

# <COMPANY> Governance Plan

## SharePoint® 2010 On Premise

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## Revision and Signoff Sheet

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### Reviewers

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# 1 Introduction

Governance is the set of policies, roles, responsibilities, and processes that guide, direct, and control how an organization's business divisions and IT teams cooperate to achieve business goals. A comprehensive governance plan can benefit your organization by:

- Streamlining the deployment of products and technologies, such as SharePoint Server 2010.
- Helping protect your enterprise from security threats or noncompliance liability.
- Helping ensure the best return on your investment in technologies, for example, by enforcing best practices in content management or information architecture.

The plan defines ownership responsibilities for both business and operational teams (including the Microsoft On Premise Service team), as well as set policies and define limits for various parameters, ensuring that the system is used in accordance with its designed intent and in compliance with corporate policies/procedures and organizational constraints.

The plan also defines policies that may affect implementation, configuration and/or operation of the various components of the SharePoint On Premise service.

## 1.1 Purpose

This governance plan document is specific to "SharePoint On Premise 2010 – On Premise". It provides a recommended practices framework for <COMPANY> to implement proper governance on top of their SharePoint on premise service offering. The target audience is both IT and business user.

## 1.2 Governance Plan Objective

The objective of a SharePoint 2010 On Premise Service Governance Plan is to ensure successful planning, delivery, operation and support of the <COMPANY>'s SharePoint On Premise service initiative. When governance is properly implemented according to this type of governance plan, the following statements should hold true:

- The service is well-defined, and roles, policies and processes are in place and enforced to ensure smooth delivery, operational excellence and continuous improvement
- Microsoft On Premise processes are understood and lines of communication follow predictable paths
- Management and operational teams review and proactively act based on usage data and business needs
- Business usage translates to business value via known pathways and is measurable
- Business users are assured of protected data, and the security model is known and enforced
- Administrative roles are trained and can manage the system efficiently
- Business users know how to use the available features as intended
- Site lifecycle is well designed and managed, and information management best practices are enforced and followed
- Usage growth is predictable and managed

## 2 Services Descriptions: Supported Scenarios and Capabilities

### 2.1 On-Prem Solution Scenarios

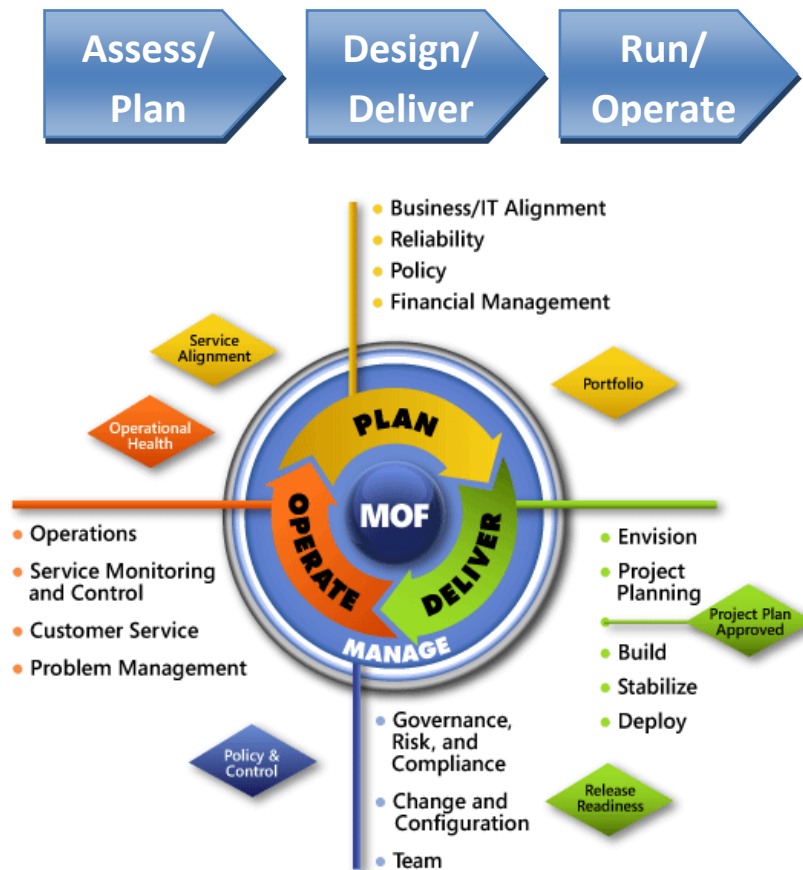
The <COMPANY>'s On-Premise environment will be launched using SharePoint 2010. Moving forward, the On-Prem environment is solely intended for custom solution development not appropriate for SP BPOS-D and any other standard collaboration uses will not be allowed.

	SP	On-Prem Solution Scenario	Services/Capabilities Enabled	Services Required
Medium, Large and Dedicated Solutions	8	2010	<b>Composite Solutions using custom coded SharePoint Components: Workflows, InfoPath forms with code, Office Add-ons, Reporting Services Reports, web parts, Shared Services, or other functionality</b>	Code reviews, testing and component deployment and monitoring Full Development Lifecycle
	9	2010	<b>Migration of existing compatible applications to the SharePoint Platform</b>	Code reviews, testing and component deployment and monitoring Full Development Lifecycle
	10	2010	<b>Composite Solutions using a predominance of custom code with limited selective use of SharePoint capabilities</b>	Code reviews, testing and component deployment and monitoring Full Development Lifecycle

### 3 Organizational Roles and Responsibilities

#### 3.1 Overview

As with a SharePoint on-premise implementation/program, the customer’s organizational responsibilities for a BPOS-based “service” will vary as a function of the stage in the overall lifecycle of the program (simplified lifecycle view shown below).



A high level view of how various roles are involved in each of these rough stages is provided below, and more detail on the specific customer roles is provided in the following sections. Note that many of the roles mentioned specific to a phase will cross-over into other phases – this summary view just provides a high level representation for a typical organization.

- In the “Assess/Plan” phase, IT management, business representatives and decision makers involved with strategy and planning will be required, along with technical disciplines/subject matter experts (SMEs) to determine requirements, provide specifications, and ensure alignment with architecture standards. (See notes on “Governance Board” below.)
- In the “Design/Deliver” phase, technical disciplines/SMEs and support management will be required to work with Microsoft On Premise Services for successful deployment of the service and its support infrastructure, and IT management will need to be involved in meetings and decision making. In addition, training and adoption/user experience disciplines will need to design their programs during this period as well.

- In the “Run/Operate” phase, customer-facing and more in-depth (i.e., Tier 1 and 2) support personnel will of course be required (with Tier 3 being provided by Microsoft On Premise Services), and IT SMEs/leads will be involved in maintaining operational integrity of the service catalog (monitoring/reporting, security/AD integration, etc.). Business representatives will also be important during the ongoing run operation to manage business demand/feedback as well as ongoing requirements and business user communications. Training and adoption activities will be ongoing during this phase and thus involve those disciplines.

Note that the standard “service offering” roles of “Service Owner”, “Service Design Engineer” and “Service Design Tech Analyst” are incorporated into the comprehensive set of roles specified below.

### 3.2 Governance Board

In addition to these individual roles, successful SharePoint deployments, either on-premise or on premise-based, require not only a strong “governance plan”, but a strong “governance board” with ultimate responsibility for meeting the firm’s goals with respect to SharePoint. This function, sometimes called the “SharePoint Governance Board”, provides strategic insight and direction for the SharePoint service, and it is typically comprised of many of the individuals with key roles in the above phases. Long-term, the board serves to manage the lifecycle of the asset, which may include working with IT management to assess the service offering in terms of cost, value, needed improvements, portfolio rationalization, and potential future retirement.

Additional considerations related to the Governance Board:

- The executive sponsor must be a member of this team. It’s typically a CIO or the IT director.
- Business owners of SharePoint from all departments should have representation on this team.
- Technical representative on this team should (at least) include an Enterprise/Information architect and IT Management (e.g., Program/Product/Service/Asset Manager with overall responsibilities for the customer’s BPOS-S-based service)
- The team should meet at least quarterly to review the policies and updates.
- The team may have rotating membership to infuse fresh perspective.
- Exemplify good information architecture practices in your own deliberations (like using a well-designed collaboration site to record your deliberations and maintain its artifacts).
- Report to the wider organization (and gather requirements across the organization) by using a Web site and on premise surveys.
- Maintain a set of milestones and a shared calendar.
- Consider piloting information architecture practices in some divisions of the organization and using that experience to incrementally improve the information architecture practices across the wider organization.
- Refer to <COMPANY> Web Program Office (WPO) for an example of existing governance policies and procedures.

### 3.3 Organizational Roles and Responsibilities Summary Tables

Typical roles associated with a customer’s on premise SharePoint deployment are provided in the following diagram and listed below, broken out by roles typically associated with strategy and planning, and roles considered more operational.



Team Model.vsd

The check/box indicates degree of involvement with each phase (☑ is highest). At the discretion of the organization, roles may be filled by consultants, an individual may assume more than one role, and multiple individuals may assume the same role.

**Strategy, Planning and Management (typical)**

Table 1: Strategy, Planning and Management Roles and Responsibilities

Role	Responsibilities	Gov Board Member	Assess/ Plan	Design/ Deploy	Manage/ Run
Executive Sponsor	Provides executive-level sponsorship for SharePoint. The primary responsibility of the Executive Sponsor is strategic, positioning SharePoint as a critical mechanism for achieving business value and helping to communicate the value of the SharePoint environment to the management levels of the organization.	☑	✓		✓
IT (and other management) Stakeholders	Any IT (or other) management that is considered a stakeholder and either wants: (a) to have input to the program or (b) to stay informed on program status. Responsibilities TBD	(✓)	(✓)	(✓)	(✓)
Business Owner	Responsible and accountable for all content and proper site usage.		✓	✓	✓
Service Owner	Responsible for managing and operating SharePoint as a service within <COMPANY>. Establish Site Owner community with periodic team calls. Document the Lifecycle Management of Sites for building new sites, migrating existing sites and merging sites.	☑	✓	✓	✓
Area owner/admin	Site collection owner with general permissions		✓	✓	✓
Site owner	Individual site owner with general permissions. Responsible for enforcing all policies and procedures. Participate in rotating peer review, at least quarterly, of 25% to 50% of site content to ensure adherence to policies. Participate in periodic Site Owner team calls.		✓	✓	✓
Enterprise Architect	Defines the governance policies related to compliance with enterprise architecture standards Ongoing review of compliance		✓		✓
Information Architect	Defines the governance policies associated with information architecture Assists with the solution design/configuration as it relates to information architecture Ongoing review of adherence to information management policies/best practices (compliance)		☑	✓	✓

Role	Responsibilities	Gov Board Member	Assess/ Plan	Design/ Deploy	Manage/ Run
SharePoint "Service" Manager (ie, Product/Program/Asset Manager)	<p>Responsible for business advocacy and satisfied stakeholders.</p> <ul style="list-style-type: none"> <li>Enabling the lifecycle of the SharePoint service</li> <li>Being the leader in regard to service enhancements, serious service issues, and conflicting or difficult service decisions</li> <li>Ensuring that resources are in place to perform Service Level Management, service improvements and Design activities</li> <li>Identifying and managing the SharePoint service requirements and service improvements</li> <li>Ensuring that the SharePoint service design satisfies the documented business requirements</li> <li>Analyzing and reviewing the performance of the underlying technical services against operating level agreements for those services</li> </ul>	☑	☑	☑	☑
Project Manager	<p>Management of any individual projects related to the SharePoint on premise planning and deployment. Hands off to Product/Program manager at project completion.</p>		✓	☑	
Business Analyst	<p>Works with stakeholders to define vision, objectives, requirements, functional specifications, business value (projection and measurement)</p> <ul style="list-style-type: none"> <li>Has domain knowledge of the SharePoint service business requirements and the ability to map them to SharePoint capabilities or custom solutions</li> <li>Reviews SharePoint technical service designs with the SharePoint Service Design Engineer and determining that they can satisfy the business requirements</li> <li>Acts as technical subject matter expert on all of the SharePoint service capabilities and components</li> </ul>	✓	✓	✓	✓
Human Resource and Legal Representation	<p>Responsible for portal and content compliance with HR and legal mandates. Assists with creation of compliance policy. Assists with educating users about usage policies and, in case of enforcement, works with the managers. May get involved in legal/HR issue resolution once the system is up and running.</p>	✓	✓		✓
SharePoint Business Representative/Liaison(s)	<p>Managing the overall design and functionality integrity of SharePoint from a business perspective. The SharePoint Business Owner works closely with their business unit constituency as well as the IT product manager in charge of the service. The</p>	✓	✓		✓

Role	Responsibilities	Gov Board Member	Assess/ Plan	Design/ Deploy	Manage/ Run
	function typically includes responsibility for business demand management, requirements gathering and communication, and site collection lifecycle management.				
Overall User Experience and Training (may be split roles)	Defines the governance policies associated with user interface and navigation guidelines. Defines the end-user interface with the service catalog and service/support request Develop training strategy and plans to train different tiers of users (end users, support, administration/development (as needed), in accordance with governance policies, standards and practices and the needs of different user segments. Execute training plan.		✓	✓	✓
Adoption, Change Management and Value Realization Specialist	Based on business objectives, develops adoption strategy and change management plan. Performs usage/value base-lining and monitors/analyzes adoption on and ongoing basis relative to goals. Assesses business value realization on an ongoing basis.	✓	✓		✓
Support Management	Develops support plan and maintains the support infrastructure integrated with Microsoft on premise	✓	✓		✓
Communications lead and team	Develops governance policies related to various end-user communications (program level, administrative, support, training, etc) Implements communications plan		✓	✓	✓

### 3.4 Operations, Support and Development (typical)

The roles and responsibilities in the operations, development and support teams are described in detail in the following table.

