Microsoft Digitalen

SharePoint IT Governance

Om sessionen

SharePoint IT Governance

Måske er I igang med etableringen af et MOSS miljø eller også står I foran at skulle planlægge etableringen. Spørgsmålene tårner sig op.
- Hvordan håndterer man denne nye applikation?
- Er det overhovedet en applikation eller er det en platform?
- Hvad kræver det af vores organisation?

Uanset om kravet om SharePoint udspringer fra IT afdelingen eller tager afsæt i konkrete behov fra forretningen vil vi med denne session forsøge at inspirere jer til, hvordan I kommer godt i gang med et meget væsentligt område for enhver SharePoint installation; IT Governance.

Ambitionsniveauet afhænger meget af organisationens størrelse, men områderne, der bør afdækkes og de farer der lurer, er de samme.

Denne session vil kigge nærmere på hvilke dokumenter og vejledninger Microsoft præsenterer og stiller til rådighed og det vil blive suppleret med konkrete erfaringer fra en Microsoft Partner, der har hjulpet forskellige danske kunder med installationen og fastlæggelse af "SharePoint IT Governance".

- Worked with Microsoft Technology for more than 15 years
- Implemented solutions on all version of the SharePoint Technologies since the early version of SPS2001 and STS
- Represented ProActive in the Microsoft Office "12" TAP
- Solution Architect on several major MOSS projects launched since beginning of 2007 and currently being developed
- Today working as Chief Architect at ProActive A/S with strategic focus on enterprise customers and the global adoption of SharePoint Technologies

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my **Linked** in profile
www.linkedin.com/in/henrikkim

SharePoint Governance

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"Governance uses **people, process, technology, and policies** to define a service, resolve ambiguity, and mitigate conflicts within an organization"

Source: The Burton Group

Governance? What Governance?

- This session is not about:
    - Content - Quality, Ownership and Relevance
    - Information Architecture and navigation

Platform or Application?

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In my opinion? Yes, it is a platform

Let us treat it so

Agenda

- Fast track to Building a Robust and Enterprise Ready Platform

- 5 Key areas of SharePoint Governance
  - Executive Sponsorship
  - Clear Goals, Vision, Mission and Metrics
  - Skilled People and Training
  - Defining operations
  - The supporting organization

- Resources

- Wrap up

- Q & A

Building a Robust and Enterprise Ready Platform

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Building a Robust and Enterprise Ready Platform

Planning and Design

Planning MOSS Part 1

Site Structure & Navigation
Shared Services
Collaboration
Personalization & My Sites
BI, Excel Services & BDC
Search & Indexing
Content Types

Planning MOSS Part 2

Availability Planning
Capacity Planning
Topology
Information Architecture
Authentication & Roles
Security

Deployment

Installation

OS prerequisites
MOSS Installation
Service Accounts
Base Shared Services
Web Applications

Configuration

Custom Code Installation
Service Configuration
Timed Jobs & Imports
Indexing Configuration
Base Information Architecture
Functional Tests

Operations

Operations

Log files
Monitoring of Services
Backup Procedures
Scalability Options
Capacity Monitoring
MS Operation Mgmt. Tools

Disaster recovery

Backup and Restore
How-to
Timing / SLA

IT Governance

5 Key areas of SharePoint Governance

Executive Sponsorship

Executive Sponsorship

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- It is often difficult to achieve the Executive buy-in on setting up a platform:
    - The business case is much easier defined for the "applications"
    - Internet, Intranet or Extranet are the typical high-level scenarios

- However, it is about communication and clear messages:
    - The systems built on top of SharePoint are most likely critical to the Business
    - Know the impact in case of failure
    - Define and narrow direct cost – and map all others to the "applications"
    - Realize in the process that establishing the platform should be separate from the "application project(s)"

- Establish IT-board and identify direct operational ownership

5 Key areas of SharePoint Governance

Clear Goals, Vision, Mission and Metrics

5 Key areas of SharePoint Governance

Skilled People and Training

![Digitalen - Forum for it-pro]

Skilled People and Training

- Build Excitement
- Engage Users
- Inspire Users
- Develop Users
- Build User Communities

