

Planning for Success: SharePoint Governance, Architecture, and Design

Dan Holme
Director of Training & Consulting
Intelliem, Inc.
www.intelliem.com
danh@intelliem.com



BEST PRACTICES RESOURCE CENTER
<http://go.microsoft.com/fwlink/?LinkID=125981>

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Agenda

- Planning the farm
- What is governance?
- Identify manageability controls in SharePoint
- Define information architecture
- Align manageability controls with information architecture to determine design
- Selling governance
- Resources

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Planning the farms

SharePoint farm alternatives

- Roles
 - Web front end (WFE)
 - Query
 - Index
 - Application (e.g. Excel Services)
 - Database
- Single-server
 - Test, evaluation, training, very small implementation
- Two-server
 - SharePoint: single server farm (all roles except database)
 - SQL database
- Multi-server
 - WFEs + Query
 - Query can be separated
 - Index
 - Application
 - SQL Database

Farm notes

- x64 all the way
- Geographic distribution & replication
 - SQL server not geographically distributed
 - Geo-replication not supported by SharePoint
 - Third-party solutions provide replication
 - Third-party WAN accelerators
- Multiple farms
 - “Local” performance
 - Test/Dev, Staging, Production
 - Different levels of customization
 - Keep “main” farm clean for easier migration to SharePoint 2010
- MOSS not required everywhere
 - Collaboration workloads can be supported by WSS

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What is governance?

What is governance?

- Governance defines the people, processes, technologies, and policies that deliver a service
- Synonyms:
 - Service delivery framework
 - Service definition
- Goals
 - Set expectations: Service Level Agreements (SLAs)
 - Define requirements: Inputs and Outputs
 - Resolve ambiguity, mitigate conflict, manage change

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Governance addresses

- Lifecycle of service
 - Deployment
 - Communication & training
 - Ongoing support & change management
- Align SharePoint with business requirements
 - Business definition of service
 - What problems are you solving: scope & requirements
 - Technical definition of service
 - Manage risks & costs
 - Drive & support adoption

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Definition of service

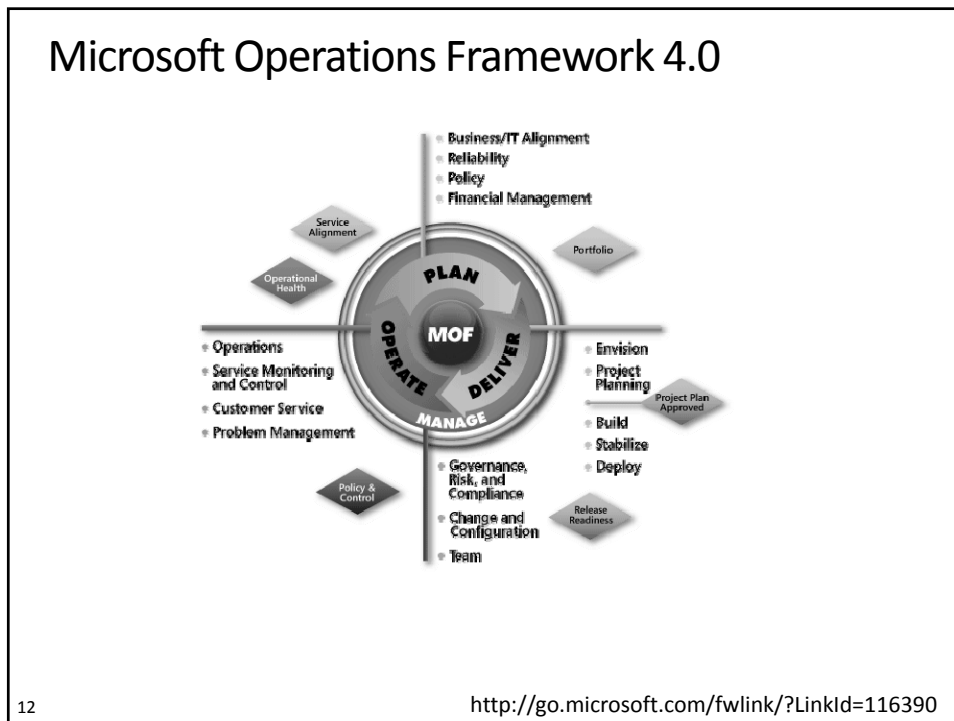
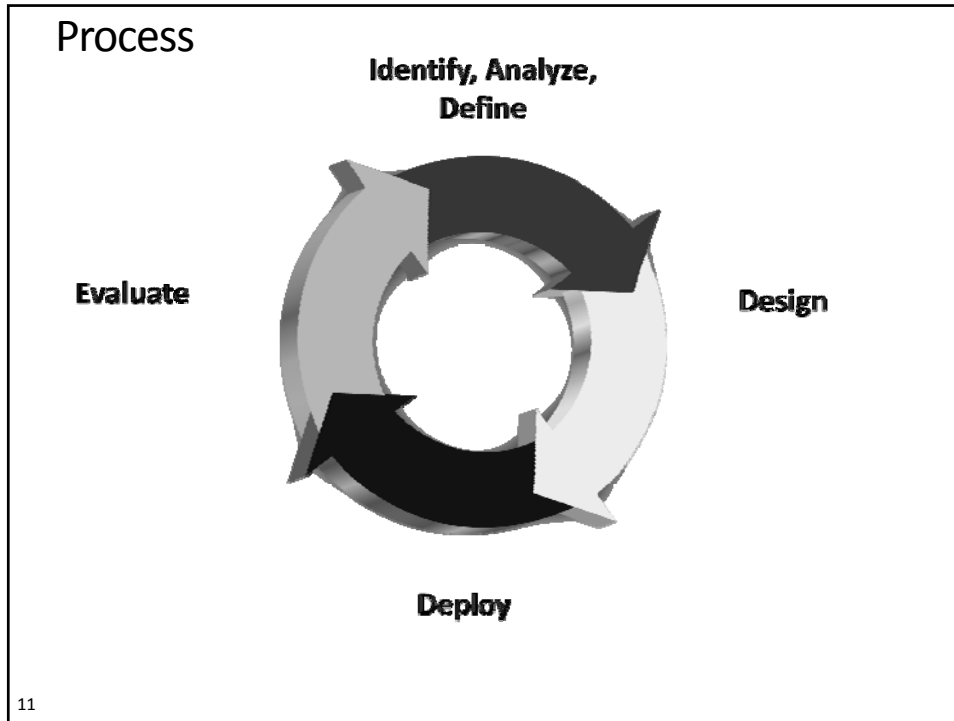
- Service Level Agreements (SLAs)
 - Service performance: uptime
 - Service continuity: scheduled maintenance windows
 - Data protection: storage, security, data recovery
 - Customization
 - Support: training, troubleshooting
- Allocation of costs (must align with SLAs)
 - Shared service
 - Charge back (hardware, users, bandwidth, storage)
 - ↑SLAs → ↑ Cost allocation
- SLAs & cost allocation impact design!

