CA Technologies

Microsoft Office SharePoint Online 365

Functional Design Document, Phase 1 Foundations

Version 1.5

Revision History

Date	Version	Description	Author
5/15/14	0.1	Pre-Draft	Maria Espino
5/1/15	0.2	Pre-Draft	Maria Espino
5/8/15	0.3	Taxonomy Additions	Jamie Boeder
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5/26/15	0.7	Updates and Additions	Maria Espino
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7/21/15	1.4	Separated documents to focus this document on only Phase 1 items.	Maria Espino
7/27/15	1.5	Updates and Additions	Maria Espino

Table of Contents

1 Introduction

This document has been created to outline the implementation of an information architecture based on Microsoft Office SharePoint Online 365, as part of CA Technologies, Inc.'s E3 Software as a Service Agreement with Microsoft. This document will attempt to identify:

- The defining functional elements that will need to be constructed to support the information architecture necessary for a successful deployment of SharePoint collaboration platform that can sustain new content additions as well as future migrated content additions.
- The solutions that the proposed information architecture will provide in order to satisfy the business requirements previously gathered and documented for phase 1.

The following has been identified as **out of scope** for this project's design:

- Detailed plan and migration of current content housed in various other on premises SharePoint servers, such as SharePoint 2007, SharePoint 2010, and SharePoint 2013.
- Detailed recommendations on the use of SharePoint features such as: branding, design, workflows, customizations, core developments, apps management, or design management.
- In depth guidance and training on the creation and use of MySite and MySite's features,
- Recommendations on creation and use of security-driven Active Directory user profiling, as those will be included in the Technical Specifications.
- Recommendations on creation and use of a two-way search index integration between On Premises solutions and SPO365, as those will be included in the Technical Specifications.
- Recommendations on document, library, list, site, and site collection archiving process that works with SPO365 which will be addressed in a subsequent phase.

1.1 Who contributed to the Information Architecture design?

The informational architecture that is being delivered as part of this project is only recommended to support a Microsoft Office SharePoint Online 365 organizational installation within CA Technologies and its people. As such, the contributions of CA's employees are essential to appropriately design an information architecture that is fluid and easy for them to use.

In a series of group workshop sessions, one on one interviews, and countless brainstorming conversations we have spent considerable time with CA's employee population. Several were extremely interested in giving us their input and suggestions, from the Information Technology department to Sales to Legal to Support, every single department was represented in assisting and supporting the changes to their SharePoint environment that will come with this deployment.

1.2 Purpose

The purpose of this document is to outline the solutions and design necessary to implement a well-organized informational architecture and site structure for the SPO365 environment at CA Technologies, Inc.

1.3 Acronyms and Common Names

The use of certain acronyms throughout this document and common names known only to CA Technologies' employees are listed below for reference.

Acronym or Common Name	Meaning or Definition
SPO365 on SPOL	SharePoint Online 365
SP2007 (or MOSS)	Microsoft Office SharePoint Server 2007 (On Premises)
SP2010	SharePoint Server 2010 (On Premises)
SP2013	SharePoint Server 2013 (On Premises)
OnPrem	On-premises software is installed and run on computers on the premises (in the building) of the person or organization using the software.
Cloud	Cloud computing which involves distributed computing over a network, where a program or application may run on many connected computers at the same time.
IA	Information Architecture is the structural design of shared information environments to support usability and findability within them.
Taxonomy	The practice and science of classification of things or concepts, as well as to the principles underlying such a classification.
SaaS	Software as a Service; usually referring to software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted on the cloud by independent software vendors or application service providers.
ISV	Independent Software Vendors is a company specializing in making or selling software, designed for mass or niche markets; such as CA Technologies or IBM or SAP.
ASP	Application Service Providers are internet hosting provides computer-based services to customers over a network; such as Microsoft in offering their Offce365 Suite of Products online.

2 Site Structure

Site hierarchy for SPO365 is the most important first step in defining how this system will impact users' ability to find and reuse information in a consistent process. It is more so important since Office365 comes with some pre-built, unmodifiable elements that can be a hindrance in the customization of an IA for the company.

Working with these limitations requires a lot of thought and involvement with the end-users. Engaging the users from the very beginning ensures great user adoption and less rework time at the end of the project.

2.1 Root Level Site Collections

2.1.1 Publishing Portals as Root Sites

All site collections are built with the Publishing Portal site template to facilitate the access to key features that business leads require.

Access to specialty features such as the Enterprise Wiki and Design Manager are only available to publishing sites. Other features such as publishing workflows and catalog options for content aggregation are also only available to publishing sites.

Design Manager is especially critical for our business leads to be able to design their departmental portals to a design of their choosing. That feature is only available to publishing sites.

2.1.2 Publishing Subsites for Content Authoring

Business leads are granted either site ownership of their department portals under /SITES/DEPT or site collection administration of their collaborative workspaces under /TEAMS/{Department Name}.

Each portal site has been given a corresponding publishing sub site for content creation, editing, management, and publishing that allows business leads to grant whoever is a content contributor access to the sub sites without having to grant them access to their top level sites. This provides an extra security layer and facilitates more control over content contributions versus design elements.

For example, a departmental portal may house a library of images, photos, and icons that can be utilized centrally as media storage for the entire department at the content authoring sub site level, but the images, photos, and icons used to create the design for the portal can be kept at the top level site. The designer or designers then have easier access to those media files versus the centralized one.

You could potentially add tags, required meta-data, even an approvals process for the centralized media library that then designers do not have to fiddle with to design or redesign pages for their departmental portal. Since only designers would have access to the top level site, no regular department team members would be able to bypass the process established and drop things into the designer’s library.

2.2 Managed Paths in SharePoint Online

The second most noticeable limitation of SPO365 is the fact that you are given only two managed paths, in addition to the MySite managed path, to work with that cannot be modified and cannot be added to.

The first one is: /SITES

This managed path is often used to host the portals for departments and other features that the organization will use. It is often open to all internal users and it remains very light in weight as not much content is hosted on these sites, usually. It can also serve to host external web applications that are built upon the SharePoint platform for public consumption to all network accounts.

PHASE 1 NOTES:
All sites underneath this managed path are sites that will be migrated over from other internal collaborative sources during later phases of this project and thus are ***out of scope*** for phase 1. However, the framework is being installed as part of this phase.

The second one is: /TEAMS

This managed path is often used to host the more collaborative efforts between departments and other features that the organization will use. It is often open to only a select few internal users based on their department or other security considerations.

PHASE 1 NOTES:
All departmental collaborative sites underneath this managed path are sites that will be migrated over from other internal collaborative sources during later phases of this project and thus are ***out of scope*** for phase 1. The only sites that would be housed under this managed path with the Phase 1 release are:

/TEAMS/PROJECTS
/TEAMS/{DEPT}PROJECTS
/TEAMS/{NEWDEPT}

3 Branding and Page Layouts

3.1 Master Page

The master page is the SharePoint web control that handles how the top header, search, navigation, and left side bar will look and feel to the user. The master page for the portal requires the following custom elements:

- The master page will reflect the colors and highlights defined in the applied theme. The default theme will be CA Blue.

