

Spotlight On

Governance for SharePoint

Presented by
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About Me

- Technology professional with 19 years experience in integration, project management, custom application development, visual production and corporate training.
- AIIM Certified Enterprise Content Management Practitioner
- Currently Director, Marketing Operations & SharePoint Architect for Skechers USA, a global footwear manufacturer
- Principal Enthusiast at my blog SharePointStrategist.com; contributor on SharePointGovernance.org
- Vice Chair of SPUGS.org, non-profit dedicated to promoting SharePoint User Groups
- 12 Years as a content management specialist for legal and government industries

Enterprise Balancing Act



Why You Need Governance

- Drive consensus about policies and procedures for SharePoint installation & information management as a whole
- Minimize security risks and “SharePoint Sprawl”
- Combat information silos & collaboration failures
- Drive business process improvement
- Maximize investment in SharePoint tools



Elements of Good Governance

Collaborative process with constant iterations

Addresses technology and enterprise information needs

Integrate varied professionals

Process not personality driven

Specific, measurable goals



The Definitive Text

SharePoint Deployment and Governance Using CobiT 4.1: A Practical Approach

By Dave Chennault, CISA / MCP and
Chuck Strain, CISA, MCSE, MCTS

- Available here at the conference & on my blog bookstore
- Step by step guidance for SharePoint governance
- Must have guide for today's topic
- Referenced throughout this presentation