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People



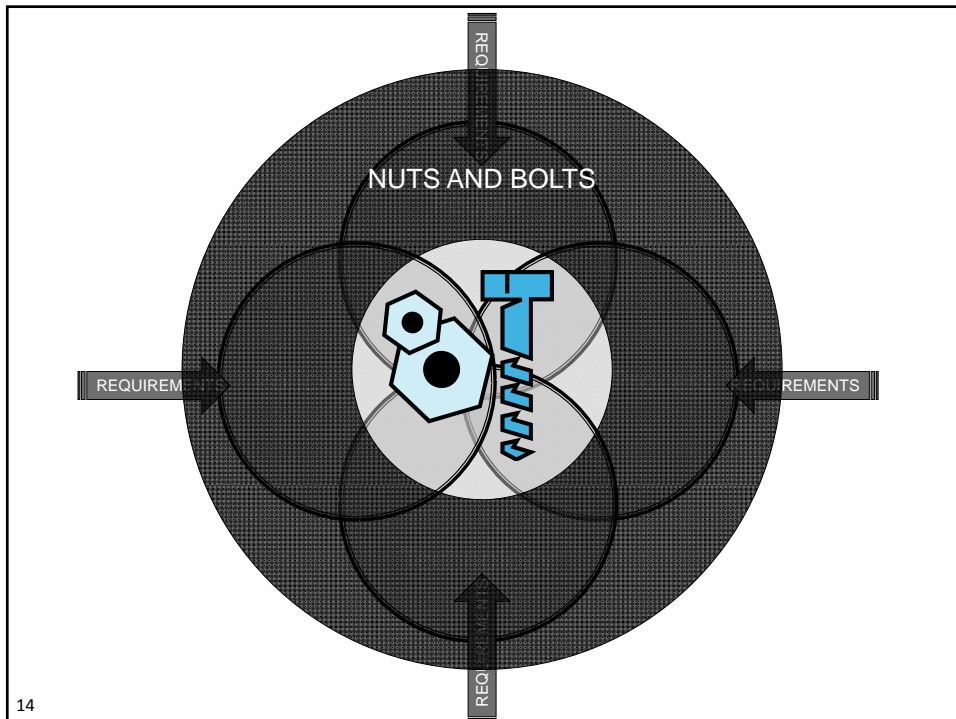
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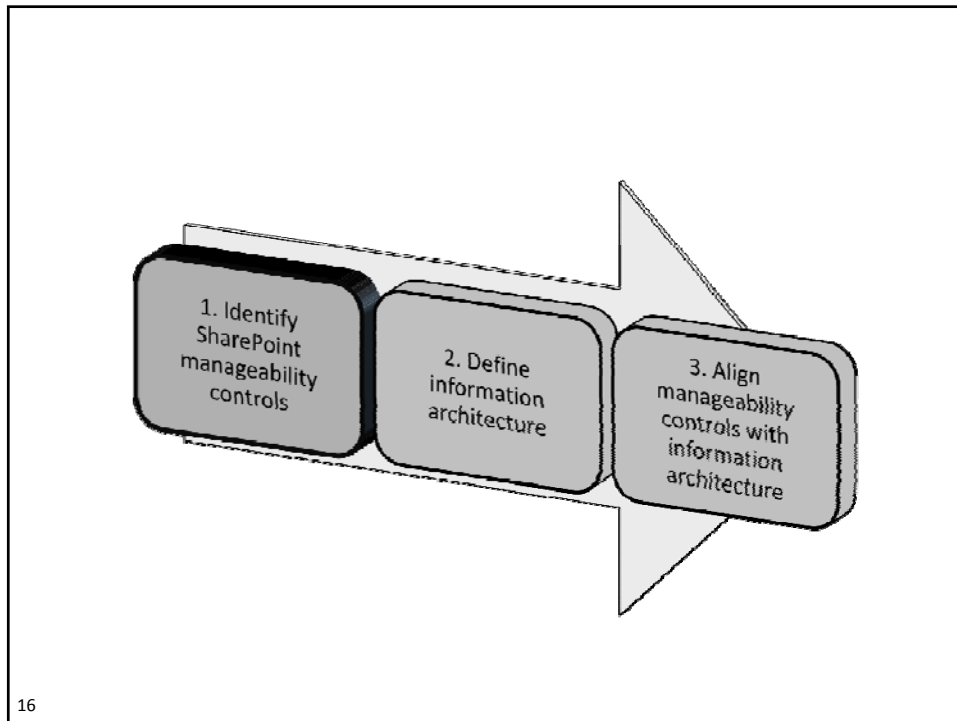
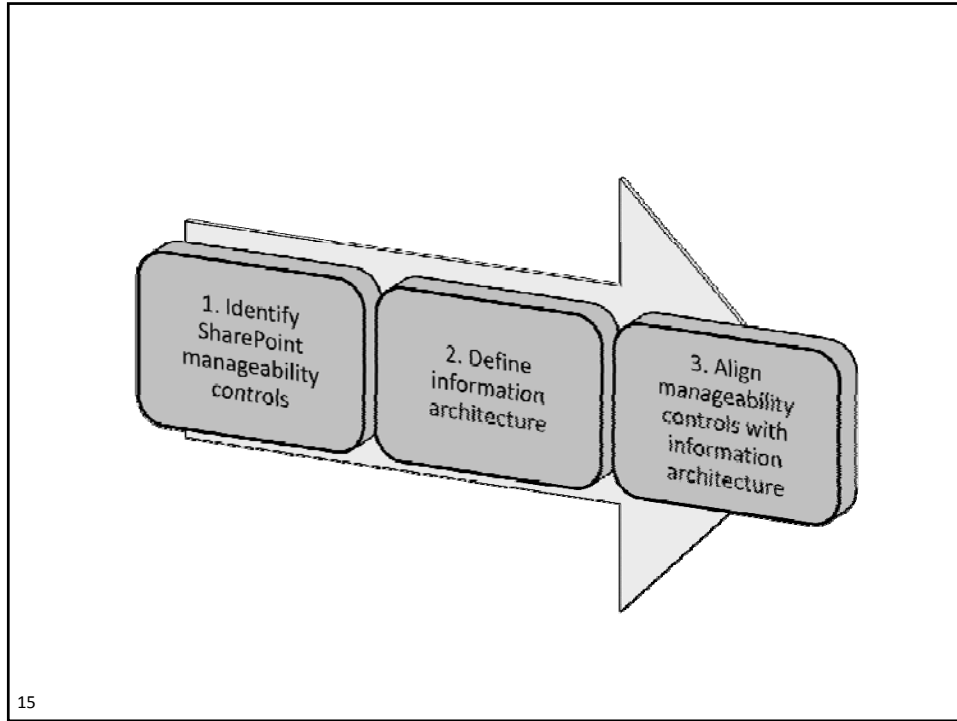
Policies