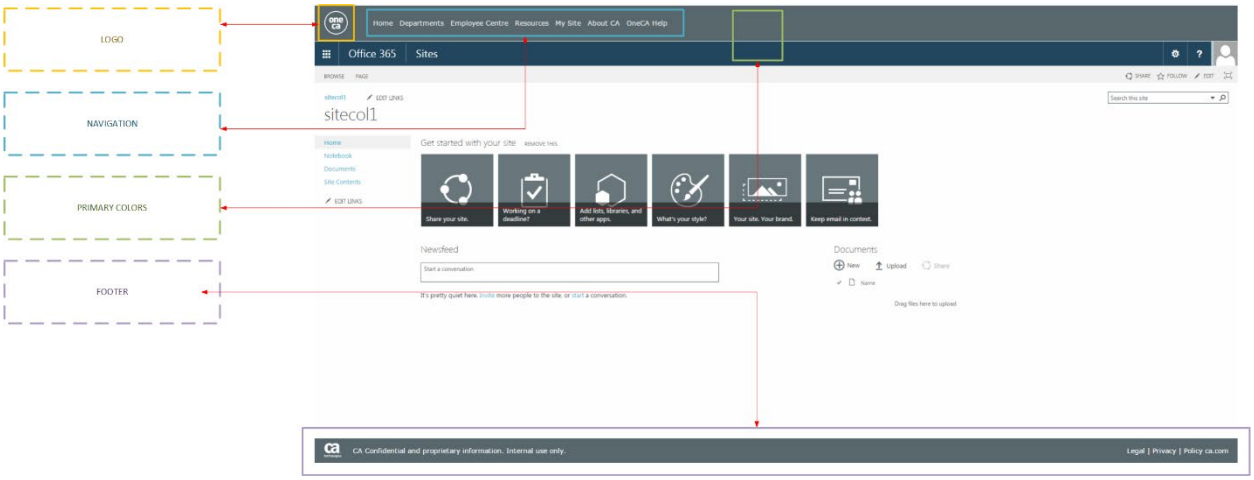


Figure 3.1-a: Master Page Legend

AREA	DESCRIPTION	DESIGN SPECIFICATIONS
LOGO	The Brand Logo for OneCA.	A white circle with the word "ONE" above the word "CA".
		Dimensions: 50 px by 50 px
		Color: White (#FFFFFF)
NAVIGATION	Controls end user navigation.	A JSS file that is built into the navigation area and is driven by a navigation app control.
		Base Color:
		Hover Color:
		Active Color:
		Fonts Used: Calibri
		Font Styling Used: Color: White (#FFFFFF); Size: 11 px; Weight: Bold
PRIMARY COLORS	Used in header and footer elements.	Based off of the seattle.master default page.
		Top Banner Color: #58676d
		Secondary Top Banner Color: #647d8e
		Footer Color: #58676d
		Fonts Used: Calibri
		Font Styling Used: Color: White; Size: 11 px; Weight: Bold

FOOTER	The footer requirement was deprecated for this system as it is a cloud-based system.	Legal disclosures will be added to the global navigation.

- Global navigation that reflects the 7 main areas:
  - NEWS
  - DEPARTMENTS
  - EMPLOYEE CENTER
  - RESOURCES
  - MYSITE
  - ABOUT CA
  - ONECA HELP

- The page header will use the approved corporate logo as defined below:

Figures 3.1-b & 3.1-c: Official CA Branded Logos

- Global navigation will display the drop-down menu style very similar to one.CA.com's navigation referenced below:

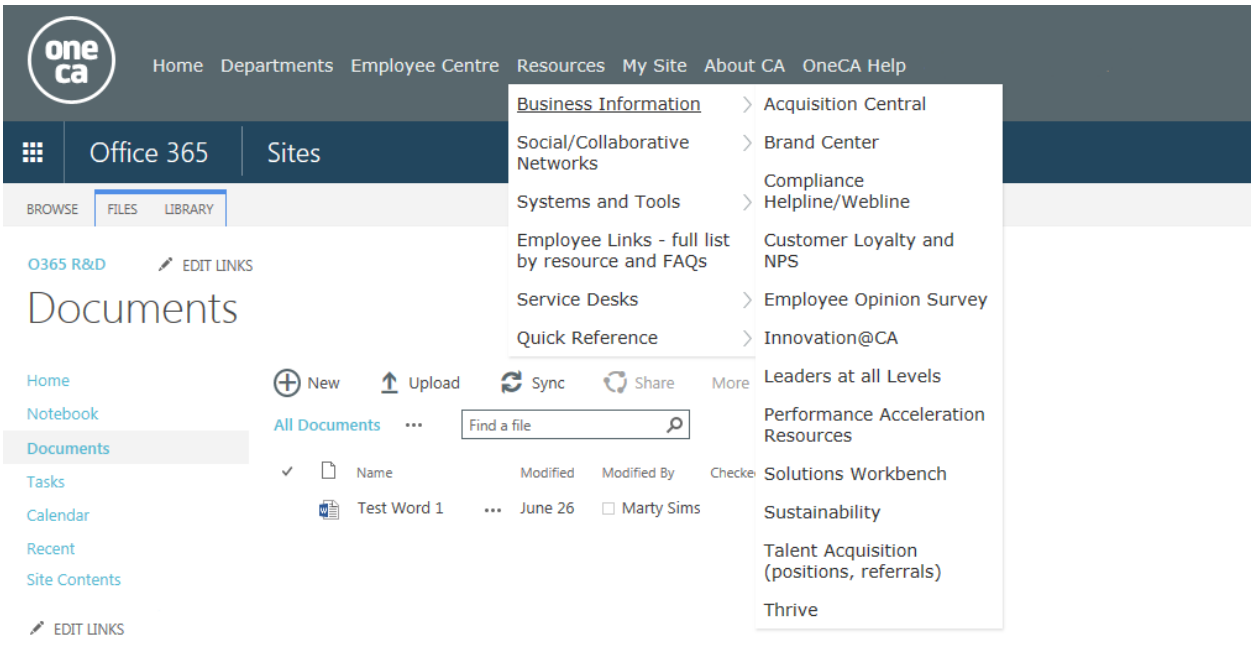
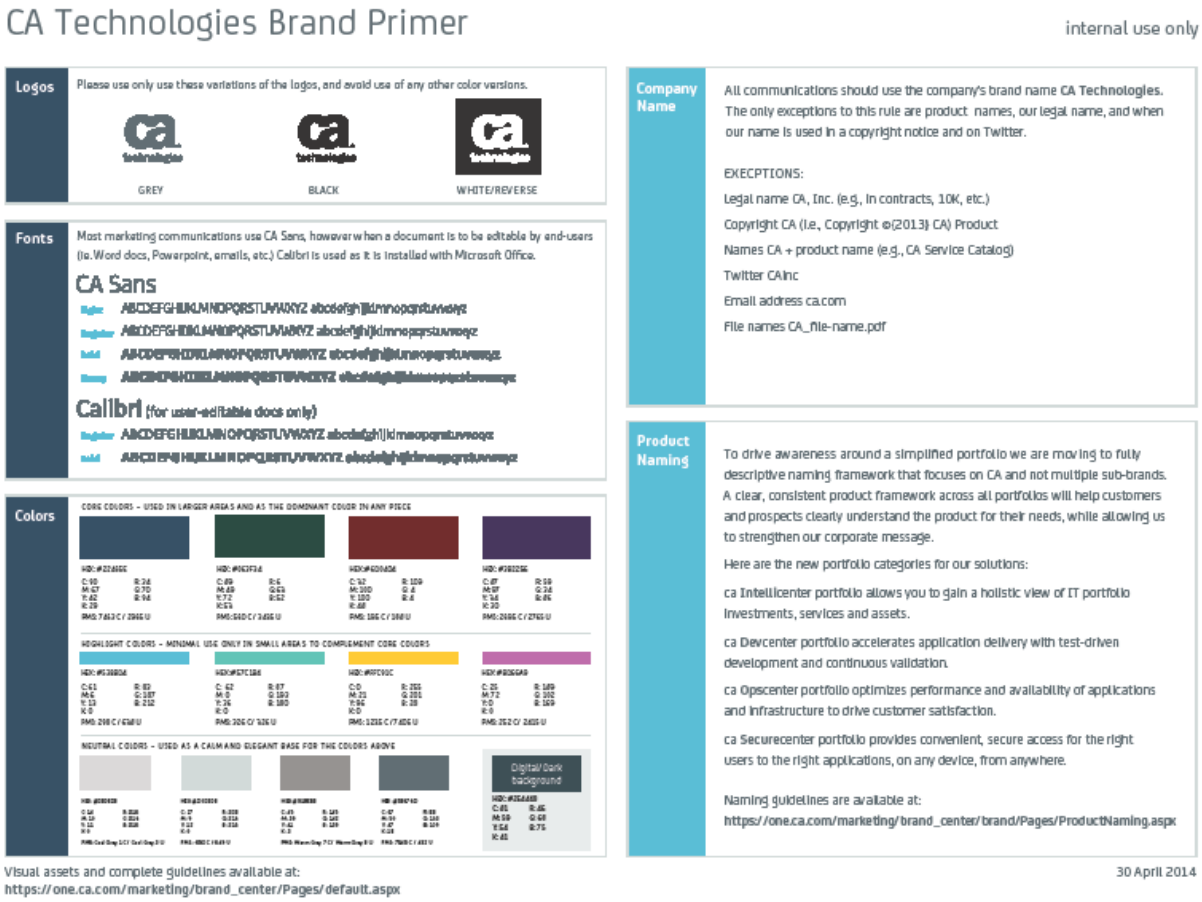


Figure 3.1-d: Global Navigation with Fly out Menus

- The default colors used will reflect the various shades of gray and light use of the highlight colors that appear in the Creative Brief, approved by CA. These colors make up the CA Blue theme.