Key roles eliminated relative to on-premise SharePoint implementations include:

- Windows Server administrator<sup>1</sup>
- Backup administrator
- SQL Server administrator
- SharePoint developers allocated to core platform build/test/release functions<sup>2</sup>

Key roles reduced in allocation relative to on-premise SharePoint implementations include:

- SharePoint farm administration

Table 2: Operations, Support and Development Roles and Responsibilities

Role	Responsibilities	Gov Board Member	Assess/ Plan	Design/ Deploy	Manage/ Run
Farm and Site Collection Administrator(s)	Defines the governance policies around quotas, security and permissions; web app, SharePoint shared service, site collection and site overall management		✓	✓	✓

<sup>1</sup> The role likely continues to exist but is no longer needed for the purpose of SharePoint operations

<sup>2</sup> May be required if otherwise customization allowed per policy

Role	Responsibilities	Gov Board Member	Assess/ Plan	Design/ Deploy	Manage/ Run
	<p>Manages the service catalog and monitors the site provisioning request queue</p> <p>Monitors system uptime, adherence to SLAs</p> <p>Monitors on premise service backup and restore operations re: adherence to SLAs</p> <p>Reviews SharePoint on premise service management, logging, and usage reports</p> <p>Monitors directory synchronization status</p> <p>Works with AD, security and search leads to administer those areas</p> <p>Key member of migration team</p>				
Network Lead	<p>Defines the governance policies related to network usage</p> <p>Monitors network usage</p> <p>May participate in implementation of WAN accelerators on BPOS-D service, as required</p>		✓	✓	✓
Directory Lead	<p>Defines the governance policies for the Active Directory® directory service use and synchronization to the on premise service</p> <p>Assist with setting up SharePoint On Premise to use AD for authentication (and may get involved in resolving directory synchronization issues as they arise during operations).</p>		✓	✓	✓
Security Lead	<p>Defines the governance policies for ensuring the solution is satisfying security requirements.</p> <p>Responsible for managing security on the site collection level to create and change permission levels on the Web site and assign permissions to users and groups.</p> <p>May get involved in resolving security issues as they arise during operations.</p> <p><b>Note:</b> it is typical to delegate some responsibilities to Site Collection Administrators/Site Owners.</p>		✓	✓	✓
Search lead	<p>Defines search-related governance policies</p> <p>Participates in design and management of search implementation</p>		✓	✓	✓
Migration lead	<p>Defines the policies related to migration of content/data and pre-existing SharePoint or third party sites/content/data to SharePoint</p> <p>Leads migration activities</p>		✓	✓	✓
Information coordinator/consultant	<p>Defines the process and standard procedures for configuring sites per business specification.</p> <p>Implements site collections for business units</p>		✓		✓
SharePoint Service Design Engineer/Solution Architect/Custom Development Manager (for custom solutions as allowed by governance)	<ul style="list-style-type: none"> <li>Ensures that the SharePoint Service is designed to meet the customer's requirements</li> <li>Analyzes potential changes to existing SharePoint service definitions</li> <li>Evaluates what IT capabilities and infrastructure can be used, developed or acquired to help satisfy new SharePoint service requirements</li> </ul>		✓	✓	

Role	Responsibilities	Gov Board Member	Assess/ Plan	Design/ Deploy	Manage/ Run
	<ul style="list-style-type: none"> <li>• Designs and Creates:                             <ul style="list-style-type: none"> <li>• SharePoint Service Specifications</li> <li>• SharePoint Service Designs</li> <li>• SharePoint Service plans</li> <li>• SharePoint Service architecture</li> <li>• SharePoint Service policies</li> </ul> </li> </ul> <p>Defines the governance policies associated with the customer development environment and processes used for development, both local and with the service test team.</p> <p>Responsible for enforcing guidelines around customization, coding/code review, service testing/provisioning, security, and performance.</p> <p>Leads design of any allowed customizations (may define the on-premise service catalog request/site provisioning system)</p>				
Custom Development Test/QA Manager (for custom solutions as allowed by governance)	<p>Define the governance policies associated with the test environment and processes used for testing and releasing criteria.</p> <p>Responsible for guidelines around defect classification and defect tracking and management.</p> <p>Implements QA plans for custom solutions</p>		✓	✓	
Development Lead(s) – Web (SPD) development or Custom Solutions (as allowed by governance)	<p>Develops applications for customers. May be involved in requirements gathering for new solutions.</p> <p>Responsible for building the framework and features of the SharePoint sites.</p> <ul style="list-style-type: none"> <li>• Build the SharePoint look and feel</li> <li>• Modify SharePoint templates as needed</li> <li>• Build new Web Parts</li> <li>• Write Microsoft ASP.NET code</li> <li>• Participate in design tasks as needed</li> </ul> <p>Participate in development and testing as needed</p>		✓	✓	
Test Lead(s) – Custom Solutions (as allowed by governance)	<p>Tests custom applications for customers</p>		✓	✓	
Release Manager	<p>Defines release governance</p> <p>Manages release of both OOTB service (e.g. upgrades/patches) as well as customizations extending the service</p>			✓	✓
Tier 1 Support Team	<p>Customer support</p>				✓
Site Owner Roles	<p><b>Site Actions:</b></p> <ul style="list-style-type: none"> <li>• Edit a Page</li> <li>• Create a Page</li> <li>• Show Page Editing Toolbar</li> <li>• View All Site Content</li> <li>• View Reports</li> <li>• Site Settings</li> <li>• Manage Content and Structure</li> </ul> <p><b>Site Administration:</b></p> <ul style="list-style-type: none"> <li>• Regional settings</li> <li>• Site libraries and lists</li> <li>• Site usage reports</li> <li>• User alerts</li> </ul>				✓

Role	Responsibilities	Gov Board Member	Assess/ Plan	Design/ Deploy	Manage/ Run
	<ul style="list-style-type: none"><li>Content and structure</li></ul> <b>Look &amp; Feel:</b> <ul style="list-style-type: none"><li>Title, description, and icon</li><li>Themes</li></ul> <b>Permissions</b>				
User Experience Design Lead	Responsible for maximizing solution usability and enhancing user effectiveness and readiness. <ul style="list-style-type: none"><li>Connect with SharePoint Designer</li><li>Change images, CSS, master pages, and layouts (drafts only)</li><li>User-Interface responsibilities</li></ul>				

## 4 Information Architecture and ECM/Search Design

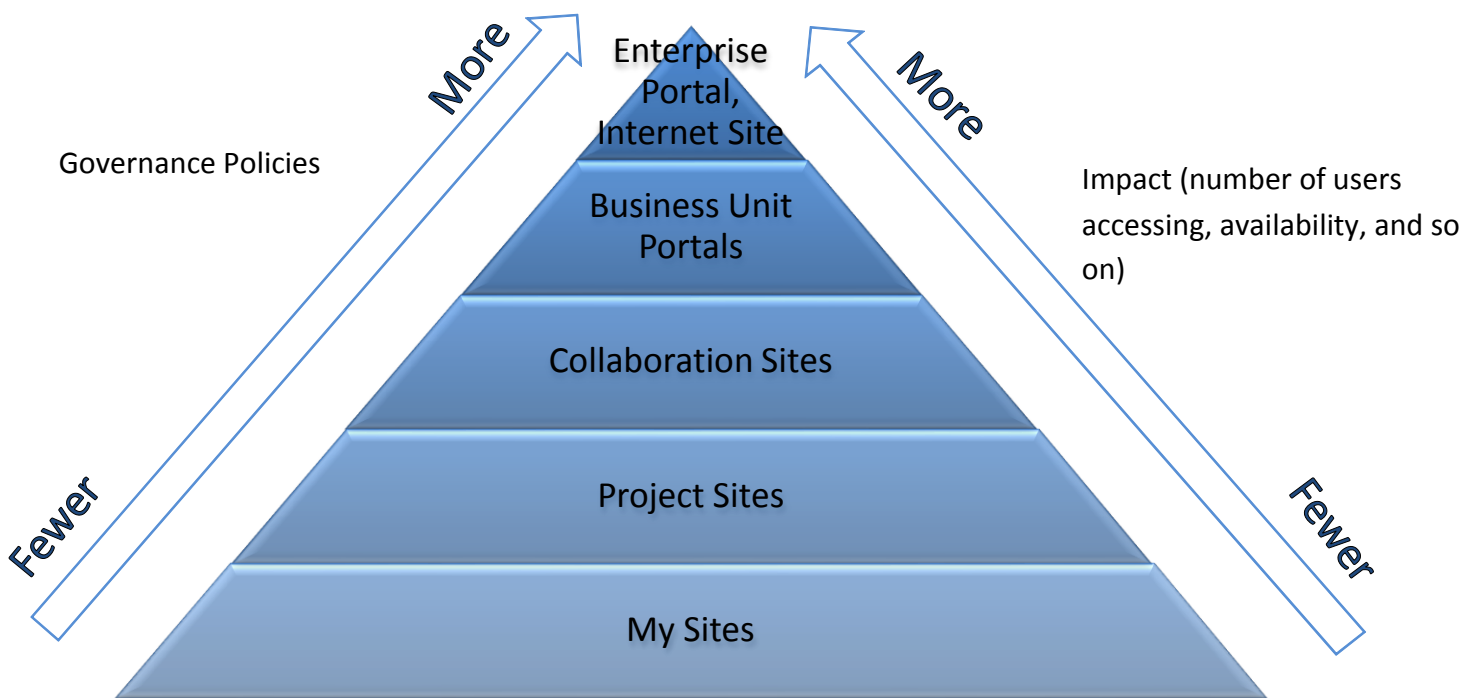
### 4.1 Information Architecture

#### SharePoint Information Architecture Overview

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. A Web site's information architecture determines how the information in that site — its Web pages, documents, lists, and data — is organized and presented to the site's users. Successful implementation of information architecture affects:

- How easy it is to find information.
- How information is stored and retrieved.
- How users navigate to information.
- How redundant or overlapping information is.
- What metadata is available for each type used for persisting information.
- What templates are used for authoring information.
- How well the information architecture is governed.

The goals, implementation and governance of information architecture will vary depending on the type of solution you are creating. From a governance perspective, each type of site has more or less overall impact within an enterprise. As a result, each type has a greater or lesser need for governance policies and more or fewer policies as a result.



For example:

- If you are designing the information architecture of an enterprise's intranet portal site, you might focus on how metadata will be used to characterize the site's content, the organization of the content in sites and document libraries, the availability of that content in portal sites, and the templates to use for creating content.
- When you design the information architecture of an Internet presence Web site, you might focus on how the site is organized into a hierarchy of subsites and Web pages, how that hierarchy is exposed in the site's navigation features, and how easy it is to search for content on the site.

## SharePoint 2010 Features Enabling Well-Governed Information Architecture

SharePoint Server 2010 includes many features which help support the implementation of well-designed information architecture, like content types and site collections. It is the task of information architects, solution architects, IT professionals, professionals, developers, and site designers to ensure these are fully utilized. Figure 1 lists the major areas that need planning in terms of a successful information architecture project and how they are used.

Figure 1: Information architecture areas and use

Area	Use
Site hierarchy	How site(s) will be structured and divided into a set of subsites.
Navigation	How site users will navigate through the site(s).
Web pages	How data will be presented on the site(s).
Personalized content	How information will be targeted to groups of users.
Metadata	How metadata will be hosted, categorized in terms sets and overarching groups, and how the data will be implemented through managed columns.
Document taxonomy	How documents will be classified and stored.
Content types	<p>How content types will represent data across the organization, within specialized sites, and how content types will be published and subscribed to.</p> <p>The governance of content types is recommended as follows:</p> <ul style="list-style-type: none"> <li>• Site Collections/Portals – Bottoms up management of Content Types to ensure consistency throughout site collection</li> <li>• Individual Sites – Self managed Content Types specific to each site</li> <li>• A maximum of three to five required fields for each content type</li> </ul>

The quality of the planning and design of information architecture will also impact how maintainable and usable SharePoint Server 2010 is. For example, defining appropriate site structures, Web pages, and navigation ensures users can find the information they need. Failure to consider these elements during the Planning phase will result in frequent modifications of the SharePoint Server 2010 solution after deployment.

## Information Architecture and Governance Bodies with SharePoint 2010

An enterprise can increase its return on SharePoint Products and Technologies investment by creating a governance body that develops and enforces information architecture standards and policies. Governance of information architecture requires the participation of all groups that have a stake in its success. Because the ultimate purpose of information architecture is to meet the needs of the business, it is essential that representatives of the enterprise's business units have a primary role in this governance group. If possible, include a professional information architect in your planning team and have that person participate in the governing group. Along with these primary stakeholders, representatives of the IT and legal organizations should be included. (*refer to the respective roles in "Roles and Responsibilities" section for all of the above; see also the "Governance Board" section, where information architecture best practices are also listed.*)

### **Information Architecture Representation in the Governance Plan**

As mentioned above, specific roles related to information architecture are important for the Governance Body and overall service design and should be documented in the Governance Plan. Additional information architecture-related policies to be included in the governance plan are listed in the following section in the “Information Governance” category. A more formal information architecture deliverable is beyond the scope of a typical governance project.