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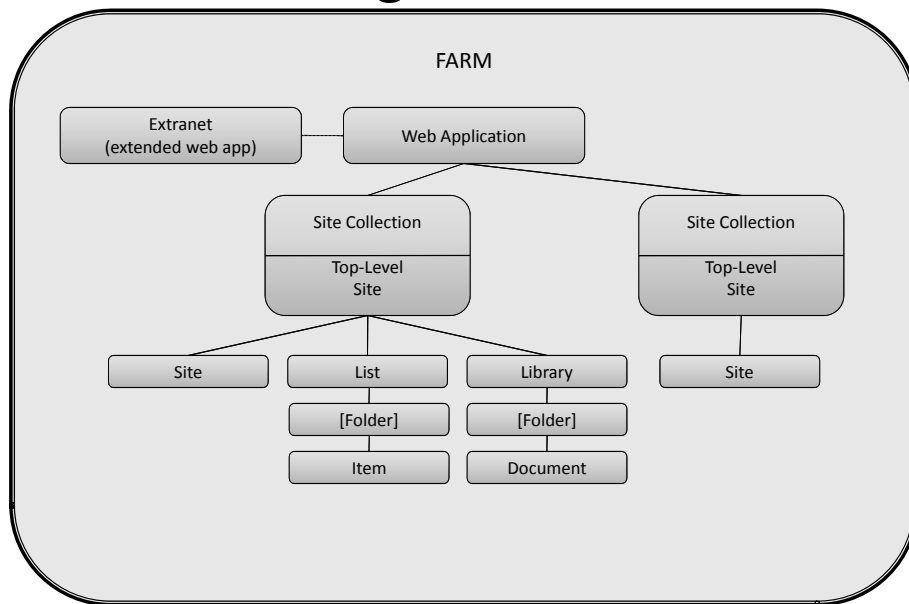
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Manageability controls

<http://go.microsoft.com/fwlink/?LinkId=92895>

SharePoint Logical Structure



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Manageability controls

- Security
- Branding
- Content management
- Content administration
- Service management

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Security controls

- Authentication
 - Authentication provider: Web application
 - Authentication timeout for FBA: Web application
 - SSL: Web application
 - Anonymous authentication: Web application
- Identities
 - User/group definition & visibility: Site collection
- Permissions
 - Role assignment / permission: Site, list, library, folder, item
 - Anonymous access: Site, library or list level
 - Ownership: Site collection
 - Security policies: Web application
- Security management
 - Roles / permission levels: Site
 - Permissions: Web application

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Branding & navigation controls

- Master pages: Site
 - Can have multiple master pages in a site
- Top link bar: Site
- Quick launch: Site
- Tree view: Site

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Content management

- List template: Site collection
- Site column: Site*
- Site content type: Site*

* Best practice, however, is to define at site *collection*

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Content administration

- Self-service site creation: Web application
- Quota definitions: Web application
- Quota application: Site collection
- Blocked file types: Web application
- Site use confirmation and deletion: Web application
- Recycle Bin: Web application
- Backup and restore: Web application, content database (or granular using third-party solutions)
 - Solution: Codeplex has a solution to capture sites on deletion so they can be recovered more easily

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Service management

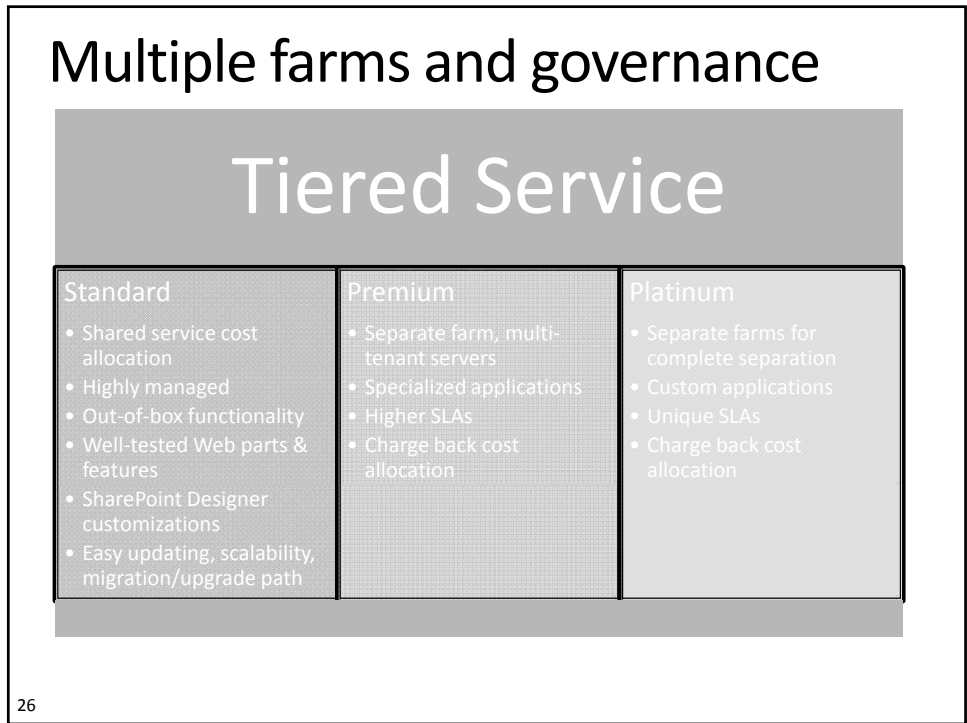
- Process isolation: Web application
- Feature availability: Web application, site collection, site
- Customization: Farm

