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How to Facilitate the Government out of Governance



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About Me

- ✔ From the great State of Alaska
- ✔ Masters in Instructional Design (from UAB)
- ✔ Worked with SharePoint..alot!
- ✔ User Experience Advocate
- ✔ Certified Athletic Trainer
- ✔ Blog: <http://monkeyblog.highmonkey.com>
- ✔ Twitter: @vcmonkey



CREDENTIALS




- **TITLE:** CEO / Technology Architect
- **EDUCATION:**
 - Instructional Design - M.Ed
 - Athletic Trainer - Certification
 - Physical Education - BS
- **CAREER 'HATS' WORN:**
 - President / CEO
 - Motivational Speaker
 - Programmer / Developer
 - Certified Athletic Trainer
 - Adjunct Professor
 - Instructional Designer
- **INTERESTS:**
 - The Steelers and Star Wars; there's no better combo.

About High Monkey







High Monkey Consulting is a biz-tech consulting company with a sense of humor. We specialize in planning, management, and delivery of biz-tech projects. With over a decade of service in challenging and diverse markets, we are versatile and able to adapt to the demands of our clients. Our consultants are well-versed in business, technology, training, and communication. We provide our clients with common sense solutions crafted with one eye on their business strategy and the other on delivering cost-effective results.

SERVICES:

Three core competencies -

-  Collaboration
-  Interface Design
-  Usability Analysis

Other services -

-  Analysis & Planning
-  Content Management Systems
-  E-Learning
-  .NET development
-  Software Integration/Development
-  Training



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Agenda

- What I'm **NOT** going to talk about
 - 2010 technical governance strategies
 - New user control / monitoring strategies
 - Top 10 ways to keep your users from screwing things up

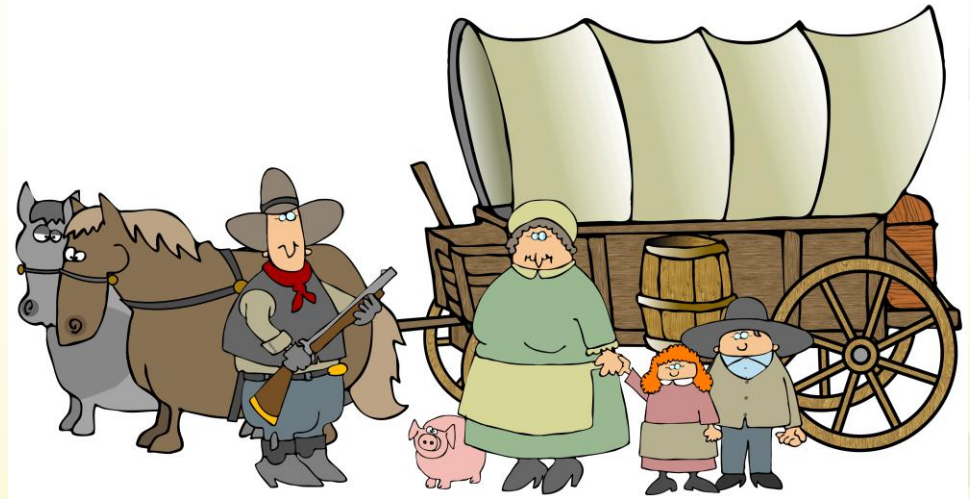
Agenda

- What I **AM** going to talk about
 - How to create your governance plan with the user in mind
 - How to start wrapping your head around the new governance needed in SP 2010
 - How to make your governance document a living entity

