

HOW TO TEACH AN OLD DOG 'IT TEAM'

New Tricks

About Me...



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Agenda

- A Brief History of the Problem
- Why is SharePoint the Solution?
- 5 Ways to Improve your site without needing “IT”
 - Improving Search with Site level managed metadata
 - Learn to use SharePoint Designer
 - Turn on ratings, tagging, and commenting for Folksonomy
 - Categorize based on metadata not folders

The Stone Age - Mainframe

- Everything Centralized
- Information Owned and Controlled by Centralized Staff
- Slow Response to Request by Information Workers
- Frustrated Users and Burned Out IT Staff
- Us vs. Them Mentality



The Iron Age - PC Networks

- Decentralization Begins
- Information often Controlled by Departmental Staff
- Silos of Information Develop
 - No Universal Access
 - Backup Disasters
- More Frustrated Users and Burned Out IT Staff
- Factions



The Modern Age - SharePoint

- Re-Centralization of Information
- Decentralized Ownership/Control
- Self-Service Access
- Frustrated Users?
- Burned Out IT Staff?
- “We Have Met the Enemy and They is US!”



SharePoint Changes the Rules

• Old Model

- Business Users design site on paper and document content
- IT builds Web site with static content
- Web site changes require same paper based process
- IT is a bottleneck

• New SharePoint Model

- IT builds SharePoint Infrastructure
- Business Users manage content, hierarchy, and security
- IT builds enhanced tools and provides disaster recovery
- Content Owners modify Content
- Best guarantee of Accurate and Timely Content