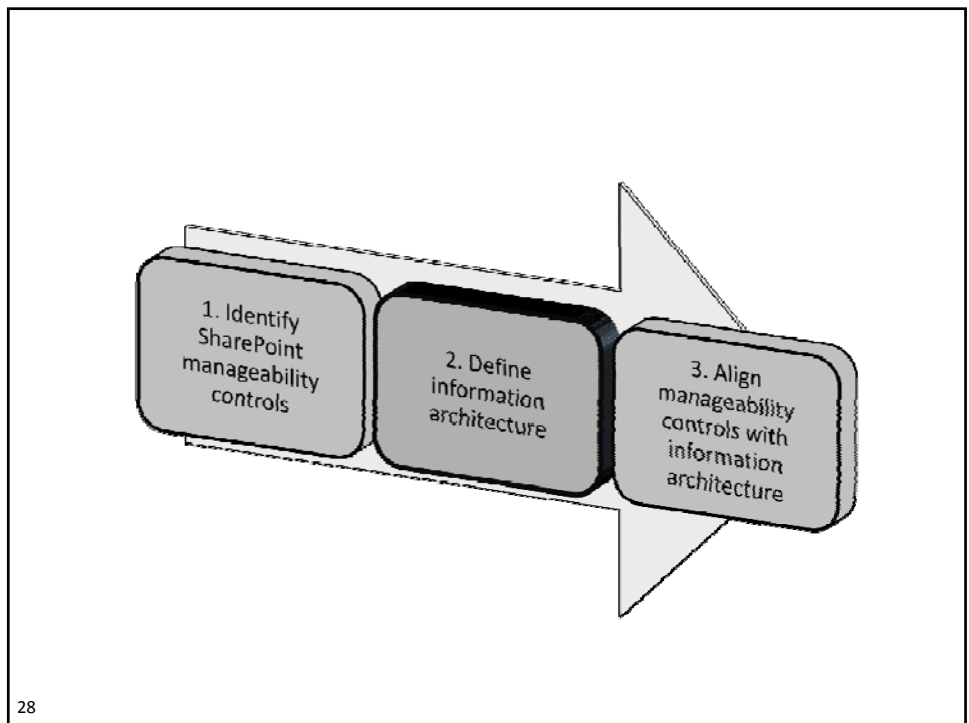
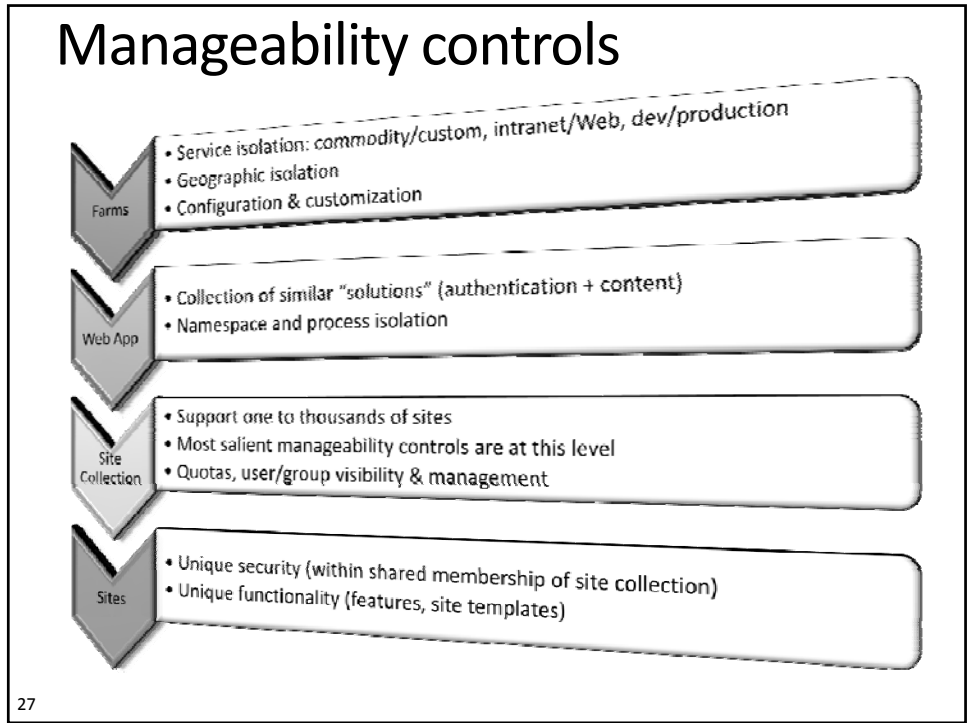
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Manageability controls summary

Web application	Site collection / Content DB	Site	List or library
SECURITY			
<ul style="list-style-type: none"> Authentication Provider Security Validation Expiration Anonymous access Permissions Security policies 	<ul style="list-style-type: none"> User and group management 	<ul style="list-style-type: none"> Anonymous access Permission levels 	<ul style="list-style-type: none"> Anonymous access Access to securable objects
BRANDING			
		<ul style="list-style-type: none"> Master pages Top link bar Quick Launch Tree View 	
CONTENT MANAGEMENT			
	<ul style="list-style-type: none"> List & site templates 	<ul style="list-style-type: none"> Site column Content type 	
CONTENT ADMINISTRATION			
<ul style="list-style-type: none"> Self-service site creation Blocked file types Site use confirmation and deletion Recycle Bin Backup and Restore 	<ul style="list-style-type: none"> Quotas Backup and restore 		
SEARCH			
	<ul style="list-style-type: none"> Search Performance (Content Database) 	<ul style="list-style-type: none"> Search Visibility 	<ul style="list-style-type: none"> Search Visibility
SERVICE MANAGEMENT			
<ul style="list-style-type: none"> Process isolation Feature isolation 	<ul style="list-style-type: none"> Feature availability 	<ul style="list-style-type: none"> Feature availability 	