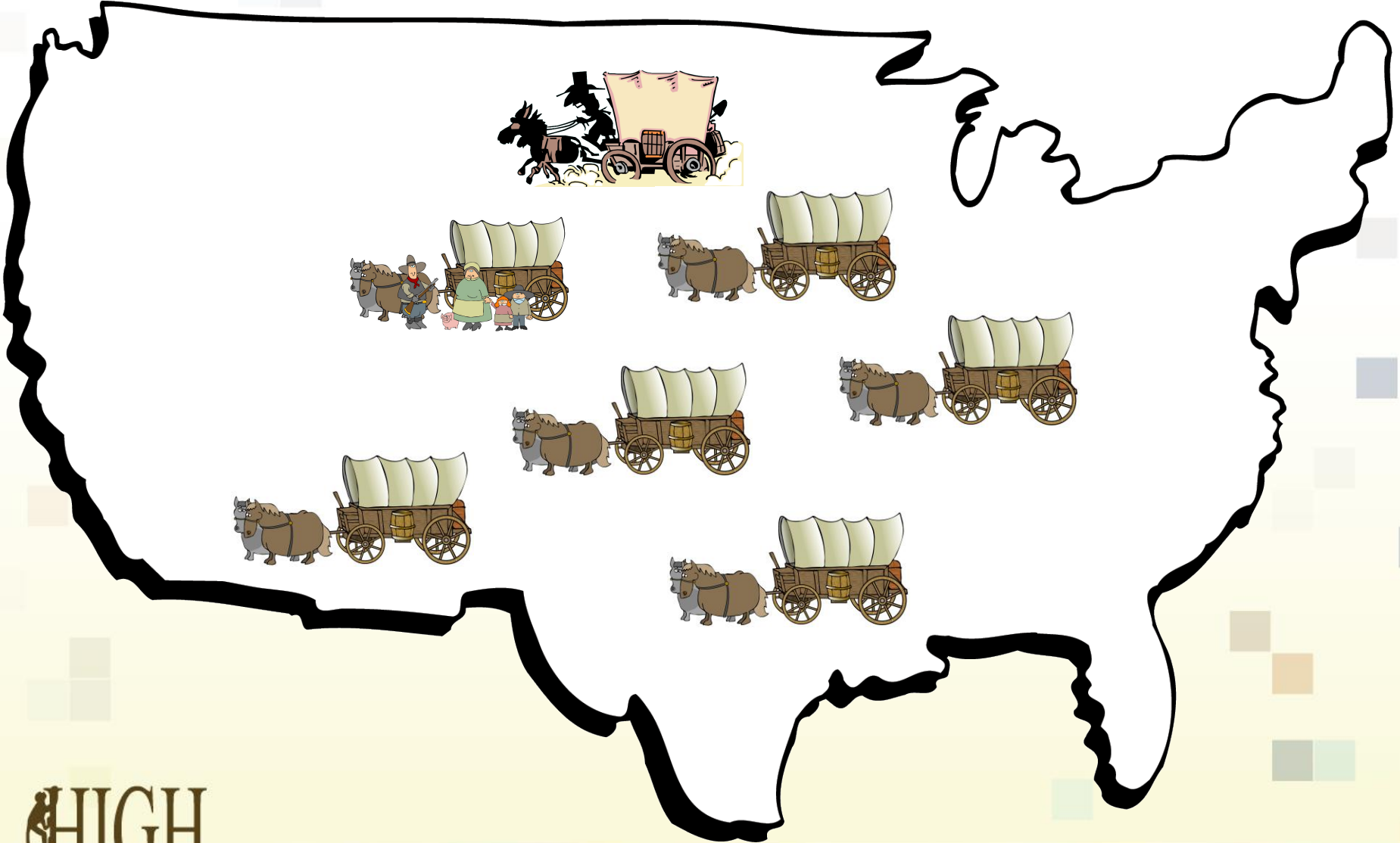
Governance

- Remember that government is for the people, by the people
- Governance should be about the PEOPLE

The 'real' history of SharePoint



The 'real' history of SharePoint



The 'real' history of SharePoint

Everyone on a different trail



Overworked

Redundant supplies



Couldn't share information



The 'real' history of SharePoint



The Answer

The 'real' history of SharePoint



A good Governance plan

- Should meet your needs now and in the future
- Should have nothing to do with the application
- Should not only make changes, but plan for communicating these changes to the masses

Governance gone bad

- Meeting today's needs without tomorrow
 - Company built a system to hold pharmaceutical information around possible new products
- No planning, just playing
 - Company built workflow between two lists that created continuous loop. Ran for almost a year before noticed
- One builds, the other supports
 - One part of the company hires consultants to build a system, then expects IT to support issues.


