



# WorkshopPLUS: SharePoint Server Administration

Administration: Governance



# Agenda - Chapter 1

1	Governance
2	IT Governance
3	Information Management Governance
4	Application Management Governance

# What is Governance?

Governance is a set of policies, roles, responsibilities, and processes that control how an organization's business divisions and IT teams work together to achieve its goals.

Every organization has unique needs and goals that influence its approach to governance. Larger organizations will probably require more and more detailed governance than smaller organizations.

A good governance plan can:

- Streamline the deployment of products and technologies, such as SharePoint.
- Help keep your organization's system secure and compliant.
- Help ensure the best return on your investment in technology.

# Different types of Governance

## **IT Governance / Operational Governance**

- Technical: Responsibilities, roles, permissions, standards, guidelines, etc.

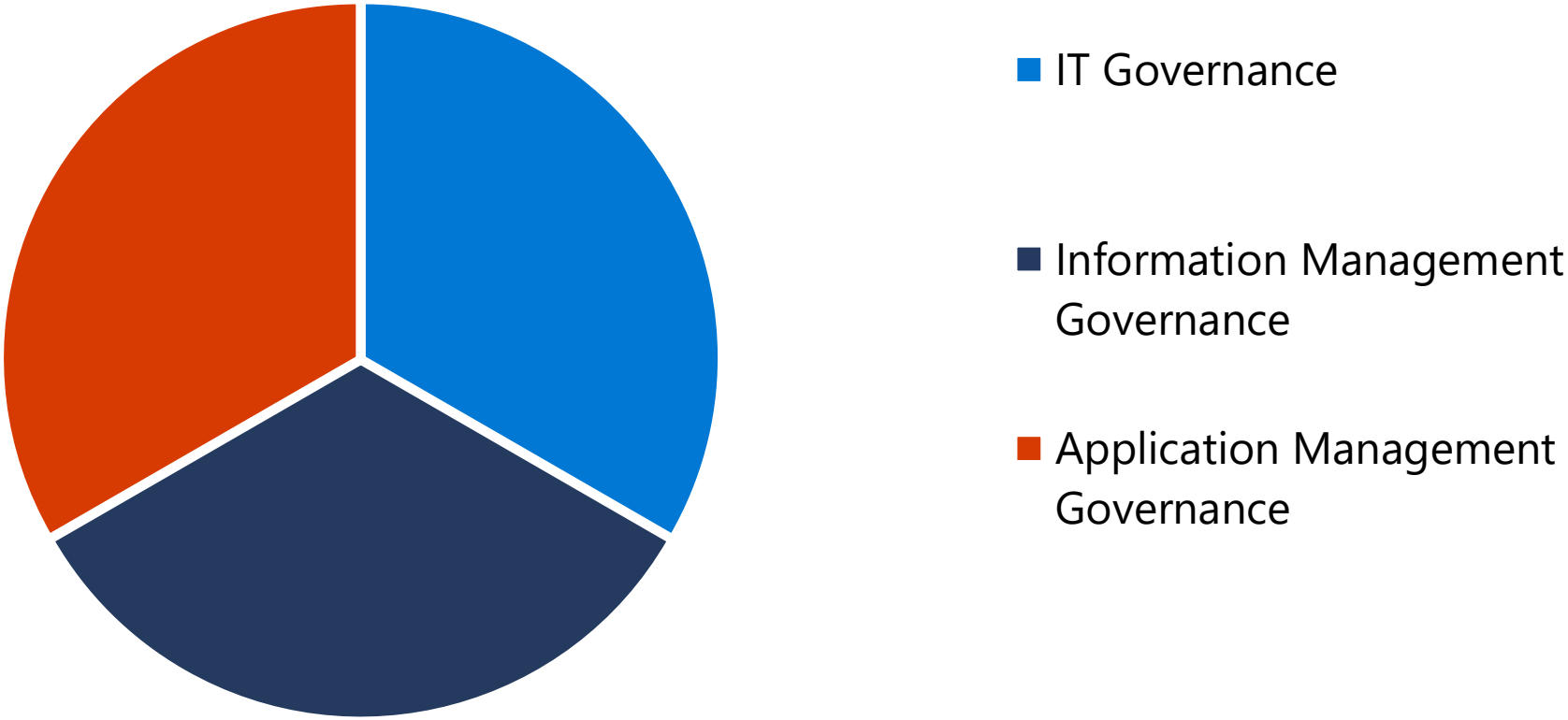
## **Information Management Governance**

- Functional: Responsibilities, roles, content types, metadata, search, etc.