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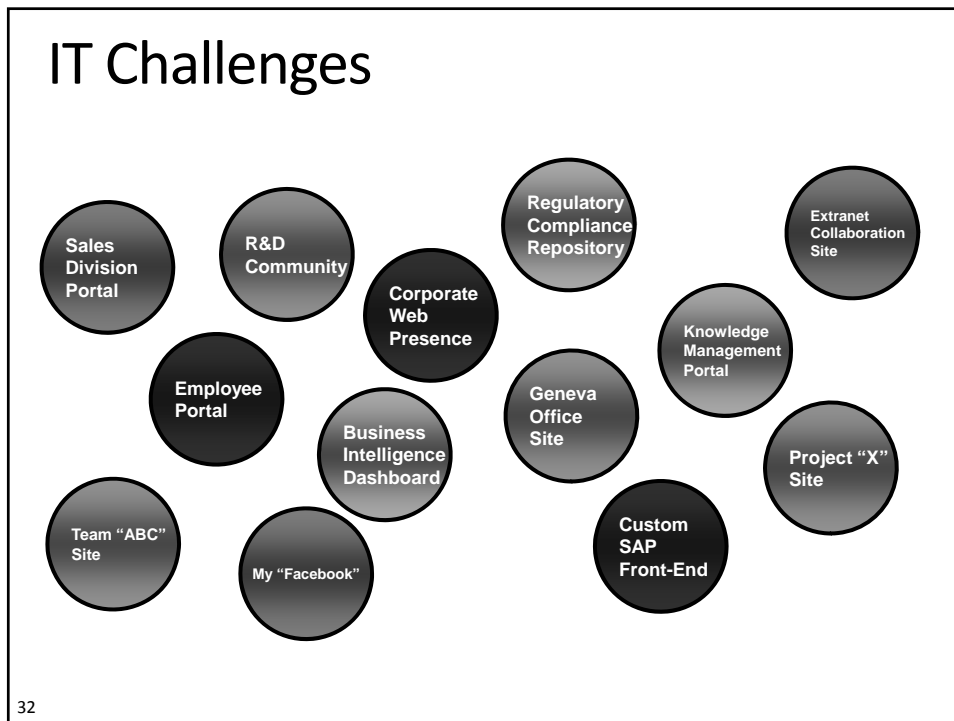
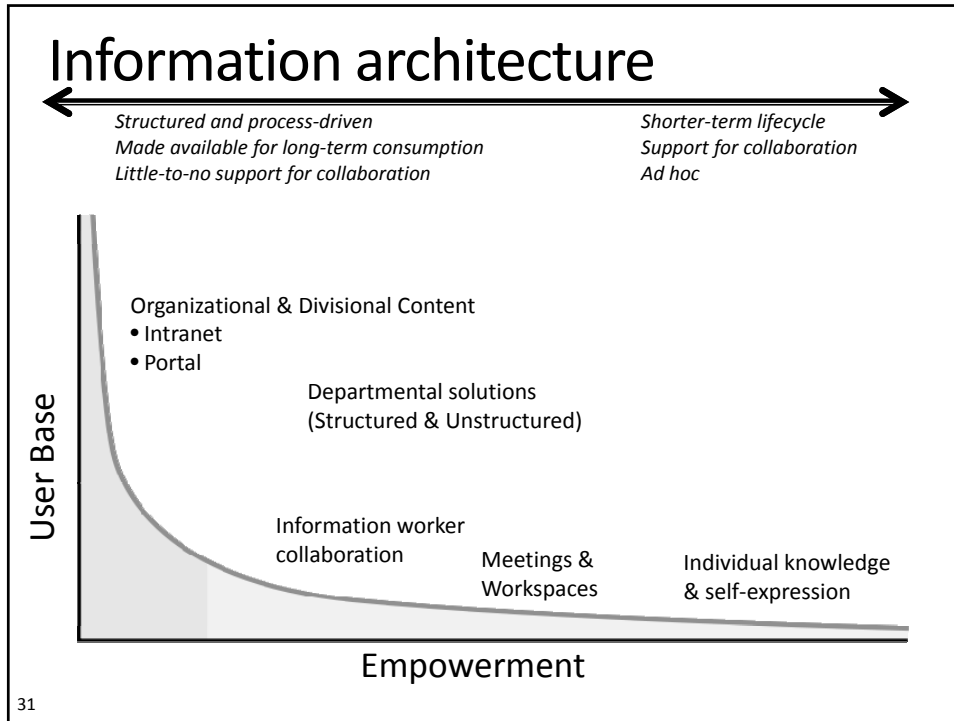
Information architecture