## 4.2 Taxonomy and Metadata

### 4.3 Search

Search connects people to the information they need to get their jobs done. General productivity search solutions increase employee efficiency by connecting a broad set of people to a broad set of information, the most common examples being intranet and people search. In comparison, search-driven applications drive measurable return on investment by helping a well-defined set of people accomplish specific business tasks more efficiently. Search-driven applications, such as research portals and 360° customer insight solutions, aggregate information from a defined set of content repositories, add structure to unstructured information, and provide a contextual, interactive, and actionable experience.

Enterprise search solutions from Microsoft enable you to:

- Provide users with results that are meaningful and dynamically tailored to their jobs, roles, and functions within the organization. This means that your sales teams will be quickly able to find product information, collateral, and answers to RFP questions, while your engineering teams will see specifications and requirements documents at the top of their results sets. Site administrators can tailor search quickly and easily to deliver contextually relevant results the first time.
- Give users the ability to use terms and languages that are unique to your business. Most organizations frequently use a set of internal names, acronyms, or code words. These words can be confusing to different groups, outsiders, or new members of your organization. Users will be able to use their own terminology to sort, refine, and query your content. Furthermore, advanced language support provides your employees the ability to find content written in its native language.
- Ensure that searches provide accurate ranking for relevant results. The major reason that a user continues to use a search engine is if it returns relevant information near the top of the search results. Microsoft search gets better with social ranking capabilities by promoting popular documents. Site administrators will quickly and easily be able to create and deploy new custom ranking algorithms that are tuned meet multiple business demands simultaneously.
- Provide a great out-of-the-box experience to get search up and running quickly. Additionally, provide a platform that grows with your business needs so that you can:
  - Quickly access and crawl new content repositories.
  - Add your users and business partners to the lists of extracted entities.
  - Perform custom content processing such as sentiment analysis or machine translation.
  - Tailor the user interface with custom SharePoint Web Parts or extend the ones that are available out of the box.

FAST Search Server 2010 for SharePoint provides an enterprise search platform for fulfilling these aims. As a brief overview, FAST Search Server 2010 for SharePoint includes a connector framework that enables the crawler to index files and metadata from various types of content repositories. It also provides an indexing engine that stores the crawled data in an efficient manner in index files, and it provides query servers, query object models, and user interfaces for performing searches on the indexed data.

You will learn more about each of these components later in this guide, but for now be aware that these components all work together to fulfill the aims and meet the requirements of enterprise search solutions.

The following table compares general enterprise search capabilities that were previously provided in Microsoft Office SharePoint Server 2007 with the new and enhanced features in SharePoint Server 2010 and FAST Search Server 2010 for SharePoint.

▪ X = available in 2007 O = available in 2010 † = improved in 2010

Features and Capabilities	Office SharePoint Server 2007	SharePoint Server 2010	FAST Search Server 2010 for SharePoint
<b>People and expertise search</b> Capture knowledge not found in documents by searching for people and expertise using SharePoint products.	X	O†	O†
<b>SharePoint 2010 connector framework</b> Securely connect to content in SharePoint sites and from sources across your enterprise. Use the Business Data Catalog to easily create your own connectors that work just like those available out of the box.	X	O†	O†
<b>100m content volume with sub-second query response time</b> Meet the scale and performance needs of your entire organization or the specialized needs of individual departments.	X	O†	O†
<b>Search from Windows 7 &amp; Windows Mobile</b> Search beyond the search center. Conduct searches from the Windows 7 desktop and on your Windows mobile device.	X	O†	O†
<b>Taxonomy tag integration</b> Bring the power of taxonomy into search. Tag metadata is shown in results, and users can refine by taxonomy-based tags.		O	O
<b>Metadata-driven refinement panel</b> With the new refinement panel in SharePoint Server 2010 and FAST Search Server 2010 for SharePoint, users can narrow the results of their searches and navigate to the right content faster.		O	O
<b>Relevance improves with social behavior</b> The click-through behavior of similar search queries affects the rank that documents receive. The more users click on a certain item, the higher its ranking for related queries.		O	O
<b>Phonetic and nickname search</b> Confidently search for a person's name as it sounds - without worrying about the exact spelling.		O	O
<b>Contextual search</b> Tailor different results and refinement options based on the profile of the user or audience.			O

Features and Capabilities	Office SharePoint Server 2007	SharePoint Server 2010	FAST Search Server 2010 for SharePoint
<b>Thumbnails and previews</b> Thumbnails and previews make the results of a search query visual, allowing users to recognize the right content quickly.			O
<b>&gt; 500m content volume with sub-second query response time</b> Scale to extremes with FAST Search Server 2010 for SharePoint while maintaining sub-second query response times.			O
<b>Advanced content processing with advanced linguistics</b> Extract and create metadata latent in documents to improve search results, sorting capabilities, and the refinement panel.			O
<b>Search-driven applications</b> Meet all the search application needs you have across your business. Common examples include 360° Customer Insight, Research and Development Innovation Portal, and Product Support.			O
<b>Business Intelligence Indexing Connector</b> Crawl Microsoft Excel® workbooks and Reporting Services Reports with improved results, descriptions, thumbnails, and refiners. Discover your business intelligence (BI) assets quickly and easily, navigate not only the document, but also the data behind the scenes, and access the information you need quickly and easily.			O

## Content Repositories

In addition to the feature comparisons, you should also consider the types of content repositories that can be crawled by each product:

- SharePoint Foundation 2010 can only crawl SharePoint sites in the same farm.
- All the other products in the above table can crawl the following types of content repository:
  - SharePoint sites (in the same farm, or in external farms)
  - Windows file shares
  - Microsoft Exchange public folders
  - Web sites that are not SharePoint sites
  - People Profiles
  - External line-of-business applications
  - Structured content in databases
  - Content returned by Web services
  - Third-party products and solutions including Lotus Notes and Documentum

## Indexing Scale

Although there are no hard-coded limits for the number of items that can be indexed by any of the products listed, there are some practical guidelines based on feasibility and performance:

- Search Server 2010 Express and SharePoint Foundation 2010 can index and search up to 300,000 items if they are used with SQL Server® Express; otherwise they can index and search up to 10 million items if they are used with a full edition of SQL Server 2008.
- A scaled-out Search Server 2010 farm can index and search up to 100 million items.
- A scaled-out SharePoint Server 2010 farm can index and search up to 100 million items.
- A FAST Search Server 2010 for SharePoint installation can support extreme scale, and can index and search over a billion items.

## 5 <COMPANY> Enterprise Processes and Procedures

### 5.1 Software Development Lifecycle Management

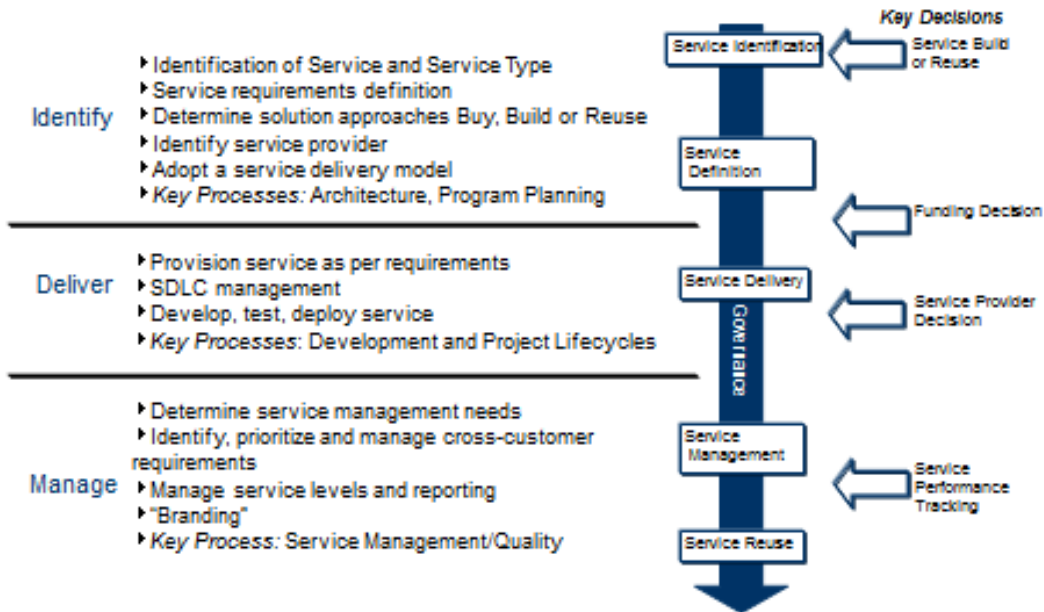
### 5.2 Change Management

## 6 Demand Management

### 6.1 Demand Management

Example:

# Shared Service Lifecycle



## 7 Site Planning

### 7.1 About planning sites and site collections

In general, you plan your sites and site collections in the following order:

- Determine the number and types of top-level sites and any sites below them in the hierarchy that are needed.
- Determine the number and types of site collections into which the sites will be organized.

### 7.2 Determine types of sites

The first step in planning a solution that is based on SharePoint Server 2010 is to determine the types of sites your organization and its customers need. Determining the types of sites affects later planning decisions, such as where the sites will be implemented in your server topology, what features to plan for each site, how processes that span multiple sites are implemented, and how information is made available across one or more sites. This section contains information about how to plan different kinds of sites.

### 7.3 Plan sites by organizational hierarchy

Plan the basic sites that you need based on the scale and structure of your organization. Each of these sites can contain information that is needed for a project or division within your larger organization, and each will link to collaboration sites that are relevant to that project or division. Some sites for larger divisions or projects will also aggregate information that is found on all the smaller sites that are devoted to smaller divisions or projects.

Use the following guidelines when you plan sites that are based on your organizational structure:

### 7.4 Divisional or team sites

Plan to create one site for a small organization or one site for every division or project of 50–100 people in a medium to large organization. In large organizations, there might be several levels of sites, with each site focusing on the content that is created and managed at its level of the organization.

You can design a site for members of your organization to collaborate on content related to your business or organizational goals. These can be self-contained or they can work with other sites as part of a publishing process. Often, these sites will have a mixture of collaborative content that is used internally and content that is intended for publication to an audience.

**Rollup sites** A rollup site contains general cross-organization content. It makes it possible for users across divisions to find information, experts, and access to organization-wide processes. It often contains sites that are related to the overall organizational information architecture and that are usually mapped to the structure of the divisional or project sites. For each organization, <COMPANY> should plan to create a centralized rollup site that uses an aggregated view of all related sites.

### 7.5 Plan application sites

An application site organizes team processes and provides mechanisms for running them. Application sites often include digital dashboards and other features to view and manipulate data that is related to the site's purpose. The information that is presented in an application site usually comes from diverse sources, such as databases or other SharePoint sites.

For example, the human resources organization in an organization could design an application site to provide employees with:

- Access to general information, such as employee handbooks and career opportunities.
- Ways to do common tasks, such as submitting timecards and expense reports.
- Dashboards to view personalized information, such as an employee's salary and benefits history.

As another example, the internal technical support group in an organization could design a Help Desk application site to provide technical support to members of the organization. Features of the application site could include the following:

- Access to a knowledge base of past support incidents and recommended practices documentation.
- Ways to do common tasks, such as starting a support incident or reviewing the status of an ongoing incident.
- Integration with communications features that support on premise meetings and discussions.
- Personalized views of data. For example, support managers could view dashboards that provide views of their team members' productivity and customer satisfaction ratings. Support engineers could view their current unresolved incidents.

## 7.6 Plan Internet presence sites

Internet presence sites are customer-facing sites. They are usually branded and are characterized by consistent stylistic elements, such as colors, fonts, and logos in addition to structural elements such as navigation features and the structure of site pages. Although the appearance of an Internet presence site is tightly controlled, the content of the site can be dynamic and can frequently change. For example, a corporate Internet presence site communicates important company information to customers, partners, investors, and potential employees. This includes descriptions of products and services, company news, annual reports, public filings, and job openings. As another example, an on premise news Internet site provides frequently updated information, together with interactive features such as stock tickers and blogs.

Because an Internet presence site represents your organization to an external audience, you might stage and test the site and then publish it — either based on a schedule or as needed — to its public "production" location. A staging site is a mirror of the authoring site that you use to test content before it is published to the production site. By using a staging site, you help ensure that published content meets strict standards. Staging sites also make it possible for content authors to work on servers that are located on your company's intranet while Internet users are using production servers in your perimeter network. A built-in content deployment feature makes it easy to move content from the authoring server to the staging server and then to the production server. For more information about content deployment, see [Content deployment overview \(SharePoint Server 2010\)](#).

## 7.7 Plan publishing sites

By using a publishing site, authors can create and modify content in the form of Web pages and documents, and they can use an approval process to make the content available to users who have the appropriate levels of viewing permissions. The publishing process involves creating content and then submitting it for approval. After content is approved, it is made available, or published, to the Web site for readers. This publishing occurs according to either a default schedule or a customized schedule, based on the needs of the project. Publishing sites can be used as intranet, extranet, or Internet sites, depending on the audience.

For example, you might use a publishing site for an Internet-facing site that publishes press releases. The public relations team creates press releases, uses the publishing workflow to approve new content, and specifies when it should be made available to consumers. As another example, you might use a publishing site for a corporate intranet site, where company news is made available to employees. Page authors can specify the target audience for their content, which makes the content viewable by only the members of the designated groups.

Like Internet presence sites, you can also use the built-in content deployment feature to move content from a staging site to a production site. The production site might be an Internet-facing site, or it might be another intranet site within your organization, depending on the size of your organization and the complexity of your publishing needs.