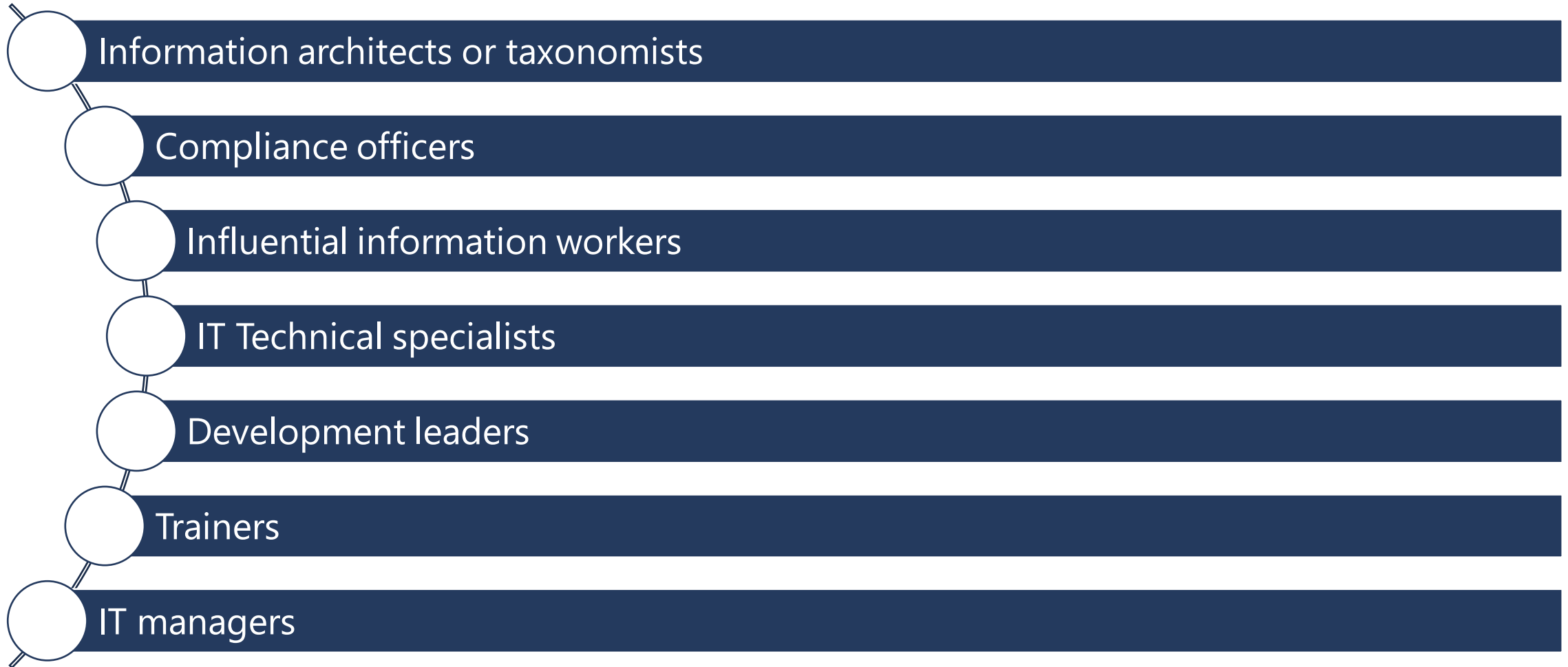
## **Application Management Governance**

- Development: Development standards, acceptance criteria, etc.

