



# PLMWorld 2006: Insight Phases of Deployment

Darren Deatz – UGS





# What we'll cover...



Deployment of Insight involves several Phases. The goal of this session is to identify and define these phases:

## Pre-Deployment

- ▶ Planning and Research
- ▶ Capture and document

## Deployment

- ▶ Deployment of the Site and Library Structure
- ▶ Deployment of Collaboration technologies
- ▶ Configuring Insight for Product Lifecycle Management
- ▶ Advanced Deployments, workflow and technology integrations



# It's like building a house...



- ▶ Before Construction begins, you need Blueprints.
- ▶ Before blueprints, you need to identify the features and how they will be laid out in the floor plan.
- ▶ For this, you must understand your lifestyle and the lifestyles of the rest of your family that will reside there.
- ▶ In a big family meeting, you start with what you like and don't like about your current home. Take the good, leave the bad.
- ▶ Research new innovative features that fit your lifestyle and begin structuring the layout.

*P rResearchcheap / Assessment t*



# Pre-deployment activities



- ▶ Product Research
  - ▶ SharePoint
  - ▶ Insight Connect and Solid Edge
  - ▶ Complimenting Products
    - ▶ Microsoft Office 2K3
    - ▶ Microsoft Infopath
    - ▶ Microsoft Project Server
    - ▶ Partner Products

Product and functionality awareness is the first prerequisite to deployment and adoption.



# What you need to research



- ▶ What is the Role of Windows SharePoint Services with Insight? SQL?
- ▶ How should I license these products?
- ▶ Will WSS fill roles in other departments in my company?
- ▶ Will my mail server and office tools work with WSS?
- ▶ Is my IT infrastructure optimized for WSS?
- ▶ Can Insight and WSS capture my procedures and workflows?
- ▶ Can I flow data between my MRP/ERP and Insight/WSS or do I need to?
- ▶ How will I communicate with external sources?
- ▶ What other products will add real value to this implementation?



## Literature

[Microsoft SharePoint: Building Office 2003 Solutions](#)

[Microsoft SharePoint Portal Server 2003 Unleashed](#)

[Microsoft SharePoint Products and Technologies Resource Kit](#)

[The Rational Guide to Building SharePoint Web Parts](#)

[Microsoft SharePoint Technologies: Planning, Design, and Implementation](#)

[Sams Teach Yourself Microsoft SharePoint 2003 in 10 Minutes](#)

[Advanced SharePoint Services Solutions](#)

[Microsoft Windows SharePoint Services Step-By-Step](#)

[Essential SharePoint](#)

[Sams Teach Yourself Microsoft SharePoint 2003 in 10 Minutes](#)

[SharePoint User's Guide](#)

[Microsoft Windows SharePoint Services Inside Out](#)

[SharePoint 2003 User's Guide \(Expert Voice\)](#)

[Microsoft Windows SharePoint Services Quick Source Guide](#)



## Microsoft Websites

[SharePoint Products and Technologies Home](#)

[SharePoint Downloads](#)

[SharePoint Portal Server on Microsoft Office Online](#)

[SharePoint Portal Server Dev Center on MSDN](#)

[SharePoint Portal Server Product Site](#)

[Windows SharePoint Services Product Site](#)

[SharePoint Products and Technologies Dev Center on MSDN](#)

[SharePoint Resource Portal](#)

[SharePoint Customization Portal](#) (FrontPage 2003 Customization Kit)

[SharePoint Portal Server on TechNet](#)

[Windows SharePoint Services on TechNet](#)

[Sign Up for a Hosted Experience. Get your own Windows SharePoint Services Portal for 30 days](#)

[SharePoint Portal Server Technical Library](#)

[Windows SharePoint Services Support Center](#)

[SharePoint Portal Server 2003 Support Center](#)

[SharePoint Products and Technologies Resource Kit](#) (selected chapters)



## Third-Party Web Sites

[WSS Demo](#) (Website implemented using Windows SharePoint Services)

[WSS FAQ](#) (Another Windows SharePoint Services implementation)

[Barracuda.NET](#)

[SharePoint Solutions](#)

[GotSharePoint](#)

[SharePointD2D: Microsoft SharePoint Community Site](#)

[SharePoint University](#)



# SharePoint Resources



## Whitepapers

[How SharePoint Works](#)

[How to Write a Filter for User by SharePoint Portal Server 2003 and Other Microsoft Search-Based Products](#)

[Web Part Framework Overview](#)

[Microsoft SharePoint Products and Technologies: Technical Overview](#)

[Windows SharePoint Services Technical Overview](#)

[Customizing SharePoint Sites and Portals Part 1](#)

[Customizing SharePoint Sites and Portals Part 2: Using Templates and Site Definitions](#)

[Customizing SharePoint Sites and Portals Part 3: Style Sheet Class Reference Tables](#)

[Using SharePoint Portal Server 2003 with SharePoint Portal Server 2001](#)

[Automated Installation of SharePoint Portal Server 2003](#)

[Writing Custom Web Services for SharePoint Products and Technologies](#)

[How to install SharePoint Portal Server 2003, Windows SharePoint Services, and Project Server 2003 on the same server](#)

[Best Practices for Developing Web Parts for SharePoint Products and Technologies](#)

[Reverse Proxy Configurations for Windows SharePoint Services](#)

[Deploying SharePoint Portal Server 2003 Shared Services at Microsoft](#)

[Microsoft Web Enterprise Portal](#)

[Team and Enterprise Collaboration Platform](#)

[Portal Solution Makes Microsoft Virtual Team Viable](#)

[Hosted Solution Facilitates Team Collaboration](#)

[Integrating Exchange Server 2003 with SharePoint Products and Technologies](#)

[Architectural Overview of Windows SharePoint Services](#)

[Windows SharePoint Services and SharePoint Portal Server 2003](#)

[Implementing Rich Collaboration Infrastructure Using Windows SharePoint Services and SharePoint Portal Server 2003](#)



## Yet, more Whitepapers

[How to Customize Your Search Using SharePoint Portal Server 2003](#)

[Reverse Proxy Configurations for Windows SharePoint Services](#)

[Microsoft SharePointPSSearch SQL Syntax \(Preview\)](#)

[Introducing SharePoint Web Services \(.NET Developer's Journal\)](#)

[Branding a SharePoint Portal Server 2003 Site: Part 1, Understanding the Use of a Corporate Brand](#)