Your Work World is Changing
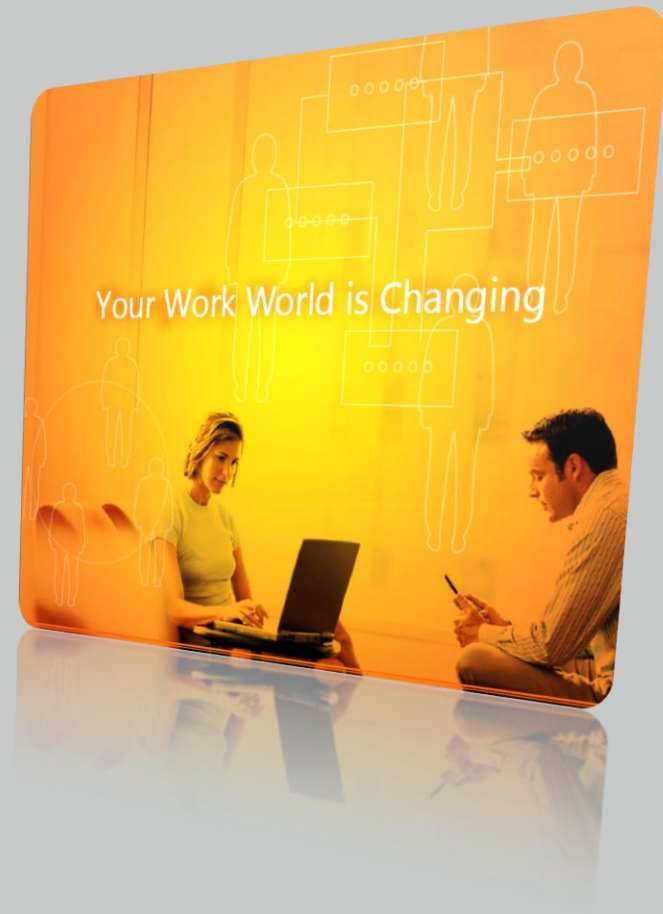
Skilled People and Training

SharePoint Specialists

Business Analyst	• Knowing the Business • Drawing processes and documenting applications
Creative Designer	• Look and feel • Tools like SharePoint Designer
Trainer	• "SharePoint Expert" • Information Worker
Infrastructure Specialist	• Central Administration is @Home
Developer	• Visual Studio and tools • Knows his SharePoint Community
Architect	• Drawing the line between platform and applications • Deep into the plumbing of SharePoint

Skilled People and Training

- Possible Microsoft Exams
  - Configuring MOSS
    http://www.microsoft.com/learning/exams/70-630.mspx

- Very important training (but often forgotten)
  - Information Worker
  - Knowledge Worker

- However, bottom line is
  - Training
  - Training
  - Training…

Goto: Learning Microsoft Office SharePoint Server 2007
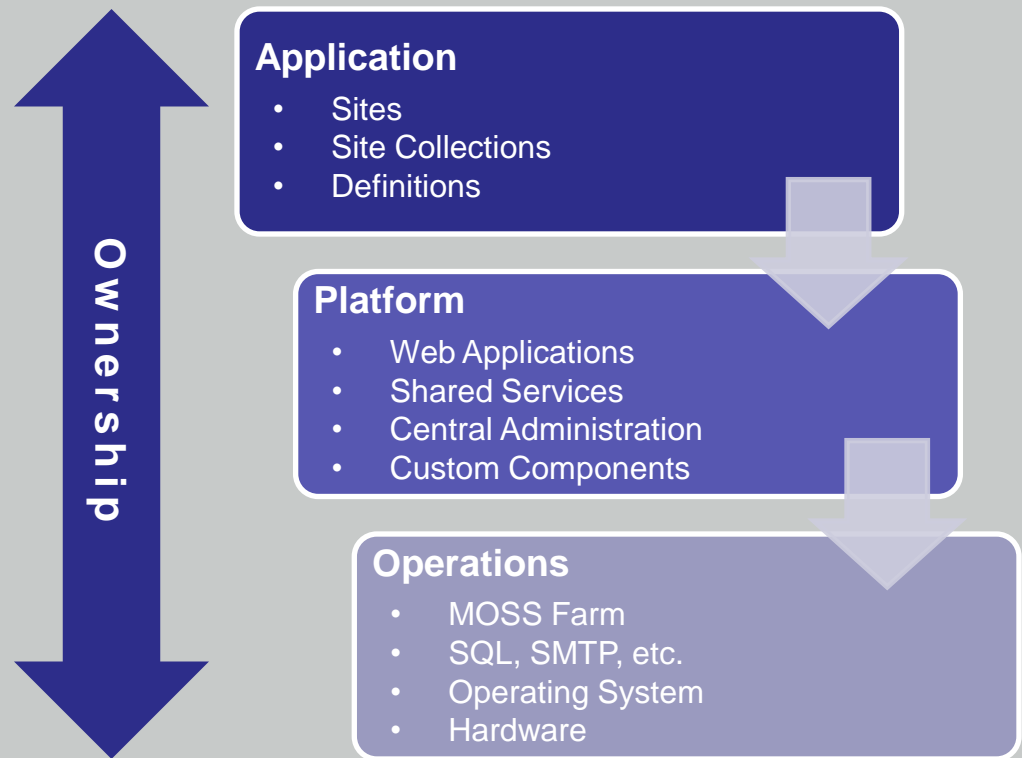http://www.microsoft.com/sharepoint/learning/default.mspx