# Importance of each type of Governance



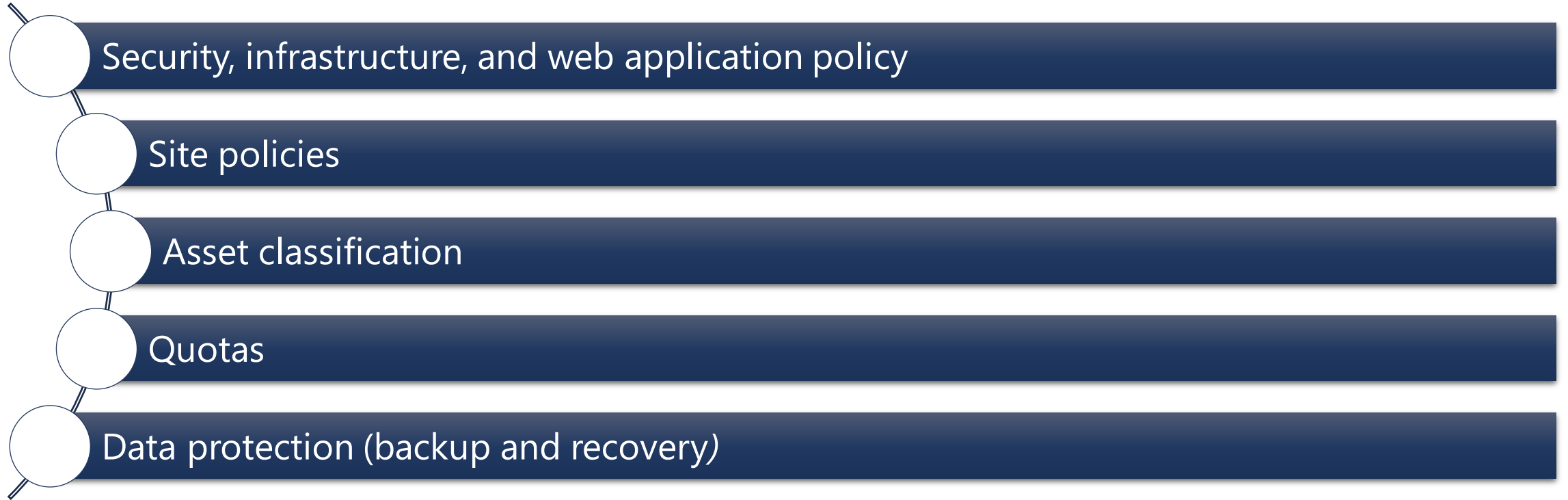
# People of the Governance Team



# Agenda - Chapter 2

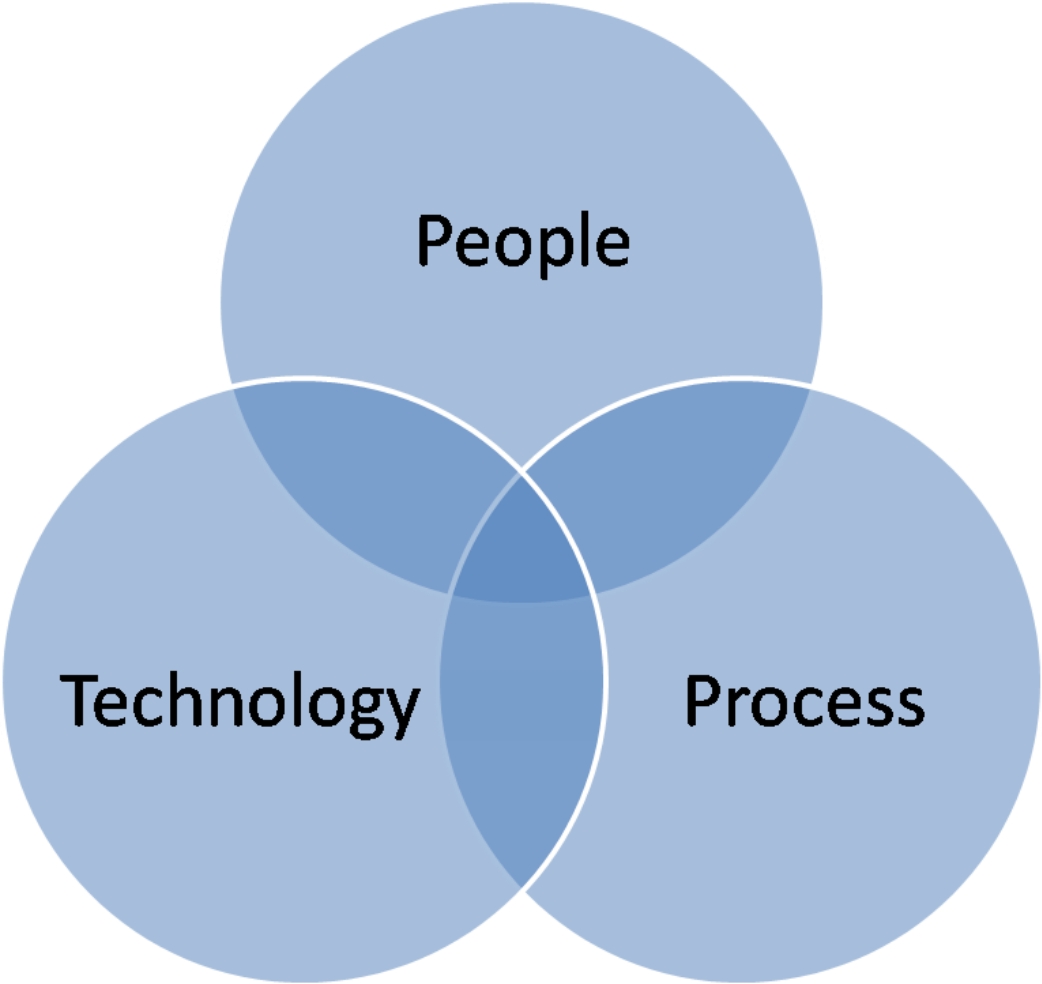
1	Governance
2	<b>IT Governance</b>
3	Information Management Governance
4	Application Management Governance