SAMPLE	RBG, CMYK, HEX CODE
	HEX: #58676D C: 67 M: 50 Y: 47 K: 18 R: 88 G: 103 B: 109
	HEX: #22465E C: 90 M: 67 Y: 42 K: 29 R: 34 G: 70 B: 94
	HEX: #D8D8D8 C: 14 M: 10 Y: 11 K: 0 R: 216 G: 216 B: 216
	HEX: #53BBD4 C: 61 M: 6 Y: 13 K: 0

R: 83
G: 187
B: 212



CA Technologies Brand Primer

internal use only

Logos

Please use only use these variations of the logos, and avoid use of any other color versions.

GREY | BLACK | WHITE/REVERSE

Fonts

Most marketing communications use CA Sans, however when a document is to be editable by end-users (ie. Word docs, Powerpoint, emails, etc.) Calibri is used as it is installed with Microsoft Office.

CA Sans

Calibri (for user-editable docs only)

Colors

CORE COLORS – USED IN LARGER AREAS AND AS THE DOMINANT COLOR IN ANY PIECE

HIGHLIGHT COLORS – MINIMAL USE ONLY IN SMALL AREAS TO COMPLEMENT CORE COLORS

NEUTRAL COLORS – USED AS A CALM AND ELEGANT BASE FOR THE COLORS ABOVE

Digital/ Dark background

Visual assets and complete guidelines available at:
https://one.ca.com/marketing/brand_center/Pages/default.aspx

Company Name

All communications should use the company's brand name **CA Technologies.** The only exceptions to this rule are product names, our legal name, and when our name is used in a copyright notice and on Twitter.

EXECPTIONS:

Legal name CA, Inc. (e.g., In contracts, 10K, etc.)

Copyright CA (i.e., Copyright ©(2013) CA) Product

Names CA + product name (e.g., CA Service Catalog)

Twitter CAInc

Email address ca.com

File names CA_file-name.pdf

Product Naming

To drive awareness around a simplified portfolio we are moving to fully descriptive naming framework that focuses on CA and not multiple sub-brands. A clear, consistent product framework across all portfolios will help customers and prospects clearly understand the product for their needs, while allowing us to strengthen our corporate message.

Here are the new portfolio categories for our solutions:

ca Intellicenter portfolio allows you to gain a holistic view of IT portfolio investments, services and assets.

ca Devcenter portfolio accelerates application delivery with test-driven development and continuous validation.

ca Opscenter portfolio optimizes performance and availability of applications and infrastructure to drive customer satisfaction.

ca Securecenter portfolio provides convenient, secure access for the right users to the right applications, on any device, from anywhere.

Naming guidelines are available at:
https://one.ca.com/marketing/brand_center/brand/Pages/ProductNaming.aspx

30 April 2014

File Include 3.1-a: CA, Inc. Approved Branding Creative Brief PDF from Marketing

FONTS AND FONT COLORS USED
Fonts Used: Calibri
Font Styling Used: Color: White; Size: 11 px; Weight: Bold

3.2 Themes

At Foundations Launch, which is the first phase of the project, we will be using two themes: CA Blue, which will be the default, and optionally CA Gray. No other themes will be displayed and available to the end user. In future phases, we may add additional themes as they are requested.

3.2.1 CA Blue Theme

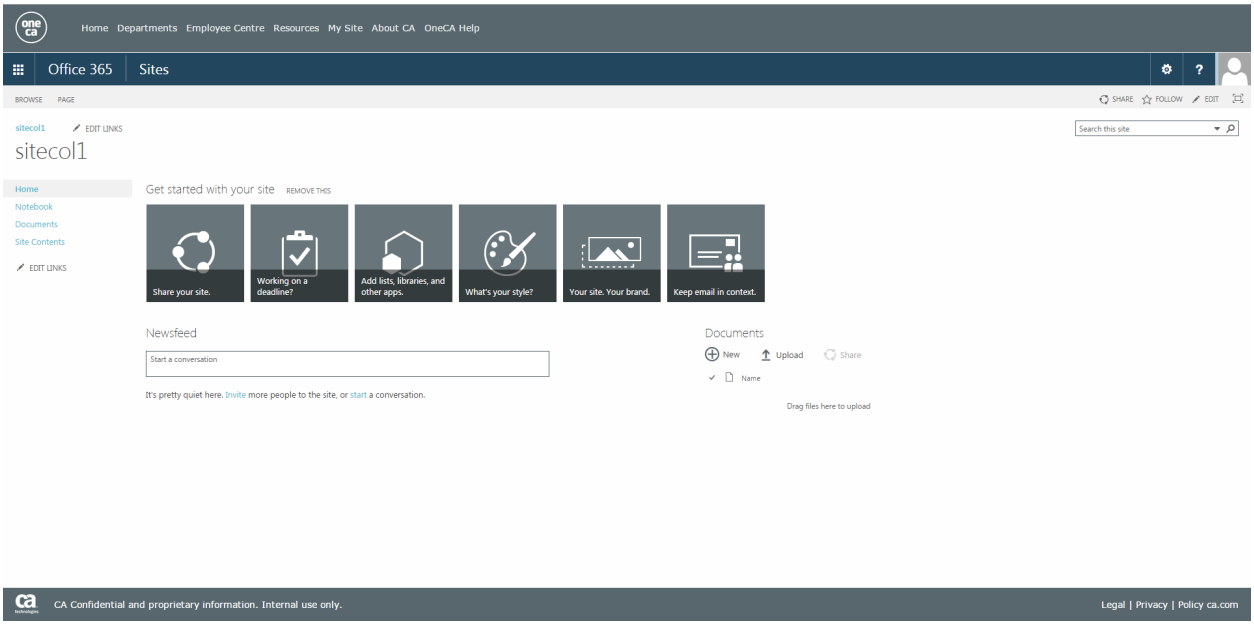


Figure 3.2.1-a: CA Blue Theme, front page.

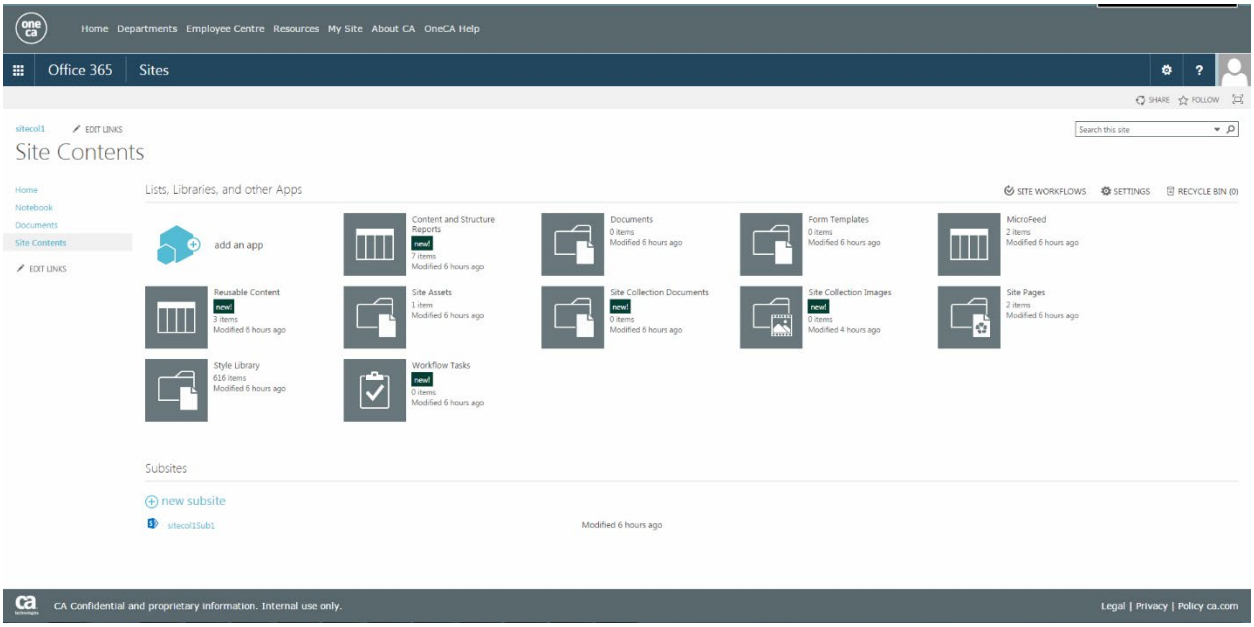


Figure 3.2.1-b: CA Blue Theme, system pages.

