



Innovative-e

Content Management in SharePoint 2010: Planning Information Architecture

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SharePoint Saturday

Washington, DC 12.05.09

www.SharePointSaturday.org

Agenda + Presentation Baselines




Baselines

- Every situation is different; there is no “One Best Practice”
- Information Architecture works best with an underlying theory of what you are trying to accomplish
- This presentation is about planning / strategy, not how to execute

Agenda

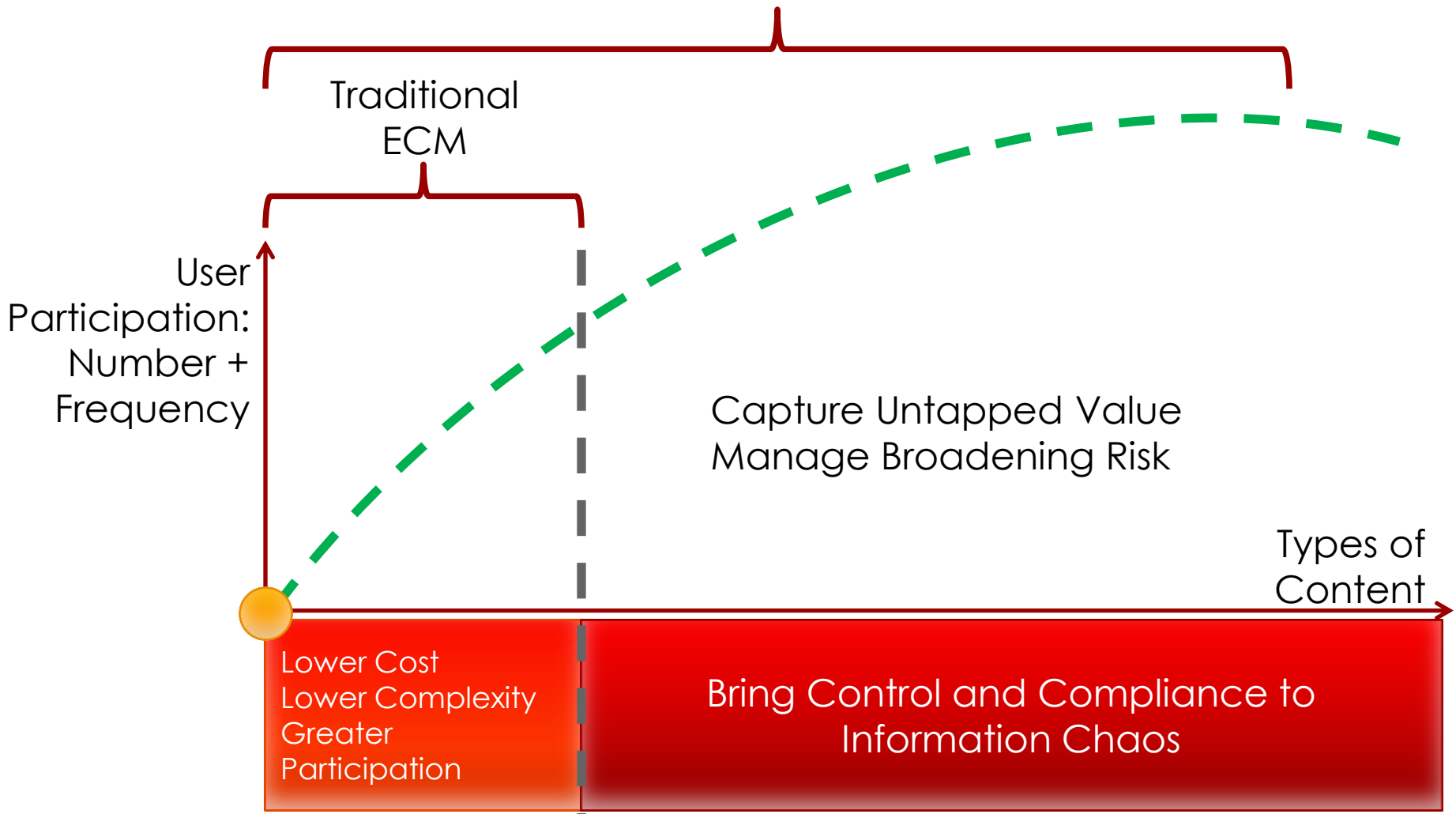
1. Define Information Architecture Goals + Working Theories
2. Overview of Information Architecture Tools in SharePoint 2010
3. Application of Information Architecture Tools to Theories
 - Methodology
 - Example