# IT Governance (software + service)





# IT Governance areas



# People area

## Organization

- Organizational structure/chart, communication methods between teams

## Team

- Team structure, required roles incl. tasks and responsibilities
- Required expertise, knowledge, training and certification

## Agreements

- Working hours, standby shifts, tasks, work planning, etc.

# Process area

## ITIL / MOF

- Which processes are used: Incident, problem, change, configuration management, etc.
- How is the end user support arranged: Service desk, key users, functional administration, etc.

## Procedures

- Periodic checks, disaster recovery, DTAP strategy, documentation / work instructions, policy enforcement, etc.

# Technology area

## Policies

- Various policies like: Patching, use of versioning, purpose of each DTAP environment
- Allowed custom solutions (full trust code and/or app model) and intake process

## Standards

- Naming standard, quota templates, site templates, default settings, use of anti-virus, development standards, etc.

## Permissions

- Administrative privileges of each role and how are these granted

# Agenda - Chapter 3

1	Governance
2	IT Governance
3	<b>Information Management Governance</b>
4	Application Management Governance

# Information Management Governance

## Information architecture

- Determines how the information in a site or solution is organized and presented to the sites users.
- Is often recorded as a hierarchical list of content, search keywords, data types, and other concepts.

## Tightly managed

- Content is tagged with structured meta-data
- Permissions tightly controlled
- Content is archived or purged
- Proper use of retention policies

## Loosely managed

- Content is tagged only socially
- Permissions and archiving is not controlled or managed

# Information Management Governance Components



# Information Architecture

Make your information architecture as efficient as possible. Identify efficiencies such as



Use metadata  
to enable  
search and  
comparisons



Manage  
versions and  
records



Catalog and  
store  
information  
properly



Design  
navigation to  
help users find  
important  
information



Integrate  
information  
architecture  
with search



Define  
publishing  
strategy



# Considerations

- How will the site or solution be structured and divided into a set of site collections and sites?
- How will the data be presented?
- How will the site users navigate?
- How will the search be configured and optimized?
- How can you organize content so that the searches return useful results?
- What types of content will live on the sites?
- How will the content be tagged, and how will the metadata be managed?
- Does any of the content on the sites have unique security needs?
- What is the authoritative source for terms?
- How will the information be targeted at specific audiences?
- Do you need to have a language or the product-specific versions of your sites?
- Who will write content for the site, and what method will you use to publish it?

# Agenda - Chapter 4

1	Governance
2	IT Governance
3	Information Management Governance
4	<b>Application Management Governance</b>

# Application Management Governance

## Application management

- How will you manage the applications that are developed for your environment?
- What customizations do you allow in your applications, and what are your processes for managing those applications?