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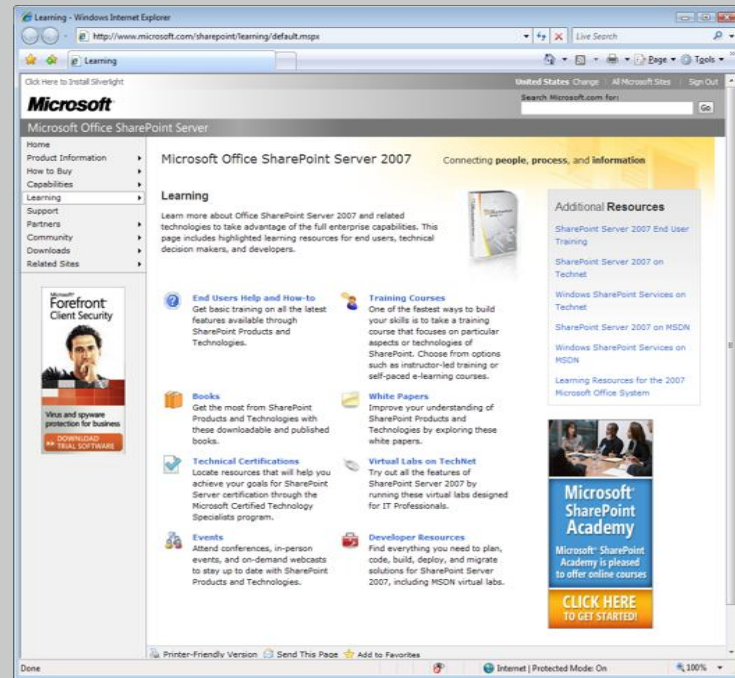
5 Key areas of SharePoint Governance

Defining operations

Defining operations

- Acknowledge the platform technology and shared ownership of the middle tier
- It is very important to define the different administrative roles at the platform level
- Operations must cover all layers – this is not just a web application running off an IIS and SQL Server. Many services are running.
- Hence the SLA definition must reach as far as the end-user's requests.

Ownership

Application
- Sites
- Site Collections
- Definitions

Platform
- Web Applications
- Shared Services
- Central Administration
- Custom Components

Operations
- MOSS Farm
- SQL, SMTP, etc.
- Operating System
- Hardware

Defining operations

- Communication
    - Reporting and Documentation
    - Establish Chain of command

- Service Level Agreements (SLA)
    - Disaster recovery
    - Scalability and Growth Planning

- Monitoring
    - System utilization
    - Traversing Event Logs and SharePoint Logs

System Center Operations Manager 2007
http://www.microsoft.com/systemcenter/opsmgr/

Microsoft®
System Center
Operations Manager 2007

SharePoint Monitoring Toolkit

Defining operations

- On going maintenance include
  - Service Pack Management
  - Enforcing policies and quotas
  - Performance tuning
  - Risk management
  - Release Management (deployment)
  - SQL Server Backup and maintenance