Do users know what they want?



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Why we try to control our users


- Because users screw up our systems
- Users perform unpredictably
- Keeping control can keep it manageable



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How users think

- The too-easy information seeking model



How users think


- Why we can't control them
 - Users can do things we can't predict
 - Users may not know what they are looking for
 - Users may not know the term to use
 - Users may just want to explore and see what's out there


Virgil's 10 governance no-no's



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1. Planning big, building bigger



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2. Being a security fatalist



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3. Believing IT knows their business



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4. Having one person do the work of 12



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5. Let politics overrule common sense



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6. Giving yourself the quick wins (leaving everyone else in the dark)



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7. Letting Microsoft guide your design



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Good design guidelines can...

- Keep the user experience consistent
- Keep people from wanting to do something different
- Allows for better adoption of new functions
- And frankly.....

When an interface doesn't make sense

PEOPLE DON'T USE THEM



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Good design governance

- Unified, consistent navigation
- Create a task-based structure
- Focus on productivity
- Properly managing knowledge
- Branding 'light'

8. Not documenting the documents



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Documentation

- Having a comprehensive documentation process will assist greatly in keeping your governance plan under control
- Creating plan audit processes can ensure consistency of structure throughout the portal's life
- Regular review of your system set-up is crucial....***ITS ALIVE***

Document Library Planning Worksheet							
Worksheet Info							
Worksheet prepared by: Virgil Carroll		Last Updated:		8/29/2008			
Install type: <input checked="" type="radio"/> WSS 3.0 <input type="radio"/> MOSS 2007							
Library Name	Site it resides in	Type of documents stored in it	Versioning used?	Does library items require approval?	Does library items require check-out?	Does library items require IRM? (MOSS 2007 only)	Content Type(s) Associated
Policies & Procedures	http://bmbweb	SOPs, company policies, HR documents	Yes, major & minor (editors can only see minor versions)	No	Yes		Standard Operating Procedures
Sales & Marketing Documents	http://bmbweb	Marketing materials	Yes, major & minor (editors can only see minor versions)	No	Yes		
Project Documents	http://bmbweb/pm/	All documents related to given projects	Yes, major & minor (editors can only see minor versions)	No	Yes		PTS, Project Charter, Project Plan, Project Action Log, Project Message, Weekly Status Report, Pictures, Budget Estimates, Project Notes, Quote, Scope of Work, Topology, Dataflow Diagram, SysAdmin, Test Script, Design Document, Trip Report, Training Document, Requirements Document, Non-specified Document, Invoice, Purchase Requisition, Drawing

HMC Document Library Planning Worksheet

Setting up security around versioning can allow editors to work on new versions of documents / items while allowing other users to see the latest approved version



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Home

SharePoint 2010 Configuration Documentation

provided by: 

This documentation tool has been built to assist IT administrators with recording vital information pertaining to their SharePoint 2010 installation. It should be noted that this application is a work in progress and will be continuously updated to provide the best documentation tool possible for SharePoint installations. This has been built off a Beta 2 installation of SharePoint 2010 and may not reflect all features included with the final release. Please email virgil@highmonkey.com to be notified of updated versions of this file.