[Branding a SharePoint Portal Server 2003 Site: Part 2, How to Apply Your Own Corporate Brand](#)

[How to enable an ASP.NET application on a SharePoint virtual server](#)

[How to Write a Back Up and Restore Application for SharePoint Portal Server 2003](#)

[Absence Request and Vacation Schedule Management](#)

[Board of Directors](#)

[Case Work Management](#)

[Change Management](#)

[Classroom Management](#)

[Competitive Intelligence Resource Dashboard](#)

[Employee Activities Site](#)

[Employee Timesheet and Scheduling Management](#)

[Employee Training](#)

[Event Coordination](#)

[Expense Reimbursement Request](#)

[Help Desk Dashboard](#)

[HR Programs and Services Forms](#)

[IT Developer Team Site](#)

[Legal Document Review Workflow Management](#)

[Loan Initiation Management](#)



# SharePoint Resources



## Resource, knowledge and training kits

[Microsoft SharePoint Portal Server 2003 Administrators Guide](#)

[Microsoft Solution Accelerator for Intranets](#)

[Microsoft Office SharePoint Portal Server 2003 Support Center](#)

[Windows SharePoint Services Administrators Guide](#)

[Microsoft SharePoint Developer's Conference Downloads](#)

[Comparison of features that are included in Windows SharePoint Services and SharePoint Portal Server 2003](#)

[SharePoint Portal Server 2003 Training Kit](#)

[SharePoint Portal Server 2003 Discovery Kit](#)



# SharePoint Resources



## Downloads and Tools

[Microsoft Office SharePoint Portal Server 2003 Document Library Migration](#)

[SharePoint Configuration Analyzer v1.0 for Windows SharePoint Services](#)

[SharePoint Products and Technologies Online Web Part and Tools Library](#)

[Windows SharePoint Services: Document Library Event Handler Toolkit](#)

[SharePoint Products and Technologies 2003 Software Development Kit \(SDK\)](#)

[SharePoint Portal Server 2003 Trial Software](#)

[Windows SharePoint Services 2.0](#)

[SharePoint Explorer](#)

[HTML Viewer for Windows SharePoint Services](#)



# SharePoint Resources



## Microsoft sponsored SharePoint Newsgroups

[microsoft.public.sharepoint.portalserver](#)

[microsoft.public.sharepoint.portalserver.development](#)

[microsoft.public.sharepoint.windowsservices](#)



## MSDN Webcasts

[Windows SharePoint Services Security](#)

[Configuring Search with the Microsoft Content Management Server Connector for SharePoint Technologies](#)

[Creating Custom Rendering Templates with the Microsoft Content Management Connector for SharePoint Technologies](#)

[Integrating Project 2003 with Windows SharePoint Services](#)

[Creating Custom Web Part Views for the Microsoft Content Management Server Connector for SharePoint Technologies](#)

[Integrating BizTalk Server 2004 with SharePoint](#)

[Integrating Microsoft Content Management Server with SharePoint Products and Technologies](#)

[SPS 2.0: Developer Considerations](#)

[SPS 2.0: Architecture and Best Practices for SPS Development](#)

[Advanced SharePoint Workflow Using Custom Document and Form Libraries \(Part 1 of 2\)](#)

[Advanced SharePoint Workflow Using Custom Document and Form Libraries \(Part 2 of 2\)](#)

[Best Practices for Developing and Deploying Web Parts for SharePoint Sites](#)

[Coding and Using Web Part Connections for SharePoint Sites](#)

[Creating and Customizing Windows SharePoint Services: List, Library, and View Definitions](#)

[Customizing and Branding SharePoint Portal Server and Windows SharePoint Services](#)

[Extending and Enhancing the SharePoint Portal Server Search User Interface](#)

[Integrating Enterprise Applications into SharePoint Portals](#)



# SharePoint Resources



## TechNet Webcasts

[Migrating to SharePoint Portal Server 2003](#)

[SharePoint Portal Server 2003: Advanced Migration Scenarios](#)

[Migrating Lotus Notes Applications to VS.NET, SQL Server, Exchange 2003, and SharePoint](#)

[SharePoint Portal Server 2003: Integrating Enterprise Applications](#)

[SharePoint Portal Server 2003: Organizing Sites and Topics](#)

[SharePoint Portal Server 2003: Personalization, Profiles, and Audience Targeting](#)

[Customizing SharePoint Portal Server 2003 with FrontPage 2003](#)

[Digital Asset Management for SharePoint Products and Technologies](#)

[SharePoint Portal Server 2003: Deploying as an Extranet](#)

[Migrating eRooms, Windows File Services and Exchange Public Folders to SharePoint](#)

[SharePoint Portal Server Infrastructure Implementation Best Practice](#)

[Integrating Project 2003 with Windows SharePoint Services](#)



# SharePoint Resources



## SharePoint Independent Software Vendors (ISVs)

[CorasWorks](#)

[Factiva](#)

[AvePoint](#)

[Sybari](#)

[Decision Support Panel](#)

[International \(DSP\)](#)

[Captaris](#)

[Synergy](#)

[Econium](#)

[Tsunami](#)

[Pentalogic](#)

...thousands more

## SharePoint Solution Providers

[Internosis](#)

[Quilogy](#)

[Avanade](#)

[Dell Professional Services](#)

[SharePoint Experts](#)

[GotSharePoint.com](#)

[imason, inc.](#)

[Hewlett Packard](#)

[OnX Enterprise Solutions](#)

[MicroLink](#)

[Portal Solutions](#)

[RDA](#)

[Ascentn Corporation](#)

...thousands more

## SharePoint Bloggers

[James Edelen](#)

[Mark Kruger](#)

[Gary Bushey](#)

[Bryant Likes](#)

[Jan Tielens](#)

[Laura John](#)

[Mads Nissen](#)

[Patrick Tissinghem](#)

[Serge van den Oever](#)

[Westin](#)

[Mike Walsh](#)

[Owen Allen](#)

[Daniel McPherson](#)

[Mark Harrison](#)

[John West](#)

[Eric Legault](#)

[Bil Simser](#)

[Eli Robillard](#)

[Ryan Rogers \(SharePoint Developer](#)

[Support - Microsoft\)](#)

[SharePointBlogs.com](#)



## Whitepapers

[GTAC Download Site](#)

[Solid Edge Version 17 Insight Implementation Guide](#)

[Solid Edge Version 17 Insight Q&A](#)

[Solid Edge Version 15 Insight Migration Guide](#)

[Solid Edge Version 15 Insight How To](#)



## Newsgroup

[Solidedge.insight](#)

## Other Resources

Your Local VAR  
Your UGS account Rep  
Your Local Usergroup  
[Insight Information Kit](#)





# For Insight Purposes...



## *Policy*

Documented boundaries inside which employees must perform a procedure or duty.