AREA	DESCRIPTION	DESIGN SPECIFICATIONS
PRIMARY COLORS	Used in header and footer elements.	Based off of the seattle.master default page.
		Top Banner Color: #58676d
		Secondary Top Banner Color: #22465E
		Third Top Banner Color: #D8D8D8
		Footer Color: #58676d
ACCENT COLORS	Used in the Guiding Tiles, hyperlinks, backgrounds, etc.	Hyperlinks: #53BBD4
		Hyperlink Visited: #53BBD4
		Error Text: #6D0404
		Tile Text: #FFFFFF

3.2.2 CA Gray Theme

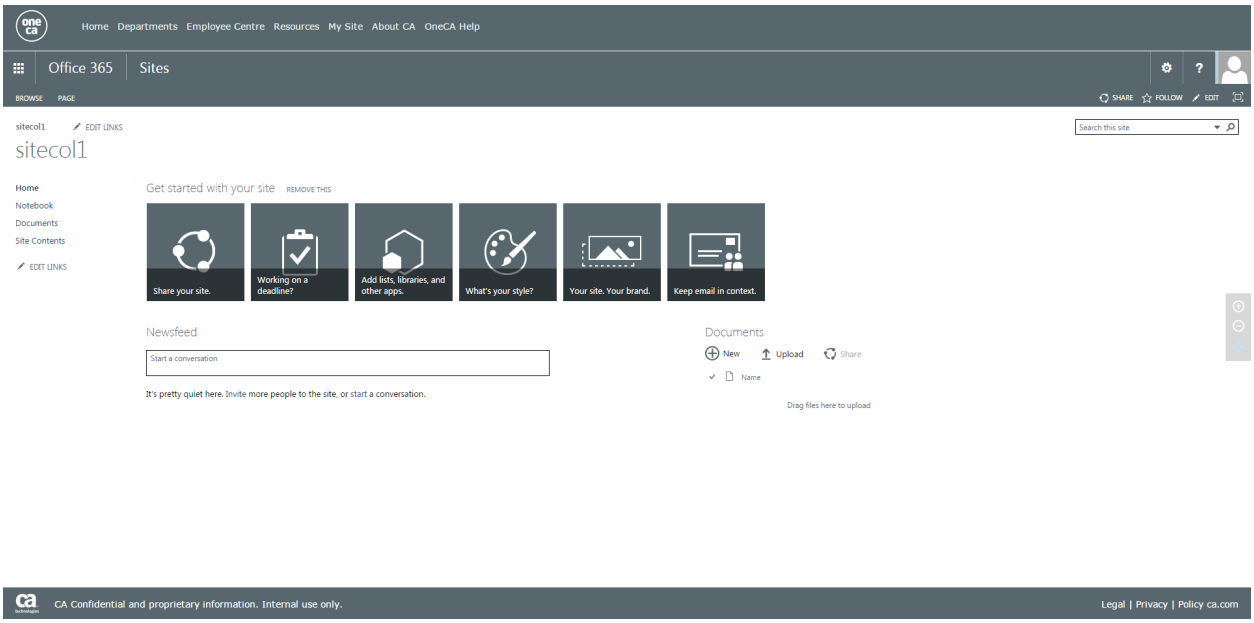


Figure 3.2.2-a: CA Gray Theme, front page.

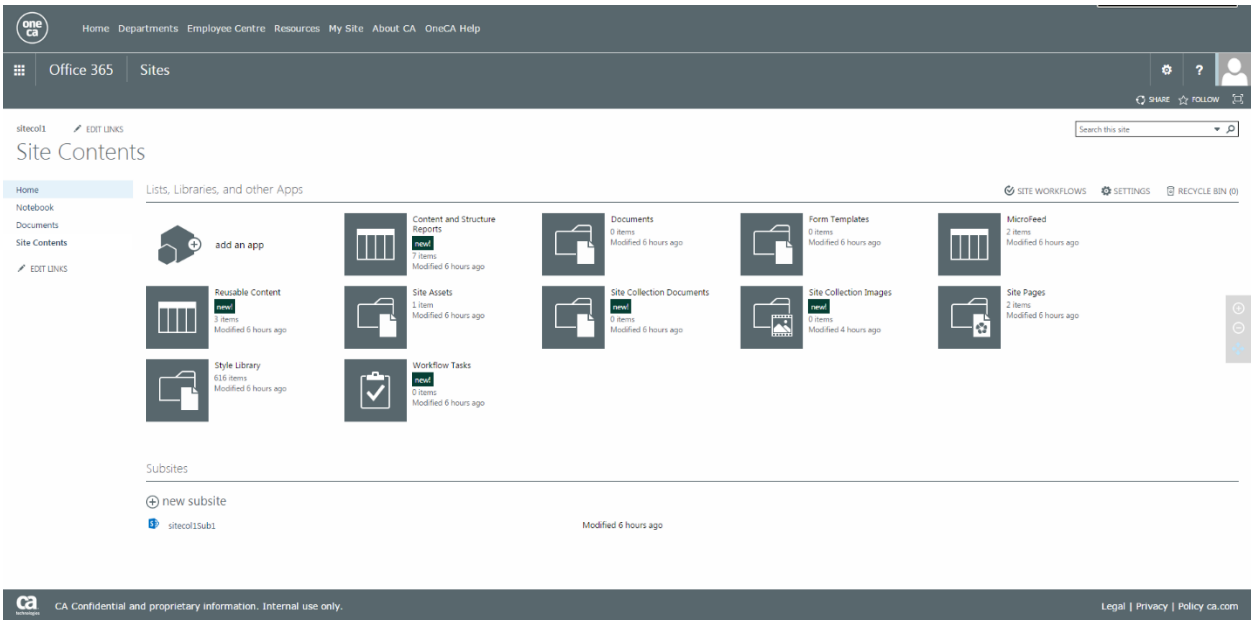


Figure 3.2.2-b: CA Gray Theme, system pages.

AREA	DESCRIPTION	DESIGN SPECIFICATIONS
PRIMARY COLORS	Used in header and footer elements.	Based off of the seattle.master default page.
		Top Banner Color: #58676d
		Secondary Top Banner Color: #58676d
		Third Top Banner Color: #58676d
		Footer Color: #58676d

ACCENT COLORS	Used in the Guiding Tiles, hyperlinks, backgrounds, etc.	Hyperlinks: #918E8B
		Hyperlink Visited: #918E8B
		Error Text: #6D0404
		Tile Text: #FFFFFF

3.3 Custom Page Layouts

3.3.1 Projects Landing Page

The content page of the PROJECTS landing pages under /TEAMS/PROJECTS sites and also for the departmental /TEAMS/{DEPT}PROJECTS sites for the portal needs to provide the following custom elements:

- Area Title
- A site directory of all visible projects would appear on the home page of Projects landing pages.
- Aggregated list of recently updated Project sites.

4 Site Navigation

4.1 Global Navigation

Global navigation will allow CA users to navigate from one major category to another and show drop down menus in relation to each category tier from whatever page they may be on. This global menu will be able at the site level for all sites and sub-sites.

4.1.1 Global Navigation App

In an effort to empower our end users with the ability to modify the global navigation on our SPO365 Online environment, we have developed a Host-Provided App for global navigation.

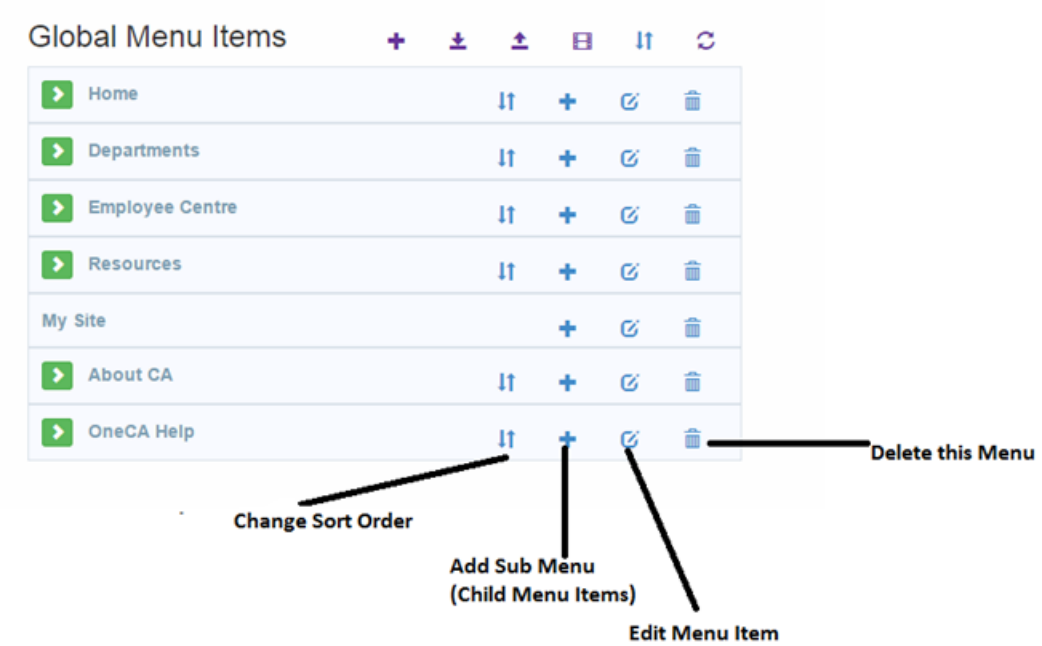


Figure 4.1.1-a: Global Navigation App, showing the ability to add/modify/delete navigational elements by administrators and E2 Business program managers.

