What is a SharePoint service?

A SharePoint service is an IT service that offers hosted sites based on Microsoft SharePoint 2013 Products. Among the things that a service provides are the following:
- Sites at a scope, such as site collection, Web application, or server farm
- Backup and recovery
- Content storage
- Support for customizations
- Security
    - Will the new site be secure so that PII and PHI does not have to be zipped?
- Service levels that are based on speed and availability

Information architecture

The goal of information architecture is to create a system that helps users collect, store, retrieve, and use the information that is needed to achieve business objectives. Selva is our architect and he is considered to be on the business side and is not on the systems side.

An assessment of what we have is in order so information architecture can help identify potential inefficiencies, such as the following:
- Inconsistent use of metadata that can make it difficult to search for and compare related data or content.
- Poorly designed and managed storage of content that can result in multiple versions of documents with no way to identify the authoritative version.
- Poorly catalogued and managed storage of data that can cause decision-makers to find and rely on the wrong data.
- Poorly designed navigation or poorly presented information that can make it difficult to find important sites and information.
- Duplication of efforts when a document/process already exists and cannot be found due to lack of file schema or metadata.

Governance:

- **Create a governing group**
    - Comprised of executive stakeholders, business division leaders, influential information workers, IT managers, and IT technical specialists, among others.
    - Since the Systems team will have their own governing body, it would be conducive for departments to have their own. IQA should develop its own team of people who know well the needs of their team members to be part of the group.
    - The goal of the governing group should be to oversee the process of the move and to troubleshoot any new integration of technology as needs change. In this capacity, the governing group for systems defines the initial offerings of the

service, and the IQA group would defines the service, develop policy (and any SOPs), and meets regularly to evaluate success/or not.

- **Communicate about the services**
  - o Once the governance policies are publicized to the enterprise, we will have a better idea of how to do this.

- **Create multiple services**
  - o A tiered service enables the phase in of services in a manageable way.
  - o For example, one service could provide thousands of sites for collaboration and another could support very large, mission-critical sites, such as enterprise intranet sites. A set of SharePoint Server services enables unique governance rules and policies at various levels of service. The IQA group who addresses this would make decisions based on JAD sessions.

- **Customization policy**
  A primary benefit of using sites that are based on the SharePoint Server is the ability of site owners to customize them. For example, site owners might change a site's appearance or provide new functionality, such as a custom Web Part or workflow. Once Systems determines the type and amount of customization that is allowed and supported at each level of service, IQA can begin to customize.

- **Metadata**

  - o Not only can metadata be used to enable searching for documents easier but it can also classify content as having high, moderate, or low business impact or value.
  - o Impact is related to exposure and content: if the content were distributed externally, would it hurt us? Or would it expose personally-identifiable information about users or customers? If so, that's high business impact content (this is where the security issues come into play—is PHI and PII secure?
  - o Value is related to availability: if the content were unavailable, could it impact the enterprise's day-to-day business? If so, that's high value content (all of Adrian's is probably high value).

  - o Each classification would then cause other behaviors – for example you could require that high business impact content be transferred only in encrypted form, or you could require that an approval process be run on medium impact content before it can be published.

- **Training**
  Who will be conducting it for those not familiar? Will there be different levels?

Questions for Governance:

Topic	Description
Site Request	How does one ask for a new site and what goes into it
Site Template	What Templates are available (including custom) and what they are used for
Site Management	Definition of the allowed management of the site for the Site Owner. Is it free for all, slightly controlled or managed by an Information Architecture?
Unused Sites	What are they and what happens to them?
User Agreement	Whenever they get a new Site or Site Collection, Site Owners must agree to access the site.
Security	How is it managed?
Support Model	How is support defined? To whom does the End User address to get answers?
Naming Convention	Databases, Servers and Web Applications should be named using a designated convention.
Backups and Restores	What is the schedule for backups and when are restores tested? What is the process for retrieving information should there be a loss of data?
Development	Define how development of new features will be done.
SharePoint Designer	Will it be used and if so, by who and how?
Archiving	Is there a plan for Records or just eliminating old content over time? Link to a file plan if it exists.
Communication Plan	Constant communication with the End Users needs to be there to ensure the success of the project.
Training	Define what kind of training will be available for site owners, administrators, and end users
Etc..	

Creating a SharePoint Information Architecture

Think of it this way, if we give a document that is so clear that the developer, or whoever is building SharePoint will be able create the SharePoint sites exactly how we need it; then our Information Architecture will be started, but without anyone to talk to, the developers can only assume our site will mirror Medicare's. Creating Information Architecture should incorporate all those involved as end users (Content types, Site Columns, Sites, Document Libraries and everything else required). Below is a sample where companies would equal divisions/departments.

	A	B	C	D	E	F	G	H	I
1	Site collection	Site	Parent site	List	Content Type	Column	Column type	Default Value	Column content
2	Home								
3		H.R.	Home						
4		H.R.	Home	Insurance documents (library)					
5		H.R.	Home						
6		H.R.	Home		Life insurance	Contract number	Number	N/A	
7		H.R.	Home		Life insurance	Contract start date	Date	N/A	
8		H.R.	Home		Life insurance	Contract end date	Date	N/A	
9		H.R.	Home		Life insurance	Insurance company	Managed metadata	N/A	Company 1
10		H.R.	Home		Life insurance				Company 2
11		H.R.	Home		Life insurance				Company 3
12		H.R.	Home		Life insurance				Company 4
13		H.R.	Home		Life insurance				Company 5
14		H.R.	Home		Life insurance	IsValid	Yes/No	Yes	
15		H.R.	Home		Health insurance				
16		H.R.	Home		Health insurance	Contract number	Number	N/A	
17		H.R.	Home		Health insurance	Contract start date	Date	N/A	
18		H.R.	Home		Health insurance	Contract end date	Date	N/A	
19		H.R.	Home		Health insurance	Insurance company	Managed metadata	N/A	Company 1
20		H.R.	Home		Health insurance				Company 2
21		H.R.	Home		Health insurance				Company 3
22		H.R.	Home		Health insurance				Company 4
23		H.R.	Home		Health insurance				Company 5
24		H.R.	Home		Health insurance	IsValid	Yes/No	Yes	
25		H.R.	Home	Employees contract (library)					
26		H.R.	Home		Employee contract				
27		H.R.	Home		Employee contract	Employee number	Managed metadata	N/A	1
28		H.R.	Home		Employee contract				2
29		H.R.	Home		Employee contract				3
30		H.R.	Home		Employee contract				4
31		H.R.	Home		Employee contract	Contract type	Managed metadata	N/A	NDA
32		H.R.	Home		Employee contract				Employment
33		H.R.	Home		Employee contract	Date of signature	Date	Today	
34									

Above is an example of a combination of Excel and Word, listing everything in a default value of the "content type" column.

Migration time is the perfect time to take advantage of restructuring our Information Architecture.

There are many new features and Web Parts that can alter a standard architecture. Some will fit this in the Rebuild migration action and that's fine, adapt the strategy to our needs. With the new search and content search Web Part what needs to be done is carefully analyze the existing architecture before doing anything.