: Jagannadha Raju Sri Raja Kakarlapudi

Alias: JAG

Location: Adelaide, South Australia

Education: B.E., (Bachelor of Engineering in Computer Science and Engineering) from University of Chennai, India.

M.S.E., (Master of Software Engineering) from The University of Adelaide.

He is presently working as SharePoint Solution Specialist at SDM (Strategic Data Management) a DWS Complany, fast growing Microsoft Gold Partner based in Adelaide, Australia. His key focus areas are Microsoft Office SharePoint Server 2007, K2 [BlackPearl] and .Net 3.0 Framework.

Like to know more about Jag, checkout his profile on LinkedIn.



Search for:

Search

Recent Comments



techdhaan on [SharePoint Planning Worksheets...](#)



Pritesh on [Passed MOSS Config!](#)



Jag on [SharePoint Designer Default Wo...](#)



Jag on [True Consultant](#)



Rakesh on [True Consultant](#)

Recent Posts

- [Passed MOSS Config!](#)
- [SharePoint Designer Default Workflow Actions](#)
- [Reporting in SharePoint 2007](#)
- [Create a SharePoint Site Quota Template](#)
- [Enable SharePoint 2007 Usage Analysis](#)

Categories

- [Certification](#) (2)
- [del.icio.us](#) (12)
- [Enterprise Search](#) (1)
- [InfoPath](#) (1)
- [IT Consultancy](#) (2)
- [Itfootprint](#) (64)
 - [Java](#) (1)
 - [Microsoft](#) (60)
 - [.Net](#) (2)
 - [SharePoint 2007](#) (50)
 - [SharePoint Designer](#) (1)
 - [WSS 3.0](#) (23)
- [MCTS](#) (2)
- [MOSS 2007](#) (1)
- [off beat](#) (2)
- [Office System 2007](#) (4)
- [Programming](#) (4)
- [Project Management](#) (1)
- [Rant](#) (2)
- [SharePoint](#) (4)
- [Software Engineering](#) (2)

- [SQL Server 2008](#) (1)
- [Tip](#) (4)
- [Visual Studio 2008](#) (1)
- [Webparts](#) (4)
- [Window Server 2008](#) (1)
- [Windows Server 2003](#) (1)
- [workflow](#) (2)

My Tags

[.Net Certification](#) [del.icio.us](#) [Enterprise Search](#) [InfoPath](#) [IT Consultancy](#) [Itfootprint](#) [Java](#) [MCTS](#) [Microsoft](#) [MOSS 2007](#) [off beat](#) [Office System 2007](#) [Programing](#) [Project Management](#) [Rant](#) [SharePoint](#) [SharePoint 2007](#) [SharePoint Designer](#) [Software Engineering](#) [SQL Server 2008](#) [Tip](#) [Visual Studio 2008](#) [Webparts](#) [Window Server 2008](#) [Windows Server 2003](#) [workflow](#) [WSS 3.0](#)

Top Posts

- [Using Query String and Data view WebPart.](#)
- [SharePoint Site Template Vs Site definition](#)
- [SharePoint Designer Default Workflow Actions](#)
- [Auto Save Your documents in Office 2007](#)
- [Built in SharePoint Web Services](#)
- [Tree View Navigation of Documents in SharePoint Document Library - Atidan Explorer for SharePoint](#)
- [SharePoint Planning Worksheets in one place](#)
- [Reporting in SharePoint 2007](#)
- [Adding Third Party Web Parts to SharePoint 2007 Environment](#)
- [Site Templates Vs Site Definitions - Part 2](#)

[SharePoint in News](#)

- [Unbounded Solutions Develops a SharePoint Printing Solutions - PR.com \(press release\)](#)
- [Galdon launches GFX 3.0 for Rightfax and Sharepoint 2007 - ITWeb](#)
- [ATTENTION: SHAREPOINT DEVELOPERS - iTWire](#)
- [Mainsoft Announces SharePoint Integrator for IBM Lotus Notes - FOXBusiness](#)
- [Lotus Notes gets SharePoint integration - Computerworld](#)

Blog Stats

- 67,163 hits



[Subscribe in a reader](#)

[Subscribe to ITFootprint by Email](#)



Member



Spam Blocked

[3,363 spam comments](#)
[blocked by](#)
[Akismet](#)

My SkyDrive

[Blog at WordPress.com](#). Theme: The Journalist by [Lucian Marin](#)

.