- ▶ A policy can be a set of procedures and/or a limitation of procedures.
- ▶ A Policy can be role based.
- ▶ Some Policies can be Software or security enforced.
- ▶ Others must be enforced by consequences.



# For Insight Purposes...



## Example Policies

1. Prior to creating a revision, a request form (ECR) must be submitted and approved by the Document Control Agent.
2. Filenames must match company standard format:  
**12-3456-ID\_R-00**
3. All documents must be checked in by COB daily.
4. Document Release Prerequisite-parts must be released prior to or at time of drawing release.
5. Document Release Prerequisite-release form must emerge from review workflow prior to release workflow.
6. Only members of the Engineering group can access pre-released documents.



# For Insight Purposes...



## *Procedure*

A documented series of steps, actions or functions performed by an employee on a document to achieve a result.

Note: if it's not documented, it's not a procedure and it can't be enforced. It's difficult to manage product data without managing product procedures.



# For Insight Purposes...



## Example Procedures

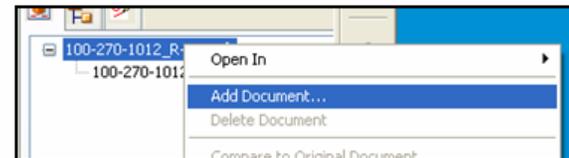
### How to Submit a document for Release Review

*This document details the procedure for submitting a PCF document for release review. This procedure will launch the electronic workflow approval for the review process.*

1. Open Insight Connect View and Markup, browse for the drawing of the part to be reviewed for release.
2. On the Package List Tree, right click on the pcf file (top of the list) and choose "Add Document" to add the part file



3. Repeat step 2 for the assembly and any other file needed.
4. Add any markups needed using the markup text document.
5. When you are finished with the markup, save the document to <http://server/eng/prerelease/review>



*This will start the review workflow. When the document has completed this process you will receive an email indicating the completion.*

6. Open the PCF and review the comments left by the reviewers
7. If needed open the part and drawing and incorporate the changes required
8. Add the documents again to the PCF. You will now have two instances of the part and drawing in the PCF-one as originally submitted and one with the changes completed. Unless required by a review to be sent through review again, you are ready for the PCF to be saved to the Release Workflow Library



# For Insight Purposes...



## *Workflow*

Allows the flow of work between individuals and/or departments to be defined and tracked.

A workflow goes beyond a procedure by capturing information rendered against the document:

- ▶ A list of required approvers and the order of approval
- ▶ A deadline for action on the document
- ▶ A status of the document
- ▶ Comments from the approvers

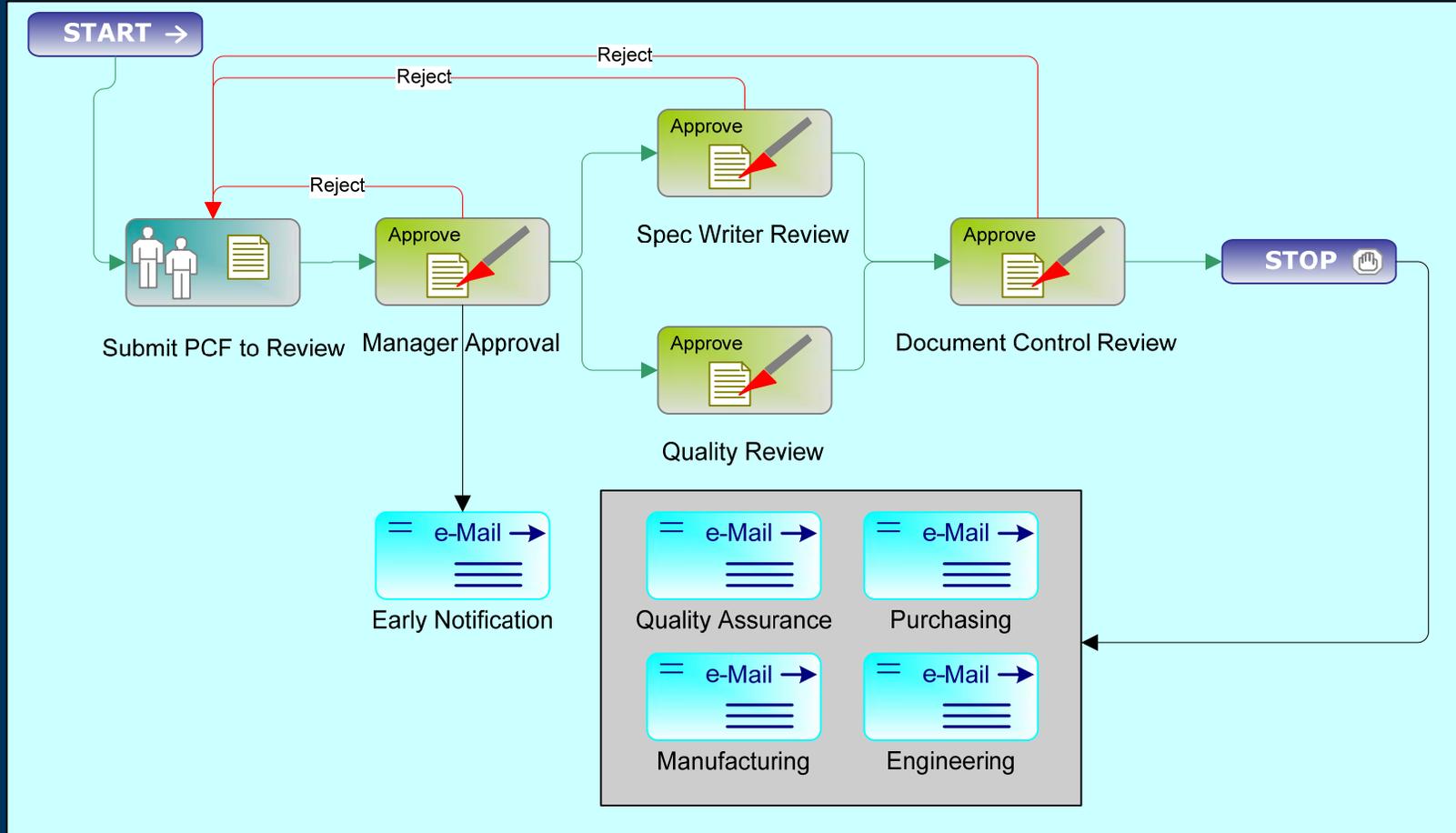


# For Insight Purposes...



## Sample Workflow

Captured with MS Visio





## The Assessment-Capturing Human Roles

- ▶ Human to Human roles (Collaboration)
  - ▶ Organization, Managers, reports
  - ▶ Departmental interaction
- ▶ Human to system Roles
  - ▶ Groups and Group permissions
  - ▶ User Roles and unique user permissions
  - ▶ Users who have multiple roles