Tip#1 – Publishing with Approval

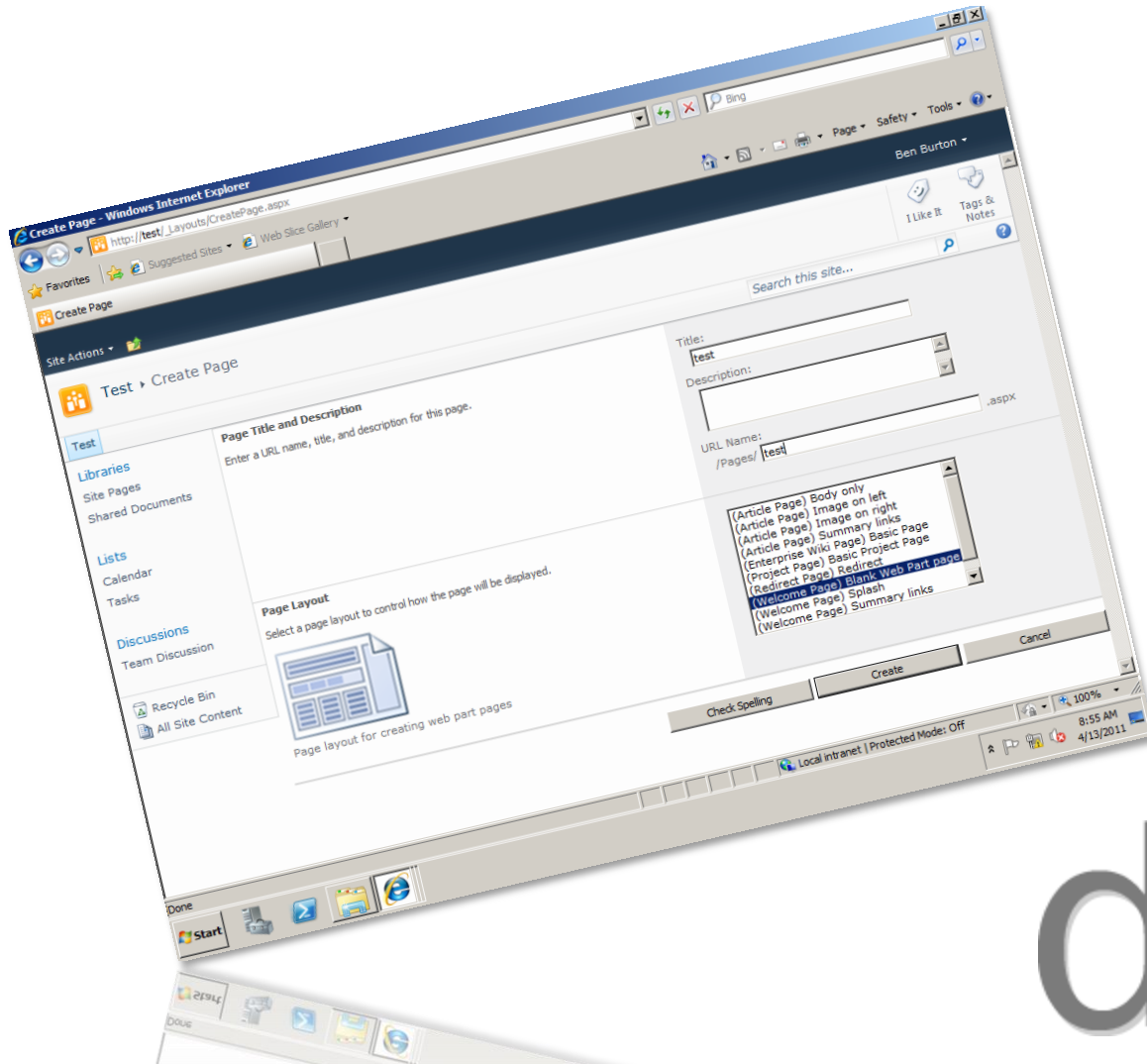
• Basic Publishing Feature Set

- Build Content based pages without knowing HTML
- Provides an approval process to control message consistency
- Provides scheduling to allow Pre-staging

• Overlooked capabilities

- Create additional Web part page layouts
- Adding Comment field for Folksonomy

Publishing with Approval/Scheduling



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Tip#2 – Delegated Security

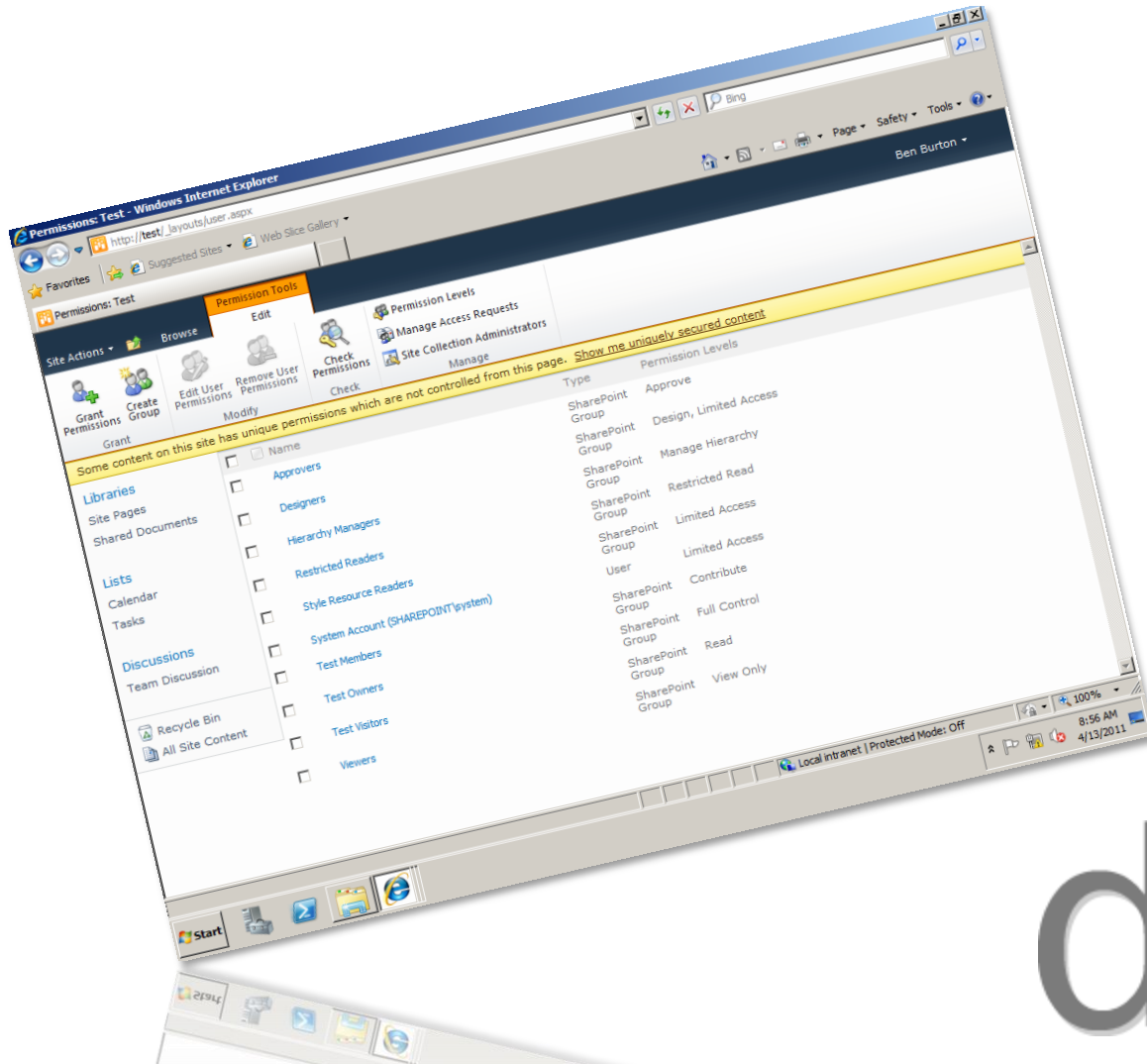
• Traditional Security Model

- Security by central committee
- Access request infrastructure required (time consuming)
- Content owners become lax