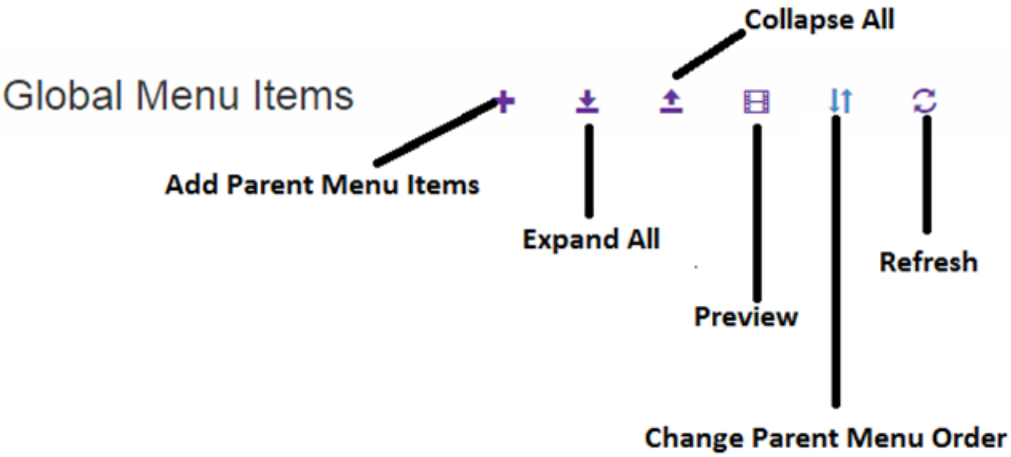


Figure 4.1.1-b: Global Navigation App, explaining the icons and their functions.

4.2 Integration with SharePoint 2007 Navigation

At release, CA's SharePoint Online 365 version will only be hosting project sites and any brand new departments that corporate initiatives create. As such, the integration that will be needed will be at the departmental level from our SharePoint 2007 instance is left to the business user. The business leads will either instruct their users to directly link to a single project site where needed or provide a link to their departmental project site directory from the departmental page in SP2007.

In future phases as we move departments over, the global navigation on SP2007 will redirect the user to the migrated departmental home page on SPO365. The departments that stay in SP2007 will then be linked in SPO365's global navigation to land on those SP2007 departmental page left yet to be migrated. Both navigational elements must be kept in synch, mirroring one another.

This is the best scenario for a seamless transition at the global level for a staggered migration from SP2007 to SPO365.

4.3 Local Navigation

4.3.1 Default Local Navigation

We will be specifying the navigation items to display in current navigation for all collaborative sites. This navigation is shown on the left side of the home page in most sites. The local settings are as follows:

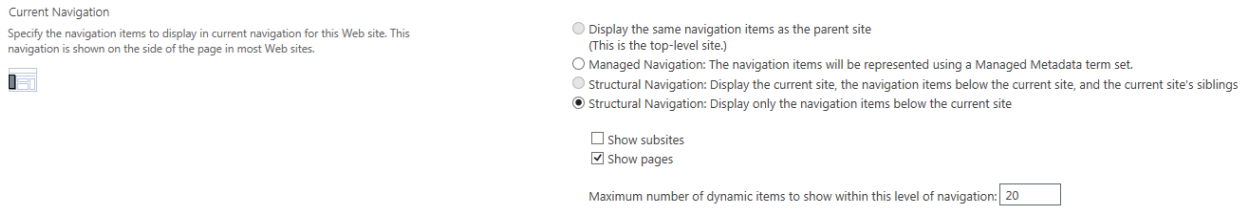


Figure 4.3.1-a: Current navigation settings that will be included in all created sites.

5 Site Naming and URL Paths

It is best practice to have in place a standard way of naming sites and appropriating URL paths to new sites that are created.

Site names are often an after-thought until an administrator is sitting there looking at the site creation page on Central Administration. No one thinks to organize the site creation process and standardize the site names and URL paths in a method that makes the most sense to users and yet can stand the test of corporate time.

URL paths are not easily changed after the fact, and often (as is the case for CA) departments and functional groups change their names around. This is why it is important to come up with a standard site name and URL naming convention that everyone can adhere to.

5.1 Site Naming Conventions

For all departmental landing pages, we will be adopting a standard naming convention to ensure CA's fluid organization can be accommodated in future growth. All departments will be assigned suitable site names of no more than 2-3 words that will not often need to change. Site names should be easily recognizable to any user, new or old and should not conform to department names or acronyms that could potentially change in the near future.

Site names cannot contain CA-known acronyms of any kind and must be spelled out. For example, TS&D's site must be named "Technology Strategy and Development" and not use the acronym that is widely known as that does not assist a new employee in finding and re-using information provided by that department.

5.2 URL Paths

For all areas and sites we will be adopting simple URL's of one or two names at most. No URL's will have spaces, underscores, or any special characters going forward. For CA's longer departmental names, abbreviations may be used but not CA-specific acronyms, with the exception of those departments which have world-wide accepted acronyms.

URL paths should never be created utilizing CAPITAL letters even if documentation shows it as capitals (usually done to call out the URL within the document in question) as part of the URL path; only small cases are acceptable.

CORRECT URL PATH	INCORRECT URL PATH
http://caone.sharepoint/news/NorthAmerica.aspx	http://caone.sharepoint/NEWS/NorthAmerica.aspx

The main portal landing page will be attained by the following URL:

http://caone.sharepoint.com

6 Site Templates

Within SharePoint, a template is collection of features that allow certain teams to collaborate and share information with focus on certain objectives. For the purposes of this implementation, our site templates will be bucketed together and presented as site definitions and feature stapling, rather than just regular site templates. This will drastically improve performance and decrease the amount of actual data that will need to be stored in a database, as we're not duplicating common shared elements of a template onto the database every time we create a new site based on template features.

The templates you see below are based on some commonly known out of the box functionality that comes inherited within Microsoft Officer SharePoint Server 2007, however all site templates mentioned below will be re-modeled as site definitions, even those that come out of the box.

6.1 Team Site Template

This all-purpose template can meet a diverse range of needs. It can store long-term routine information for a single department, or short-term information from a special project that spans several departments. For example, a marketing department can store and manage its planning and budget

documents, track issues and tasks, and share its links and contacts.

This template will require the following SharePoint features to be optionally provided to users requesting such a site:

- Documents
- Notebook
- Calendar
- Tasks
- Site Assets
- Site Feed

6.2 Project Site Templates

The projects site template will be used to provide employees with features that promote, enhance, and document team to team collaboration on projects that are ongoing within CA. It will be used for all sites created under PROJECTS, including those departments that have individual project site collections.

Unlike the Department or Programs site templates, these templates have custom features that are exclusive to collaboration rather than just providing information. A user requesting a project site template will have the option to populate existing custom lists that will display certain relevant information as part of the home page of a project site.

The release plan for Project Site Templates are as follows:

TEMPLATE	FEATURES	PHASE RELEASE
Project Lite	Project Task List, Documents, Project Status, Project Charter	Phase 1

The SharePoint Collaboration team endeavors in future phases to develop "Connector" apps that allow business users to connect to CA-specific programs such as CA PPM and CA Rally to further promote and enforce CAonCA across the organization with proper integration into SharePoint.