Goto: DocAve Software for SharePoint
http://www.avepoint.com/

AvePoint®

Development	Pre-production	Production

Test-integration
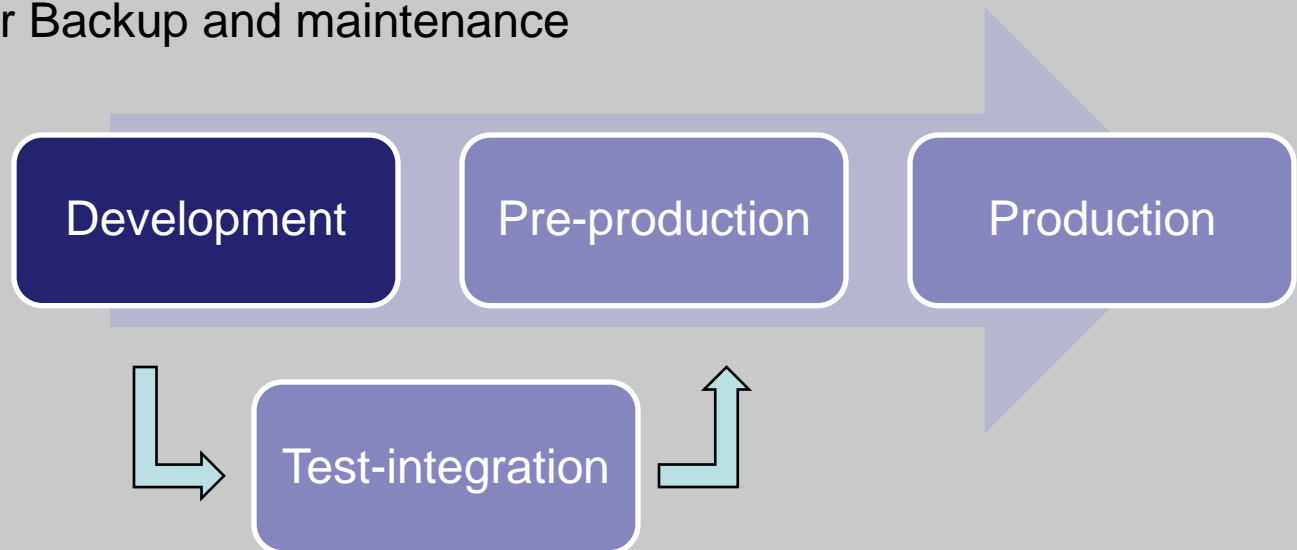
5 Key areas of SharePoint Governance

The supporting organization

The supporting organization

- Do not re-invent the wheel
  - ITIL/MOF
  - People and Roles
- Consider using project model that aids the ongoing adjustments
  - MSF Agile
  - SCRUM
  - Or similar
- Service desk/ticketing
  - Handle incidents and releases
- Development
  - Change Request Management
  - Deployment
  - Packaging
- Reporting and Documentation (again)

Use: WSP Builder on Codeplex
http://www.codeplex.com/wspbuilder
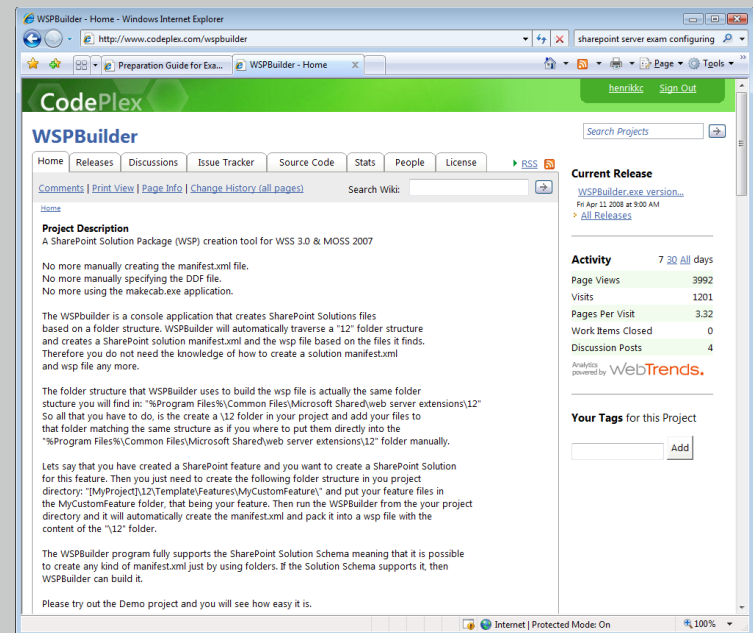
Resources