• Decentralized Security Model

- Security the responsibility of the Content Owner
- Access can be granted quickly
- Content owners maintain vigilance

Delegated Security

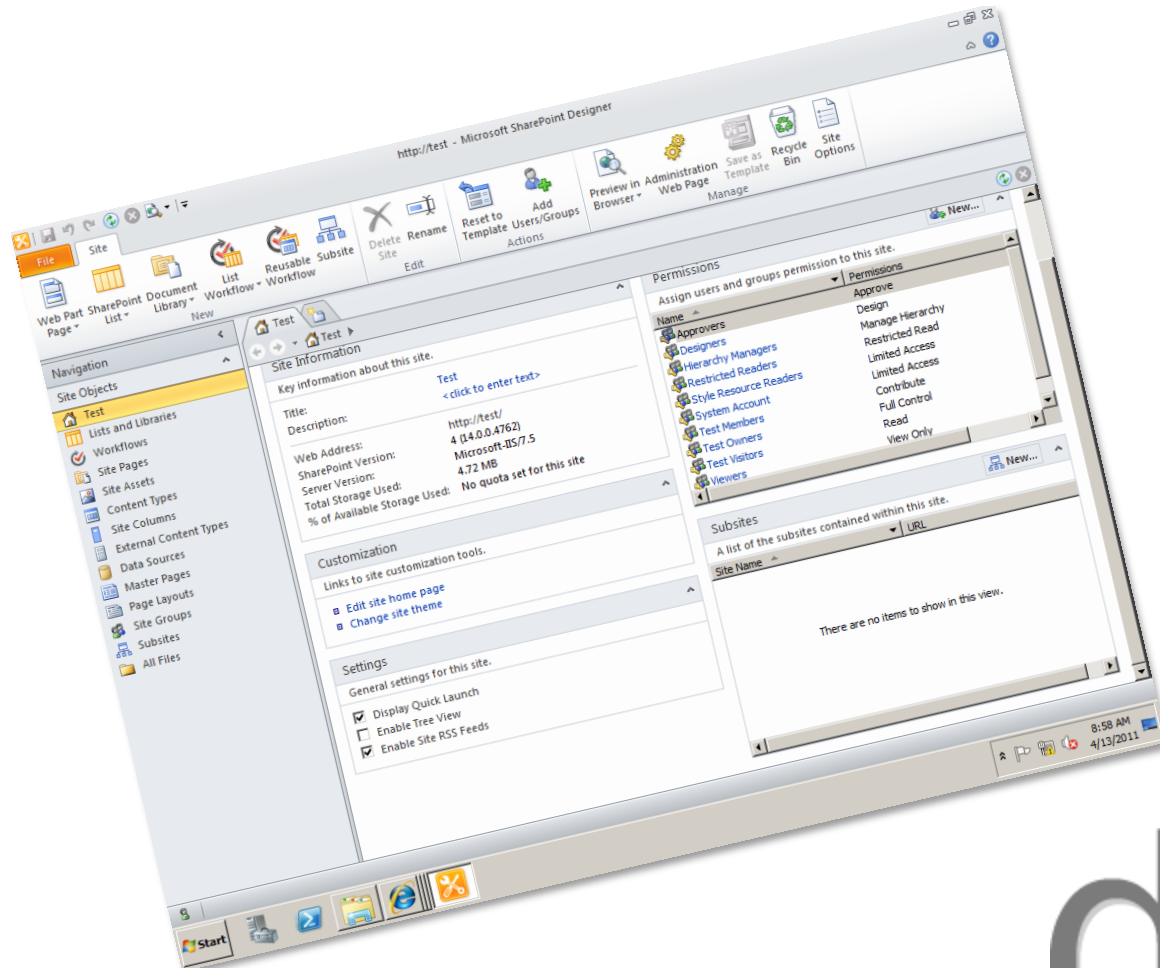


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Tip#3 – SharePoint Designer

- Workflows to automate business processes
- DataForm webpart
 - Better Grouping/Sorting/Filtering
 - Conditional Formatting for Dashboards
- External Content Types/Lists
 - Not everything is stored in SharePoint
 - Almost everything can be accessed from SharePoint
- Better Access Control than SPD 2007

SharePoint Designer



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Tip#4 – Enable Ratings for Folksonomy