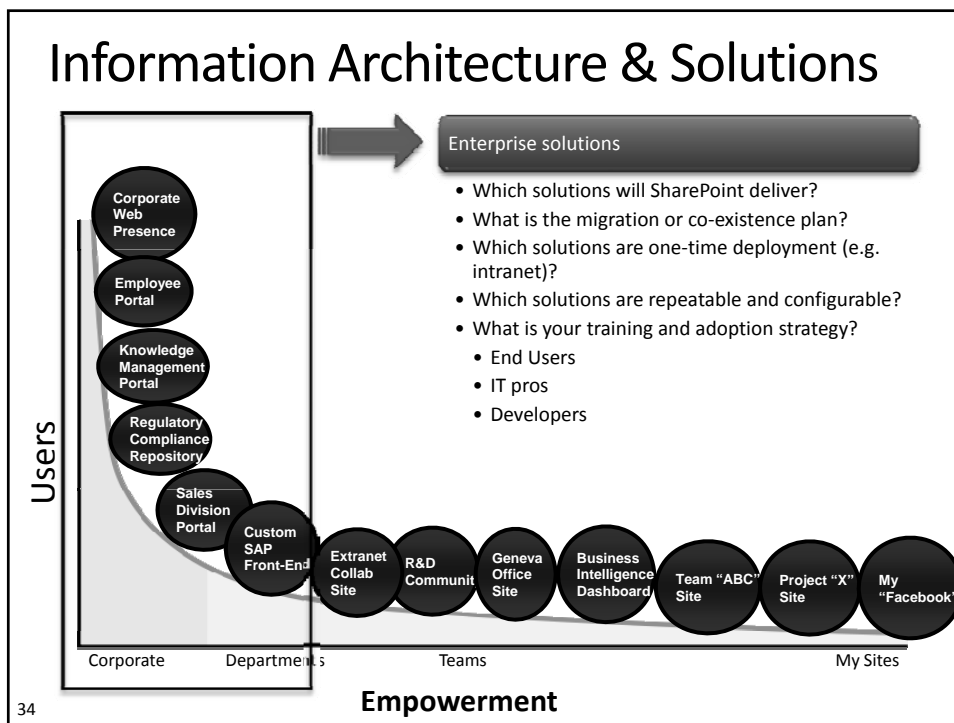
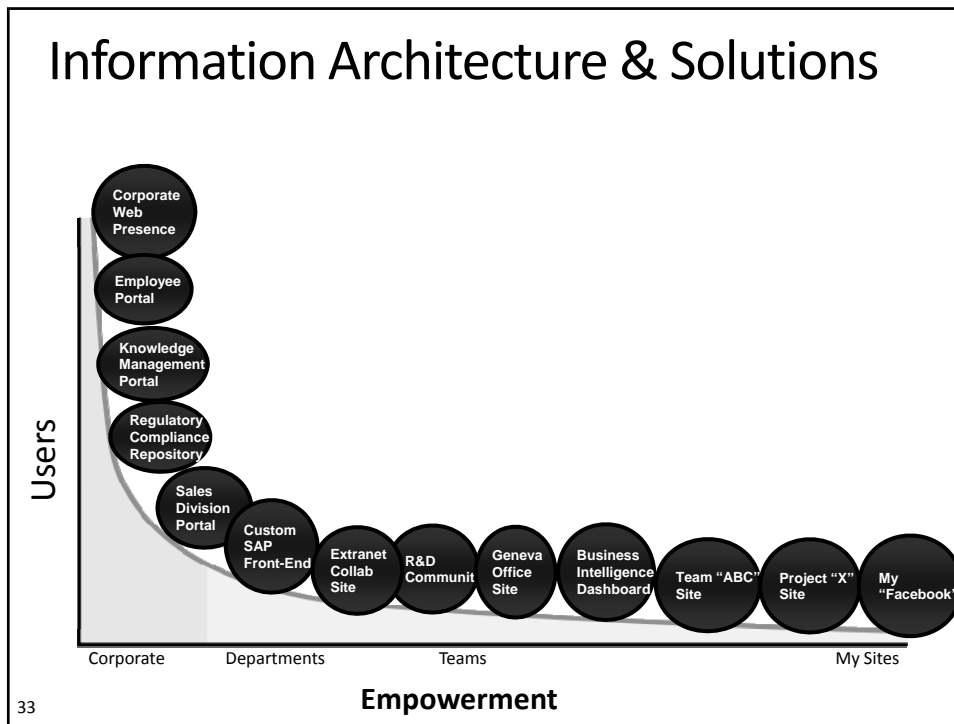
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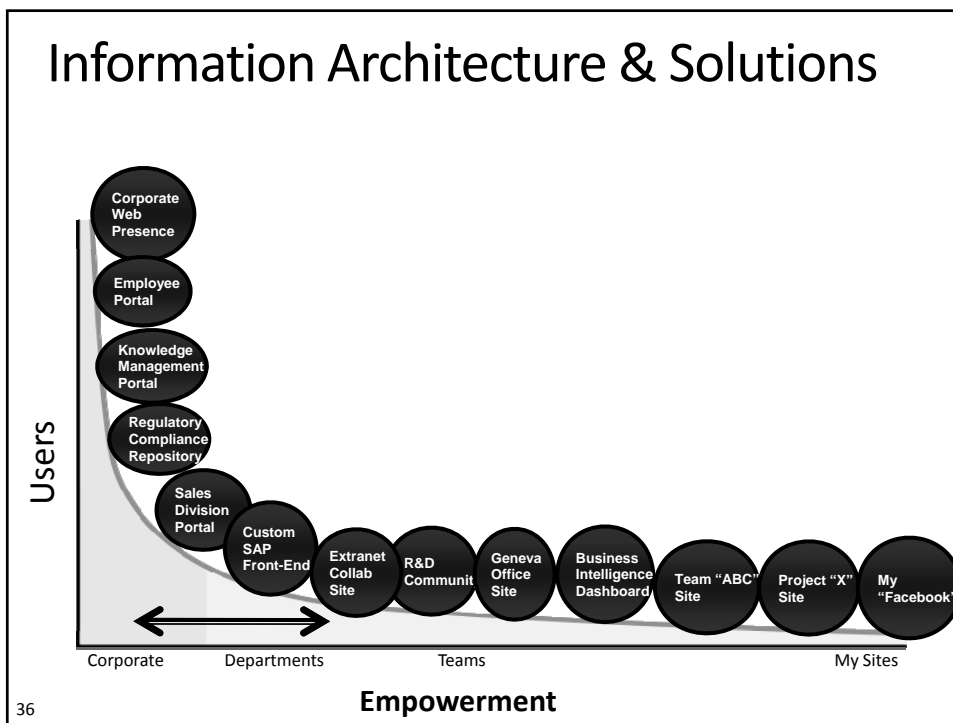
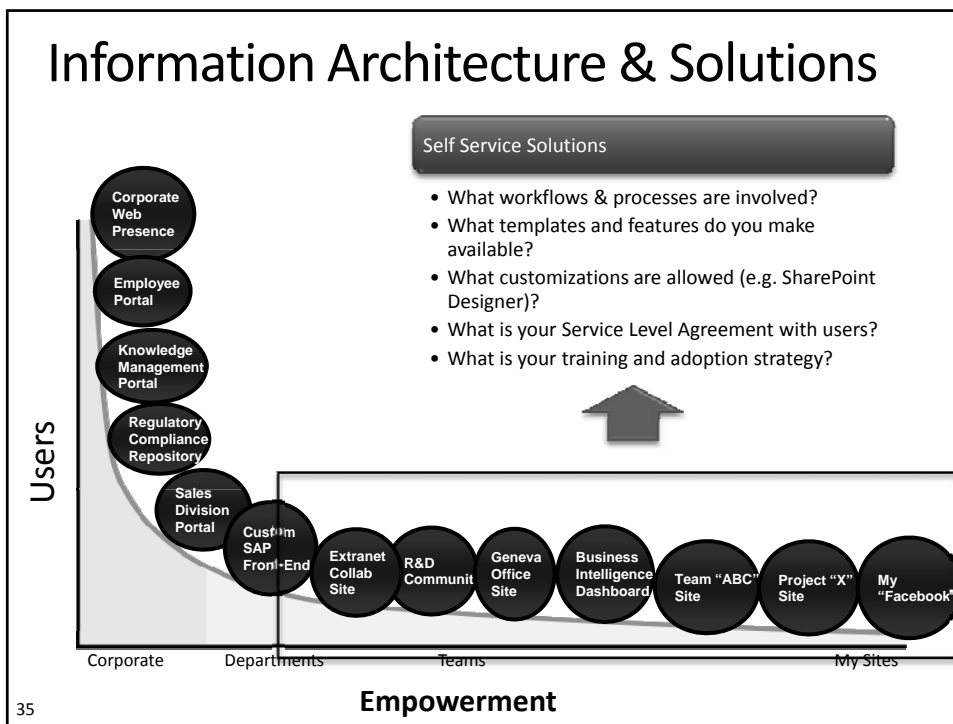
Information architecture