## Stictly managed

- Customizations must adhere to customization policy
- Test plans for deployments and upgrades

## Loosely managed

- Development environment are self organized
- Rules for customizations are less rigid

# Application Management Governance: Customizations

## Customization policy

- Determine which types of customizations you want to allow/disallow, and how you will manage customizations.
- Your customization policy should include:

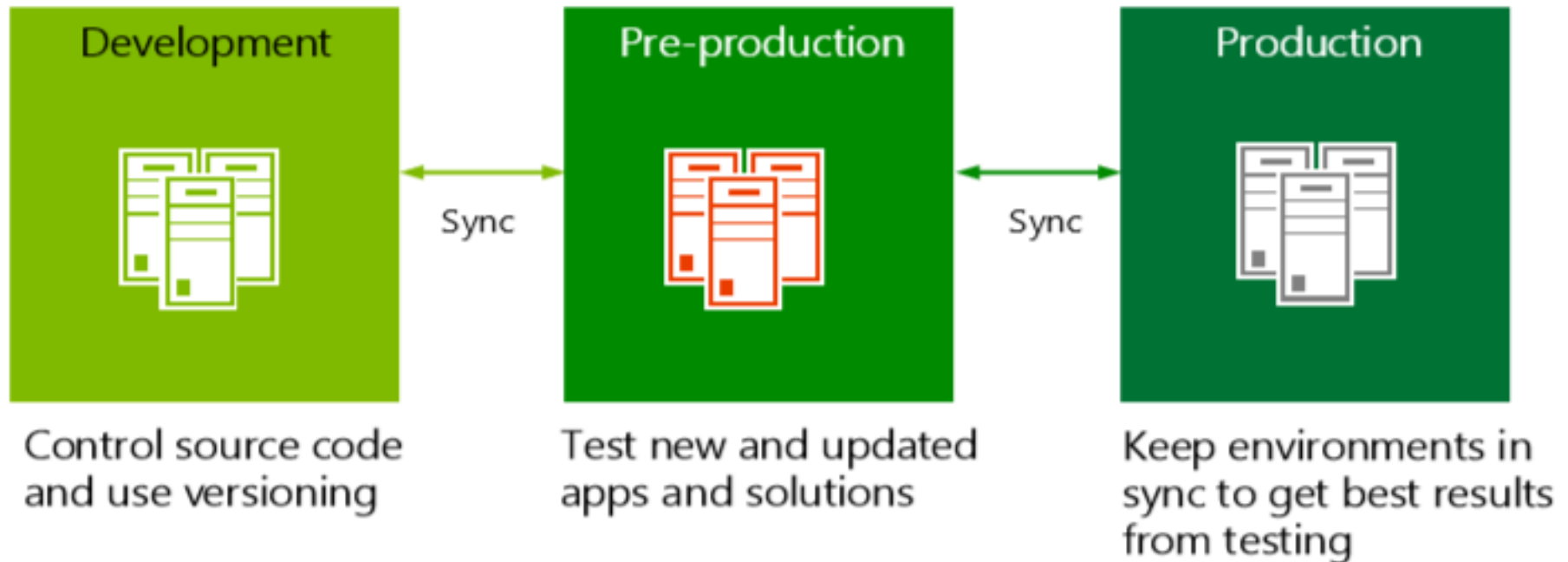
### Examples:

- Service level descriptions
- Processes for analysing
- Process for piloting and testing customizations
- Guidelines for packaging and deploying customizations
- Guidelines for updating customizations
- Approved tools for customizations
- Who is responsible for ongoing code support
- Specific policies regarding each potential type of customization

# Application Management Governance: Lifecycle

## Lifecycle management

- Follow these best practices to manage applications based on SharePoint throughout their lifecycle:



# Application Management Governance: Branding

## Branding policies

- Consistent branding with a corporate style guide makes for more cohesive-looking sites and easier development.
- Store approved themes in the theme gallery for consistency so that users will know when they visit the site that they are in the right place.
- Make use of design manager where applicable.

## Customization method

- Choose between apps. SharePoint Framework and farm solutions. Use the following as a guide

# Application Management Governance: Apps

## Governance policy for apps in SharePoint

- Set a policy for using apps for SharePoint in your organization.
- Can users purchase and download apps?
- How do you make your organization's apps available? How do you tell if they are being used?
- Take help from the following guidance

### SharePoint Store

- Determine whether users can purchase or download apps from the SharePoint store

### App Catalog

- Make specific apps for SharePoint available to your users by adding them to the App Catalog

### App Requests

- Configure app requests to control which apps are purchased and how many licenses are available

### Monitor Apps

- Monitor specific apps in SharePoint Server to check for errors and to track usage

# Knowledge Check

What are the types of Governance?

- IT, Information Management, Application Management Governance

Which IT Governance areas do we recognize?

- People, Process and Technology



Questions?