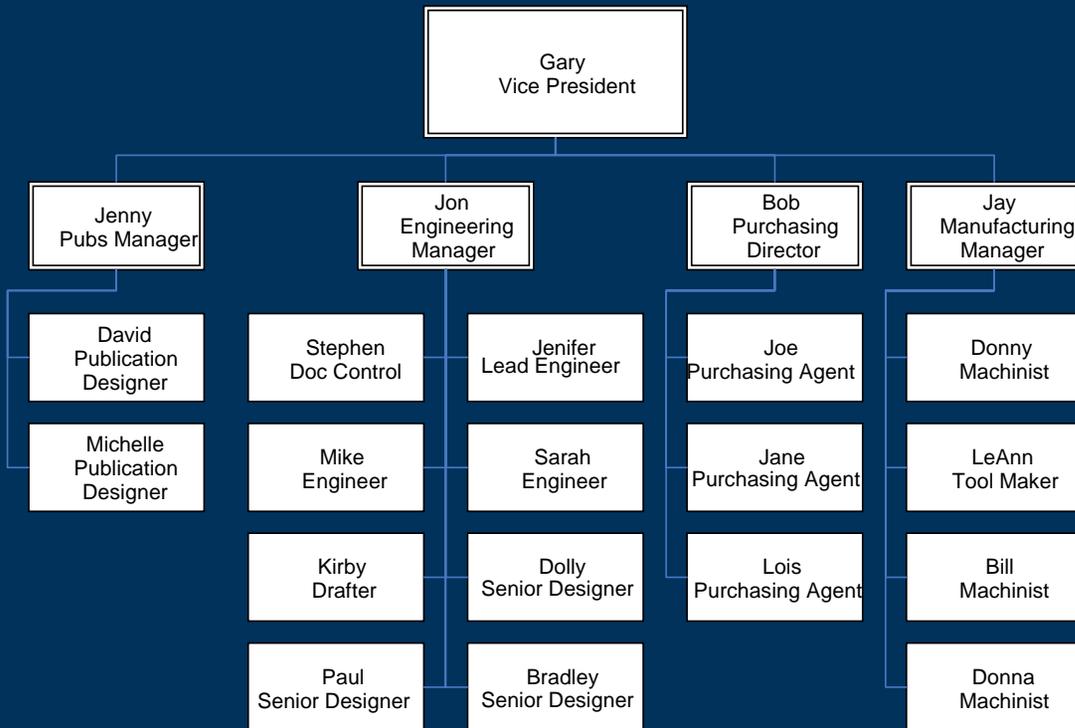


# Pre-deployment activities



Sample Groups

## Sample Org Chart



DATA CONSUMERS

DATA CREATORS

MANAGERS

DOCUMENT CONTROL AUTHORITY

# ***Accurate pre-deployment assessment is critical***

- ▶ ***Policy***
- ▶ ***Procedure***
- ▶ ***Workflow***
- ▶ ***Organizational structure***
- ▶ ***Human roles***