Generic Configuration Forms


- User Accounts
- Server Listing
- System Settings
- Backup Settings
- Web Applications (with Settings)
- Site Collections

Service Application Configuration

- Access Services
- Business Data Connectivity
- Excel Services
- Managed Metadata Service
- Search Service Application
- PerformancePoint Service Application

Home Web Applications

Web Application Details

provided by: 

Back to Home New Web Application Delete Record

Authentication	Claims Based Authentication	Use an existing application pool	<input type="text"/>
Use an existing IIS web site	test	Create new application pool	<input type="text"/>
Create a new IIS web site	test	Configurable	<input type="text"/>
Port	80	Database Server	<input type="text"/>
Host Header	<input type="text"/>	Database Name	<input type="text"/>
Path	C:\inetpub\wwwroot\wss\VirtualDirectories\44337	Windows Authentication	<input type="checkbox"/>
Authentication Provider	<input type="text"/>	SQL Account	<input type="text"/>
Allow Anonymous	<input type="checkbox"/>	SQL Password	<input type="text"/>
Use Secure Sockets Layer (SSL)	<input type="checkbox"/>	Failover Database Server	<input type="text"/>
Public URL	<input type="text"/>	Search Server	<input type="text"/>
Zone	Default	Service Applications	<input type="text"/>
		Customer Experience Improvement Program	<input type="checkbox"/>

New Extension General Settings View Extended Zones Other Settings

HMC 2010 Central Admin Documentation 2.0



9. Making a 10 step workflow 11

A good workflow can...

- Make sure work doesn't get misplaced or stalled
 - Users rarely have to recover from errors or mismanagement of work
- Procedures are more formally documented and followed exactly
- Reduces errors and work is performed in a way planned by management.
- Always meet business and regulatory requirements
- Track your work, creating an audit trail
 - System tracks all activities in a work process and who completed them
 - Give management ability to identify problems and measure productivity




10. Always selling SharePoint as an IT Tool



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Governance in SharePoint 2010



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Most important principal: *more, more, more, more*



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What has gotten harder?

- Security planning
- Storage strategies
- External data planning
- Metadata management
- Social Structure

What has gotten easier?

- NOT MUCH!! 😊
- Cross site connections
- External data integration
- Metadata usage
- Content type sharing

The major new things

- Upgrade process
- Interface / Design
- Services, Services everywhere
 - BCS
 - Managed Metadata
 - Search
- My Sites / Social Networking
- Document / Assets management
- SharePoint Designer
- SharePoint Workspaces
- Usage statistics

Metadata

- Gives users the ability to 'tag' information
 - Will assist with searching / filtering, but...
 - How do we manage this?
- Upgrade tags to managed metadata
 - Who makes this call? Who monitors this?
- *Finally* less global strategy around managing the metadata

Social Information

- How will this be managed?
- Consequences of inappropriate information
- What control do you give the users?

Global Content Types

- Who will control these?
- What will be the best way to share?

Business Connectivity Services (BCS)

- Great to have people interacting directly with a DB?
- What would be the issues?
- What about integration issues and upgrading systems?

New Ribbon Interface

- What kind of training will be required?
- Not as responsive as Office applications
- Creating custom tabs and commands to ease the use

SharePoint Workspaces

- What are the consequences of taking information off the network that shouldn't be?

SharePoint Designer

- Now more granular control
- Plans will need to be in place to grant access
- Still free and easy to acquire

Usage Statistics

- Much improved, how will this be used to create a better environment?

Mobile Views

- Will information be easier for 'road warriors' to access?

Workflows

- Replicating workflow processes
- Site workflows

And More...


- Publishing features and content organization
- Connecting with LOB applications
- Global Roll-ups with calendars (overlays)


So how do we keep our governance strategies alive?



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A good Governance plan should...

- Be reviewed regularly (and by many parties)
- Learn from the past
- Not be afraid to adjust
- Keep user experience always in mind

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- The business side of collaboration
- Reaching a global audience
- Sharing ideas about why we do things the way we do
- Next Webinar Session:
 - September 28th – *Who? What? Where? - Searching in SharePoint*

Presenter: Geoff Varosky, Senior Solutions Developer

week3

COLLABORATION TECHNOLOGY INTEREST GROUP

A business community sharing collaboration ideas, technologies, and solutions.



Microsoft SharePoint Conference 2011

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Kurt DelBene
President, Microsoft Office Division

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That's Why I Use SharePoint



SharePoint Process Your Way! No Brick Walls!



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QUESTIONS??

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