

**HOW TO EFFECTIVELY MANAGE YOUR
SHAREPOINT ENVIRONMENTS,
DEPLOYMENTS, AND CUSTOMIZATIONS
WITH SOLID GOVERNANCE, SOLUTION
PACKAGES, AND SOURCE CONTROL**

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Agenda

- Common Pain Points
- Governance Strategies
- Managing “12 Hive” Customizations
- Code Promotion Techniques
- Instructor Led Demonstration
 - New Visual Studio project
 - Simulate common 12 Hive modifications, including demonstrating how to:
 - Build a “Hello World” .NET web part
 - Wrap that web part with a Feature
 - Add custom actions into the UI
 - Deploy these customizations with a SharePoint Solution Package
- Conclusion

Common Pain Points

Administrators / Power End Users

- ❑ Findability
- ❑ Maintaining an Information Architecture
- ❑ Viral Growth
- ❑ Retention
- ❑ Security & Risk Management
- ❑ Adoption
- ❑ Training/Support
- ❑ Capacity Monitoring
- ❑ Lack of Vision / Quagmire

Architects / Developers

- ❑ Version Control
- ❑ Overwriting Work
- ❑ Front End Consistency
- ❑ Team Member Consistency
- ❑ Too Few Environments ☹️
- ❑ Stability/Promotability
- ❑ What Changed, Why, and When

Administrative Pain Points?

Solution:
GOVERNANCE

Environment Governance Strategies

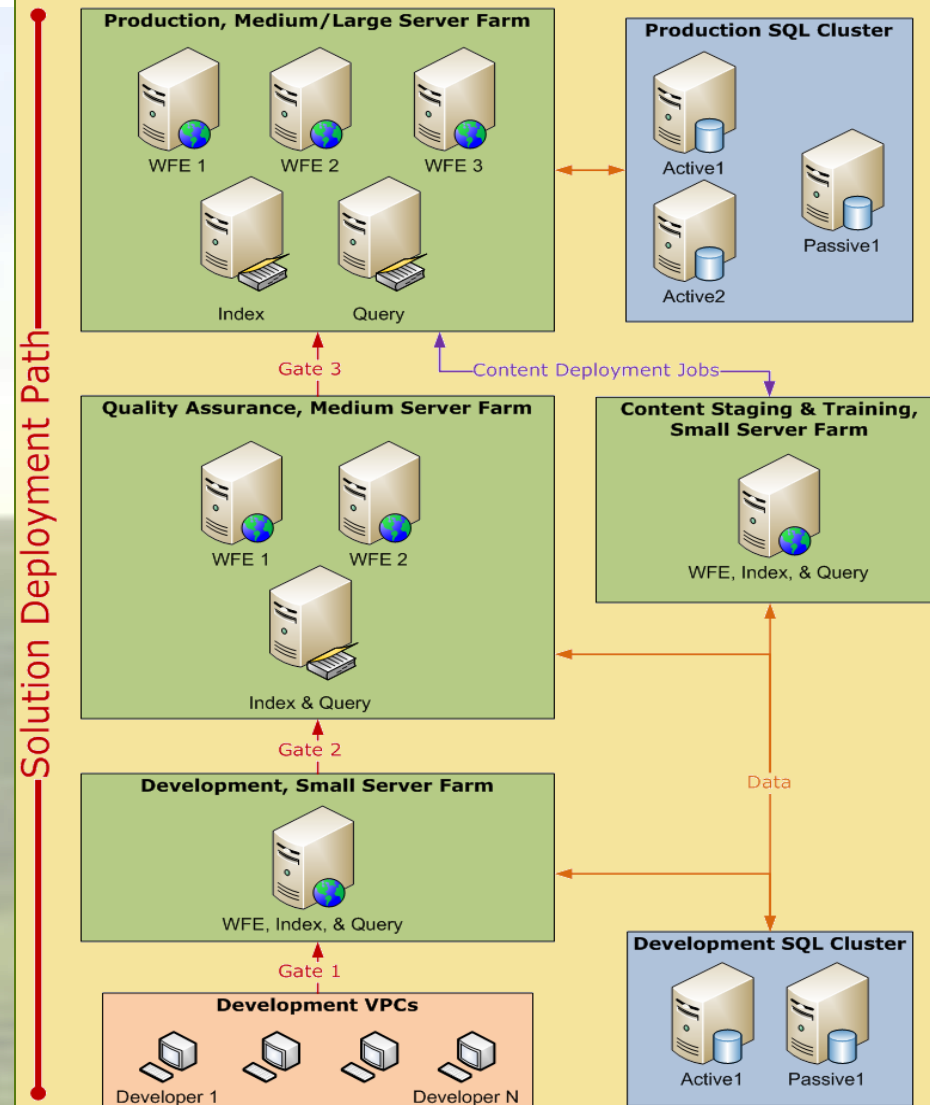
- **WHAT** areas need to be governed?
 - ▣ Taxonomy / Information Architecture
 - ▣ Physical Infrastructure & Platform Services
- **HOW** will we govern?
 - ▣ How will we hold ourselves accountable?
- **WHO** will it be governed by?
 - ▣ What Roles are in Play?
 - ▣ What skills are needed?
- **WHY** are we doing this?
 - ▣ End user adoption... (ROI)