- Taxonomy is categorization from the Top Down
- Folksonomy is categorization from the Bottom Up
- Ratings
 - Ratings entered once per user
 - Ratings averaged by timer job once an hour
 - This is a common model used on the Internet

Folksonomy

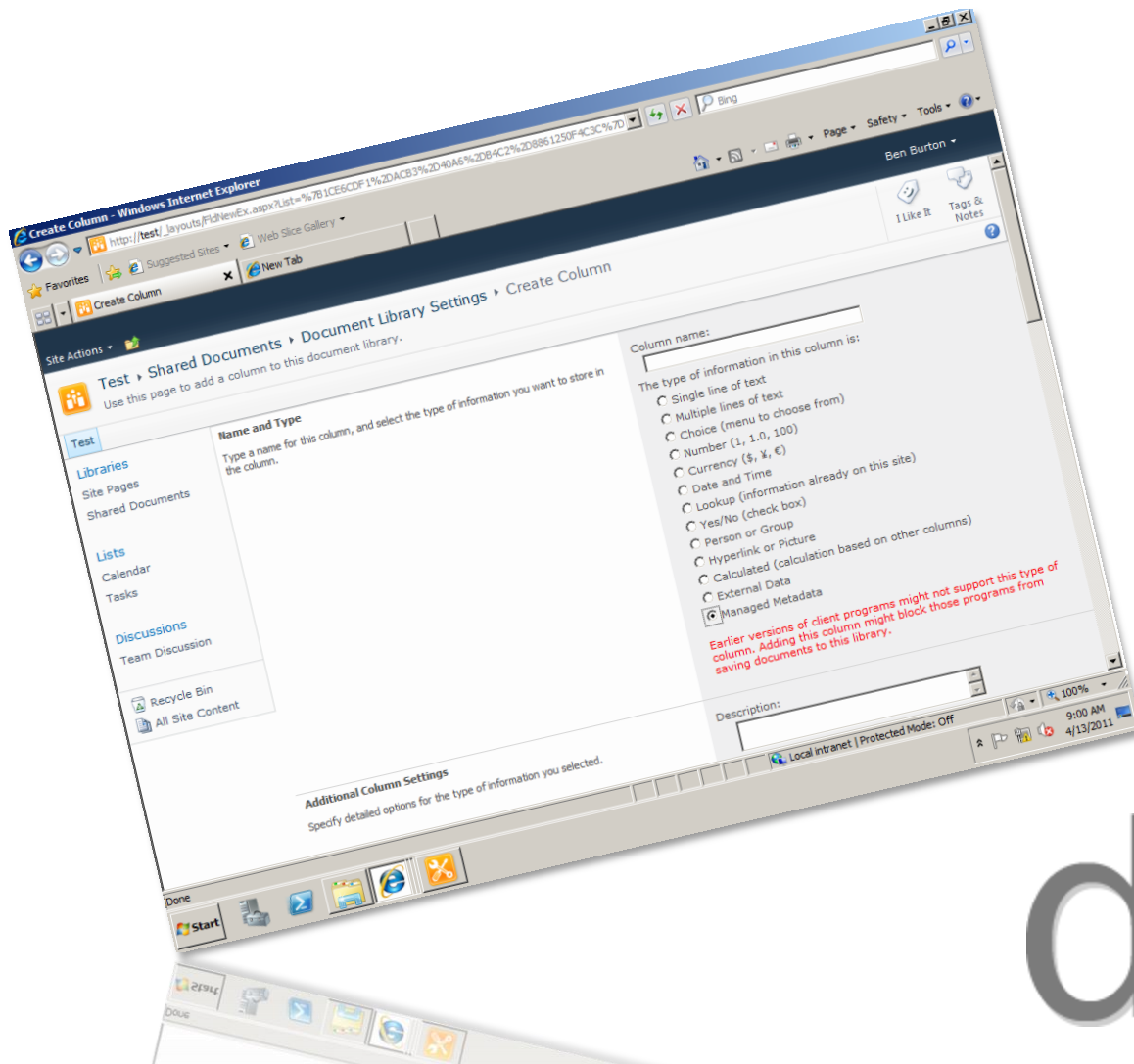


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Tip#5 – Local Managed Metadata

- Managed Metadata improves Findability
- Managed Metadata can be maintained without Farm Admins
- Add Managed Metadata column
 - Local Site Collection based
 - Open or Closed Metadata termset
 - Termset Editor available at Site Collection level
 - Management can be delegated

Local Managed Metadata



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Best Practices

- Do unto IT as you would have IT do to you!
Treat IT as Partners
- Ask for Training to learn new Features
- Help create appropriate Governance Policies - and -
Support Enforcement of Governance Policies
- Ask IT to focus on disaster recovery and custom tools
- Strive to keep content Accurate AND Timely

QUESTIONS?

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