Information Architecture for SharePoint Server

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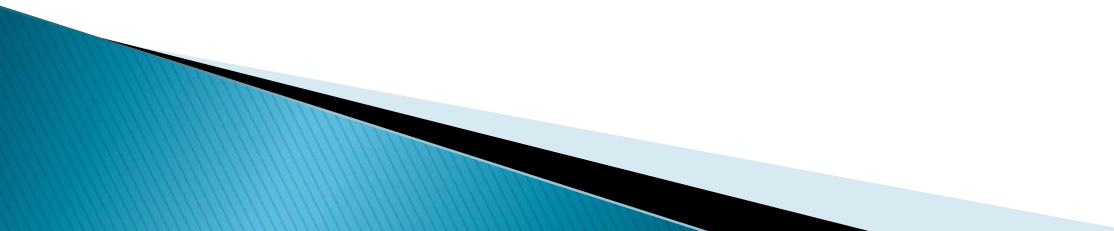
SharePoint User Group UK
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About Spencer

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- General SharePoint Dogsbody
- Microsoft Certified Master | SharePoint 2007
- Microsoft Certified Master | SharePoint Instructor & Author
- Most Valuable Professional | SharePoint Server
- SharePoint Patterns & Practices Advisory Board Member
- Enterprise Architect working with Microsoft's largest customers deploying SharePoint Server
- Works with SharePoint Product Group on 2010 Readiness
- Author for MSDN on Excel Services, ECM, WCM
- Author for TechNet on Farm Topologies & Security
- ISPA Vice President
- 16 years in Enterprise IT

Agenda

- Some Terminology
- The IA Practice "Discipline"
- The Reality
- SharePoint Information Architecture
- Logical Architecture
- Global Taxonomy in MOSS 2007
- Managed Metadata in SPS 2010

Some Terminology

- Information Architecture
  - the categorization of information into a coherent structure, preferably one that the most people can understand quickly, if not inherently

- Taxonomy
  - is the practice and science of classification

- Metadata
  - Data about data

The IA Practice "Discipline"

- Extremely Immature
- More often than not counter productive
- Usually doesn't take into account products
- What works for a "Web Site" or "Intranet"
  - Isn't suitable for collaboration or social scenarios
- Often hoodwinks a project from the get go
- Internal views of an organisation
  - are poorly suited to users or customers

