

Fully Managing Policies and Procedures

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Agenda

- ▶ Document Management
 - ▶ Versioning
 - ▶ Approval Routing for Publishing
 - ▶ Metadata
 - ▶ Document Information Panel
 - ▶ Content Types
- ▶ Records Management
 - ▶ In-Place Records Management
 - ▶ Information Management Policies
- ▶ Workflows
 - ▶ Retention
 - ▶ Disposition
- ▶ Centralized vs. Decentralized Approach

SharePoint Scenario

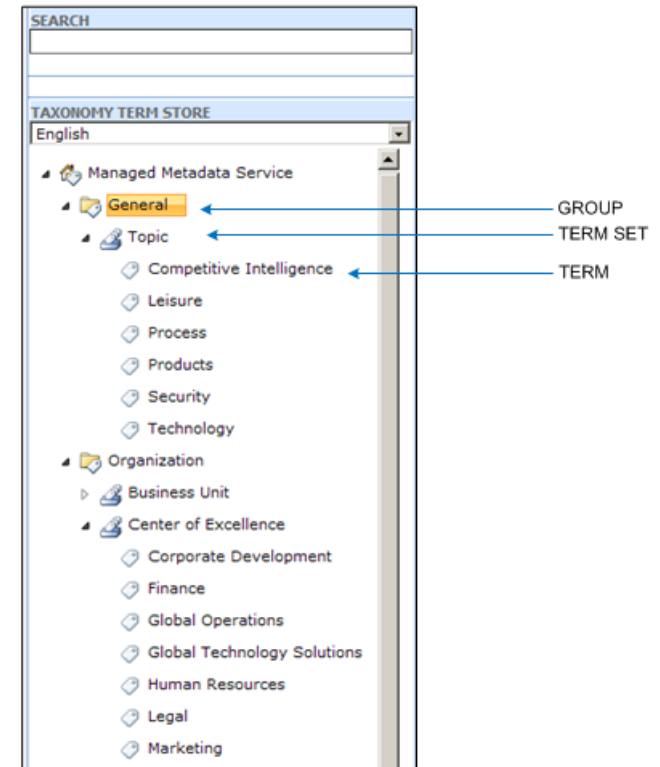
- ▶ Virginia Regional Medical Center (VRMC)
- ▶ Policies and Procedures Center
 - Document Management
 - Workflows
 - Retention Policies
 - Records Management
- ▶ Centralized vs. Decentralized

Document Management

- ▶ Versioning
- ▶ Approval Routing for Publishing
- ▶ Metadata
- ▶ Document Information Panel
- ▶ Content Types

Managed Metadata

- ▶ Centrally controlled corporate taxonomy and folksonomy
- ▶ More consistent use of terminology
- ▶ Better search results
- ▶ Dynamic
 - Managed Metadata Column
 - Add/Update term, syncs down
- ▶ Promote keywords to terms
- ▶ Use Excel to bulk import



Managed Metadata

► Metadata Navigation

The screenshot displays a metadata navigation interface. On the left, a tree view shows the following structure:

- Documents
 - Confidentiality Level
 - Product Category
 - Differentials
 - Gears
 - Bevel
 - Helical
 - Rack and Pinion
 - Spur
 - Worm

Below the tree view is a 'Key Filters' panel with 'Apply' and 'Clear' buttons. It includes sections for 'All Tags' (with an input field), 'Modified' (with a dropdown set to 'On' and a calendar icon), and 'Content Type' (with a dropdown menu). The dropdown menu is open, showing the following options:

- Document
- Folder
- Link to a Document
- Business Requirements Document
- New Product Overview
- Product Datasheet
- Sales Presentation (highlighted)
- Contract
- Internal Guidance
- Sales Flyer

On the right side, a list of documents is displayed, each with a document icon:

- 440 Ring Gear
- AXODE-2Z Pinion for 12 inch
- AXODE-2Z Pinion for 9 inch
- Contoso plus Trey beats the Competiti
- Contoso's Best Selling Gear
- How to Sell the 390 Pinion for 9 inch
- How to Sell the 390 Ring Gear
- How to Sell the A4PZ Planetary Gear
- Sales Presentation - A. Datum - Trans
- Sales Presentation - Consolidated Mess
- Sales Presentation - Lucerne - Transfe
- Sales Presentation - Northwind - Differ
- Sprockets and Cogs
- Test document
- XJ4000 Press Release
- XJ4000 Product Datasheet
- XJ6000 Product Datasheet
- XJ7000 Press Release
- XJ7000 Product Datasheet
- XJ7000 Sales Presentation

At the bottom of the list is a '+ Add new document' button.

Content Types

- ▶ Content Types enable organizations to organize, manage, and handle content in a consistent way across a site collection. By creating content types you can ensure consistency in how types of content are handled.
- ▶ When creating a content type you can specify:
 - Site Columns (metadata) that you want to assign to this type
 - Document template (only in Document based content types)
 - Custom New, Edit, Display Forms
 - Workflows Available for that content type
 - The Information Management Policy associated
 - The Document Information Panel used in the Office clients
 - Available document conversions for that content type
 - The custom solutions or features associated with this content type.

Content Type Details

- ▶ Content Types support inheritance

- Example:



- ▶ Defining Content Types in a structured process will be critical to their successful use.
- ▶ Content Types can be created for Documents, Lists Items and InfoPath Forms.
- ▶ Content Types can be used by other tools:
 - Search and Indexing
 - Content Query Web Parts
 - Office 2010 Clients
 - Records Centers

How To Use Content Types

- ▶ When will you need to create a content type?
 - If you have a kind of content (typically a kind of document) that is used in more than one document library you should consider defining a content type
 - Example:

Several users are storing client letters in various libraries in your site. They all derive from the same letterhead template and should have the same base property columns. People would like to be able to search for all client letters in a site.

Records Management

- ▶ In-Place Records Management
- ▶ Information Management Policies

Centralized vs. Decentralized

- ▶ There is no single best or correct approach

- ▶ Decentralized

- ▶ Create document in HR, IT, Finance department site
- ▶ Once published/approved, route to Policies & Procedures Center

- ▶ Centralized

- ▶ Create document in Policies & Procedures Center
- ▶ Use Content Query Web Part on department site to display documents to users

Questions?

Thank You!

How can TCSC help?

- ▶ We offer a variety of SharePoint architecture, administration, development and training services
- ▶ SharePoint Systems Assessment (Audit)
- ▶ Office 365 Pilot Assistance
- ▶ Development services including branding, web parts, workflows, etc...

Upcoming Events

- ▶ September 27th – Virginia Beach/Norfolk, Holiday Inn
 - Microsoft & TCSC
 - Business Productivity in Action: Communication, Collaboration, Cloud
- ▶ September 29th – Richmond SharePoint User Group
 - Experts Panel & Dinner
 - VHDA Building Innsbrook
- ▶ October 12th - Richmond, The Place
 - Business Productivity in Action: Communication, Collaboration, Cloud
- ▶ November 5th – SharePoint Saturday Richmond Convention Center
- ▶ November 9th – TCSC SharePoint Seminar, The Place @ Innsbrook
- ▶ January 7th – SharePoint Saturday Virginia Beach