The Theory of Information Architecture in SharePoint 2010

ECM for the Masses

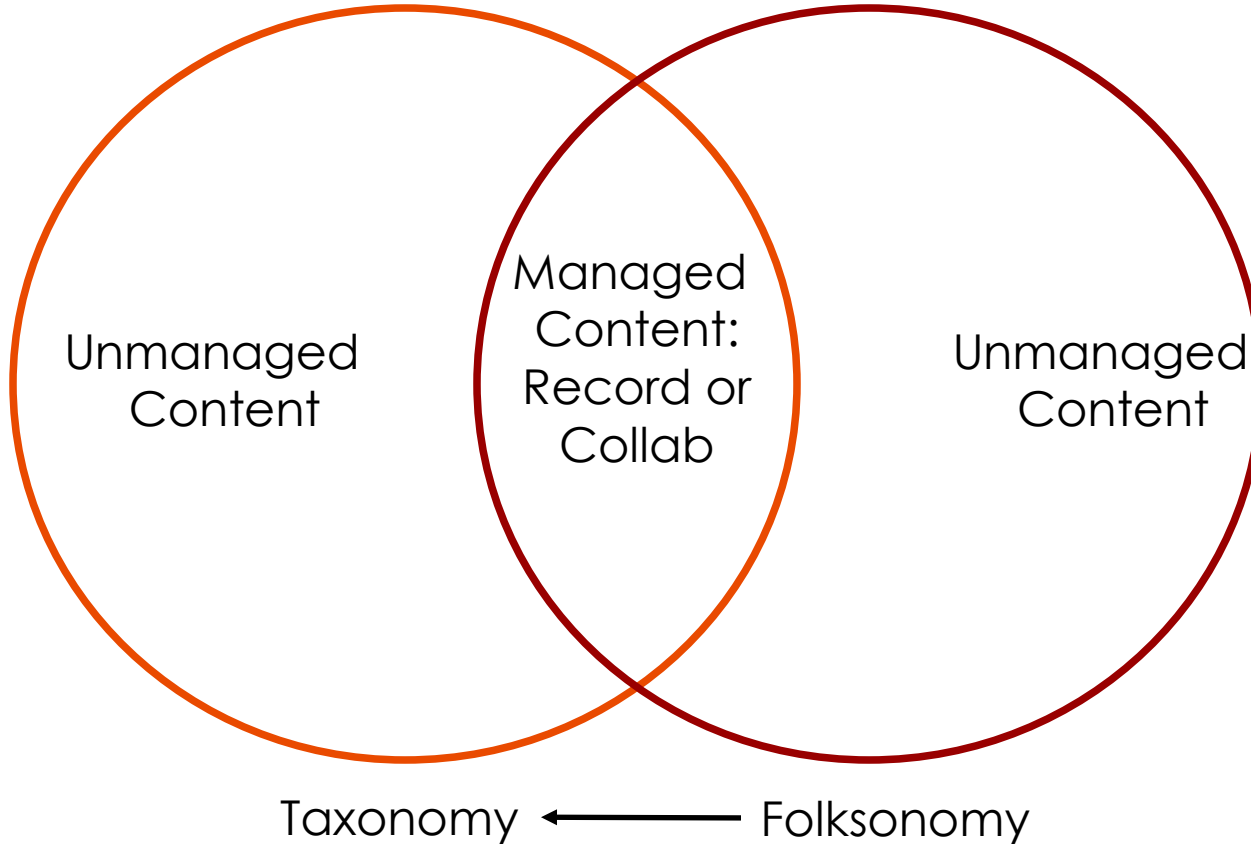
SharePoint and Office 2010



Why Managed Content

Traditional ECM Content

Breadth Content

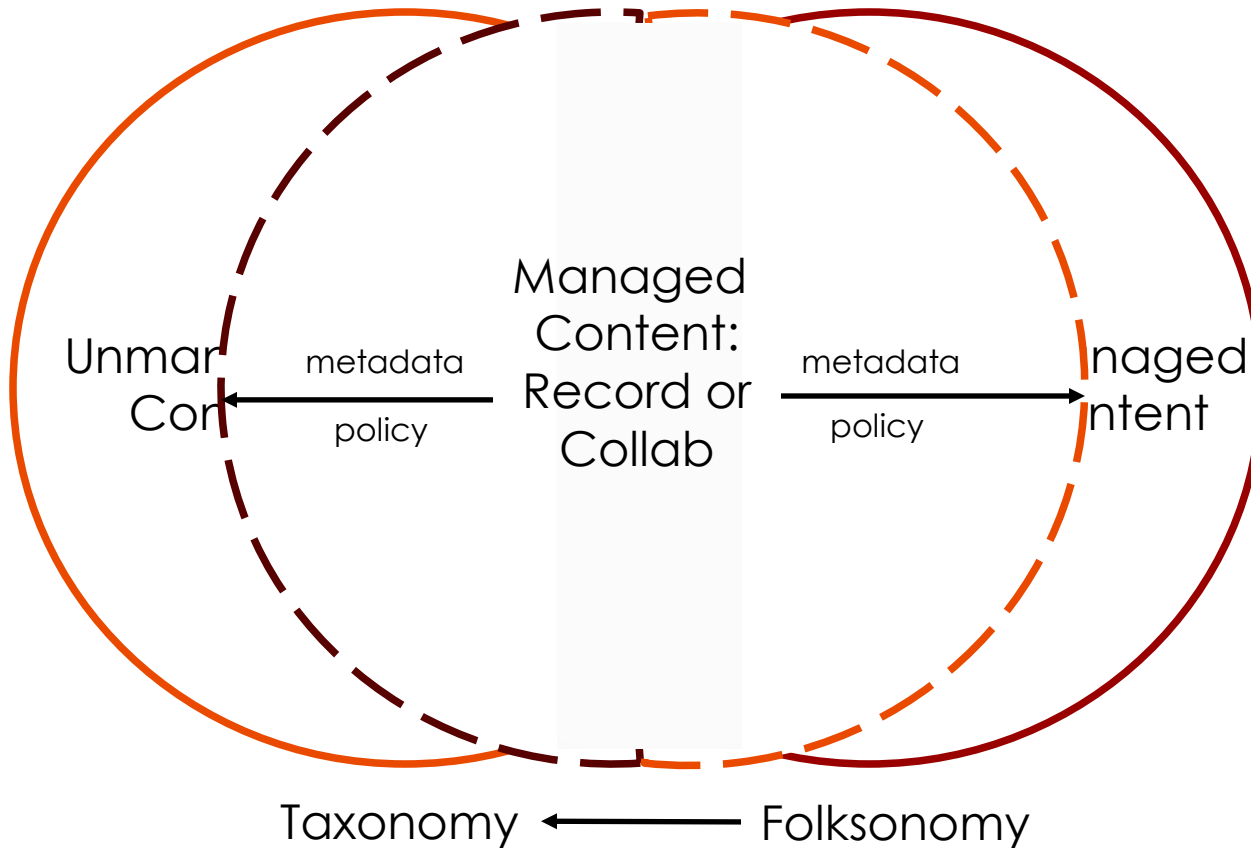


Managed Content = Metadata and policy have been applied to the content

Why Managed Content

Traditional ECM Content

Breadth Content



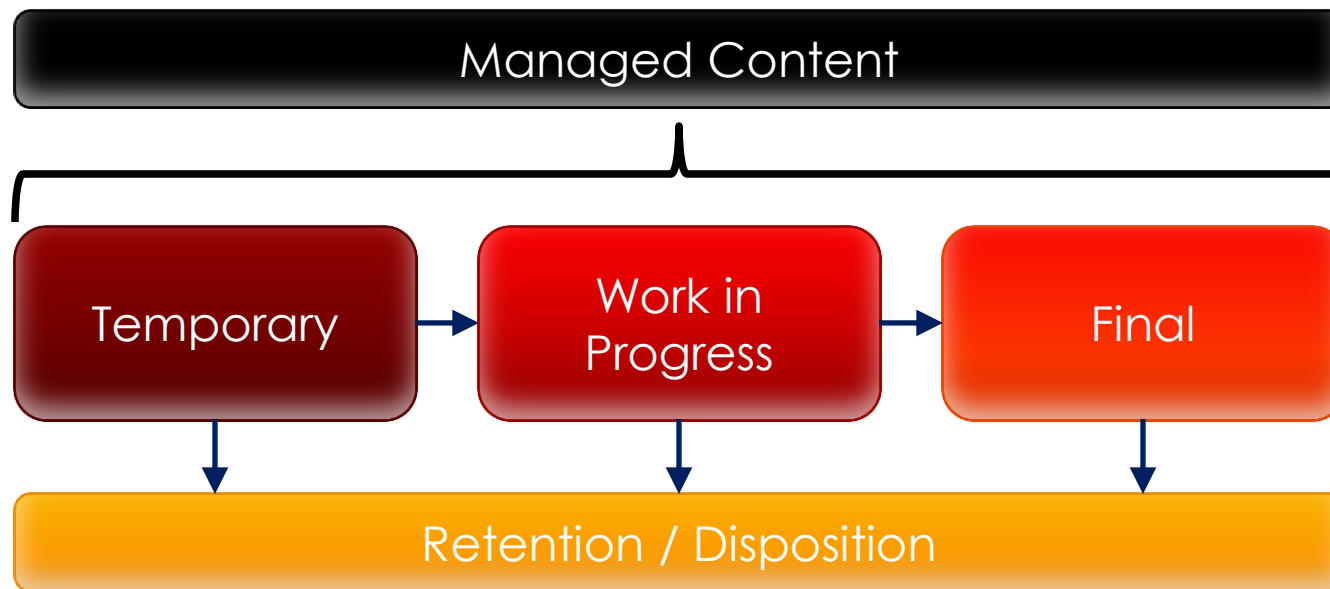
Goals:

- Increase transparency
- Increase compliance
- Scale policy and process across all types of content in an organization
- Reduce manual end user actions

Managed Content = Metadata and policy have been applied to the content

Content Lifecycle*

* Separate from the Business Process



→ = Metadata, Policy + Workflow

SharePoint 2010 Information Architecture Tools

- Enterprise Content Types
- Document Sets
- Information Management Policies
- Metadata
- Term Sets
- Content Organizer

Enterprise Content Types

- [TechNet] A *content type* defines the attributes of a list item, a document, or a folder. Each content type can specify:
 - Properties to associate with items of its type
 - Metadata to associate with items of its type
 - Workflows that can be launched from items of its type
 - Information management policies to associate with items of its type
 - Document templates (for document content types)
 - Document conversions to make available (for document content types)
 - Custom features

Site collection Admins can:

- Extend a published content type
- Derive from a published content type

Document Set

- Is a content type
- Can apply metadata, workflow and policy at the Document Set level
- Documents within a Document Set can be in multiple locations
- A document Set can have its own landing page with explanatory web parts
- Can use version control at the document set level (check in / out)
- Foundation for document assembly
- The Document Set will appear in search results

Information Management Policy



[TechNet] An *information management policy* is a set of rules for a type of content. They enable you to control who can access your organizational information, what they can do with it, and how long the information should be retained.

- You can associate a policy with a library, list, or content type
- Provides integration with Office system applications
- Can set retention / deletion rules using information management policies

Metadata

- Metadata can be applied through:
 1. Browser
 - List items can be tagged by using the “Edit Properties” UI
 - By a business process
 - By folder structure (where the document is physically located)
 - Values from the parent Document Set
 - Through a Content Type
 2. Client
 - Document Information Panel allows for tagging in the authoring surface of the Office client
 - Backstage in the Office clients will allow full fidelity of the managed metadata controls
 - InfoPath forms
 3. Custom Apps: 3rd party or custom applications using SharePoint Metadata OM
 4. FAST Server: Metadata parsing
- Metadata can be a term in a term set or a managed keyword
- Metadata can be used as a basis for navigation