The reality

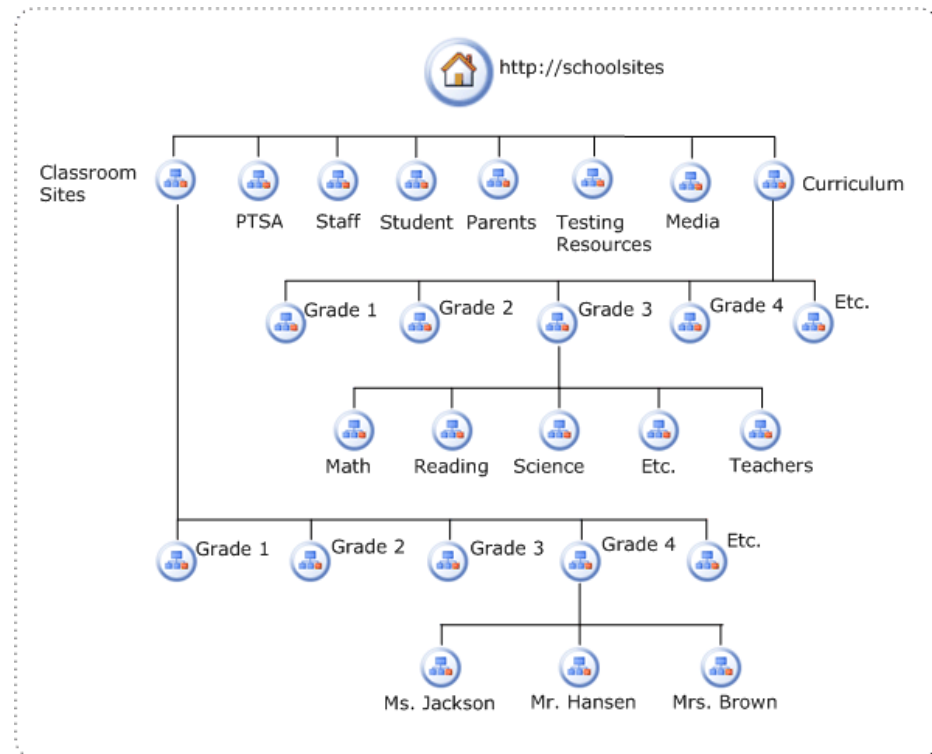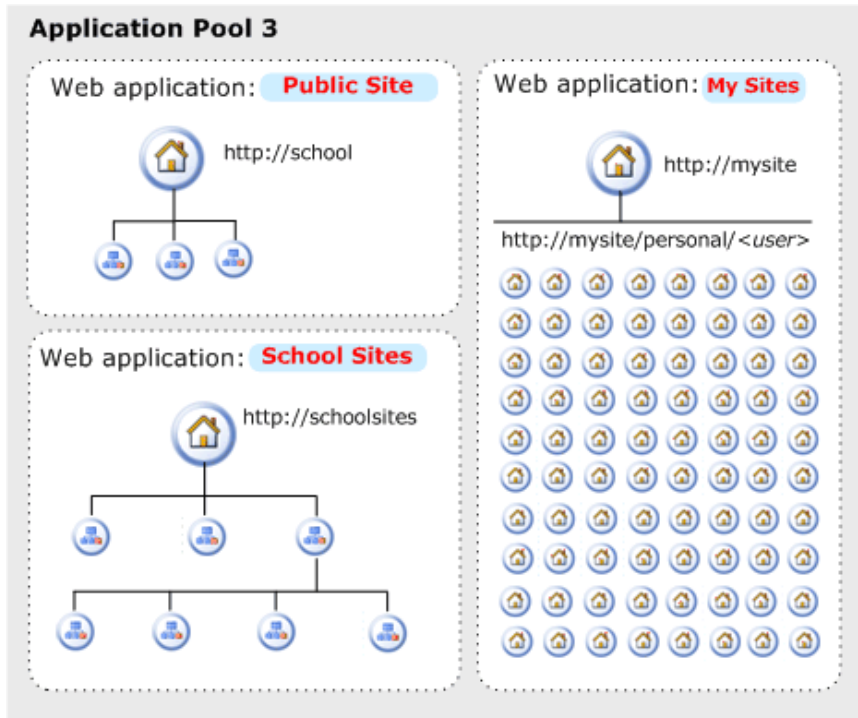# IA for SharePoint

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SharePoint Information Architecture

- SharePoint scales by means of Site Collections
- Therefore inherent restrictions
  - as there are with every product

- Information Architecture for SharePoint means four things:
  - Logical Architecture Objects
  - Content Types (& Columns)
  - Search
  - Governance

SharePoint Information Architecture

SharePoint "Architect"

