

Information Architecture for SharePoint Document and Records Management

One-day course

- 23 February 2012
- 24 May 2012
- 18 October 2012

at the Innovation Centre, University of Hertfordshire

£25

Early Booking
Discount

Choice
of three
dates

- SharePoint information governance
- Information architecture design
- Analysing and organising content
- Applying retention schedules
- Tagging content
- Migration issues



www.cimtech.co.uk



Information Architecture for SharePoint Document and Records Management

One-day course: ■ 23 February 2012 ■ 24 May 2012 ■ 18 October 2012

Overview

This course is aimed at information managers, records managers and IT project managers considering the use of SharePoint for documents and records management. The course content will help you create a well-managed SharePoint implementation that meets Information Governance requirements and creates a sustainable solution for documents and records.

The course gives concrete and impartial advice from a non-technical perspective. It covers both 2007 and 2010 SharePoint releases and the substantial differences between them.

You will take away from this course

- clear ideas of what content to put into SharePoint and what not to
- an outline of your Information Governance requirements
- advice on records management in SharePoint
- methods of carrying out an information audit to prepare for SharePoint
- methods of organising and tagging content in SharePoint
- practical guidance on migrating content into SharePoint.

Programme

The morning starts with coffee and introductions.

Session 1 covers the design of a corporate information architecture: how to decide what goes where between SharePoint, data applications, intranet, shared drives, EDRM, email accounts, paper and Enterprise 2.0 applications. It discusses Information Governance requirements, the differences between information, documents and records and the legal admissibility implications of each solution. It looks at different types of SharePoint sites and how to use the Records Centre.

Session 2 gives practical advice on carrying out an Information Audit to identify and categorise the contents for SharePoint. It offers two audit options: one using central resources and one using local staff to complete questionnaires. The session explains the uses of an audit, how it can best be managed, what tools to use, how to include databases and different media and how the data can be analysed and the results used.

Session 3 looks at how to structure content into SharePoint site collections, sites and document libraries and how to populate the structure using the results of the Information Audit. Good classification design will provide ease of use and a sustainable structure while enabling records management, workflow and access controls to be applied. The session will identify design constraints and offer principles and tips. It will demonstrate an example of a well-structured SharePoint implementation.

Session 4 looks at retention schedules: how to design them, where to find good examples and how to apply them. It discusses how to apply retention schedules to the SharePoint Records Centre and active sites and how to execute disposal.

Session 5 looks at tagging SharePoint content: using metadata to assist with searching and managing content. It will discuss how to use Views to represent content in different ways for different users, how to design Content Types and how to use Managed Metadata, Managed Terms and Managed Keywords. It looks at automated classification and folksonomy as alternatives to traditional classification.

Session 6 discusses how to migrate existing content to SharePoint sites and what to do with the residue. It looks at tools to automate the deduplication, tagging and movement of content and the human issues involved in change management.

Programme

09.15 *Registration and coffee*

09.30 **Introductions**

09.45 **Session 1 Information Architecture Design** Planning the management of corporate information: what goes where between SharePoint, data applications, intranet, shared drives, EDRM, email accounts, paper and Enterprise 2.0. Information governance issues. Different types of SharePoint sites. How to use the Records Centre.

Discussion

10.45 *Coffee break*

11.00 **Session 2 Analysing Content** Conducting an Information Audit: objectives, options and outputs. Direct and devolved methods.

Discussion

12.15 *Lunch break*

13.00 **Session 3 Organising content** Creating a classification scheme and applying it to the SharePoint site structure. Mapping the Information Audit to the scheme. Design constraints, principles and tips. Access control.

14.00 **Session 4 Applying retention schedules** Designing retention schedules. How to apply them to your SharePoint sites.

Discussion

14.45 *Tea break*

15.00 **Session 5 Tagging content** Designing a metadata model. Standards and best practice. Methods of automating capture. Designing Content Types and Managed Metadata. Taxonomy v. folksonomy.

15.45 **Session 6 Migration issues** Migration, change management and tools to help with deduplication and weeding.

Discussion

16.30 *Close*

● *All sessions will be delivered by Cimtech senior consultants including Alison Gibney and Dave Pitt. Cimtech reserves the right to alter the timing and content of the sessions.*

Booking

Please complete the booking form overleaf and return to Cimtech as soon as possible. If you book a place and your plans change, an alternative delegate is welcome. If that is not possible, you may cancel your booking with a refund—less 10 per cent administrative charge—provided we receive notification in

writing at least 10 working days before the event. Cancellations received after that will be liable for the full amount. Special diets can be accommodated and a list of local hotels will be sent on request—please tick the appropriate boxes on the booking form. The early booking discount is available on bookings made twenty-eight days in advance of the course.