## 7.8 Plan other sites

You can plan to make it possible for site users to create additional sites. For example, you can plan to give a My Site to each team member who uses a site. A My Site is a team site that is based on Microsoft SharePoint Foundation 2010 and has public and private views. You can also make it possible for team members to create other sites, such as Document Workspace sites, when they collaborate on documents and other projects. Similarly, you can give users of an Internet site access to collaboration sites as part of a Web-based service. For example, you can give them permissions to create Meeting Workspace sites and participate in on premise meetings as part of their experience of using your site.

For information about the kinds of sites you can create, see [Sites and site collections overview \(SharePoint Server 2010\)](#).

## 7.9 Determine site collections

After you determine what types of sites your solution requires, the next step is to plan how these sites are implemented across site collections. A site collection is a hierarchical set of sites that can be managed together. Sites in a site collection have common features, such as shared permissions, galleries for templates, content types, and Web Parts, and they often share a common navigation. A site is often implemented as a site collection with the top-level site as the home page of the site collection.

In general, when you plan a solution that is based on SharePoint Server 2010, put the following kinds of sites in separate site collections:

- Internet sites (staging)
- Internet sites (production)
- All team sites related to a divisional site or Internet site
- Document Center sites
- Records Center sites

All sites in a site collection are stored together in the same SQL database. This can potentially affect site and server performance, depending on how your site collections and sites are structured, and depending on the purpose of the sites. Be aware of the following limits when you plan how to allocate your content across one or more site collections:

- Keep extremely active sites in separate site collections. For example, a knowledge base site on the Internet that allows anonymous browsing could generate lots of database activity. If other sites use the same database, their performance could be affected. By putting the knowledge base site in a separate site collection with its own database, you can make resources available for other sites that no longer have to compete with it for database resources.
- Because all content in a site collection is stored in the same content database, the performance of database operations — such as backing up and restoring content — will depend on the amount of content across the site collection; the size of the database; the speed of the servers hosting the database; and other factors. Depending on the amount of content and the configuration of the database, you might have to divide a site collection into multiple site collections to meet service-level agreements for backing up and restoring, throughput, or other requirements. It is beyond the scope of this article to provide prescriptive guidance about how to manage the size and performance of databases.
- Creating too many sites below a top-level site in a site collection might affect performance and usability. Limit the number of sites of any top-level site to a maximum of 2,000.
- If you plan to use content deployment to move content between an authoring site collection and a production site collection, the site collections must be either in separate Web applications, or they must use separate content databases within the same Web application. For information about content deployment, see [Content deployment overview \(SharePoint Server 2010\)](#).

## 8 Governance Policies

### 8.1 SharePoint On Premise vs. SharePoint On-Premise Policy Governance

#### Introduction

The SharePoint 2010 Governance Guidance for on-premise implementations provides a number of governance policies organized into the following areas (number of policies in parentheses):

- Information Governance Policies (19)
- Development, Deployment and Support Governance Policies (20)
- Security Policies (4)
- Operations Policies (8)
- Customer Governance Policies (to be added as required)

### 8.2 Governance Policy Considerations for SharePoint 2010 On Premise (by Category)

#### Information Governance Policies

Defining information-governance plans requires an understanding of the site topology, the purpose of each Offering (like intranet or extranet), and preferably a knowledge of future planned Offerings, such as My Sites. Information policies need to be defined for each site within the SharePoint deployment. A policy needs to be defined per topic area for each site Offering.

#### Storage Quotas

Name	Storage Quotas								
<b>Purpose</b>	Many organizations have many site collections deployed in a SharePoint On Premise 2010 farm. Additionally, the management of site collections is often delegated to department or business-unit administrators to reduce the overall burden on the IT staff. Without governance, site collections can grow in size and exceed disk space capacity or grow beyond the limits of architectural designs, which can slow performance								
<b>Defined By</b>	MOS, but further controlled downstream by system administrator								
<b>Service Spec (Version and Date)</b>	<p><b>Content Storage Allocation</b></p> <p>The default SharePoint On Premise content storage allocation for a customer is calculated by multiplying the number of Standard user licenses purchased by 250 megabytes (MB). This total is aggregated (or pooled) over the entire organization. The content storage allocation excludes any storage that is attributed to backups, Recycle Bins, or index size. For example, an organization of 5,000 standard users has 1,250,000 MB—1.25 terabytes (TB)—of content storage.</p> <p><b>Site Type Reference</b></p> <p>Microsoft SharePoint On Premise offers several different site types: Portal Site, Root Team Site, Team Sites, Extra Large (XL) Site Collections, My Sites, and Partner Sites. These site types are hosted by three to four different web applications depending upon whether Partner Sites are requested by a customer as part of the SharePoint On Premise service. Each of the web applications has a dedicated URL. Microsoft provisions these web applications for each SharePoint On Premise Dedicated customer. All new customers have the following three web applications by default: portal site, team site, and my site. It is important to understand the differences between the various site types, in order to understand the features and specifications of SharePoint On Premise 2010. Table 2 describes the different site types.</p> <p><b>Table 2. SharePoint On Premise Site Types</b></p> <table border="1" data-bbox="504 1939 1445 2018"> <thead> <tr> <th data-bbox="504 1939 719 1975">Site Type</th> <th data-bbox="722 1939 1166 1975">Description</th> <th data-bbox="1169 1939 1305 1975">Default Quota*</th> <th data-bbox="1308 1939 1445 1975">Max Quota</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Site Type	Description	Default Quota*	Max Quota				
Site Type	Description	Default Quota*	Max Quota						

Name	Storage Quotas				
	Portal Site*	The main root site collection for a company. For example: <a href="https://portal.contoso.com">https://portal.contoso.com</a> . Customers can optionally permit self-service site creation beneath this URL.	100 GB	200 GB	1
	Root Team Site	The secondary root site collection for a company, from which all other team sites are derived. For example: <a href="https://team.contoso.com">https://team.contoso.com</a> . Customers can optionally permit self-service site creation beneath this URL.	5 GB	5 GB	1
	Team Site	A collaboration site where many employees and team members can contribute. For example: <a href="https://team.contoso.com/sites/TeamA">https://team.contoso.com/sites/TeamA</a> .	2 GB	20 GB	Unlimited within purchased storage
	Extra Large (XL) Site Collection	A type of Team Site that can have more space allocated than the average Team Site. For example: <a href="https://team.contoso.com/sites/XLTeamB">https://team.contoso.com/sites/XLTeamB</a>	200 GB	200 GB	20
	My Site	A personal site for a single employee. For example: <a href="https://my.contoso.com/personal/alias">https://my.contoso.com/personal/alias</a> . These sites can also have subsites, and can contain social networking features.	100 MB	5 GB	Unlimited within purchased storage quota
	Partner Site (Optional)	A Team Site used for collaboration between employees and external users outside the company. This dedicated URL isolates partner collaboration away from the internal Team Site content. For example: <a href="https://partner.contoso.com/sites/TeamA">https://partner.contoso.com/sites/TeamA</a> . Like the Team Site web application, the Partner Site web application features self-service site creation and site collections of all sizes.	2 GB	20 GB Standard Size	Unlimited within existing storage quota
	<p>* All site collection owners receive a notification when they consume 90 percent of the storage quota. For example, the owner of a 2 GB site collection receives notification when the usage reaches 1.8 GB.</p> <p><b>Note:</b> For storage quota increases that have not reached the maximum quota limit, customers can submit a service request (SR) via the customer's help desk team. Service requests must be submitted on a site-by-site basis.</p> <p><b>File Upload Size</b> The maximum file size that a customer can upload to a SharePoint On Premise site is 250 MB. Although SharePoint On Premise can accept files of this size, the customer's ability to upload large files is dependent on the connectivity capabilities from the customer to the SharePoint On Premise service. Bandwidth and network latency may prevent uploading of very large</p>				

Name	Storage Quotas
	files.
<b>Policy</b>	
<b>Key Considerations</b>	<p>Quotas are often exceeded when:</p> <ul style="list-style-type: none"> <li>• People upload unnecessary data.</li> <li>• File sizes are significantly larger than predicted.</li> <li>• An archiving solution is not properly designed. (This is the most important of these considerations to anticipate.)</li> <li>• SharePoint may not be the best long-term approach for data that must be retained solely for governance or industry regulations. In these cases, it may make sense to archive the data outside of SharePoint On Premise 2010.</li> </ul>

### Site Structure

Name	Site Structure
<b>Purpose</b>	This is an information-architecture planning task but governance is required to enforce consistent usage of the sites over time
<b>Defined By</b>	Information Architect or Architect
<b>Service Spec (Version and Date)</b>	None
<b>Policy</b>	
<b>Key Considerations</b>	

### Self-Service Provisioning: Managed Self Requesting

Name	Self-Service Provisioning: Managed Self Requesting
<b>Purpose</b>	This is an information-architecture planning task but governance is required to enforce consistent usage of the site over time
<b>Defined By</b>	Architect, System Administrators
<b>Service Spec (Version and Date)</b>	Refer to Dealer Connect and B2C for existing <COMPANY> policies and procedures.
<b>Policy</b>	<p>&lt;COMPANY&gt; will establish a site request form and associated work flow for both individual sites and site collections. The site request form will list all responsibilities of Site Owners. The Site Owner must agree to the formal responsibilities and complete all information necessary to provision the site. The request will be automatically routed to the appropriate individual for approval. After approval is received, the site or site collection will be automatically provisioned. The site owner will then build the site according to &lt;COMPANY&gt; governance policies and guidelines. The following steps are recommended for building Site Collections (Portals):</p> <p>Portal approach</p> <ul style="list-style-type: none"> <li>• Assess Content Types in top level and all intermediate sites; leverage these types with child sites</li> <li>• Analyze existing site or database in the case of Lotus Notes migration</li> <li>• Build new site structure including lists, document libraries, web parts, pages and navigation</li> <li>• Design content types</li> <li>• Populate site with initial content to make site usable; if migration this will be</li> </ul>

Name	Self-Service Provisioning: Managed Self Requesting
	<p>significant content</p> <ul style="list-style-type: none"> <li>• Present site for approval</li> </ul> <p>The site owner will be required to obtain final approval before the site becomes live.</p>
<b>Key Considerations</b>	<p>Request form must include:</p> <ul style="list-style-type: none"> <li>• Site Name</li> <li>• Parent Site Collection</li> <li>• URL</li> <li>• Description</li> <li>• Business Owner - Accountable person for content and use</li> <li>• Site Admin - for technical assistance</li> </ul> <p>Optional data may include other data such as Brand and Geography.</p>

### Permissions Management

Name	Permissions Management
<b>Purpose</b>	This is an information-architecture planning task but governance is required to enforce consistent usage of the site over time
<b>Defined By</b>	System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	None
<b>Policy</b>	
<b>Key Considerations</b>	It's important to call out who is responsible for permissions and permission management. Example: The project site owner is solely responsible for the site and its permission management.

### Branding and Templates

Name	Branding
<b>Purpose</b>	A formal set of branding policies helps ensure that sites consistently use enterprise imagery, fonts, themes, and other design elements. For example, in SharePoint Server 2010, you can import a Microsoft PowerPoint 2010 theme directly into a SharePoint site, which automatically applies the theme to all subsites.
<b>Defined By</b>	Strategy Team, Architect, User Experience Manager, System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p>&lt;COMPANY&gt;'s objective is to have a consistent look and feel across all site collections and individual sites. The following characteristics are recommended:</p> <ul style="list-style-type: none"> <li>• Consistent use of corporate approved &lt;COMPANY&gt; logo and colors</li> <li>• Ease of navigation</li> <li>• Enable site users to get to any information or other sites with no more than three clicks from the initial landing page</li> <li>• SharePoint themes and style sheets will not be allowed on initial release date of November 16, 2010. This policy may later be changed by the Governance Board.</li> </ul>
<b>Key Considerations</b>	Different types of workloads require different site templates. For example, Internet presence and many enterprise-portal implementations require the publishing templates that come with SharePoint On Premise 2010. It is important to understand the underlying dependencies of template features and corresponding SharePoint On Premise 2010 workloads.