Planning and architecture for Office SharePoint Server 2007

These two books provide information and guidelines to lead a team through the steps of planning the deployment of a solution based on Microsoft Office SharePoint Server 2007. The books also include links to planning worksheets for recording information related to the planning and deployment activities.

- Planning and architecture for Office SharePoint Server 2007, Part 1 (http://go.microsoft.com/fwlink/?LinkID=79552&clcid=0x409)
- Planning and architecture for Office SharePoint Server 2007, Part 2 (http://go.microsoft.com/fwlink/?LinkId=85548&clcid=0x409)

SharePoint Deployment Guide and Checklists

The book for any SharePoint Administrator's pocket! Concise and with relevant and important check lists that can be used in the day to day work.

- Office SharePoint Server 2007 deployment guide and checklists (http://go.microsoft.com/fwlink/?LinkId=108286&clcid=0x409)

SharePoint Governance Plan - template

The SharePoint Governance Plan is a guidebook outlining the administration, maintenance, and support of a Corporation's SharePoint environments. It identifies lines of ownership for both business and technical teams, defining who is responsible for what areas of the system. Furthermore it establishes rules for appropriate usage of the SharePoint environments.

- SharePoint Products and Technologies governance plan (http://go.microsoft.com/fwlink/?linkid=92333&clcid=0x409)

Design and build sites for Office SharePoint Server 2007

This guide provides prescriptive guidance that can help you and your team build custom enterprise sites by using Microsoft Office SharePoint Server 2007

- Design and build sites for Office SharePoint Server 2007 (http://go.microsoft.com/fwlink/?LinkId=110087)

Database Maintenance for SharePoint v3

This paper describes the recommended maintenance strategies for the databases that host content and configuration settings for SharePoint Products and Technologies

- Database Maintenance for SharePoint (http://go.microsoft.com/fwlink/?LinkId=111531&clcid=0x409)

Deploying and Supporting Enterprise Search

This document shares the experiences of Microsoft teams in deploying Enterprise Search at Microsoft.

- Deploying and Supporting Enterprise Search (http://download.microsoft.com/download/2/5/3/253F0074-5C2C-4B45-A1C6-62C2C288C6EB/DeployingAndSupportingEnterpriseSearchTWP.doc)

Managing Enterprise Metadata with Content Types

A general introduction to metadata and their implementation into SharePoint Technologies using Content Types, also covering how to expose the information to the search interface.

- Managing enterprise metadata with content types (http://go.microsoft.com/fwlink/?LinkId=101604&clcid=0x409)

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- Know your way around Technet!

- The navigation is deep but learn the structure and accept the many cross-links.

- Please Microsoft: Create permanent links when using "Add to Favorites". ☺

Goto: Microsoft Technet Library for MOSS
http://technet.microsoft.com/en-us/library/cc262612.aspx