D e p l o y m e n t



# Deployment Phases



## Phase I: Vaulting

1. Technology Deployment-Software Installation

## Phase II: Collaboration

- ▶ Site and library configuration

## Phase III: Lifecycle

- ▶ Production site

## Phase IV: Shared Data and Network Expansion

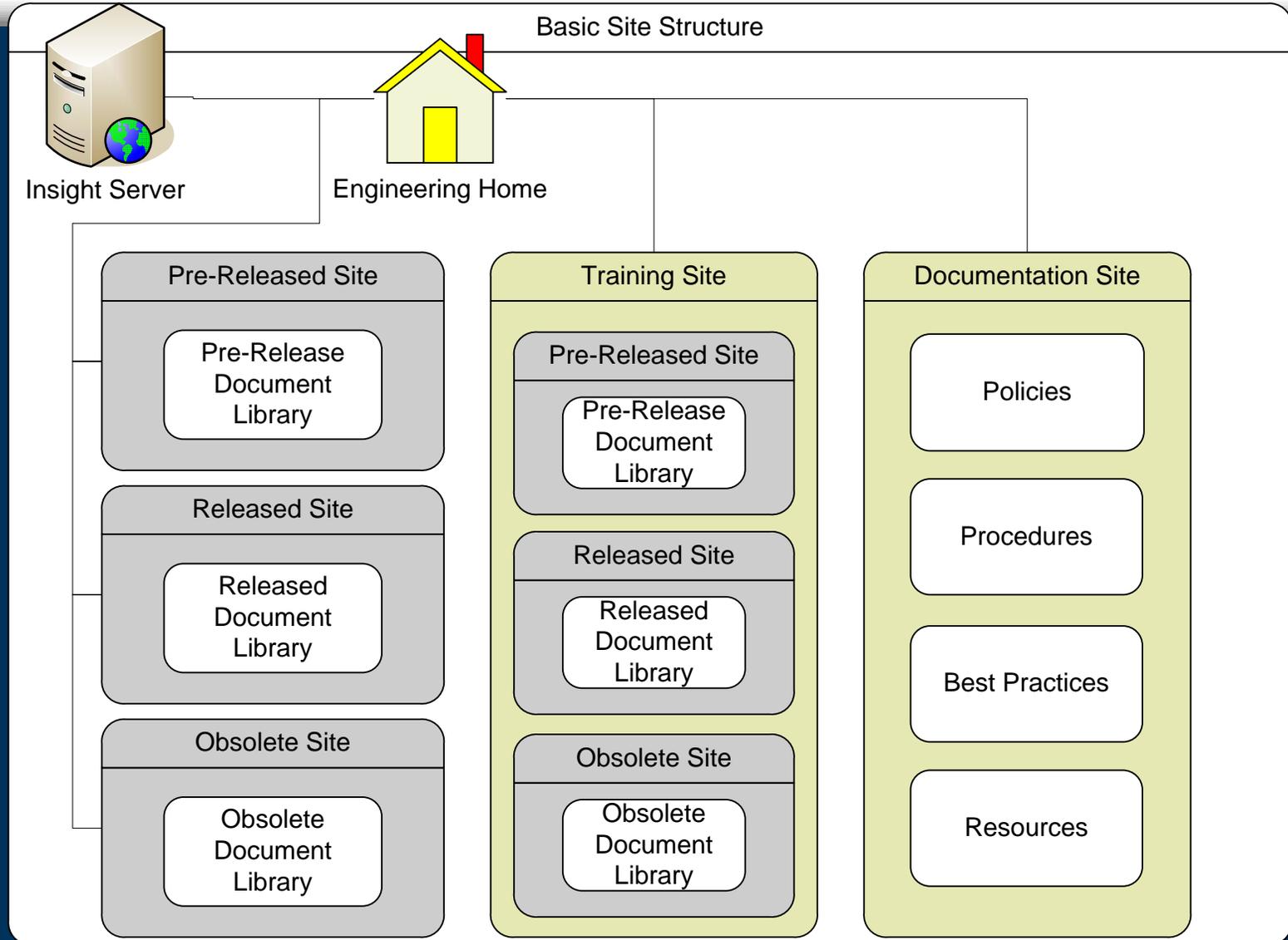
- ▶ Training and user support

2. User training and support (Guided tour)
3. Production site configuration (Data collection)
4. Standardized data (Insight Connect)
5. Uploading Solid Edge Data (Add to library)
  - ▶ Clean up and organize data

**REQUIRED!**



# Phase I: Vaulting





# Phase I: Vaulting



Ac

1.

2.

Untitled - Solid Edge Administrator

File Help

Option	Allo...	Value
Life cycle - make obsolete	No	True
Life cycle - update draft	No	True
Allow broken links	No	True
Prevent duplicate document names in Insight	No	False
Revision delimiter	No	-
User templates	No	
Property seed file	No	C:\Program Files\Solid Edge V17\Program\propseed.txt
Custom settings file	No	C:\Program Files\Solid Edge V17\Program\Custom.xml
Hole size file	No	C:\Program Files\Solid Edge V17\Program\Holes.txt
Pipe threads file	No	C:\Program Files\Solid Edge V17\Program\PipeThreads.txt
Link mgmt file	Yes	
Search scope	No	C:\Program Files\Solid Edge V17\Program\SearchScope.txt
Solid Edge Admin	Yes	C:\Program Files\Solid Edge V17\Program\Options.xml
Linear revisions	No	False
Store geometry in Part file for fast open	No	True
Disable Revision Manager	No	False
Inactivate all parts when opening assemblies	No	True
Allow unreleased links	No	False
Show Revision Manager actions in past tense	No	False
Backup folder	No	C:\Documents and Settings\deatz\Application Data\Unigraphics Solutions\Solid Edge\Backup folder
Frame Local Library Folder	No	C:\Program Files\Solid Edge V17\Frames
Replace Filename	Yes	[Filename]
Start up screen	No	C:\Program Files\Solid Edge V17\Program\DocDL\1000\start\SEStartUp.htm

Ready



# Phase I: Vaulting



## Configure Client Machines

1. Create Network Place
2. Set File Locations
3. Set Local Cache
4. Set Searchscope
5. Configure Internet Explorer Options and Security



# Deployment Phases



Phase I: Vaulting

Phase II: Offer Collaboration range of collaboration

Phase III: Utilizes to meet your needs.

Phase IV: SharePoint Framework Expansion

*Insight Connect*

*Xpress Review*

*IE Portal Viewer*



# Deployment Phases



Engineering PDM Client

Customer Client

All View Owners

Revision MGR

Response to PCF

and authors  
IE add-in  
of CAD data

Create PCF parts

Desktop Backups

View Properties

View & Markup

**Insight Connect**

View Graphics

Measure

**Xpress\*\*Review**

View BOM

Section

**Section\*\*  
IE Portal Viewer**

Free

LifeCycle Tools

Free

Licensed

Redistributable

\*\*if author enables



# Deployment Phases



## Phase II: Collaboration

- ▶ Identify Client Types
- ▶ Install IC software, obtain licenses (Non SE clients)
- ▶ End user training
- ▶ Deploy viewing stations
- ▶ Configure SharePoint Server
  - ▶ Deploy Webpart viewer
- ▶ Install Xpress Review Software



# Deployment Phases



Phase I: Vaulting

Phase II: Collaboration  
Insight provides tools for tracking and managing product lifecycle.

Phase III: Lifecycle  
Phase IV: SharePoint Framework Expansion  
Lifecycle Status

Revision Manager (Revising released documents)

In Context Revisions (On the fly in assembly)

Edgebar Status Display

Lifecycle Assistant (Releasing and obsoleting)

Revision rules on file open



# Deployment Phases



## Phase III: Lifecycle

- ▶ Careful research and planning is required
- ▶ Accurate configuration is required
- ▶ Testing is required
- ▶ End user training is required