WHAT: Taxonomy & IA

- The BIG 3:
 - ▣ Who are our users?
 - ▣ What are they trying to do?
 - ▣ How will they do it?
- Information Architecture –
Where does this go?
- Document Compliance
(security & retention)
- Search (Best bets, keywords,
usage, relevancy)
- Standards, Templates, and
Site Versioning
- New Site Request
Management (Viral Growth)
- Support Tiers

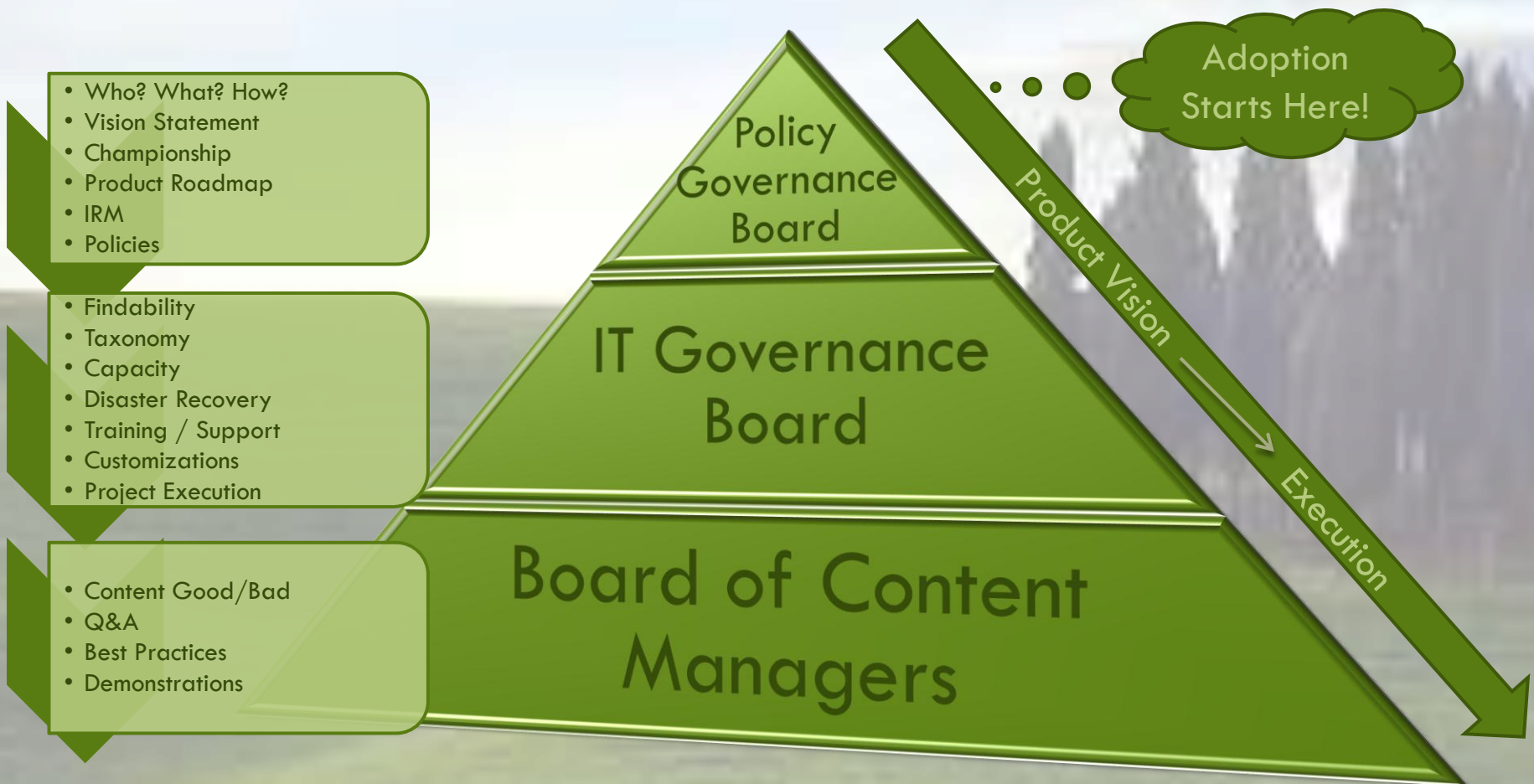
WHAT: Infrastructure

- Goal: Environment Governance Plan
 - ▣ Stability
 - ▣ Consistency
 - ▣ Promotable
- “Too few Environments”
- Content Database Scaling & Monitoring
 - ▣ “Technical Taxonomy”
- Server Load (CPU, Memory, Local Disk, etc.)
- Disaster Recovery
- Customizations
- Documentation



HOW: Board(s) of Governors

Communication & Accountability



WHO: Roles & Responsibilities

IT Governance Board

- Product Manager
- Technical Architect
- Database Architect
- Findability Architect
- Compliance Architect
- Change Manager
- Training Manager
- Support Manager

Board of Content Managers

- Product Manager
- Content Managers

Policy Governance Board

- CIO
- Product Manager
- Enterprise Risk Management
- Business Stakeholders

WHO: What Skills are Needed?