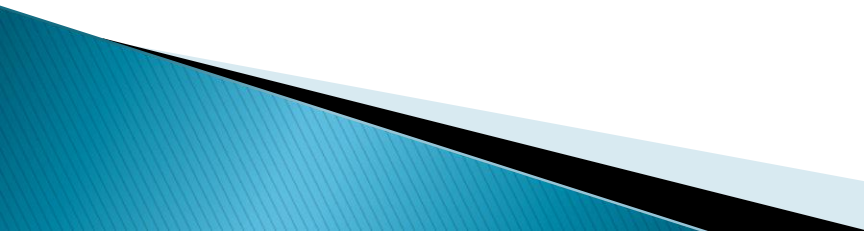Site Collection Administrators

Logical Architecture Objects

Logical Architecture Design

- The single biggest factor in SharePoint success
  - bar none!
- You absolutely must do this first
  - it drives everything else
  - technical and non technical
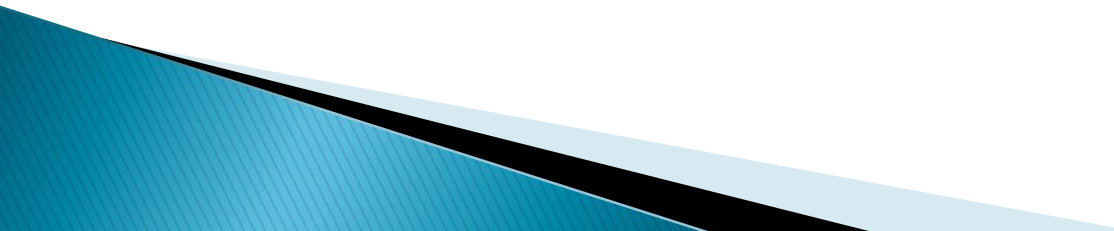
- BUT!   Don't go to far...

Logical Architecture

- It's **never** right the first time
- You don't know how SharePoint will play out
  - No, really! You don't!
- Collaboration is meant to be user driven

- Tightly defined IA supports specific scenarios:
  - Published Content
  - Internet (WCM)
  - Records Management
  - "Classic" Document Management

Logical Architecture

- Start with "Canonical" Models
  - These are proven and tested
  - E.g. Team, Mysites & Intranet
  - Small deployments can collapse models

Just Say No…

- Vanity URLs
  - Name per department

- URL driven navigation myths
  - e.g. SEO
  - Users just don't care

- Focusing the IA design on Navigation
  - IA != Navigation

- IA based upon organisational structure

Nivarna in 2007?

- "Global Taxonomy"
  - Content Types across Site Collections and Web Applications

- Cross Site Configurator
  - http://www.codeplex.com/SPConfigurator/

- Custom or Third Party tooling
  - e.g. Repliweb (which isn't a replication tool!)

Nirvana in MOSS 2007?

- Give it up!
- By the time you implement a "global taxonomy"
  - You realise you don't need it
  - Your company acquires another
  - etc

- Unless you are willing to bear the cost of a bespoke solution
  - and limit your use of the platform

Managed Metadata

>> Was one of the biggest missing pieces in the puzzle...

Content Type Publishing

Controlled Vocabulary

...so it was acquired... ☺

Managed Metadata Overview

Managed Metadata (Service Application)

Content Type Hub
(Site Collection)

Term Store
(Database)

Content Types

Terms
Term Sets
Term Groups

Term Store

| Definition | • Database in which managed metadata is stored |

| Usage/Limits | • Term Groups container
• Language settings, ACLs
• One per Service Application |

| Example | • Security Isolation
• Scalability |

Term Set Group

Definition	• A collection of Term Sets
Usage/Limits	• Many groups per Term Store • Security Boundary
Example	• Finance • Marketing

Term Set

Definition	• A collection of terms
Usage/Limits	• One instance of source term • 30,000 terms per term set • 1,000 term sets per term store
Example	• Column must contain term from specific term set • Locations

Terms (now we're talking!)

Definition	• A keyword or phrase that can be associated with items in SharePoint
Usage/Limits	• Merge, delete, deprecate, translate, move • Synonyms, Descriptions, Translations • One million objects per term store
Example	• Managed Metadata Column

Demo

» Managed Metadata

Content Type Syndication

- Up-to-date and consistent schemas across the Enterprise
- Syndicated content types can have a single policy i.e,. from now on blogs posting must expire after 18 months