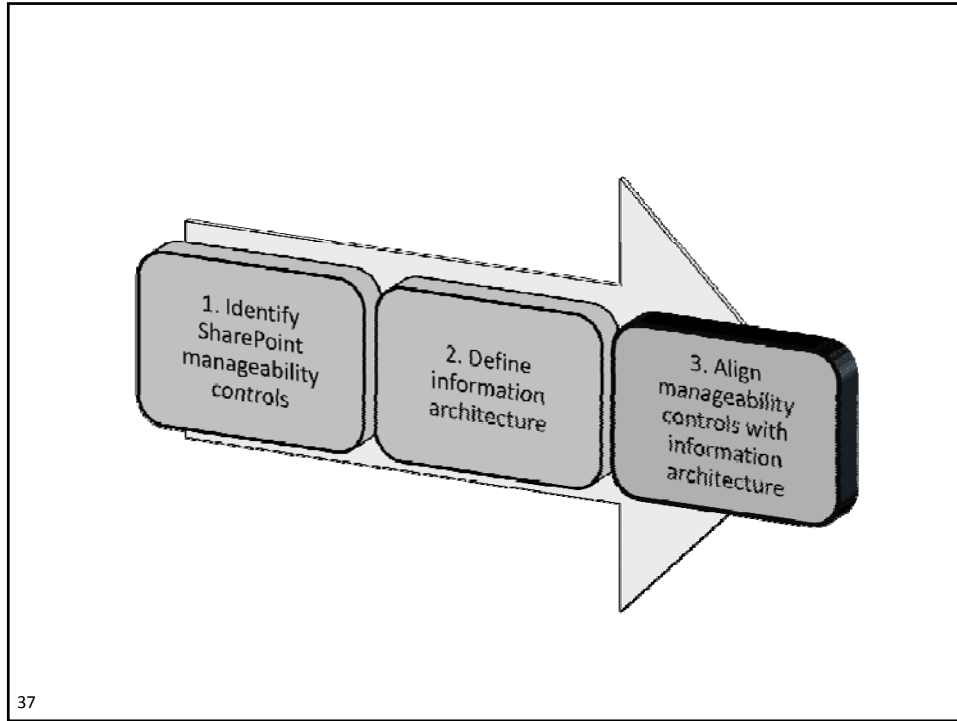
<p>Made available for long-term consumption Little-to-no support for collaboration Structured and process-driven</p>	<p>Shorter-term lifecycle Support for collaboration Ad hoc</p>
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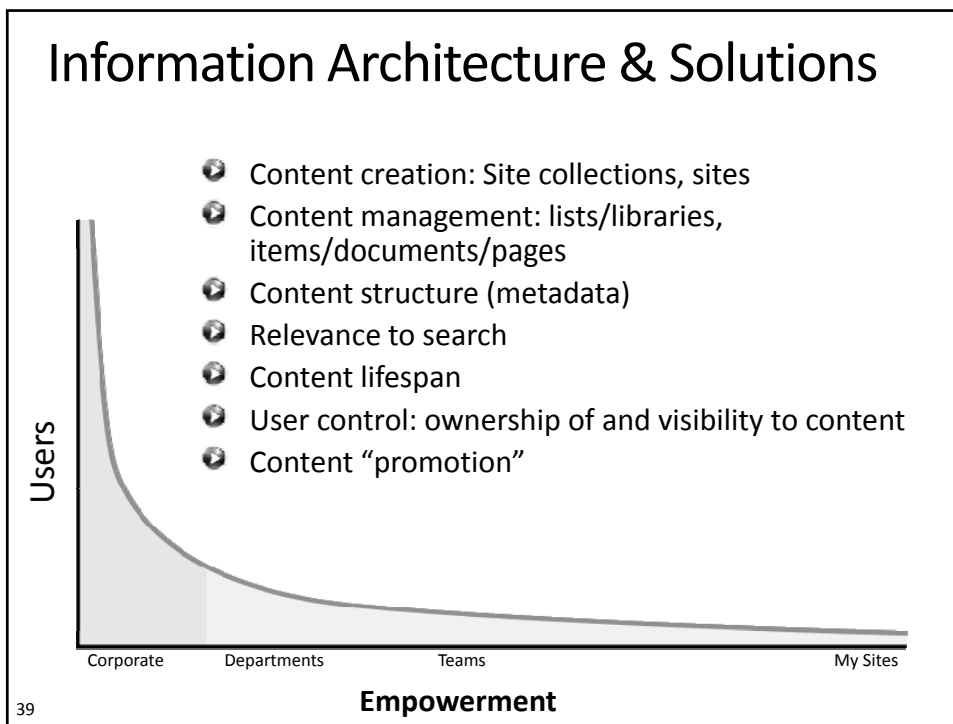






Aligning manageability & information architecture

<http://go.microsoft.com/fwlink/?LinkId=92897>



- ## Organizational & divisional content
- “Intranet” and long term content
 - Corporate
 - Divisions, departments, etc.
 - Characteristics
 - Related to enterprise and permanent organizational divisions: businesses, regions, departments
 - Chief Knowledge Officer
 - Long-term value
 - Structured, managed, process-driven
 - Examples
 - Communication *across* organizational containers
 - Wikis with a goal of long term consumption
 - Document libraries: communications, contracts
 - Records management repositories
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Implementation

- One farm (before geography accounted for)
- Web application
 - <http://intranet>
 - One for organization as a whole
 - Optional: one more that hosts *all* divisions
 - Anonymous access, features
- Site collections: one per division
 - Managed path, e.g. “departments”
 - Sites: subsites likely reflect organizational map:
<http://intranet/depts/department>
- Tip: remember this is the *organizational* not the *collaborative* content

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Manageability controls

- Self-service site creation: disabled
 - Process-driven provisioning
- Permissions
 - Wide visibility (read-only access)
 - Anonymous at “enterprise” intranet site level
 - Authenticated Users READ at “divisional” site collection
 - Tight control over change
 - Create, delete, modify content: highly restricted
 - Lists, libraries: restricted based on InfoSec policies

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Manageability controls

- Document check-out & approval: required
- Content types defined
 - Structured, well-defined metadata & processes
- Content administration
 - Backup & long-running processes
 - Quota, e.g. 15 GB per division
 - >15GB, move to separate content database
- Content expiration: none
- Content databases
 - Recommended limit per web app: 29
(database mirroring & log shipping failover)

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Information worker collaboration

- Collaboration within departments, projects & teams
- Characteristics
 - Projects & informal teams
 - Limited lifetime
 - Promotion to “long term” organizational content
 - Site owners: power users & non-technical users
- Challenges to management of collaborative content
 - Number and size of teams
 - Project complete: site abandoned
 - Team changes: site changed with new content/users
- Management structure & process “depends”