## Customization Policy

Name	Customization
<b>Purpose</b>	<p>SharePoint Server 2010 includes customizable features and capabilities that span multiple product areas, such as business intelligence, forms, workflow, and content management. Customization introduces risks to the stability, maintenance, and security of the SharePoint Server 2010 environment. To support customization while controlling its scope, you should develop a customization policy that addresses the following considerations:</p> <ul style="list-style-type: none"> <li>• Approved customization tools. For example, you should decide whether to allow the use of Microsoft SharePoint Designer 2010 and specify which site elements can be customized, and by whom.</li> <li>• Ways to manage source code, such as a source control system, and standards for documenting the code.</li> <li>• Development standards, such as coding best practices.</li> <li>• Testing and verification standards.</li> <li>• Required packaging and installation methods. You should control the use of sandboxing, which enables site owners to host custom solutions in a partially trusted context so they do not affect the rest of your SharePoint implementation.</li> <li>• The kinds of customizations supported. For example, you might want to allow the use of Web parts to integrate Microsoft Silverlight 3 applications together with SharePoint sites.</li> </ul> <p>For more information about processes for managing customizations, see the white paper <a href="http://go.microsoft.com/fwlink/?linkid=92311">SharePoint Products and Technologies customization policy</a> (<a href="http://go.microsoft.com/fwlink/?linkid=92311">http://go.microsoft.com/fwlink/?linkid=92311</a>).</p>
<b>Defined By</b>	<p>MSO + Architects, Development Manager, Test Manager, User Experience Manager, System Administrators, Security Resource</p>
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p>To gain additional value from SharePoint On Premise Dedicated, customers can deploy customized solutions that extend SharePoint functionality, for example, linking line-of-business applications to the SharePoint On Premise service. A fixed number of custom solution deployments are included as part of the SharePoint On Premise Dedicated service.</p> <p>Important: Microsoft does not offer a hosted development or testing environment. Consequently, all development and testing must take place in either a customer-hosted or partner-hosted environment.</p> <p>The process for deploying a custom solution or third-party application is as follows:</p> <ol style="list-style-type: none"> <li>1. The customer submits a High Level Design (HLD) document that describes the details of the proposed custom solution or third-party application to Microsoft.</li> <li>2. Microsoft reviews the HLD document.</li> <li>3. After validation and Microsoft acceptance of the HLD document, the customer develops and tests a solution in its own environment on its own servers. The customer is completely responsible for validation and testing.</li> <li>4. As a part of the development process, the customer should validate the solution using the Code Analysis Framework tool (CAF) that is provided by</li> </ol>

Name	Customization
	<p>Microsoft Online. The tool validates the solution against security flaws and ensures that it is built using the known best practices.</p> <p>5. If the solution validates correctly, the customer submits it to Microsoft.</p> <p>6. After a review by the SharePoint On Premise Customization team, the customization team schedules the solution for production deployment according to the change calendar published for the year.</p> <p>7. Before production deployment, the solution package is deployed to the hosted SharePoint On Premise preproduction environment (PPE) for customer validation.</p> <p>Notes:</p> <ul style="list-style-type: none"> <li>SharePoint On Premise hosts a PPE for customers to validate customizations prior to production deployment. However, the PPE is not a substitute for a customer or partner-hosted test environment.</li> <li>E-mail is not enabled by design on PPE to prevent inadvertent spamming to security groups and individuals during testing.</li> </ul> <p>8. After the customer validates the solution in the PPE, it is deployed to the production environment.</p> <p>Note: All deployments to production must adhere to certain change windows that are published in the change calendar. Deployment may be delayed to the next change window if requirements are not met in enough time.</p> <p>For more information and guidance about how customers can deploy custom solutions on the SharePoint On Premise Dedicated platform, see "Microsoft SharePoint On Premise Dedicated Custom Solution Support," which is available on premise from the Microsoft Download Center.</p>
<b>Key Considerations</b>	<p>Use of sandbox solutions.</p> <p>Prefer composite solutions over custom solutions.</p>

### Site Templates (and supported site types)

Name	Site Templates
<b>Purpose</b>	<p>Site templates are a set of customizations that are applied to a site definition. By using a site template, a SharePoint Server service can promote consistent branding, site structure, and layout in the sites that users create. You can create customized site templates for provisioning sites and use them instead of the templates that are included in SharePoint Server as part of a SharePoint Server service.</p> <p>For more information, see <a href="http://go.microsoft.com/fwlink/?LinkID=184756">Working with site templates and definitions (http://go.microsoft.com/fwlink/?LinkID=184756)</a>.</p>
<b>Defined By</b>	MSO + Customer Architects, User Experience Manager, System Administrators can customize
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p><b>Supported Site Types</b></p> <p>Customer should specify which of the available site types should be deployed (listed in the Services Description)</p>

Name	Site Templates												
	<table border="1"> <thead> <tr> <th data-bbox="600 241 842 280">Site Type</th> <th data-bbox="842 241 1449 280">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="600 280 842 360">Portal Site</td> <td data-bbox="842 280 1449 360">The main root site collection for a company from which all other team sites are derived. For example: <a href="https://company_name">https://company_name</a></td> </tr> <tr> <td data-bbox="600 360 842 472">Team Sites</td> <td data-bbox="842 360 1449 472">A collaboration site where many employees and team members can contribute. For example: <a href="https://company_name/sites/TeamA">https://company_name/sites/TeamA</a>. These can have sub-sites as well.</td> </tr> <tr> <td data-bbox="600 472 842 533">Partner Site</td> <td data-bbox="842 472 1449 533">A team site used for collaboration between employees and external users outside the company.</td> </tr> <tr> <td data-bbox="600 533 842 629">My Site</td> <td data-bbox="842 533 1449 629">A personal SharePoint site for a single employee. For example: <a href="https://MySiteName/personal/alias">https://MySiteName/personal/alias</a>. These sites can also have sub-sites as well.</td> </tr> <tr> <td data-bbox="600 629 842 775">Site Collection</td> <td data-bbox="842 629 1449 775">A group of sites that all exist under a top-level site. The sites share common administration pages and site settings. A team site can be a site collection sub-site beneath it. For example: <a href="https://company_name/sites/TeamA/Calendar">https://company_name/sites/TeamA/Calendar</a> would be a part of the Team site collection above it.</td> </tr> </tbody> </table>	Site Type	Description	Portal Site	The main root site collection for a company from which all other team sites are derived. For example: <a href="https://company_name">https://company_name</a>	Team Sites	A collaboration site where many employees and team members can contribute. For example: <a href="https://company_name/sites/TeamA">https://company_name/sites/TeamA</a> . These can have sub-sites as well.	Partner Site	A team site used for collaboration between employees and external users outside the company.	My Site	A personal SharePoint site for a single employee. For example: <a href="https://MySiteName/personal/alias">https://MySiteName/personal/alias</a> . These sites can also have sub-sites as well.	Site Collection	A group of sites that all exist under a top-level site. The sites share common administration pages and site settings. A team site can be a site collection sub-site beneath it. For example: <a href="https://company_name/sites/TeamA/Calendar">https://company_name/sites/TeamA/Calendar</a> would be a part of the Team site collection above it.
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	<p><b>Site Hosting Applications</b></p> <p>Microsoft provisions Web applications for each SharePoint On Premise Dedicated customer, each with a dedicated URL. The Web applications host the following sites:</p> <ul style="list-style-type: none"> <li>• SharePoint On Premise My Sites</li> <li>• SharePoint On Premise Portal Site and Team Sites (collaboration sites)</li> <li>• Partner sites (team sites) for employees and partner users outside the customer organization (optional)</li> </ul> <p>SharePoint On Premise does not permit sites that are not secured with SSL.</p> <p>Internet access can be enabled at the customer's request. Microsoft uses wild-card SSL certificates, so the URLs for the My Site and portal/team site must be similar (for example, <a href="https://teams.contoso.com">https://teams.contoso.com</a>, and <a href="https://my.contoso.com">https://my.contoso.com</a>).</p> <p>Note: Domains with more than three levels (for example, <a href="https://home.sharepoint.contoso.com">https://home.sharepoint.contoso.com</a>) are not allowed due to the wild-card SSL certificates.</p> <p><b>The Services Description document should define which site types and web applications are required for the desired offering</b></p> <p><b>Site Admin Templates</b></p> <p>Site collection administrators can make use of site admin templates to customize a SharePoint On Premise site. From Appendix A of the Services Description doc: .</p> <p>The "fabulous 40" Windows SharePoint Services application templates consist of 20 site admin templates and 20 server admin templates. The server admin templates are not supported in the SharePoint On Premise Dedicated environment.</p> <p>The following site admin templates can be deployed in the SharePoint On Premise environment:</p> <ul style="list-style-type: none"> <li>• Board of Directors</li> <li>• Business Performance Reporting</li> <li>• Case Management for Government Agencies</li> <li>• Classroom Management</li> </ul>												

Name	Site Templates
	<ul style="list-style-type: none"> <li>• Clinical Trial Initiation and Management</li> <li>• Competitive Analysis Site</li> <li>• Discussion Database</li> <li>• Disputed Invoice Management</li> <li>• Employee Activities Site</li> <li>• Employee Self-Service Benefits</li> <li>• Equity Research</li> <li>• Integrated Marketing Campaign Tracking</li> <li>• Manufacturing Process Management</li> <li>• New Store Opening</li> <li>• Product and Marketing Requirements Planning</li> <li>• Request for Proposal</li> <li>• Sports League</li> <li>• Team Work Site</li> <li>• Timecard Management</li> </ul>
<b>Key Considerations</b>	Different types of workloads require different site templates. For example, Internet presence and many enterprise-portal implementations require the publishing templates that come with SharePoint On Premise 2010 . It is important to understand the underlying dependencies of template features and corresponding SharePoint On Premise 2010 workloads.

## Workflows

Name	Workflows
<b>Purpose</b>	Workflows are programs that implement business processes for users of a SharePoint Server site. They are associated with items in the site, such as documents, forms, or list items. Workflows have many applications as part of an IT service. For example, you can use a workflow to provision a new site, track a support issue, or take action when a site collection's quota is exceeded. For more information, see <a href="#">Plan workflows (SharePoint Server 2010)</a> .
<b>Defined By</b>	Architects, Development Manager, System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	SharePoint On Premise 2010 supports out-of-the-box workflows as well as custom workflows with Microsoft SharePoint Designer 2010, Microsoft Visual Studio® 2010, and Windows® Workflow Foundation. The types of workflow implementations that are supported across groups should be stipulated in the governance plan. Note: Although developing workflows with Windows Workflow Foundation creates more advanced and powerful workflows, it often involves a steep learning curve and can be an expensive investment in terms of the time needed to build, test, and deploy such workflows.

## Sandboxing

Name	Sandboxing
<b>Purpose</b>	A <i>sandbox</i> is a restricted execution environment that enables programs to access only certain resources, and that keeps problems that occur in the sandbox from affecting the rest of the server environment. Solutions that you deploy in a sandbox

Name	Sandboxing
	<p>are called <i>sandboxed solutions</i>. Code Access Security (CAS) limits the operations that these solutions can perform.</p> <p>A member of the Farm Administrators group must implement the sandboxed environment before any sandboxed solutions can be uploaded. Site collection administrators can upload and activate sandboxed solutions. If the solution does not contain an assembly, a user who has full control at the root of the site collection can also activate the solution.</p> <p>You can increase isolation by using remote load balancing and by running the sandboxing service on only specific servers. In a production environment, we recommend that you use remote load balancing and dedicate a separate server to running sandboxed solutions. Only members of the Farm Administrators group can block sandboxed solutions, configure load balancing, and reset exceeded quotas. For more information, see <a href="#">Plan sandboxed solutions (SharePoint Server 2010)</a>.</p>
<b>Defined By</b>	Strategy team, Architects, Development Manager, Test Manager, System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p><b>Limitations</b> Sandboxed solutions cannot use certain computer and network resources and cannot access content outside the site collection they are deployed inside. If you need to access to content external to the site collection, you need to use a full-trust proxy or use Microsoft Business Connectivity Services to perform the content access on behalf of the sandboxed solution.</p> <p><b>Training</b> Sandboxed solutions delegates (or offloads) the support challenges to others within the organization. Depending on the type of solution, site-collection administrators or users who have been granted full-control permissions at the root of the site collection can deploy the solution. While this may remove a burden from operations and provide convenience to site-collection users, it also presents a new layer of delegation for SharePoint, which has historically been challenging for many organizations to absorb. Users who deploy sandboxed solutions will undoubtedly need to help troubleshoot issues with sandboxed deployments. Site-collection users with deployment permissions need to be educated (or at least cautioned) about what types of solutions are appropriate for deployment.</p> <p><b>Support</b> Sandboxed solutions will require the same support and troubleshooting attention as farm-deployed solutions. The question to consider before deploying a sandboxed solution is to determine who will be responsible for supporting issues that are caused by sandboxed solutions.</p> <p><b>Performance</b> Architecting the sandboxed solution environment for throttling, load balancing, and a dedicated server are important considerations. However, it is also important to understand the culture within the organization. It is hard to architect a proper environment if you do not have a solid grasp of the numbers and types of solutions that will be deployed over time. Throttling and load balancing are great mechanisms but are not “cure all” configurations. A sandboxed environment can be overloaded quite easily if controls are not put in place from an organizational perspective to limit</p>

<b>Name</b>	<b>Sandboxing</b>
	and control the types of solutions that are deployed.