6.2.1 Project Lite

The Project Site template is the only template that we are releasing as part of Phase 1 is the "Project Lite" template. This template features a simple home page that allows project managers and collaborators to manage their project needs successfully. It includes the following:

FEATURE	DESCRIPTION
Project Site Guidance Tiles	Provides an easy way for end users to set up the basics for their project sites.
Project Tasks Lists	Provides a means by which team members and project managers can coordinate and work through tasks associated with the project. The task list can also be viewed as a timeline.

Project Charter	Provides a way to add a mission statement and/or scope statement about what the project is and what is to be accomplished with it.
Project Documentation	Provides a way to house project documents.
Project Help	Provides a wiki-like page that users can edit to add in important information about the project.
Project Status Reports	Provides the ability to add recurring project status reports that is visible on the home page.
Work Reports	Provide easy, pre-filtered views of the project task list.
Project Closure Task List	Project managers should have a task list that is only visible to them that shows them a checklist of items they need to do to effectively close their projects.

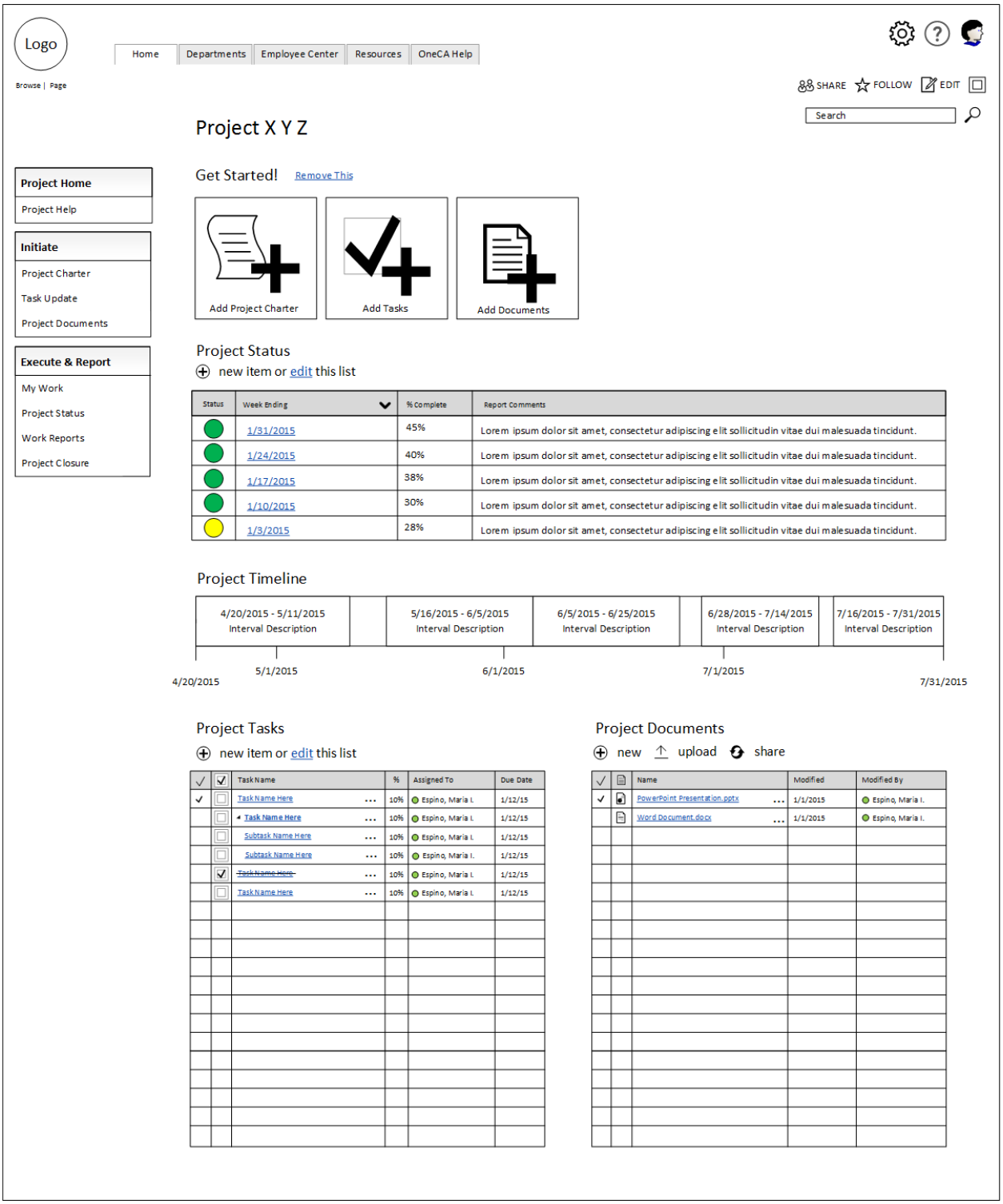


Figure 6.2.1-a: Project Lite Wireframe, showing the home page.

7 Site Creation

7.1 Site Creation Request Form

The site creation request form will need to have the following elements added to it in order to support this new information architecture and governance policies.

7.1.1 New Site Request Form (All Employees)

All employees with visitor or member access can request a new site from wherever they are in the system by submitting a site request form that is processed by the Business Lead of the area where they wish the site to be housed under.

Below is the sample wireframe of the New Site Request Form with a detail on all the fields we need to capture per business requirements.

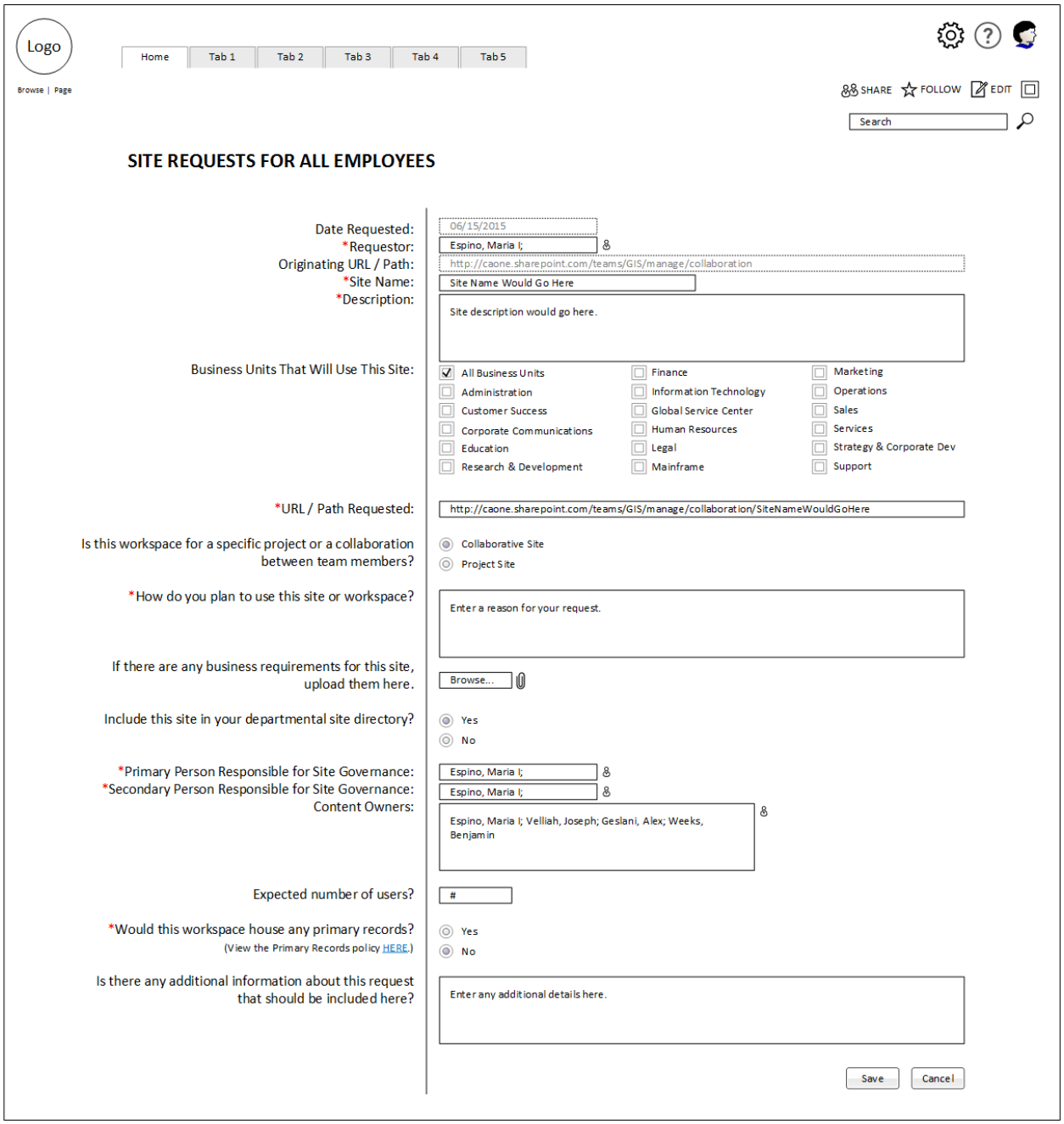


Figure 7.1.1-a: Wireframe showing the New Site Request form as seen by all regular employees.