The Right Resources



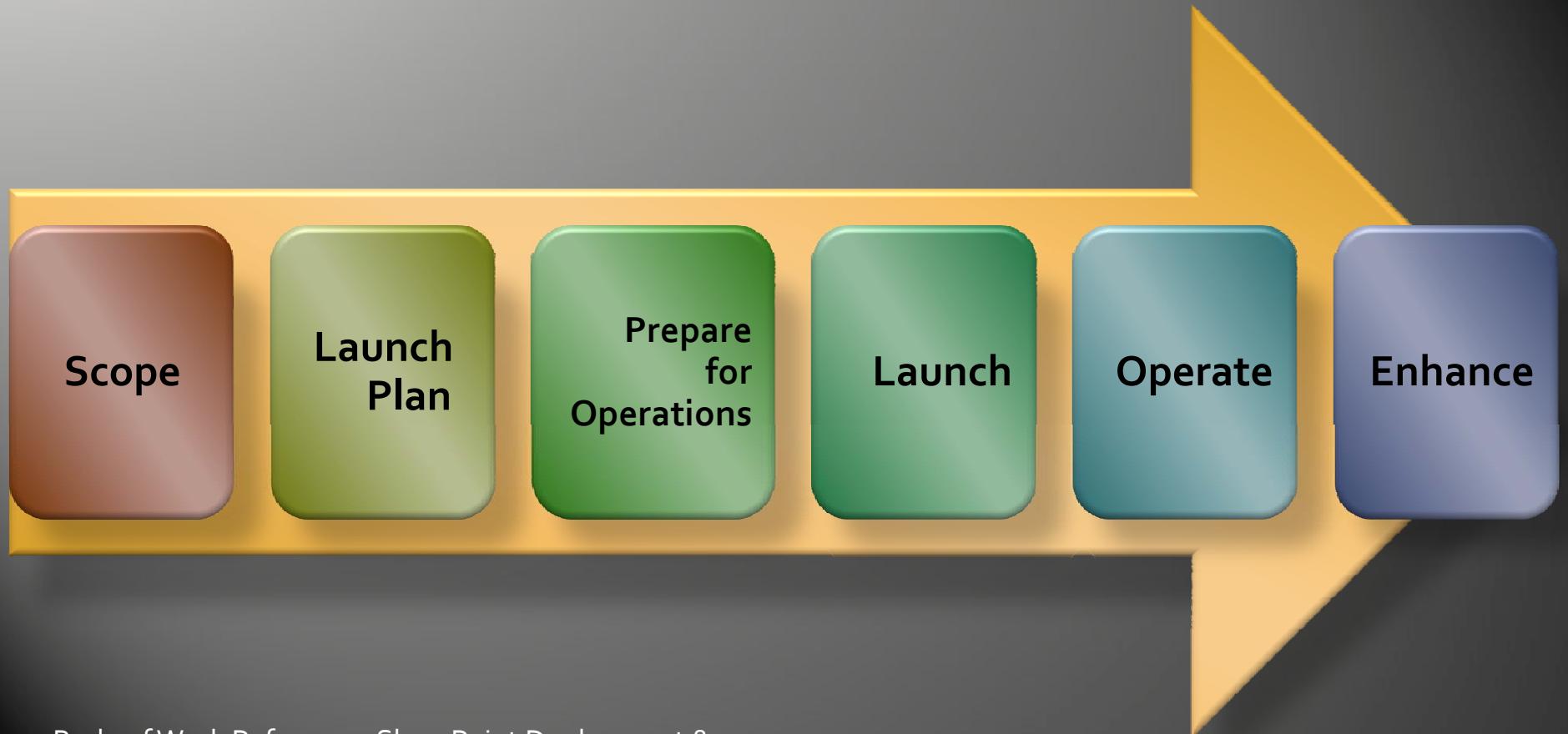
Existing State: Know Where You're At

Capability Maturity Model (CMMI)



Body of Work Reference: Carnegie Mellon SEI
<http://www.sei.cmu.edu/cmmi/general>

Governance Framework



Body of Work Reference: SharePoint Deployment & Governance using CobiT 4.1

The Process for Success



Architecture Considerations

- **Taxonomy** - How you classify data as expressed through:
 - Database & web app design
 - Content types
 - Custom columns
 - Other metadata
- **Legacy Integration**
 - Links to external databases & other LOB apps
- **Data Conversions**
 - Unstructured to Structured Data
 - File Stores



Compliance & Governance

- Information retention policy
 - Document & data life cycles
- Legal (litigation & other requirements)
- Executive management review/approval
- Enterprise change management policies
- SOX
- HIPPA

Each consideration can be handled by defining metadata with associated workflows, audit trails, publishing sites, content expiration and a taxonomy that identifies the owners & categorization of content.



Functional Areas

- ❑ Document & Image Management
- ❑ Records Center
 - Policies & Procedures
- ❑ Work in Process or Collaboration Libraries
- ❑ Team Sites
- ❑ My Sites
- ❑ BI Consumption



Process Areas

- ❑ Committee Structure
 - Accommodate for Growth
 - Add subject matter experts
- ❑ Communications Planning
 - Can never do enough!
- ❑ Training Program
 - Secure professional assistance
- ❑ Support Policies
 - Define service strategies & agreements



SharePoint Feature Mapping

- ❑ Web Application
- ❑ Audiences
- ❑ Site Collection Type
 - Quotas
- ❑ Site Columns
- ❑ Content Types
- ❑ UI – Master & Content Pages
- ❑ Lists & Libraries
 - Views
- ❑ Web Parts
- ❑ Alerts



Example Architecture

- Web Application –
 - Single by Port
 - Separate administration web app
- Audiences – by department or security group
- Site Collection Type – Publishing / Team
 - Quotas – based on SQL db architecture
 - Per Department is standard
- Site Columns (Metadata)
 - Document Type or Category
 - Department
- Content Types (General to Specific)
 - Media Files
 - Published
 - WIP
 - Or by more detailed type
- UI – Master & Content Pages
- Lists & Libraries
 - Views
- Web Parts
- Alerts



Web
Front
End



Web
Application

Metadata, Content Types, UI



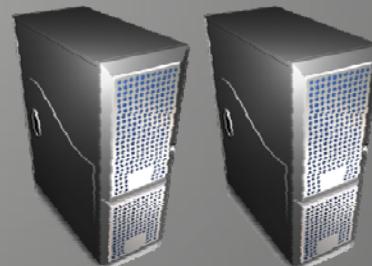
Site Collections



User
Experience



Example Architecture



DualWebFront Ends
Failover; load
balancing



Multiple Web
Application by
Function

Metadata, Content Types, UI



Site Collections



Varied
User
Experience



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Extended Considerations

- Process Automation & Legacy Integrations require additional connectivity & resources
 - Document & data life cycles
- Evaluate ECM Software to identify features & tools that will help you to implement & enforce your policies.
 - See SharePoint Feature Map
 - See ECM Strategy Handout
- Use visual workflow tools to show lifecycles (Visio or Mind mapping software)
- Add complexity by iteration



A Final Thought...

Enthusiasm

Contagious
Actionable
Quantifiable
Repeatable

An Essential Management Principle



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Resources

- MVP Community – Twitter, Blogs
- My Blog: SharePointStrategist.com
- SharePointGovernance.org
- Peers – User Groups
- Training