### Records Management

<b>Name</b>	<b>Records Management</b>
<b>Purpose</b>	<p>Records management is the process by which an organization determines the types of information that should be considered records, how records should be managed while they are active, and for how long each type of record should be retained. Records management includes the performance of records-related tasks such as disposing of expired records, or locating and protecting records that are related to external events such as lawsuits.</p> <p>Records management enables you to do the following:</p> <ul style="list-style-type: none"><li>• Use a records archive to manage records or manage records in-place.</li><li>• Create workflows to move documents to a records archive.</li><li>• Determine whether you will manage e-mail within SharePoint Server or within an e-mail application.</li><li>• Determine how to translate social content such as blogs, wikis, or My Site Web sites into records.</li></ul> <p>For more information, see <a href="#">Records management planning (SharePoint Server 2010)</a>.</p>
<b>Defined By</b>	Strategy team, Architects, System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	

## Managed Metadata

Name	Managed Metadata
<p><b>Purpose</b></p>	<p><i>Managed metadata</i> is a hierarchical collection of centrally managed terms that you can define and then use as attributes for items in Microsoft SharePoint Server 2010. A user's role determines how the user can work with managed metadata.</p> <p>Users can see only global term sets and term sets that are local to the user's site collection. <i>Local</i> term sets are created within the context of a site collection. <i>Global</i> term sets are created outside the context of a site collection. If there are term sets that some users should be unable to view, assign these term sets to separate groups. For more information, see <a href="#">Plan to share terminology and content types (SharePoint Server 2010)</a>.</p> <p>An organization's governance policies can affect how you design managed metadata services and connections. For example, a formal process for managing terms and term sets will affect how you set connection parameters. If every document that is created must have a certain set of attributes, you will probably want to have a content type hub in at least one service. Familiarize yourself with an organization's governance plan before you determine the managed metadata services and connections. For more information, see <a href="#">Managed metadata service application overview (SharePoint Server 2010)</a>.</p>
<p><b>Defined By</b></p>	<p>Strategy team, Architects, System Administrators, Security Resource</p>
<p><b>Service Spec (Version and Date)</b></p>	
<p><b>Policy</b></p>	
<p><b>Key Considerations</b></p>	<p><b>Privacy</b>                      Privacy is a key boundary that helps define the need for additional managed metadata services. For example, if the legal department term store contains confidential information that no one outside the department should view, having a separate managed metadata service is a plausible scenario.</p> <p><b>Metadata Sharing</b>                      Understanding the sharing requirements (or possibilities) across the organization is a key consideration for architecture. Sharing, along with information architecture and privacy, helps define a holistic view for how data should be maintained, shared, or isolated in the organization.</p> <p><b>Performance</b>                      Term stores are stored in SQL Server databases. Understanding the size of the term stores is helpful for architecting the SQL Server deployment (like the location of database files across disks or separating databases across servers).</p> <p><b>Maintainability</b>                      In multimanaged metadata service deployments, you can specify where keywords and column-specific data are stored with the default keyword location and default column-specific term set location attributes. Capturing terms in the proper term sets</p>

Name	Managed Metadata
	<p>is important for completeness of your metadata.</p> <p><b>Extensibility</b> The managed metadata platform supports a flexible and extensible model. However, organic growth of terms over time is not always extensible by nature. Organic growth has the potential to produce a taxonomy that differs significantly from what was defined in the planning phase. Through organic growth, users will add data undefined by the taxonomy, which creates a "folksonomy."</p> <p>If the taxonomy for the metadata is not correctly defined during information-architecture planning, it can lead to structural problems in the term store. In these cases, a need for term store consolidation or restructuring can be very expensive after the fact.</p>

### External lists

Name	External Lists
<b>Purpose</b>	
<b>Defined By</b>	Architects, System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p><b>Security</b> There is a potential for external data to become editable in unintended ways. Limiting external list capabilities and managing permissions to the list are critical to maintain data integrity in the environment. Item-level permissions cannot be set on items in external lists.</p> <p><b>Performance</b> There are many ways that performance can quickly become a problem with external lists. For example, if a number of tables or views from a single database or a single SQL Server are exposed within SharePoint On Premise 2010 , the potential bandwidth exposure to the server has not been increased. If multiple users are viewing, filtering, and editing at the same time, the additional load may overload database servers that were never intended to support this additional entry point into the system.</p> <p><b>Data Modification</b> Forms that are derived from external data sources may not have the necessary business logic. In many cases, referential integrity is not enforced directly within the schema. These business rules are often enforced through stored procedures, Web services, or client applications. If the SharePoint On Premise 2010 external list form does not support the same business rules, data errors are likely to occur.</p> <p>Versioning cannot be configured on items in external lists. Item history is not available.</p>

Name	External Lists
	<p><b>Search</b> Should a search crawler be allowed to crawl external lists? Depending on the organization, this might be decided at the list, site, or organizational level.</p> <p><b>Workflows</b> Workflows cannot be configured on external lists.</p>

### Microsoft Business Connectivity Services (BCS)

Name	Microsoft Business Connectivity Services
<b>Purpose</b>	
<b>Defined By</b>	Architects, System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p>With new flexibility and capabilities, more governance is necessary to guide how the BCS feature is implemented.</p> <p><b>Farm Architecture</b> Is BCS used within a single farm or across multiple farms?</p> <p><b>Line-of-Business (LOB) Integration</b> BCS is a powerful capability that supports bringing external data into SharePoint On Premise 2010 in a structured manner. From an architectural perspective, governance should help guide how external data is leveraged in SharePoint On Premise 2010 . With the new cross-farm sharing model, BCS connections should be defined and operated with the enterprise in mind instead of individual applications.</p> <p><b>External Content Types</b> Are external content types deployed to production using SharePoint Designer 2010 or Windows SharePoint Services Solution Package (.wsp) files?</p> <p><b>Permissions</b> What types of permissions do you give SharePoint Designer 2010 users in production?</p>

### Language Support

Name	Language Support
<b>Purpose</b>	
<b>Defined By</b>	Architects, System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p>Multilanguage sites require extensive planning well beyond the implementations of multilingual and variations capabilities. You need to consider the impacts across all functional and nonfunctional requirements to make sure that the solutions function properly.</p> <p>This affects things like end-user experiences, IT support, publishing of variations content, viewing the SharePoint chrome using multilingual capabilities, and performance of the Content Deployment feature.</p>

## Publishing

Name	Publishing
Purpose	
Defined By	MOS, but further controlled downstream by system administrator
Service Spec (Version and Date)	
Policy	
Key Considerations	

## Development Environment

Name	Development Environment
Purpose	
Defined By	Strategy Team, Architects, System Administrators, User Experience Manager, Development Manager, Test Manager
Service Spec (Version and Date)	
Policy	
Key Considerations	<ul style="list-style-type: none"> <li>•</li> </ul>

## Design Goals

Name	Design Goals
Purpose	
Defined By	MOS, but further controlled downstream by system administrator
Service Spec (Version and Date)	
Policy	
Key Considerations	

## Development Process

Name	Development Process
Purpose	
Defined By	MOS, but further controlled downstream by system administrator
Service Spec (Version and Date)	
Policy	
Key Considerations	<p>Development processes and guidelines should be defined for any development group. SharePoint projects are no different. Microsoft published a document called <a href="#">Team-Based Development in Microsoft Office SharePoint Server 2007</a>. While this is a good starting place, many additional details of team-based development for SharePoint for customer use must be decided.</p> <p>You must develop guidelines for the following aspects to define all the required development processes.</p> <ul style="list-style-type: none"> <li>• <b>Application management</b> – How are the files implementing an application organized and managed?</li> </ul>

Name	Development Process
	<ul style="list-style-type: none"> <li>• <b>Source control</b> – How can the application files be managed in source control?</li> <li>• <b>Build process</b> – What procedures are used to build the system on the integration server?</li> <li>• <b>Deployment Process</b> – What processes are used to deploy the system to the integration server and then towards the production environment?</li> </ul> <p><b>Developer synchronization</b> – How can developers be sure they are using the correct version of all application files?</p>

### Versioning and Source Control

Name	Versioning and Source Control
<b>Purpose</b>	
<b>Defined By</b>	MOS, but further controlled downstream by system administrator
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	

### Deployment Method

Name	Deployment Method
<b>Purpose</b>	
<b>Defined By</b>	Architect, Development Manager, System Administrator
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	An additional consideration is whether to support bin or GAC deployments. The deployment approach chosen has impact on security, need for resetting IIS during development to unload the binaries, and debugging.

### Web Parts Support

Name	Web Parts Support
<b>Purpose</b>	
<b>Defined By</b>	MSO + Architects, Development Manager, Test Manager, System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	SharePoint On Premise Dedicated customers can take advantage of Web Parts in Office SharePoint Server 2007 to add functionality to sites. For a list of the Web Parts that are supported, see Appendix B of SharePoint On Premise Dedicated Service Description document.

### Features

Name	SharePoint Features
<b>Purpose</b>	
<b>Defined By</b>	Architects, Development Manager, Test Manager, System Administrators, Security Resource
<b>Service Spec (Version and Date)</b>	

<b>Name</b>	<b>SharePoint Features</b>
<b>Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p>Considerations include:</p> <ul style="list-style-type: none"> <li>• Should features be deployed to the entire farm or individually (for example, as sandboxed features)?</li> <li>• Who deploys features?</li> <li>• When are features deployed?</li> <li>• What application-specific information should be logged for monitoring and troubleshooting?</li> <li>• Who validates and approves the design of a new feature against business requirements before it is built?</li> <li>• Who reviews and approves the final feature for deployment?</li> </ul>

### Use of SharePoint Designer 2010

<b>Name</b>	<b>SharePoint Designer 2010</b>
<b>Purpose</b>	<p>You can manage how Microsoft SharePoint Designer 2010 is used in an organization at either the Web application level or the site collection level. You can control the following types of access to SharePoint Designer 2010:</p> <ul style="list-style-type: none"> <li>• Enable or disable SharePoint Designer 2010 use for an entire application or site collection. If you want to ensure that all designers and owners within a specific site collection can use SharePoint Designer 2010, enable this setting at the site collection level.</li> <li>• Enable or disable the ability to detach pages from the site definition. If you want to preserve the branding for all sites in a site collection, you should not allow users to make changes that would result in detaching the page from the site definition.</li> <li>• Enable or disable master pages and page layouts in SharePoint Designer 2010. If you do not want users to see the master pages and page layouts for a site, you should disable this setting.</li> <li>• Enable or disable the site URL structure and its contents. If you do not want users to view and edit any file on the site, you should disable this setting.</li> </ul>
<b>Defined By</b>	MOS, but further controlled downstream by system administrator
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p>Using SharePoint Designer 2010 to customize pages without prior approval should be prohibited.</p> <p>The use of SharePoint Designer 2010 to augment development is a great way to speed up the development process. However, it might prove more practical to limit all final feature packaging to .wsp files. This means all SharePoint Designer 2010 changes are migrated to Visual Studio 2010 and implemented that way.</p> <p>The use of SharePoint Designer 2010 in a production environment should be discouraged in most cases. All changes should go through a complete development and testing process before going to production.</p> <p>A finite list of appropriate SharePoint Designer 2010 actions should be defined for the production environment.</p>

### Use of SharePoint Client Technologies Like Silverlight

Name	SharePoint Client Technologies
Purpose	
Defined By	MOS, but further controlled downstream by system administrator
Service Spec (Version and Date)	
Policy	
Key Considerations	

### Feature Cleanup

Name	Feature Cleanup
Purpose	Feature deactivation does not always support removing all artifacts because of other dependencies. Policy needs to be defined as to how the dependency removal should be handled.
Defined By	Architect, Development Manager, System Administrators
Service Spec (Version and Date)	
Policy	
Key Considerations	You can you Feature Receivers to fully remove objects. However, for complicated features that may be used throughout the farm, full removal can cause failures in pages that use the component. Another consideration is what to do with processed data. For example, in a scenario where you remove a custom workflow solution, decisions need to be made if you want to delete the document library that contains all of the processed workflow items or in-process workflow items.

### SharePoint Farm Environments

Name	SharePoint Farm Environments
Purpose	
Defined By	Strategy team, Architect, Development Manager, Test Manager, System Administrators
Service Spec (Version and Date)	
Policy	
Key Considerations	It is often more difficult for smaller customers to build and maintain these farms and support the full testing and deployment process. In those situations, it is common to experience deployment and production bugs that you normally would not encounter. Additionally, it is possible that the developers will need to debug issues directly in production if they do not have proper development farms to replicate issues found in a production environment.

### Support

Name	Support
Purpose	
Defined By	Strategy team, Support Lead, System Administrators, Development Manager, Test Manager
Service Spec (Version and Date)	
Policy	

Name	Support
<b>Key Considerations</b>	The support policy varies based on the type of solution and also the service-level agreement (SLA). The support policy needs to account for the multiple tiers of support that needs to be provided.

### Logging

Name	Logging
<b>Purpose</b>	
<b>Defined By</b>	Information Architect or Architect
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p><b>Event Throttling</b> The Unified Logging Service (ULS) and event logging now have a richer category-based management. You can set specific subcategories to a unique level of logging while throttling other subcategories that belong to same root category. The event throttling settings should be specified for each environment. For example, the event throttling settings in development integration will likely be different than production.</p> <p><b>Log-File Retention</b> Retaining logs is important to troubleshooting and monitoring activity. In SharePoint Server 2007, the default log-file retention policy was to set log files to generate once every 30 minutes, with a total of 96 log files at any given time. The ULS has been improved by reducing log file size by at least 50 percent. This allows a completely new approach to setting the log-file retention policy. The default setting is 14 days. A new option exists to restrict trace logs to a fixed disk size. Event-log flood protection can also be enforced to prevent one event from flooding the event logs database.</p> <p><b>Logging Database</b> SharePoint On Premise 2010 supports logging to SQL Server as well in the WSS_Logging database. It is important to factor storage capacity for this database, where to store it, and how to back it up.</p>

### Security Policies - Authentication

Name	Security Policies
<b>Purpose</b>	
<b>Defined By</b>	MSO + System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p>SharePoint On Premise Dedicated requires a directory trust with the customer's Active Directory implementation. This directory trust enables users to have their credentials validated automatically with pass-through authentication. This means that when users are logged on to computers that are connected to their company domain, they are signed in to the SharePoint On Premise service and are not additionally prompted for their credentials. Some other considerations for the customer are as follows:</p> <ul style="list-style-type: none"> <li>• SharePoint On Premise permits authentication with up to five Active Directory forests per customer.</li> <li>• Every user must authenticate to the SharePoint On Premise service; the service does not permit anonymous access.</li> </ul>

Name	Security Policies
	<p><b>NTLM Support</b>                      The default authentication protocol is NT LAN Manager (NTLM) 2.0. NTLM is the simplest method of authentication, requiring only an external trust between the Microsoft Managed Active Directory Forest and the Customer Forest.</p> <p>Scenarios in which the SharePoint On Premise servers need to connect to a data source using the credentials of the person browsing the page do not work with NTLM.</p> <p><b>Single Sign-On Support</b>                      SharePoint On Premise Dedicated does not support any method of single sign-on (SSO) authentication in a situation where a user authenticates to the SharePoint Server and the server connects to another system on behalf of the user, impersonating that user.</p> <p><b>Kerberos Support</b>                      SharePoint On Premise Dedicated does not support Kerberos for constrained delegation or for authentication.</p>
<b>Key Considerations</b>	<p><i>Security Policies - Authorization</i></p> <p>SharePoint provides a comprehensive security model that supports defining security roles to delegate responsibilities throughout the organization. This approach is generally referred to as role-based authorization control. This approach has significant management benefits over managing access control per user. Security policies should be defined per environment (like production, staging, and test). These security policies are typically defined by the system administrators, and the management of policies other than those applying to System Administrator can be delegated. It is a recommended practice to define security policies to avoid jeopardizing the entire system by any one user.</p>

**Backup Administrator**

Name	Backup Administrator
<b>Purpose</b>	
<b>Defined By</b>	System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p>Backup Administrator should be added to the default local group called <i>Backup Operators</i>.</p> <p>Permissions should apply to:</p> <ul style="list-style-type: none"> <li>• The 14 hive</li> <li>• Event logs</li> <li>• IIS metabase</li> <li>• Web-configuration files</li> </ul>

**SharePoint Farm Administrator**

Name	SharePoint Farm Administrator
<b>Purpose</b>	
<b>Defined By</b>	System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	

<b>Name</b>	<b>SharePoint Farm Administrator</b>
<b>Key Considerations</b>	The farm administrator will be added in the default SharePoint Group called <i>Farm Administrators</i> .