ID#	Req.	Column Name	Data Source	Default	Editable?
1	Y	Date Requested	[Today]	Today's Date	N
2	Y	Requestor	[You]	Person Logged In	Y
3	Y	Originating URL	URL where the user originates request from		N
4	Y	Site Name	Single Text Field Input		Y

5	**Y**	Description	Multiple Text Field Input		Y
6	**N**	Business Unit	Checkbox Selection, Allow Multiples	All Business Units	Y
7	**Y**	URL Requested	Appends Site Name to Originating URL, without spaces	Originating URL with appended Site Name, without spaces	Y
8	**N**	Site Type	Radial Selection	Collaborative Site	Y
9	**Y**	Request Reason	Multiple Text Field Input		Y
10	**N**	Item Upload	Item Upload		Y
11	**N**	Site Directory	Radial Selection	Yes	Y
12	**Y**	Primary Site Owner	People Picker, Limit to 1		Y
13	**Y**	Secondary Site Owner	People Picker, Limit to 1		Y
14	**N**	Site Members	People Picker, Select Multiple		Y
15	**N**	Number of Users	Single Text Field Input		Y
16	**Y**	Primary Records Use	Radial Selection	No	Y
17	**N**	Additional Information	Multiple Text Field Input		Y

7.1.2 New Site Request Form on Edit (All Employees)

Upon receiving the New Site Request Form, the Business Leads are able to edit the form and work through the request. They would see additional features to the form that allow them to direct where the sites will be created, who would have the different types of permissions on the sites, and if they site will be listed in the site directory for each site collection, among other things.

Logo

Browse | Page

Home | Tab 1 | Tab 2 | Tab 3 | Tab 4 | Tab 5

SHARE FOLLOW EDIT

Search

SITE REQUESTS FOR ALL EMPLOYEES

Date Requested:	06/15/2015
*Requestor:	Espino, Maria I;
Originating URL / Path:	http://caone.sharepoint.com/teams/GIS/manage/collaboration
*Site Name:	Site Name Would Go Here
*Description:	Site description would go here.
Business Units That Will Use This Site:	☑ All Business Units ☐ Finance ☐ Marketing ☐ Administration ☐ Information Technology ☐ Operations ☐ Customer Success ☐ Global Service Center ☐ Sales ☐ Corporate Communications ☐ Human Resources ☐ Services ☐ Education ☐ Legal ☐ Strategy & Corporate Dev ☐ Research & Development ☐ Mainframe ☐ Support
*URL / Path Requested:	http://caone.sharepoint.com/teams/GIS/manage/collaboration/SiteNameWouldGoHere
Is this workspace for a specific project or a collaboration between team members?	◉ Collaborative Site ○ Project Site
*How do you plan to use this site or workspace?	Enter a reason for your request.
If there are any business requirements for this site, upload them here.	Browse...
Include this site in your departmental site directory?	◉ Yes ○ No
*Primary Person Responsible for Site Governance:	Espino, Maria I;
*Secondary Person Responsible for Site Governance:	Espino, Maria I;
Content Owners:	Espino, Maria I; Velliah, Joseph; Geslani, Alex; Weeks, Benjamin
Expected number of users?	#
*Would this workspace house any primary records? (View the Primary Records policy HERE.)	○ Yes ◉ No
Is there any additional information about this request that should be included here?	Enter any additional details here.

FOR INTERNAL USE ONLY

Approval:	◉ Yes ○ No
Comments to Requestor:	Enter the comments for the original requestor here.
Approved URL / Path:	http://caone.sharepoint.com/teams/GIS/manage/collaboration/SiteNameWouldGoHere
Template:	Select Template
Should the site inherit permissions from its parent?	◉ Yes ○ No
If not, what permissions would you like to grant for...	
Read Only Permissions:	NT\Authorized Users
Contributor Permissions:	Espino, Maria I; Velliah, Joseph, Geslani, Alex; Weeks, Benjamin
Internal Comments:	Enter any internal comments or notes here. These notes are not sent in email to requestors.

Save | Cancel

Figure 7.1.2-a: Wireframe showing the New Site Request form on Edit by a business lead.

ID#	Req.	Column Name	Data Source	Default	Editable?
1	Y	Date Requested	[Today]	Today's Date	N
2	Y	Requestor	[You]	Person Logged In	Y
3	Y	Originating URL	URL where the user originates request from		N
4	Y	Site Name	Single Text Field Input		Y
5	Y	Description	Multiple Text Field Input		Y
6	**N**	Business Unit	Checkbox Selection, Allow Multiples	All Business Units	Y
7	Y	URL Requested	Appends Site Name to Originating URL, without spaces	Originating URL with appended Site Name, without spaces	Y
8	**N**	Site Type	Radial Selection	Collaborative Site	Y
9	Y	Request Reason	Multiple Text Field Input		Y
10	**N**	Item Upload	Item Upload		Y
11	**N**	Site Directory	Radial Selection	Yes	Y
12	Y	Primary Site Owner	People Picker, Limit to 1		Y
13	Y	Secondary Site Owner	People Picker, Limit to 1		Y
14	**N**	Site Members	People Picker, Select Multiple		Y
15	**N**	Number of Users	Single Text Field Input		Y
16	Y	Primary Records Use	Radial Selection	No	Y
17	**N**	Additional Information	Multiple Text Field Input		Y
		- - - Internal Use Only - - -			
18	**N**	Approval	Radial Selection	Yes	Y
19	**N**	Comment to Requestor	Multiple Text Field Input		Y
20	**N**	Approved URL	Appends Site Name to Originating URL, without spaces	ID#7	Y
21	**N**	Template	Drop Down List	Team Site	Y
22	**N**	Inherited Permissions	Radial Selection	Yes	Y
23	**N**	Read Only Permissions (Site Visitors)	People Picker, Select Multiple	NT\Authenticated Users	Y
24	**N**	Contributor Permissions (Site Members)	People Picker, Select Multiple	ID#14	Y

25	**N**	Internal Comments	Multiple Text Field Input		Y

7.1.3 Quick Create Site Request Form (Business Leads)

Business leads and other support engineers have a need to be able to quickly create sites as business needs arise. A separate form for them will be created and based on their log in credentials, they will be taken to this form versus the form above from the (+ new site) link.