1 Publishing content types

- Content Types are "published" from a "normal" Site Content Type Gallery
- Maximum of 1 Hub per Metadata Shared Application Service
- It is not a requirement that a Metadata Service syndicate content types
- It is not a requirement that a service connection consume content types from the service
- Setting a site collection to be the hub enables necessary components on hub
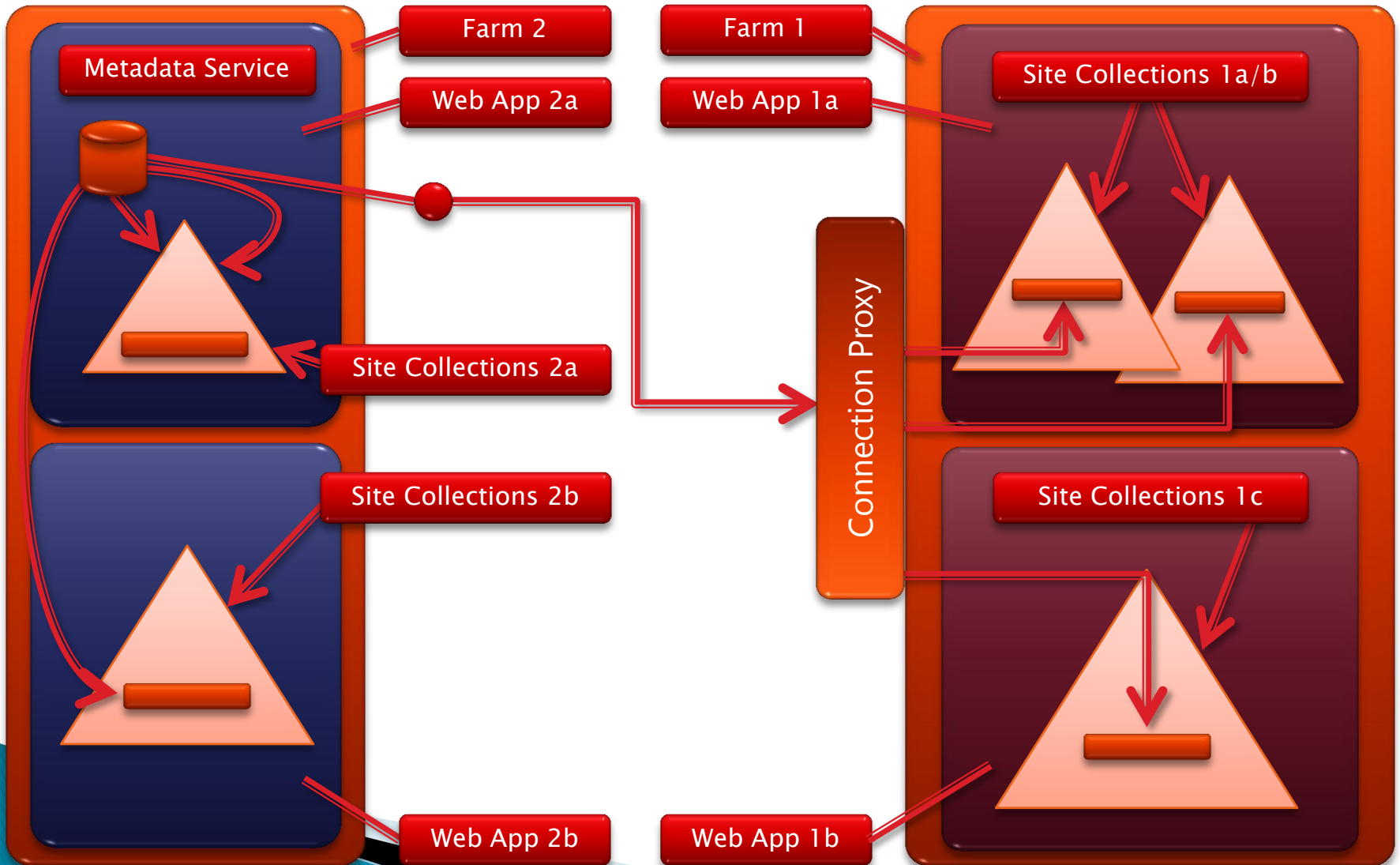
2 What gets published?