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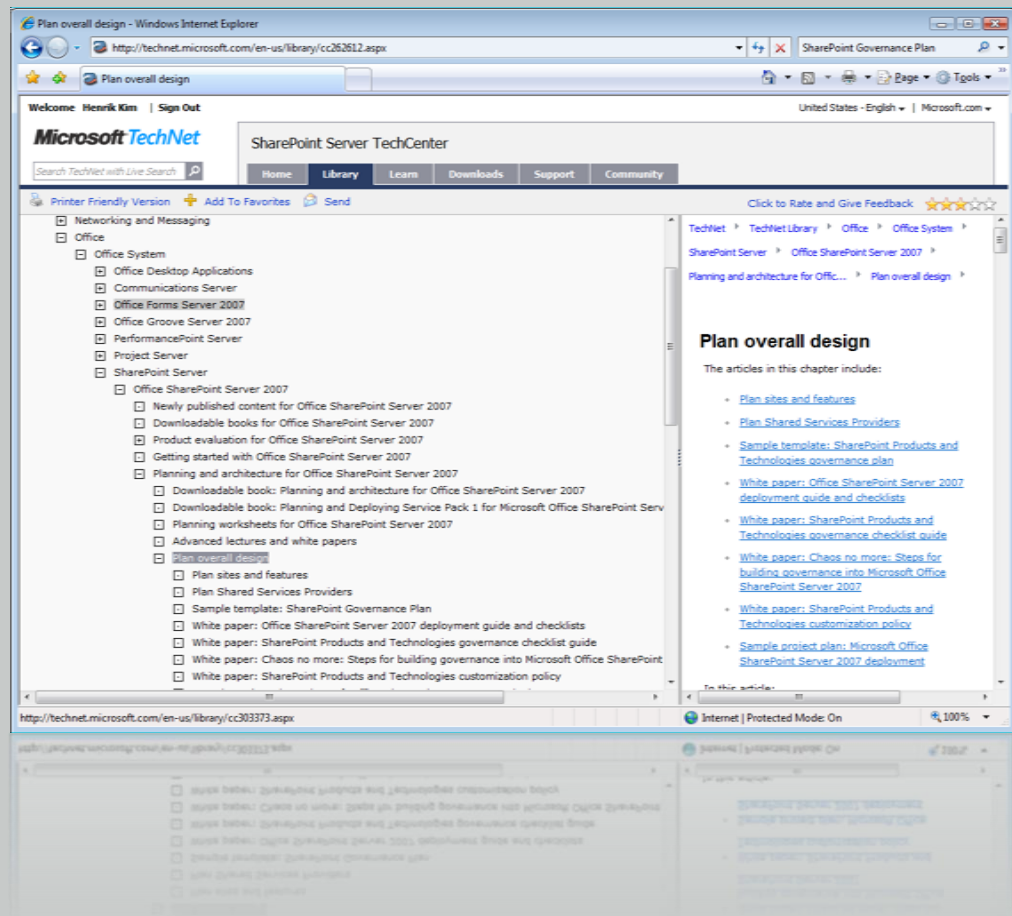
- Resource site build using Office SharePoint Server
- Aggregating information from multiple sources
- Role-based filtering and "gearing up" for:

Get Ready
- Why SharePoint Server 2007?
- Win Executive Sponsorship
- Build a Business Case

Engineer
- Identifying Needs
- Do I Need a Partner?
- Compliance
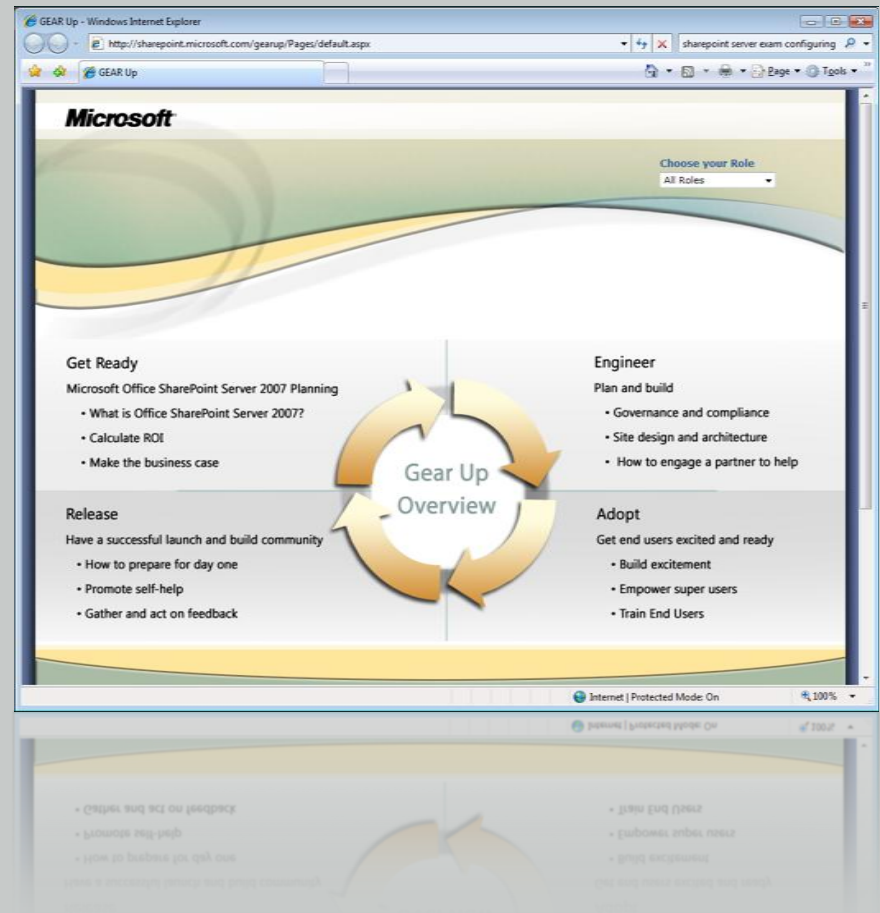- Site Design and Architecture
- Governance