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Implementation

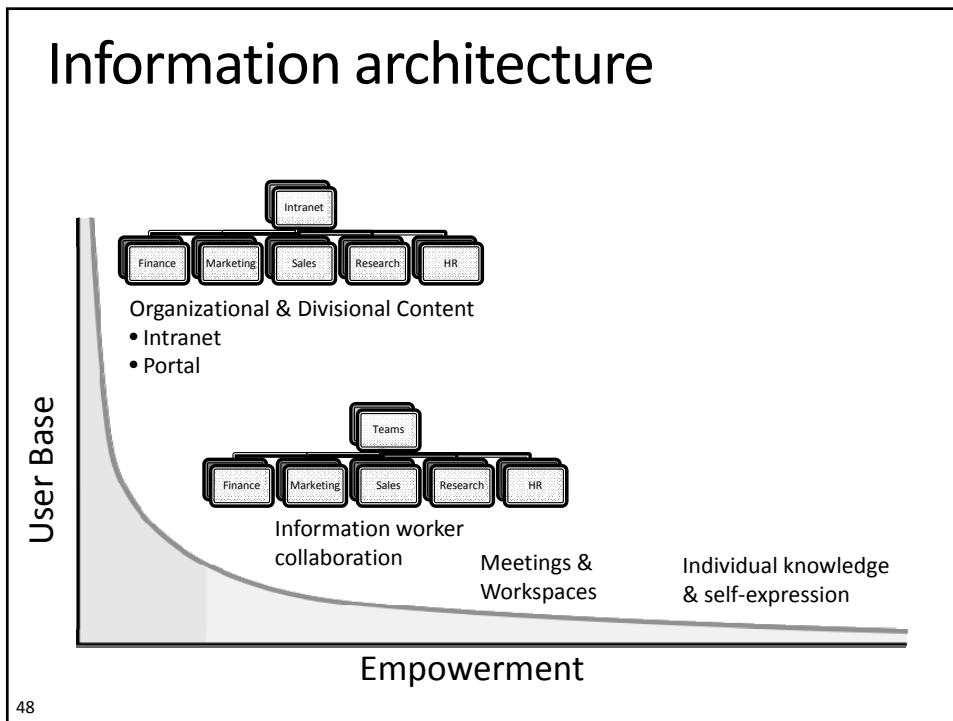
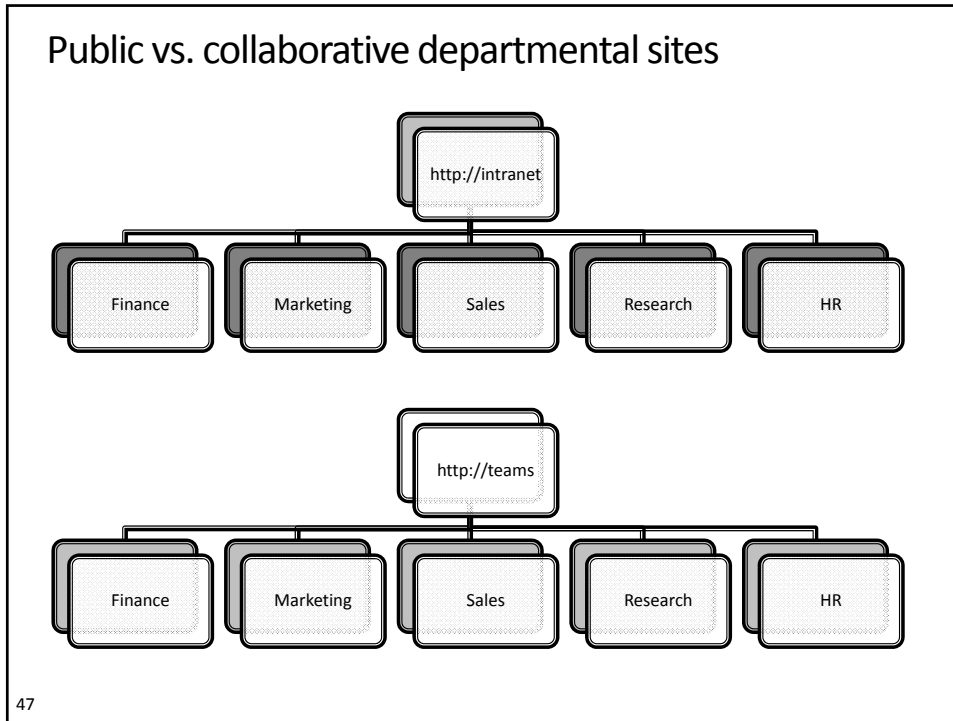
- Server farm: proximal to team
 - May require more than one farm for geographic proximity
- Web application
 - http://teams
 - Web-app manageability controls
 - Security policies (important at this level!)
 - Authentication providers
 - Recycle Bin settings
- Site collections
 - Quotas, user & group management
 - One site collection per division, department, or team
- Content databases
 - DB restore SLA: size × number of teams
 - One content DB per site collection

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Manageability controls

- Quotas: enabled
 - Consider size and *support* of exception requests
 - e.g. if 90% of sites will be <400MB and you're willing to support requests for increases from 10%, then set your quota at 400MB.
- Self-service site creation
 - Enabled *or*
 - Custom site provisioning process
 - Gather information
 - Enforce business logic
- Content expiration
 - Notification, *not* automatic deletion
 - Process to tombstone & promote content

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Meetings & workspaces

- Characteristics
 - Short-term lifetime
 - Site owners: power users & non-technical users
- Examples
 - Meetings, surveys, short-term collab on a document
 - Meeting Workspace, Document Workspace

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Implementation

- Server farm: proximal to users
- Web applications
 - <http://meetings> or <http://documents>
 - One web app unless required
 - Security policy / authentication provider, etc.
- Site collections
 - Unlikely that you'll need to manage content in this category with site collection settings
 - Host content in one site collection

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Manageability controls

- Quotas: enabled
 - Remember: size *and* support calls
 - Strict so that these sites don't become "dumps" for more collaborative or structured content
 - Communicate: these are *hard* limits (no exceptions)
- Self-service site creation
 - As automated & responsive as possible
- Content expiration
 - What is "very short term" to you?
 - Reflect policies for recurring meeting lifetime
 - Content can be recycled to new sites or promoted

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Individual knowledge & expression

- Examples
 - Blogs
 - MySites
 - Social networking
 - Discussion forums
- Value
 - Procedures they carry out
 - Experiences they have worked through
 - Perspectives about the organization and its constituencies
 - Share ideas about non-work-related topics
 - Unleash creativity to create value

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Implementation

- Server farm: proximal to user
- Web application
 - http://mysites
 - Separate from other types of content
- Site collections
 - Blogs/discussions only: one site collection hosting all blogs & discussions
 - MySites: separate site collections (default)

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Manageability controls

- Quotas: enabled
 - Remember: size *and* support calls
 - Strict so that these sites don't become "dumps" for more collaborative or structured content
 - Communicate: these are *hard* limits (no exceptions)
- Self-service site creation
 - Provision site collection
 - Restrict or enable creation of sub-sites
- Content expiration: none
 - Provision: archive, promote, delete

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Governance checklist

Governance should define

- Determine the appropriate service
 - MOSS vs. WSS vs. something else
 - Tiers: commodity vs. premium
 - Physical placement of service / farm
- Provision web application
- Provision site collection & site
- Look-and-feel: branding & navigation
- Functionality (list & library templates, e.g.)
- Security standards

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Governance should define

- Customization & usage
- Development capability
- Naming conventions
- Metadata
- Quotas
- Information management
- Compliance
- Managing search

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Selling governance

Selling Governance

- Why is it so hard to sell?
 - “We don’t need it”
 - “It’s just a bunch of paperwork”
 - Lack of understanding!
- What is governance, really?
 - Risk management
- Who cares about governance
 - Everyone *should*, business leadership *does*
- When do people care about governance?
 - Before project
 - After crisis
 - At chaos

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Resources

Take your learning to the next level

Resources

- SharePoint Best Practices Resource Center
 - <http://go.microsoft.com/fwlink/?LinkID=125981>
- SharePoint TechNet Library
 - [http://technet.microsoft.com/en-us/office/sharepointserver/default\(en-us\).aspx](http://technet.microsoft.com/en-us/office/sharepointserver/default(en-us).aspx)
- SharePoint Governance Resource Center
 - <http://technet.microsoft.com/en-us/office/sharepointserver/bb507202.aspx>
 - *Bottom of the page!* WSS Governance white papers
- CodePlex Governance Tools
 - <http://www.codeplex.com/governance>

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Resources

- [SharePoint Products and Technologies customization policy](#)
- [Chaos no more: Steps for building governance into Microsoft Office SharePoint Server 2007](#)
- [SharePoint Products and Technologies governance checklist guide](#)
- [SharePoint Products and Technologies customization policy](#)
- [Sample template: SharePoint Governance Plan](#)
- [Governance Information for SharePoint Server 2007](#)

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Resources

- www.officesharepointpro.com
- *Windows IT Pro* magazine
- Blog
<http://share.intelliem.com>
- danh@intelliem.com
- Q & A

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