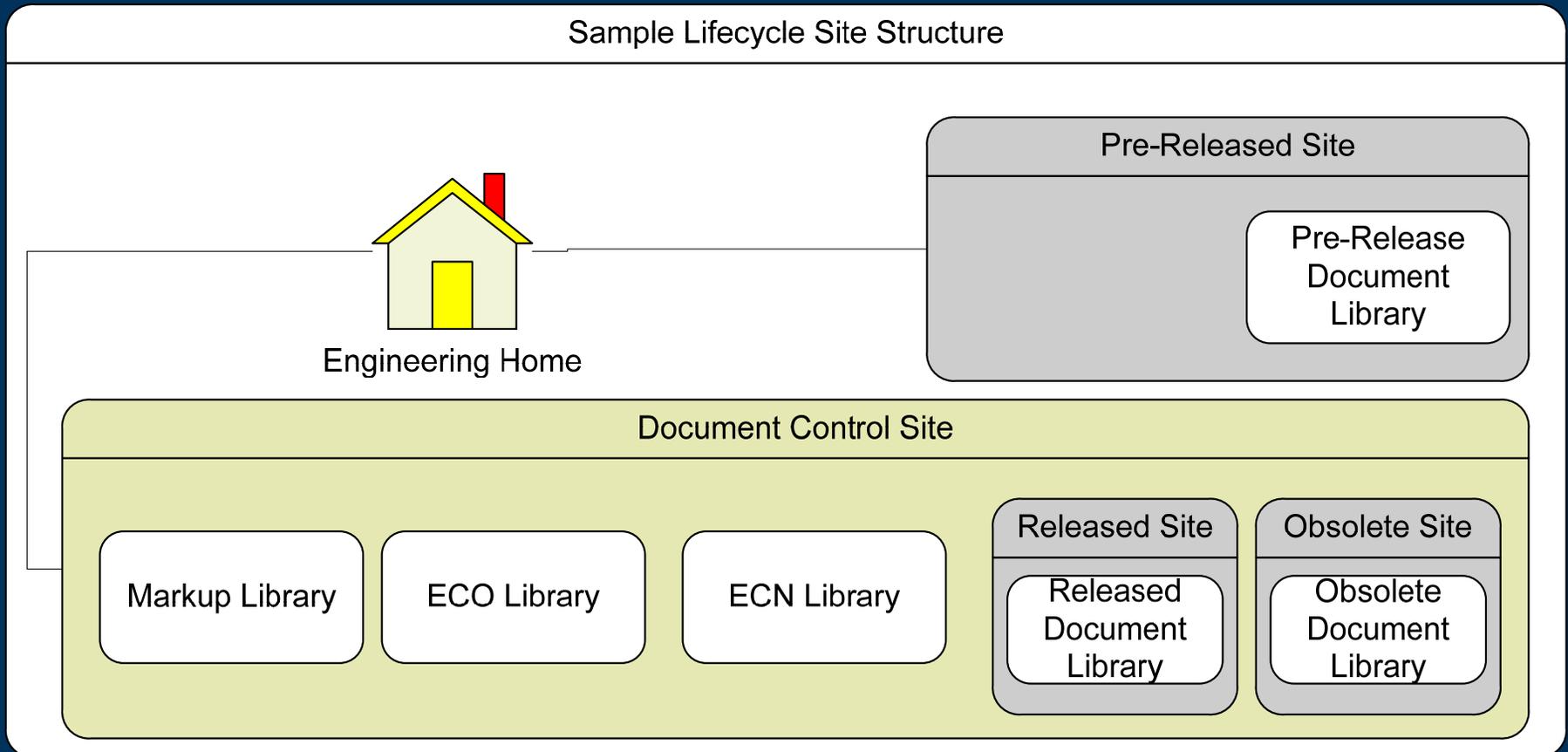
## Phase III: Lifecycle

If you plan to use Lifecycle, we strongly suggest:

- ▶ Contracting the UGS Services group
- ▶ Pre-deployment assessment
- ▶ Formal end user training
- ▶ Assign a Document Control Agent “gatekeeper”
  - ▶ Performs all releases
  - ▶ Limits access to released documents



## Phase III: Lifecycle





# Deployment Phases



Phase I: Vaulting

Phase II: Collaboration

Phase III: Lifecycle

Phase IV: SharePoint Framework Expansion



# Deployment Phases



## Phase IV: SharePoint Framework Expansion

SharePoint offers many flexible tools to increase productivity, communication and collaboration via the web portal:

Custom Lists

Calendars

Shared Document Libraries

Discussion Groups

Workspaces



# Instant, Flexible Lists



Standard public View

ID	Name	PartNumber	SERevisionLevel	Description	ProjectName	Make_Buy	Vendor	Order_Status	Work_Status	Mana
1	plate4.psm	05-0033	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	INVENTORY	NA			manag
2	Plate2.psm	05-0031	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	INVENTORY	NA			manag
3	Plate1314.par	05-0022	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	MAKE	NA			manag
4	Plate5.par	05-0027	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY	JUNGLBLT	NOT ORDERED		manag
5	Plate6.par	05-0028	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY	GMBH	ORDERED		manag
6	Plate7.par	05-0029	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	INVENTORY	NA			manag
7	Plate15.par	05-0023	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY	LEITNER	BACKORDERED		manag
8	Plate9.par	05-0030	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	INVENTORY	NA			manag
		05-0020	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	MAKE	NA			manag
		05-0021	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	MAKE	NA			manag
		05-0025	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY		IN TRANSIT		manag
		05-0026	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY		RECEIVED		manag
		05-0001	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag
		05-0002	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag
		05-0032	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag
		05-0003	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag
		05-0004	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag
		05-0019	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag
19	Weldment1.pwd	05-0034	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag
20	Plate1718.par	05-0024	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY	SHOP STK	ORDERED		manag
21	Weldment9.pwd	05-0035	0	WELDED STEEL PLATE	EXAMPLE LIBRARY	BUY				manag

One Click to Columnized Spreadsheet View

One click File Export to Excel, Access or Reports

Linked Spreadsheet Filtered and sorted



# Collect, Report, Delegate,



Home Documents and Lists Create Site Settings Help Up to Project Gateway

**Robbins COMPANY** New Project Home

Solid Edge Insight Connect ECR Form Release Form Release Vault Gantt Charts Production Schedule BOM (PIC) Log Hours

Open Issues and Risks

Issue ID	Title	Assigned To	Priority	Category	Due Date
1	Materials Backorders	manager	(2) Normal	(2) Category2	
2	Tooling rework	aruda	(2) Normal	(2) Category2	
3	Wire Coils delivered wrong size	drake	(2) Normal	(2) Category2	
4	parts don't fit on this machine 2345234		(1) High	(1) Category1	

Customer Data

Type	Name	Modified By
	Geological Studies	INSIGHT\administrator
	Technical Specifications	INSIGHT\administrator
	Request for Quote	INSIGHT\administrator

TBM Project Schedule

February 20 - February 26, 2005

Sun	Mon	Tue	Wed	Thur	Fri	Sat
20	21	22	23	24	25	26
			Inserts - rough machine from Kent			
			Inserts - butter weld from Kent			
			Inserts - stress relieve from Kent			
			Inserts - finish machine from Kent			
			Segment - fabrication weldments			
			Burn grizzly bars and false face			
			Segment - pre-machining			
			Finish Weld Inners			