Term Set

- The folksonomy to taxonomy solution
- Create and manage different hierarchies that share terms
- Same term can have different parents in different term sets
- Each term set can have unique sort order
- Allow/disallow end user updates
- Term Set Management:
 - Copy
 - Reuse
 - Description
 - Merge
- Term Set Management (cont.)
 - Import
 - Deprecate
 - Delete
 - Not available
 - Full multi lingual
 - Extensible custom properties
 - Custom properties
- Terms can have:
 - Synonyms
 - Description
 - Translations

Content Organizer

- [TechNet] Basically the routing engine used in the Records Center site template from SharePoint 2007
 - Allows you to automatically route documents to different libraries and folders within those libraries
 - Can also be used for mundane housekeeping type activities such as making sure that no folder within a document library contains more than 5000 items, for example
 - Can route documents based upon any attribute
 - Can build a content structure based upon attribute values
 - The content organizer is available in all sites
 - Certain metadata fields can be required to receive user input when new assets are added
 - Will only work on content types that are or derive from the Document content type (no list management)
- * There is also a "Send To" function available on documents and list items
- Copy, Move, or Move + Leave a Link

Methodology

1. Inventory existing content
2. Classify content
 - Look for commonalities in structure, policy and defaults
 - What organizational level is the content used: enterprise, department, team
 - Think about how to enable “general use” content
3. Organize into Enterprise content types and document sets
 - Content type where there are commonalities in structure, policy and defaults
 - Content types can inherit from other content types
 - Document Set where the work product spans multiple documents
4. Decide where information management policies apply
 - Consider access permissions, auditing needed, use restrictions (i.e. no printing) and retention / deletion

Methodology (cont.)

5. Decide on applicable metadata
 - Custom columns associated with documents and lists
 - Cases in which the system or a user might take different actions based on a characteristic of an item - the characteristic itself is probably metadata
 - Common things that users will want to sort or filter items on
 - Words or phrases that users are likely to “tag” items with
 - “Choice” or “Lookup” columns in an existing SharePoint Server site
 - An existing taxonomy, if your organization has one
6. Map the physical flow of the document
 - The sites, lists and libraries where the content will be physically located throughout the lifecycle

Example: Generic Document

1. Create a Word Document through a generic Word Document Content Type

2. Confidentiality = ?
+ Lifecycle Stage = ?



Lifecycle stage = Temp; retention WF every 30 days.
Confidentiality = Public; access = everyone



Lifecycle stage = WIP; retention WF every 60 days. Confidentiality = Internal; access = restricted



Lifecycle stage = Final; retention WF every 90 days

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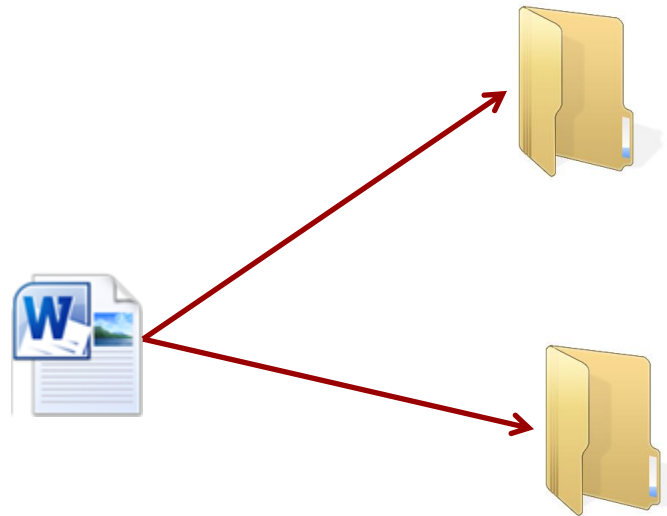


Lifecycle stage = final; retention WF every 90 days

Unless the document is a record, then retain for three years

Example: Enterprise Content Type + Document Set

1. Create a Contract Document Set that has a Word Document + PowerPoint + Excel



Owner = Erica Toelle
Retention = three years (contract)

Owner = Jane Doe
Retention = three years (contract)

2. At Document Set Level:
Confidentiality = Internal +
Lifecycle Stage = WIP +
Project = ACME +
Owner = Erica Toelle

3. Based on the Contract Content Type, When lifecycle stage = Final, route to Record Center