**System Administrator**

<b>Name</b>	<b>System Administrator</b>
<b>Purpose</b>	
<b>Defined By</b>	System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p>This is typically implemented by:</p> <ul style="list-style-type: none"><li>• Creating an AD group (for example, Enterprise Site-Collection Administrators).</li><li>• Add the users you want to that group.</li><li>• Apply to Policy for Web Applications in Central Administration.</li></ul> <p><b>Other Security Policies</b></p> <p>Other security policies that you will typically need to define:</p> <ul style="list-style-type: none"><li>• Site owner.</li><li>• Contributor.</li><li>• Reader.</li></ul> <p><b>Note:</b> You may use out-of-the-box permissions levels (like contributor), or you may need to create custom permission levels with custom permission settings based on customer requirements.</p> <p>Other security policies typically included are:</p> <ul style="list-style-type: none"><li>• SQL Administrator.</li><li>• Active Directory Resources.</li><li>• Enterprise Security Administrator.</li></ul>

## Operations Governance Policies

### Enterprise Site Collection Administrators

Name	Enterprise Site Collection Administrators
Purpose	
Defined By	System Administrator
Service Spec (Version and Date)	
Policy	
Key Considerations	<p>Administrators will need to perform various tasks depending on their role.</p> <p><b>Example Tasks</b></p> <ul style="list-style-type: none"> <li>• Audit index logs to tune search and indexing.</li> <li>• Handle usage analysis and tuning.</li> <li>• Manage policy creation and enforcement.</li> <li>• Determine content-crawling content sources and schedules.</li> <li>• Identify allowable types of content.</li> <li>• Enforce data-storage policies.</li> <li>• Create site templates.</li> <li>• Maintain site permissions.</li> </ul> <p><b>Documentation</b></p> <ul style="list-style-type: none"> <li>• Document the installation and configuration of the environment.</li> <li>• Document the application support team and escalation points of contact.</li> <li>• Create on premise documentation for training and support needs.</li> <li>• Document the IT Support Team Escalation points of contact.</li> </ul>

### Changing Passwords

Name	Changing Passwords
Purpose	
Defined By	System Administrator, Security Resource
Service Spec (Version and Date)	
Policy	
Key Considerations	<p>Changing service-account passwords will affect the following at a minimum:</p> <ul style="list-style-type: none"> <li>• SQL Server service account</li> <li>• Server farm account</li> <li>• Application pool accounts</li> <li>• Service application accounts</li> </ul> <p>Procedures need to be defined to specify how the password changes will be applied in AD, SQL Server, SharePoint, IIS, and so forth to minimize downtime.</p> <p>Managed Service Account capability in SharePoint On Premise 2010 addresses the concern for not needing to manage account passwords manually. This policy is needed in organizations that do not want to use the Managed Service Account capability because of other IT management policies.</p>

### Database Maintenance

Name	Database Maintenance
Purpose	
Defined By	System Administrators, SQL Database Administrators
Service Spec (Version and Date)	

<b>Name</b>	<b>Database Maintenance</b>
<b>Date)</b>	
<b>Policy</b>	
<b>Key Considerations</b>	<p>Establish server monitor and DBA tasks to for you SQL Environment.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• Limit content databases to 100 GB.</li> <li>• Limit memory usage to less than 70 percent.</li> <li>• Limit free disk space to more than 25 percent.</li> <li>• Limit CPU usage to less than 70 percent.</li> </ul>

### Monitoring and Cleaning Up Sites

<b>Name</b>	<b>Monitoring and Cleaning Up Sites</b>
<b>Purpose</b>	
<b>Defined By</b>	MSO, but configurable by Customer administrator
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p><b>Site Use Confirmation</b></p> <p>A SharePoint On Premise site collection may be created and actively used for a period of time, but then no longer needed. These unused site collections still affect the aggregate storage that is available to a customer. To mitigate this issue for team site collections, SharePoint On Premise customers can submit a change request to have notices automatically sent to site owners that require them to confirm that their site collections are in use and still active.</p> <p>Note: The use confirmation feature is enabled for team site collections only. It does not apply for My Sites.</p> <p>When the site use confirmation feature is enabled and a site is created, the site is added to an internal database and logged as an active site. After a specified time interval defined by the customer, the site owner is sent an e-mail notification asking the owner to either confirm that the site is active or delete the inactive site.</p>
<b>Key Considerations</b>	<p>Establish and communicate appropriate service-level agreements (SLAs) for content archival and content deletion. Consider that team sites often have limited life-spans that are determined by the projects they support. Use lifecycle management to remove and archive inactive sites regularly.</p>

### Enforcing Site and Content Size Limits

<b>Name</b>	<b>Enforcing Site and Content Size Limits</b>
<b>Purpose</b>	
<b>Defined By</b>	System Administrators, Business Owners
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p><i>Policy Definition</i></p> <p>See Quotas section above, Site Storage and File Upload Size sections.</p>
<b>Key Considerations</b>	<p>Establish guidelines for managing site collections, sites, lists, and documents according to business needs, including the following:</p> <p>Example only and not a recommendation:</p> <ul style="list-style-type: none"> <li>• 50,000 site collections per content database.</li> <li>• 500 MB per site collection (default quota maximum).</li> <li>• 50 MB file size limit (recommended) up to 2 GB (maximum).</li> </ul>

<b>Name</b>	<b>Enforcing Site and Content Size Limits</b>
	<ul style="list-style-type: none"> <li>• 2000 items per list view.</li> </ul>

**Backup Policies**

<b>Name</b>	<b>Backup Policies</b>
<b>Purpose</b>	
<b>Defined By</b>	MSO + Strategy Team, System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p><i>Policy Definition</i></p> <p><b>Data Backup and Restore</b> Data protection services are provided to prevent the loss of SharePoint On Premise data. Backup of Microsoft SQL Server® production databases is performed every 24 hours. Customers can recover libraries, lists, and documents, as described in the section above.</p> <p>To ensure that previous versions of libraries are available from the Recycle Bins, we recommend that versioning be enabled for critical data. We also recommend that customers limit the number of major and minor versions that are stored, to avoid reaching storage quota limits.</p> <p><b>Recovery of Deleted Sites and Content</b> Microsoft assists customers in recovery of deleted content, sites, and subsites that are not captured by the Recycle Bin. The following conditions apply to site restorations:</p> <ul style="list-style-type: none"> <li>• Customers must submit a service request within seven business days of the deletion.</li> <li>• Restoration can take up to seven business days to complete. However, if Microsoft receives the restore request on the same day as the deletion, restoration can typically occur more quickly.</li> </ul>
<b>Key Considerations</b>	

**Disaster Recovery**

<b>Name</b>	<b>Disaster Recovery</b>
<b>Purpose</b>	
<b>Defined By</b>	MSO + Strategy Team, System Administrators
<b>Service Spec (Version and Date)</b>	
<b>Policy</b>	<p><b>Service Continuity Management</b> SharePoint On Premise Dedicated is hosted in Microsoft-managed, enterprise-level data centers that are designed to deliver highly available, highly resilient On Premise Services. Because of this, the SharePoint On Premise service is available at 99.9-percent uptime and financially backed by an industry leading Service Level Agreement (SLA).</p> <p>However, service availability can be affected by hardware failures, natural disasters, and human error. To address this, SharePoint On Premise offers service continuity management, a process for managing risks to ensure that a company’s IT infrastructure is capable of providing continuing services if normal availability solutions fail. Service continuity management for</p>

Name	Disaster Recovery
	<p>SharePoint On Premise Dedicated includes provisions to quickly recover from such unexpected events.</p> <p>Two metrics that are commonly used in service continuity management to evaluate disaster recovery solutions are:</p> <ul style="list-style-type: none"><li>• Recovery point objective (RPO) reflects the acceptable amount of data loss at the conclusion of the data recovery process.</li><li>• Recovery time objective (RTO). The acceptable amount of time the service can be down before being brought back on premise.</li></ul> <p>SharePoint On Premise Dedicated has set an RPO and RTO in the event of a disaster:</p> <ul style="list-style-type: none"><li>• Eight-hour RPO: In the event of a failover to a secondary data center, SharePoint On Premise Dedicated will restore a copy of the customer's data that is equal to or less than eight hours old at the time of service disruption.</li><li>• 24-hour RTO: The customer will be able to resume service within 24 hours after service disruption if a disaster incapacitates the primary data center.</li></ul>
<b>Key Considerations</b>	Microsoft On Premise handles SCM.

## Training and Communication

A training plan needs to be developed to train different tiers of users (end users, support, administrative, development) of the system. This plan should include training workshops on premise and in person to use SharePoint On Premise 2010 according to the governance policies. The plan should cover the kinds of training required for specific user groups and describe appropriate training tools. The following table lists some considerations for developing a training plan.

Policies:

- All users of the system will require some form of training; two to four hours of computer based training are recommended.
- Business owners need education about the product, including capabilities.
- Site owners need advanced training, including office integration and security policies.
  - Site Collection Administrators – one week of in class training culminating in formal certification testing is recommended; annual updates to training of two to three days is also recommended
  - Site Administrators – three days of training is recommended
- End users need usage-overview training.
- Help-desk personnel require intense training and troubleshooting analysis. Tier two or tier three support should be considered for official, externally provided training.
- Training approach should begin by covering elementary tasks and progress to more difficult tasks, culminating in administrator level tasks and administrator “certification.”
- Training tools may include:
  - “How to” documentation (such as what exists today)
  - Instructor-led training hosted by the portal administrator or other competent individuals
  - On Premise labs hosted on a sandbox environment

Training will initially consist of on premise reference materials for both typical end users (addressing “how to” information) and system administrators (addressing more technical issues such as SharePoint Services deployment best practices). Refer to the official SharePoint Training Plan for a comprehensive overview of this training.

## Appendix A: IT Governance Glossary/Definitions

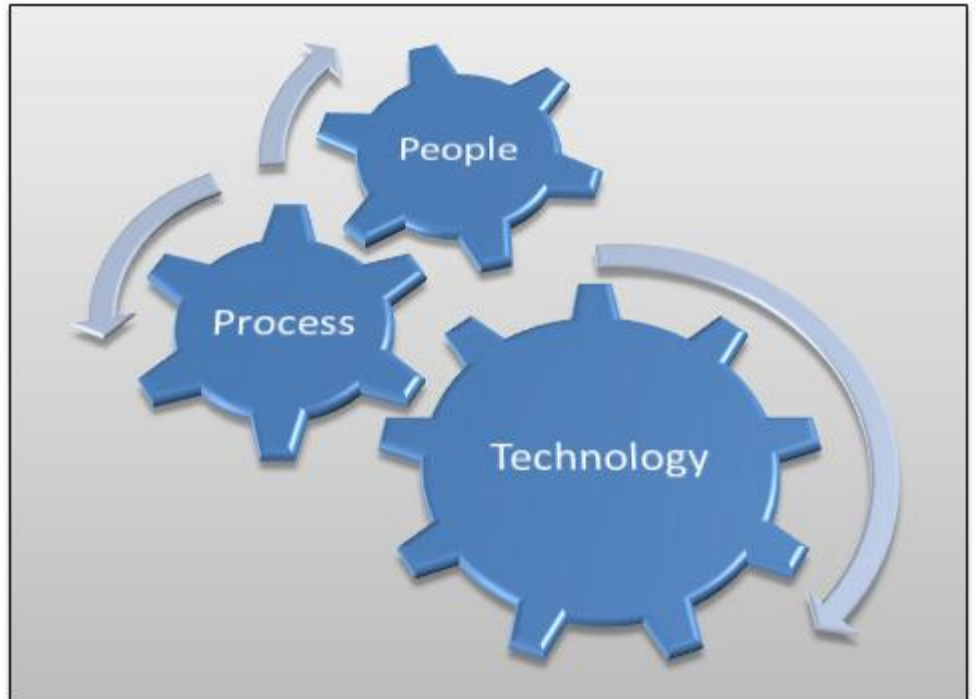
## Appendix B: SharePoint Terminology

## Appendix C: SharePoint On Premise Service Definition

## Appendix D: MCS guidance for establishing SharePoint as a Shared Service Offering

SharePoint has been designed specifically to enable being delivered as a shared service and has many service monitoring and service governance functions designed directly into the product itself. At its heart, SharePoint is a composite solution framework that allows end-users to compose solutions to their own business process problems.