Project Members

- aruda
- Darren Deatz
- drake
- engineer
- INSIGHT\administrator
- manager
- pfeiffer

Manage Schedule



# Deployment Phases



## Phase IV: SharePoint Framework Expansion

Tight Integration with Office 2003

InfoPath

Microsoft Project Server 2003

1000's of Solution Providers and Software vendors

Basic Workflow Utilities Provided with Insight Server



# Deployment Phases



## Phase IV: SharePoint Framework Expansion

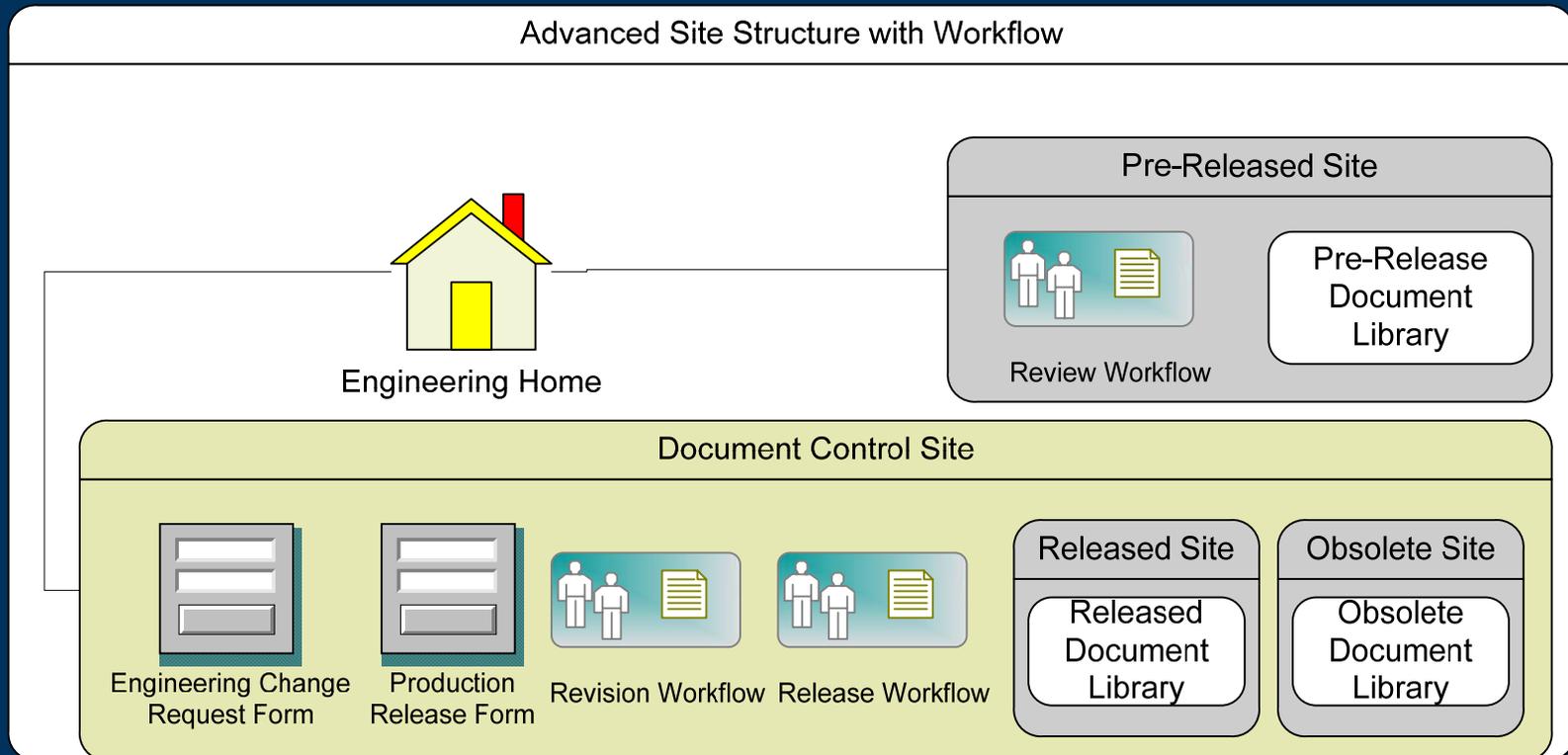
- ▶ Expand Portal use within engineering
- ▶ Expand Portal to other departments
- ▶ Deploy enhanced search tools
- ▶ Deploy business process management tools
- ▶ Deploy basic workflow tracking for PCF