Level 0 (End Users)

- Uploading Documents
- Discussion Boards
- MySites
- Tasks & Issues
- Calendaring
- Blogs
- Search

Level 1 (Content Managers)

- Level 0 plus...
- Creating Sub sites & pages
- OOB Web Parts
- OOB Workflows
- Templates
- Site Administration
- Managing Security

Level 2 (Product Manager)

- Level 1 plus...
- “Theory” and “Why”
- Trainer Acumen
- OOB vs. Custom
- SharePoint Designer Workflows
- Site Collections

Level 3 (Architect)

- Level 2 plus...
- .NET Developer
- ASP.NET Experience
- SharePoint Development Experience
- Custom Web Parts
- Branding Dev.
- Workflow Dev.

WHO: What Skills are Needed?

Level 1.5 (Compliance Architect)

- Level 1 plus...
- “Theory” behind security
- Broken Inheritance
- Central Admin Policies
- Security Auditing
- Search Security

Level 2.5 (Findability Architect)

- Level 2 plus...
- Search Center
- Crawler settings
- Content Sources
- Search Scopes
- Best Bets
- Usage Analysis
- Noise Words
- Search Security

WHY: Phil's Phantastic Phormula Phor Success

```
□ if (Leadership == true)
  {
    if (Governance == true)
      EndUserAdoption = true;
  }

if (EndUserAdoption == true)
  ROI = true;

if (ROI == true)
  SUCCESS = true;    // !!!!
```

Circling Back...

Pain – Point

- Findability (I)
- Maintaining Taxonomy (I)
- Viral Growth (C)
- Retention (P/I)
- Security (I)
- Risk Management (P/I)
- Adoption (P/I/C)
- Training/Support (I/C)
- Capacity Monitoring (I)
- Lack of Vision (P)
- Quagmire (P)

Policy
Governance?

IT
Governance?

Content
Governance?

Developer Pain Points?

Solution:

Project Diligence

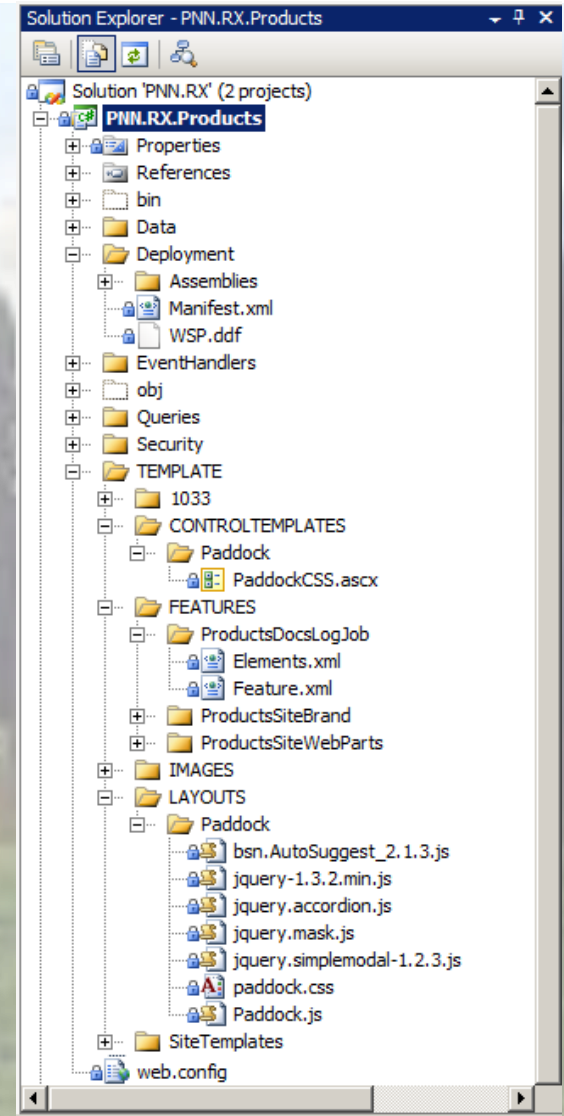
- ▣ Version Control
- ▣ Overwriting Work

SharePoint Solution Packages

- ▣ Front End Consistency
- ▣ Team Member Consistency
- ▣ Stability/ Promotability

Change Advisory Board

- ▣ What Changed, Why, and When – Rollback?



INSTRUCTOR LEAD DEMONSTRATION

Using Visual Studio to deploy
SharePoint Customizations

Conclusion...

- Phil's Phive Phindings...
 1. Identify your vision, roadmap, and risks
 2. Identify appropriate roles & accountabilities
 3. Govern 1 & 2 accordingly
 4. Budget for Dev and Test environments
 5. Use Solution Packages for code deployments

QUESTIONS & COMMENTS

Phil Wicklund