To make this possible, SharePoint has a large number of capabilities that have been tested to a very high level, and are known to not pose a hazard to the overall SharePoint environment no matter how they might be configured. These capabilities, such as sites, lists, libraries, views and the out-of-the-box web parts, can be safely handed over to business users and employed by them without the further involvement of IT.



At the other end of the spectrum, SharePoint when used as an application platform is poised to host any number of “custom” SharePoint components. Each and every one of these components poses a risk to the shared SharePoint environment. Each of those components may have memory leaks which will gradually use up all the memory on each of the SharePoint servers until those servers are forced to restart – interrupting all users on the Shared environment. Or those components may consume an inordinate amount of memory and/or computing power such that all users on that server end up experiencing long wait times or session time-outs. And these components may not pose a problem except on days when the shared SharePoint environment is under a significant load.

It is therefore incumbent upon the SharePoint Service Group<sup>3</sup> to manage the use of SharePoint as an application platform such that components are completely tested and approved and determined to be free of risk to the shared SharePoint environment prior to their deployment.

In the middle of this spectrum with out-of-the-box components at one end, and custom components at the other, there are also “declarative” components such as InfoPath forms, SharePoint designer workflows, Business Connectivity Services applications, and Expression Blend Silverlight “xap” files.

<sup>3</sup> The name SharePoint Service Group is used generically throughout this document to refer to the organizational unit that governs, manages and administrates the SharePoint platform at <COMPANY>.

These components offer the business tremendous agility by allowing them to compose solutions at a whole different level of complexity, but they are also published directly to the shared SharePoint environment, they do not go through the same development lifecycle as custom components, and if used by users who do not understand the risks, then problems can occur – the most classic example of which is where a user who doesn't know any better modifies the global master page using SharePoint Designer, causing it to fail, which results in all users across the entire farm to receive "Page cannot be displayed" errors instead of the page they requested.<sup>4</sup>

It is therefore incumbent upon the SharePoint Service Group to establish governance around declarative tools to assure that they are placed into the hands of users who are knowledgeable and able to take responsibility for managing the risks.

These governance issues are commonly referred to by SharePoint service organizations as the dichotomies of Content vs. Code and Publishing vs. Deployment. At the one end we have content such as documents which users directly publish to SharePoint by the millions using various publishing mechanisms, at the other end we have code that is deployed to SharePoint via a deployment architecture that typically includes source control, and QA and UAT testing environments. Content is clearly the responsibility of the business and IT is only there to help the business make the best use of the SharePoint technologies. Code is clearly the responsibility of the development teams who must work within a quality assurance program governed by the SharePoint service group. Problems often occur in the middle, that grey area known as declarative solutions.

It is important to place as many of the declarative capabilities in the hands of the business since these capabilities will empower users to compose more powerful solutions, but the SharePoint Service group has to manage and govern the use of declarative tools and artifacts to prevent and mitigate the risk to the overall shared SharePoint service.

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<sup>4</sup> The editing of master pages can be limited to a specific set of users through Central Administration in SharePoint 2010 to effectively eliminate this issue.

## The IT Infrastructure Library v3 (ITIL v3)

To achieve a proactive maturity level and realize the greatest benefits to the <COMPANY> business, the SharePoint Service Group will need to adopt, live and breathe the best practices for Shared Service Design. These practices are well documented in the IT Infrastructure Library version 3 (ITILv3). This document uses the terminology, processes and functions of this framework throughout, and you can find links to the ITIL v3 documentation in the appendix along with a glossary of the most important terms.

The parts of the process that are explained in this document lie in the early Planning stages. The mind map for a complete Microsoft Operations Framework (which is based on ITIL v3) Business IT alignment phase can be found in Appendix B.

### Begin with a Service Orientation

When you first start to plan the delivery of a service it is necessary to clearly separate the concerns of the service customers from your concerns as the supplier of the service. The customer's goal is to transfer the cost and risk of the service to the service provider. They want to concentrate on their core job, what they do well, and have the service do the rest.

A service is a way of delivering value to customers by making it possible for customers to achieve what they want or need without having to manage the specific costs and risks associated with doing so.

When thinking about a service there are many good analogies to consider such as stores, restaurants and hotels. All of these provide a service that removes from the customer the need to manage the specific costs or risks associated with those services.

Consider the following diagram of the business process of a dry cleaning establishment. Many of those who use a dry cleaning service are not aware that the dry cleaner where they drop off their clothes does not actually clean those clothes. The cleaning is done by a washing factory that the dry cleaning shop contracts with. The dry cleaner also contracts with a transportation service that moves the garments back and forth between the factory and the dry cleaning shop according to a set schedule.



As a customer of the dry cleaning service, we don't have to think about all the connections that occur in the background. We pick up our clothes and pay the bill and the rest is the responsibility of the service.

This is exactly the model that a quality SharePoint Service group adopts in the design of the SharePoint service. The dry cleaner's customers are the equivalent of SharePoint's End Users, and the dry cleaner's staff and owners are the equivalent of what we call the Service Level managers. More importantly, the dry cleaner has the equivalent of a Service Level Agreement (SLA) with its customers who set the cost as shown in the diagram for next day and same day service for the cleaning of the shirt. The dry cleaner also has the equivalent of Operating Level Agreements (OLAs) with both the transportation service and the washing factory.

In considering this analogy, you will see that it is a wise dry cleaner who understands their OLAs before they sign an SLA with their customers. In other words, the best sequence for designing a service follows this path:

- Understand the customer's requirements
- Negotiate with your suppliers to make sure that you can deliver those requirements
- Iterate with the customer on requirements that you cannot satisfy until an agreement is reached
- Negotiate and finalize the OLAs with your suppliers
- And finally, negotiate and finalize your SLAs with your customers

A quality service is one that lives up to the expectations of the customer. The only way to deliver a quality service is to know what your customers want, and then to design and deliver it. You can't guess at what your customers want, and there aren't any shortcuts to building up the relationship

with your customers to find out what they want and need. Of course you as the supplier of the service are not going to be able to provide anything and everything that your customers ask for. For those items that the customer wants, but which you are unable to deliver, you need to have established communication channels so that they understand the issues and why their requirements are beyond the capabilities of the service.

## Definition of IT Services

Unlike the dry cleaning service, the services that are involved with IT have been formally defined in ITIL v3:

An IT service is defined as a set of capabilities (hardware/software/people/functions) that fulfills one or more needs of IT Customers. An IT service supports a business process and is perceived by the business as a coherent whole with recognized value.

ITIL v3 also goes on to define two different types of IT services: Technical services and IT services.

### Technical services

Technical services are internal to IT. These are a specific set of managed capabilities such as monitoring, technical support, networking or release management. There are two types of Technical Services.

- Infrastructure Services
- Application Services

The infrastructure for the SharePoint platform will be provided by a Technical Service group – SCS for the On-Premise environment, and Microsoft SharePoint On Premise for the BPOS SharePoint environment. All Technical Services are managed through Operating Level Agreements and the technical services provided by SCS and MSO must be managed through OLAs.

### IT Services

IT Services are services that are delivered to its customers and there are two types of these.

- Business Services – this is a bundle of Technical Services that enable the execution of a business process. This makes it possible for IT customers to achieve their business goals without having to manage the IT capabilities themselves.
- End-User Services – these services are bundles of technical services that are delivered to company employees across multiple organizations or business groups such as: messaging, collaboration, or remote connectivity.

The <COMPANY> SharePoint shared service has both of these types of customers. End users require SharePoint sites for ad hoc collaboration, meeting sites, and small shared solutions. <COMPANY> business units require solution sites for solving larger long term business problems.

IT Services are managed through Service Level Agreements, although the SLAs for End-Users are typically referred to as End User License Agreements or EULAs. An SLA is an agreement that is negotiated to provide a specific set of services, and the level at which those services will be provided.

When it comes to end user SharePoint services, it can be difficult to determine exact requirements for the SharePoint service since there isn't any one customer to negotiate and work with. Sometimes there is a solution delivery person who can stand in for the end user and represent their needs, and sometimes you simply have to workshop or survey a number of potential end users to estimate what the overall population of users will need.

One of the key things to understand is that the SharePoint application itself is not the service. The SharePoint Service group cannot just turn on SharePoint and then leave it up to the business to figure out how to use it. Instead the SharePoint service must plan and provide people and processes, providing the necessary governance, management and administration required to deliver SharePoint as a well-managed and governed service.

## Service Design and Service Level Management

The Service Design and the Service Level Management functions are a core part of the ITILv3. These two functions specifically provide a structured way for consumers and providers of IT services to meaningfully discuss and assess how well a service is being delivered.

The primary objective of service level management can be summarized as providing the mechanism for setting clear expectations with the customer and user groups about the service being delivered and then measuring performance against these requirements. Satisfied customers are a result of first setting clear expectations and then consistently meeting those expectations.

SharePoint Service Level Management is the process by which we:

- Manage the relationships with both the SharePoint service customers and the IT service providers
- Manage the service level expectations of your SharePoint customers
- Review service performance with SharePoint customers and prioritize their improvement

The key activities within the Service Level Management function include:

- Identifying and negotiating SharePoint service level requirements for service level agreements
- Ensure that SharePoint service level requirements can be met within financial budgets
- Setting accounting policies
- Monitoring and reviewing support services
- The creation and ongoing management of a SharePoint service catalog that includes the SharePoint service offerings

Service Design is the process of converting the customer's requirements into the services. It has to happen during the design phase to proactively address the service requirements. You first need to

collect the requirements, manage the cost and risk of those requirements, and then agree with the client on the final requirements that will be delivered.

Service Design and Service Level Management are two key processes that will help <COMPANY> manage SharePoint as a Service. These processes include roles, responsibilities, tools and management controls that are required to reliably deliver the desired outcome.

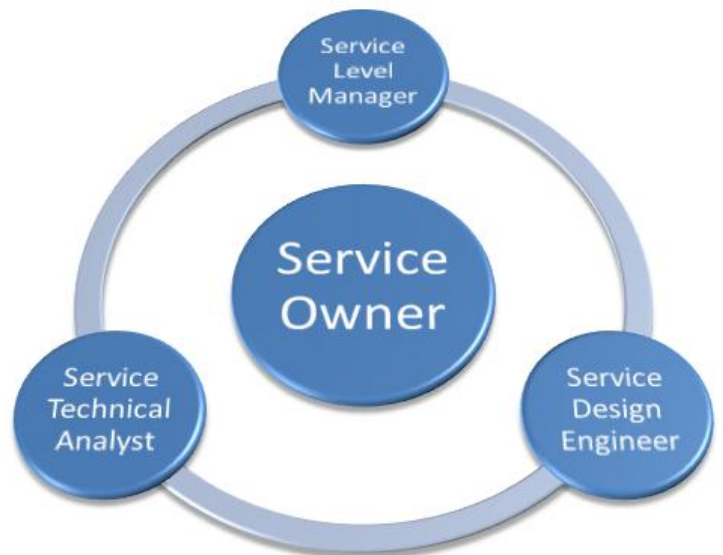
For a service to be truly dynamic the service provider has to get beyond the simpler issues of how available the SharePoint service is (the number of 9s that we have achieved) or how quickly a page loads for users in far off corners of the globe, and get down to actually satisfying the end users real needs – which is the optimization of their <COMPANY> business processes. When the service has been developed to the point where it proactively understands and addresses business needs before the business formally specifies those needs, then the service will have achieved a high level of maturity.

One point, early in the process, where SharePoint service groups sometimes go astray, is by treating the SharePoint application as if it were the service. SharePoint Service groups traveling down this path will either not write SLAs for their customers at all, or they will write SLAs before what their customers want and need from SharePoint or what their technical service providers can provide for SharePoint, is fully known. This is not recommended. SLAs should always be written based on OLAs that have been negotiated and verified to be supportable.

## The SharePoint Service Management Roles

There are four key Service Management Roles for delivering SharePoint as a Service that have to be assumed by one or more members of the SharePoint Services group.

- SharePoint Service Owner
- SharePoint Service Level Manager
- SharePoint Service Design Engineer
- SharePoint Service Technical Analyst



The SharePoint Service Owner is responsible for:

- Enabling the lifecycle of the SharePoint service
- Being the leader in regard to service enhancements, serious service issues, and conflicting or difficult service decisions
- Ensuring that resources are in place to perform Service Level Management, service improvements and Design activities
- Identifying and managing the SharePoint service requirements and service improvements

- Ensuring that the SharePoint service design satisfies the documented business requirements
- Analyzing and reviewing the performance of the underlying technical services against operating level agreements for those services

The SharePoint Service Level Manager is responsible for:

- Negotiating, agreeing and maintaining Service Level Agreements with the SharePoint service's customers
- Writing, negotiating, agreeing and maintaining OLAs with consuming internal IT teams that consume the SharePoint service as part of their own services
- Receiving and negotiating OLAs with the Internal Technical Service providers that support the SharePoint service

The SharePoint Service Design Engineer is responsible for:

- Ensuring that the SharePoint Service is designed to meet the customer's requirements
- Analyzing potential changes to existing SharePoint service definitions
- Evaluating what IT capabilities and infrastructure can be used, developed or acquired to help satisfy new SharePoint service requirements
- Designs and Creates:
  - SharePoint Service Specifications
  - SharePoint Service Designs
  - SharePoint Service plans
  - SharePoint Service architecture
  - SharePoint Service policies

The SharePoint Service Design Technical Analyst role is responsible for:

- Having domain knowledge of the SharePoint service business requirements and the ability to map them to SharePoint capabilities or custom solutions
- Reviewing the SharePoint technical service designs with the SharePoint Service Design Engineer and determining that they can satisfy the business requirements
- Acts as technical subject matter expert on all of the SharePoint service capabilities and components