# Deployment Phases



## Phase IV: SharePoint Framework Expansion



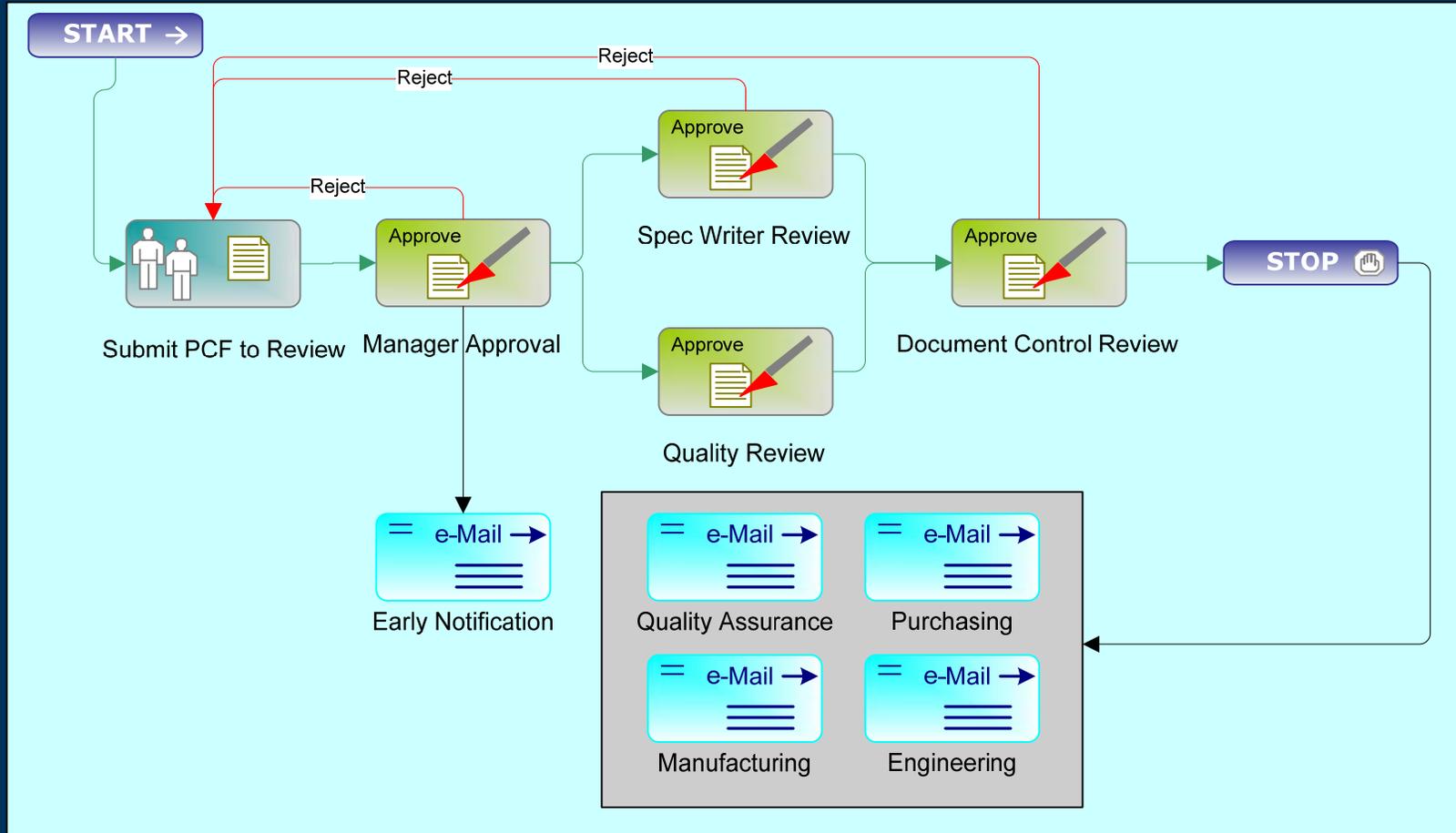


# Deployment Phases



## Sample Workflow

Captured with MS Visio

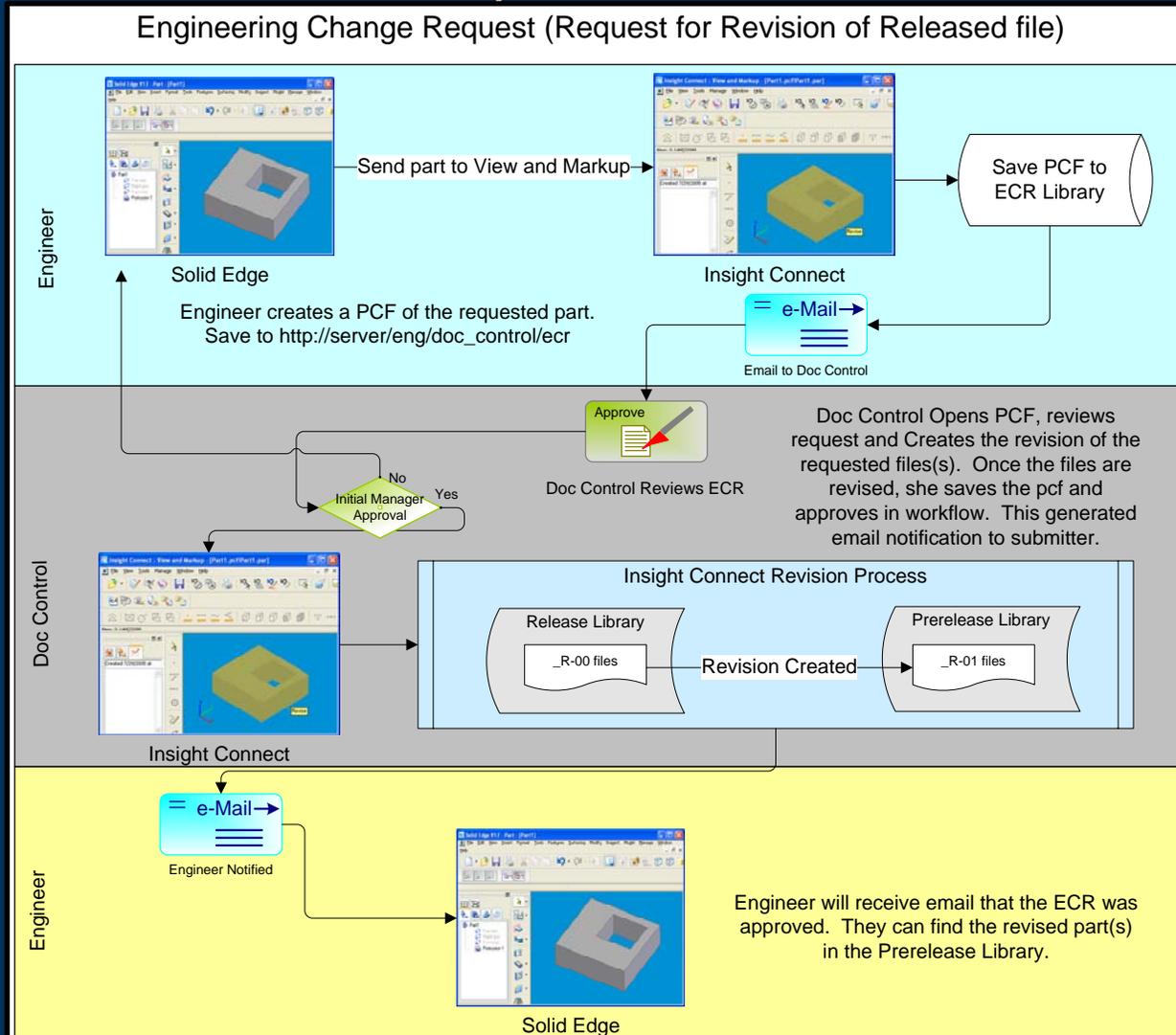




# Deployment Phases



## Sample Workflow





# Phases of Deployment



## ✓ Pre-deployment Activity

- ▶ Research and Education
- ▶ Assessment

## ✓ Phase I: Vaulting

## ✓ Phase II: Collaboration

## ✓ Phase III: Lifecycle

## ✓ Phase IV: SharePoint Framework Expansion

w w w . T s h a n d k e Y o u . c o m