Adopt
- Engaging End Users
- Developing Super Users
- Training End Users

Release
- Gathering Feedback
- Build End User Excitement
- Build Community

Goto: Microsoft SharePoint GEAR Up
http://sharepoint.microsoft.com/gearup/

Arpan Shah's Blog
http://blogs.msdn.com/arpans/rss.xml

Joel Oleson's Blog - SharePoint Land
http://blogs.msdn.com/joelo/rss.xml
Replaced by:
SharePoint Joel
http://feeds.feedburner.com/JoelsSharepointLand

Stefan Goßner
http://blogs.technet.com/stefan_gossner/rss.xml

Andrew Connell [MVP MOSS]
http://feeds.feedburner.com/AndrewConnell

STSADM Custom Extensions (Gary Lapointe)
http://stsadm.blogspot.com/feeds/posts/default?orderby=updated

Microsoft SharePoint Products and Technologies Team Blog
http://blogs.msdn.com/sharepoint/rss.xml

Microsoft SharePoint Developer Documentation Team Blog
http://blogs.msdn.com/sharepointdeveloperdocs/rss.xml

Microsoft Enterprise Content Management (ECM) Team Blog
http://blogs.msdn.com/ecm/rss.xml

Microsoft Enterprise Search Blog
http://blogs.msdn.com/EnterpriseSearch/rss.xml

Wrap-up

- Compliance and Regulations
- Ensuring Quality in the delivery model:
  - In handling incidents
  - Communication
  - Deployment
- Perimeter Security and Access
  - Scanning for viruses
  - Deciding on content allowed on the platform
- SharePoint as a platform for development

Microsoft Forefront Edge Security and Access
http://www.microsoft.com/forefront/edgesecurity/

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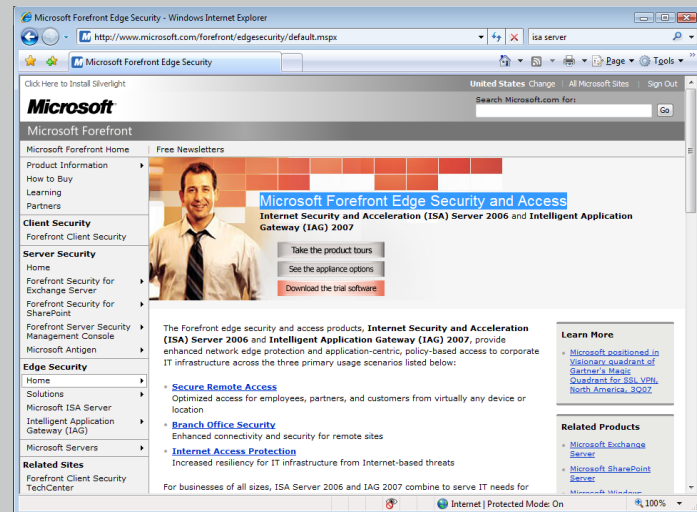
- Requires a lot of planning
  - ...but get going!
  - Prioritize and implement
- It is an ongoing process
- Invest as early as possible in the process
- Training, training, training
- Use the vast amount of guidance from Microsoft

- Engage with the Microsoft partner channel
  - Identify the single vendor to assist you in building the

    "Manageable SharePoint Platform"

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Question and Answers

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PROACTIVE