

How to Deploy Governance and Taxonomy Planning Functions in SharePoint

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The simplest approach to establishing Federated Governance Control over your SharePoint environment is as follows:

1. **Establish a top-level site collection for each of the major taxonomy categories you created during the Governance and Taxonomy Workshop.** Note that a systems architect, depending on information volume and security requirements for each might elect to create separate Web Apps for one or more of these according to SharePoint Design and Architecture Best Practices. In your case these site collections were identified as:

2. **Establish a Governance Team site** below the Governance Site Collection top-level Site
 - a. Create a prototype environment that your governance team can get to and work with on the network.
 - b. Build a Team site for your governance Team. At this point you don't need to worry about where the site is. You can always save it as a template including content and then redeploy it elsewhere.
 - c. Configure the Document Library
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 - a. Turn on version control
 - b. Turn on publication approval and make the governance team chair the owner
 - c. Create a view that shows the folders
 - d. Create a view that ignores or suppresses the folders
 - e. Set up notifications for the members of the governance team
 2. Create a folder in the documents library and label it Project Planning
 - a. Save the documents from the Governance and Taxonomy Workshop in this folder
 - b. Save any additional planning and requirements documents in this folder
 3. Create a folder in the documents library and label it Design and Architecture
 - a. Save the documents from the Governance and Taxonomy Workshop in this folder
 - b. Save any other technical documents, scans of licenses etc in this folder
 4. Create a folder in the documents library and label it Deployment and Configuration
 - a. Save the configuration documents from in this folder

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5. Create a folder in the documents library and label it Branding and “look and feel.”
 - a. Place branding information and documents that you may have accumulated in this folder
- d. Configure the Team Calendar
 6. Establish a schedule for your governance team
 7. Configure notifications
 8. Consider using meeting workspaces for each meeting
 - a. Configure the Team Discussion List
 - b. Create an Issues Log and name it “Agenda Items”
 - i. Create an approval workflow that requires the agreement of a majority of the members of the team
2. Have your Governance Team Kickoff Meeting
 - a. Review the short Governance and Taxonomy presentation included with your deliverables package from the Governance and Taxonomy Workshop
 - b. Review the deliverables from the Governance And Taxonomy workshop
 - c. Provide the team with a hands-on orientation of the team site
 - d. Demonstrate how to use the approval workflow
 - e. Show how to integrate the calendar, tasks, contacts, and folders with Outlook
 - f. Provide a shortcut on each member’s desktop to the document library
 - g. Make sure each member of the governance team knows which of the taxonomy buckets is assigned to them
 - h. Review the taxonomy bucket that will be the focus of the pilot project
 - i. Make sure the owner of the pilot project bucket is prepared to hold a meeting or two with his/her constituents to develop the next level down in their taxonomy planning (again limited to 7 or so)
3. Work with your technical folks to determine the best method for configuring your production environment to support your policy taxonomy.
 - b. Make it visible to all employees and stakeholders within the user community
3. **Establish MySites, set quotas and train the constituents on their use as private non-taxonomy workspaces** (known as trashcan taxons in the taxonomy world)
4. **Have each site-collection / business domain owner decide on the structure and policies for each site-collection.** Each Site collection represents a logical business domain and has a business domain “owner” whose job is to meet with the stakeholders for that logical collection of information. These owners were assigned during the

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workshop. These owners need to be coached by IT and collaboratively by other stakeholders. They need to work with their stakeholders and determine:

- a. **Sub-site structure** - The next tier of sub-sites using the same best practices and process used during the workshop, such as limiting the number of sub-sites to seven.
 - b. **Scope of Customization within the domain** - Which templates, themes, master pages and web parts will be allowed within that collection (with the help of IT)
 - c. **Roles and Rights within the domain** - Which individuals will have access to information in each site and what role they will have.
 - d. **Approvals** - Which approvals will be required to move information to a larger audience from the site collection
 - e. **Workflows** – Work with the stakeholders to establish standard workflows for use within the site collection / business domain.
 - f. **Content Types** - Identify any enterprise content-types that will be used to propagate information within the site collections domain, but that may be housed outside the site collection. As an example, financial information, policies and records may be kept and/or administered within the “Financial” site collection, but there are financial documents that may reside in project management, human resources and elsewhere. The financial “
5. **The community of business domain stakeholders then**
- a. Provides a review and consensus function for the domain sub-site structure created by each domain owner before it is deployed.
 - b. Provides a review and consensus on scope of customization within each domain
 - c. Provides a review and consensus on roles and rights within each domain
 - d. Provides a review and consensus on approvals within each domain
 - e. Provides a review and consensus on workflows within each domain
 - f. Provides a review and consensus on content types within each domain
 - g. Evaluates a-f above for each domain and identifies candidates for enterprise-wide deployment
6. **The community of stakeholders then supports and advises on the actual build, deployment and rollout of the pilot project** site collection and its advancement through the above processes (start with only one site collection to work through this process as the “alpha” iteration of the process. You chose Governance as the domain for your pilot project)
7. **Next focus is placed on another** domain and so on until all the domains have been deployed.
8. **The site collection /business domain owner then walks the sub-site owner** in the domain through the process of establishing and configuring sites in the third tier.

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9. **The Governance Team as a whole then works with IT to coordinate the design,** implementation and use of content-types that were identified during the Alpha iteration of the governance process.
10. **The Governance Team then works with IT to identify candidates for Business Data Catalog integration.**
11. **Periodically (once a month or once a quarter) the work of the Governance Team is reviewed by senior business leadership**

This model provides for

- Collaborative governance for the taxonomy of business domains managed by individual domain owners, and provides for collaborative standardization and approval processes.
- The establishment of site-collection content types to standardize policy, approvals, and metadata gathering for critical information types across the site collection.
- Candidate content types for promotion as enterprise-wide content types to allow business domain owners to provide management continuity for information types inside of peer business domains.