- Content Type with all the corresponding columns
- Including Document Set Content Type
- Policies
- And workflow associations (not the workflows)

Content Type Syndication

3 Managing published content types

- From the hub
  - Publish
  - Unpublish
  - Republish
  - Roll-up errors from consuming site collections

- On the consumer side
  - Extend a published content type
  - Derive from a published content type
  - View import errors
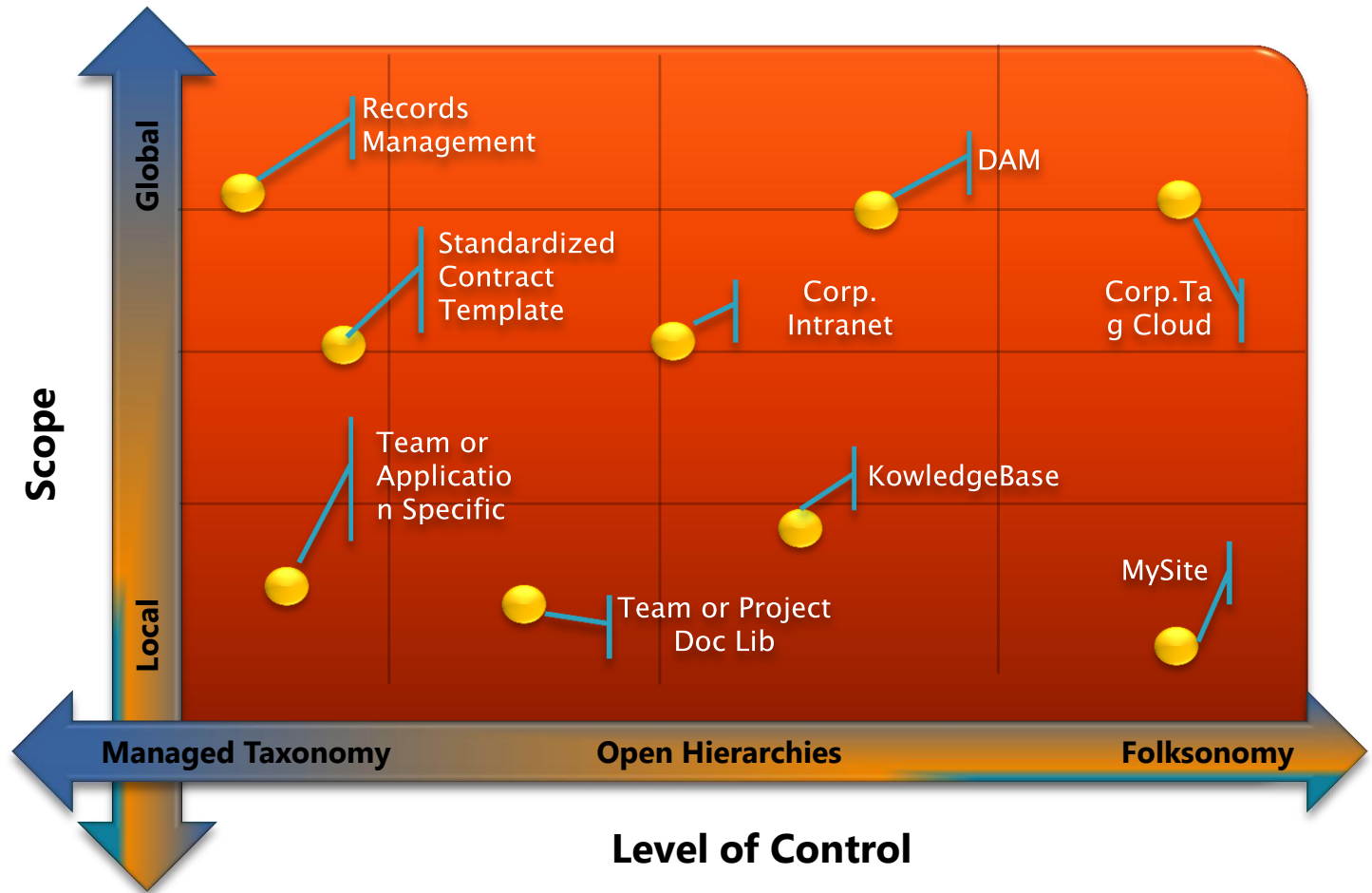 - Refresh all content types consumed from the Hub

Content Type Syndication

Demo

Content Type Syndication

Summary

Q&A

» Thanks for listening!