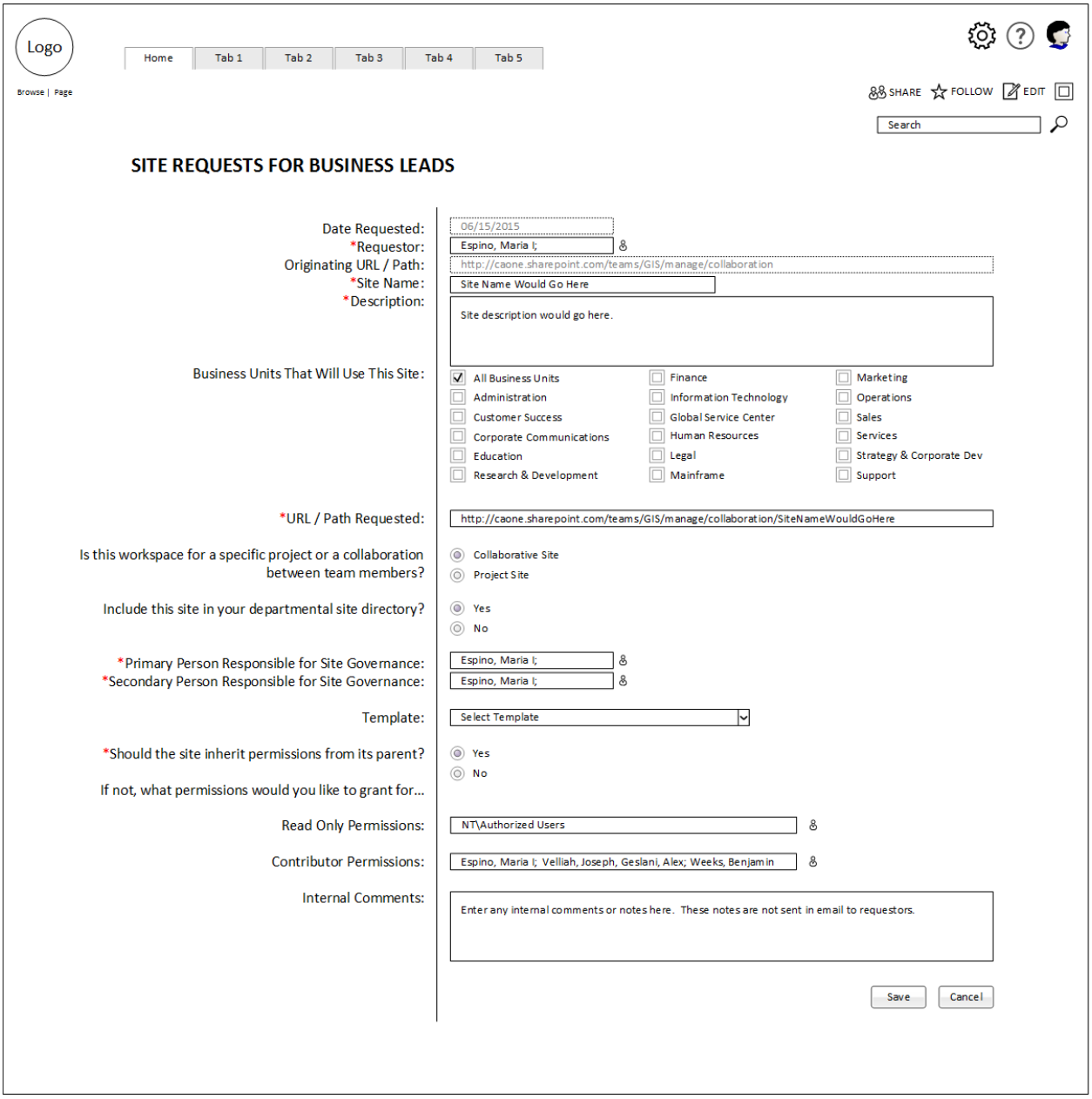


Figure 7.1.3-a: Wireframe showing the Quick Create Form for Business Leads and Administrators

ID#	Req.	Column Name	Data Source	Default	Editable?
1	Y	Date Requested	[Today]	Today's Date	N
2	Y	Requestor	[You]	Person Logged In	Y
3	Y	Originating URL	URL where the user originates request from		N
4	Y	Site Name	Single Text Field Input		Y
5	Y	Description	Multiple Text Field Input		Y
6	**N**	Business Unit	Checkbox Selection, Allow Multiples	All Business Units	Y
7	Y	URL Requested	Appends Site Name to Originating URL, without spaces	Originating URL with appended Site Name, without spaces	Y
8	**N**	Site Type	Radial Selection	Collaborative Site	Y
11	**N**	Site Directory	Radial Selection	Yes	Y
12	Y	Primary Site Owner	People Picker, Limit to 1		Y
13	Y	Secondary Site Owner	People Picker, Limit to 1		Y
21	**N**	Template	Drop Down List	Team Site	Y
22	**N**	Inherited Permissions	Radial Selection	Yes	Y
23	**N**	Read Only Permissions (Site Visitors)	People Picker, Select Multiple	NT\Authenticated Users	Y
24	**N**	Contributor Permissions (Site Members)	People Picker, Select Multiple	ID#14	Y
25	**N**	Internal Comments	Multiple Text Field Input		Y

7.2 New Site Requests Dashboards

All employees will have a dashboard for them to see the site requests that they have added and their current status in the approvals process.

In addition, Business Leads will have additional dashboards that filter site requests for their specific approvals processing needs. Business Leads will also be able to view all site requests for all site collections/business units. Business Leads will be able to process requests for another site collection/business unit besides their own if they need to fill in for their fellow colleagues.

An approvals matrix that lets the application know who is set to approver for which site collection can be easily managed and edited by the Support Administrators and E2 Program Administrators. Should a business lead need to "cover" for another, they can be added as alternate approvers.

7.2.1 Business Lead Dashboard (Views by Status)

The initial view for our business leads will show all "In Progress" requests that need to be worked through. The business lead can then select to view requests that are Cancelled or Completed in the same way that presented below.

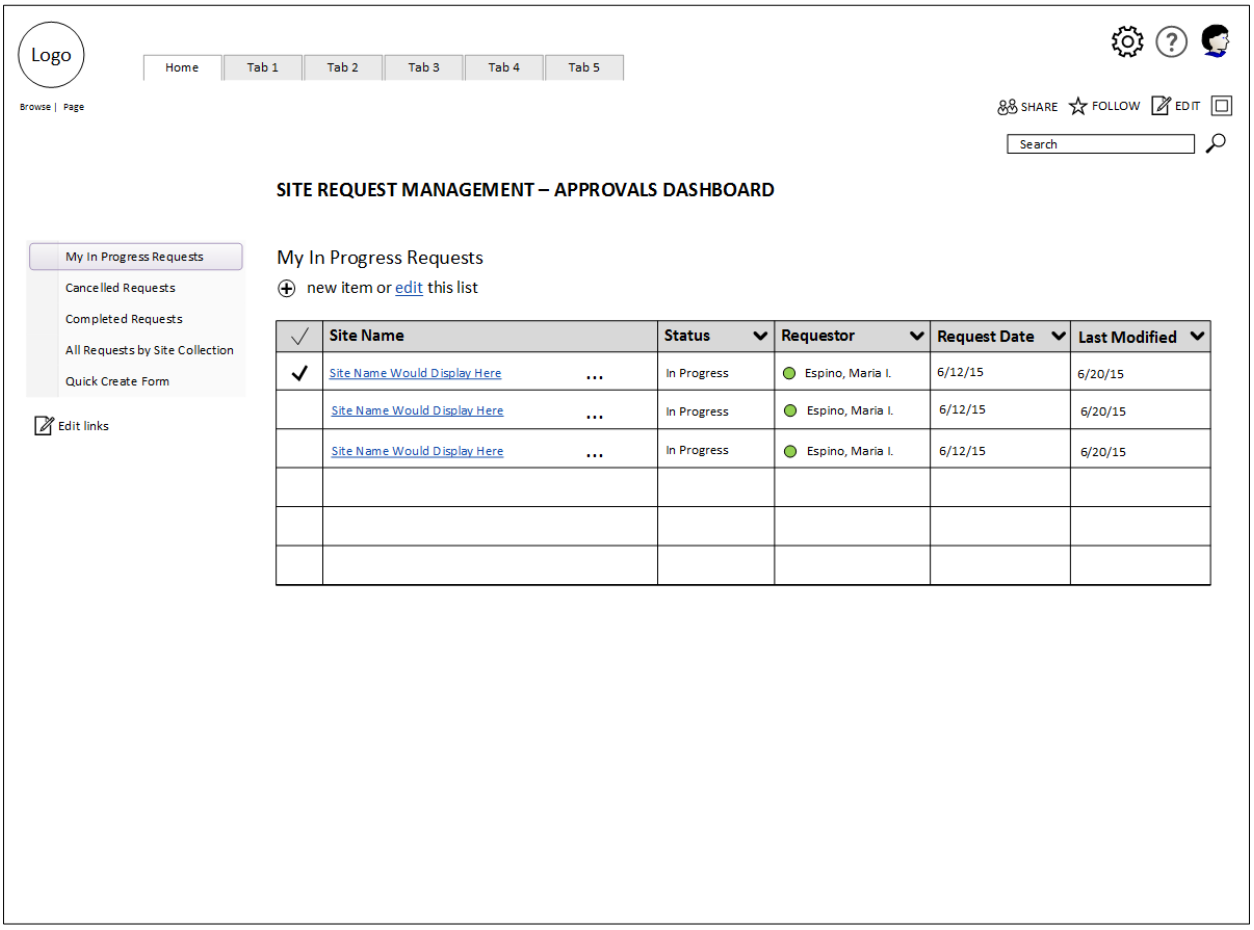


Figure 7.2.1-a: Site Creation Dashboard Wireframe, shows "In Progress" requests.

7.2.2 Business Lead Dashboard (Grouped by Site Collection for All Requests View)

Business leads can also view all requests by site collection. This allows a business lead to look over requests that are under other buckets to periodically review and/or also be able to fill in temporarily for another business lead should the need arise.

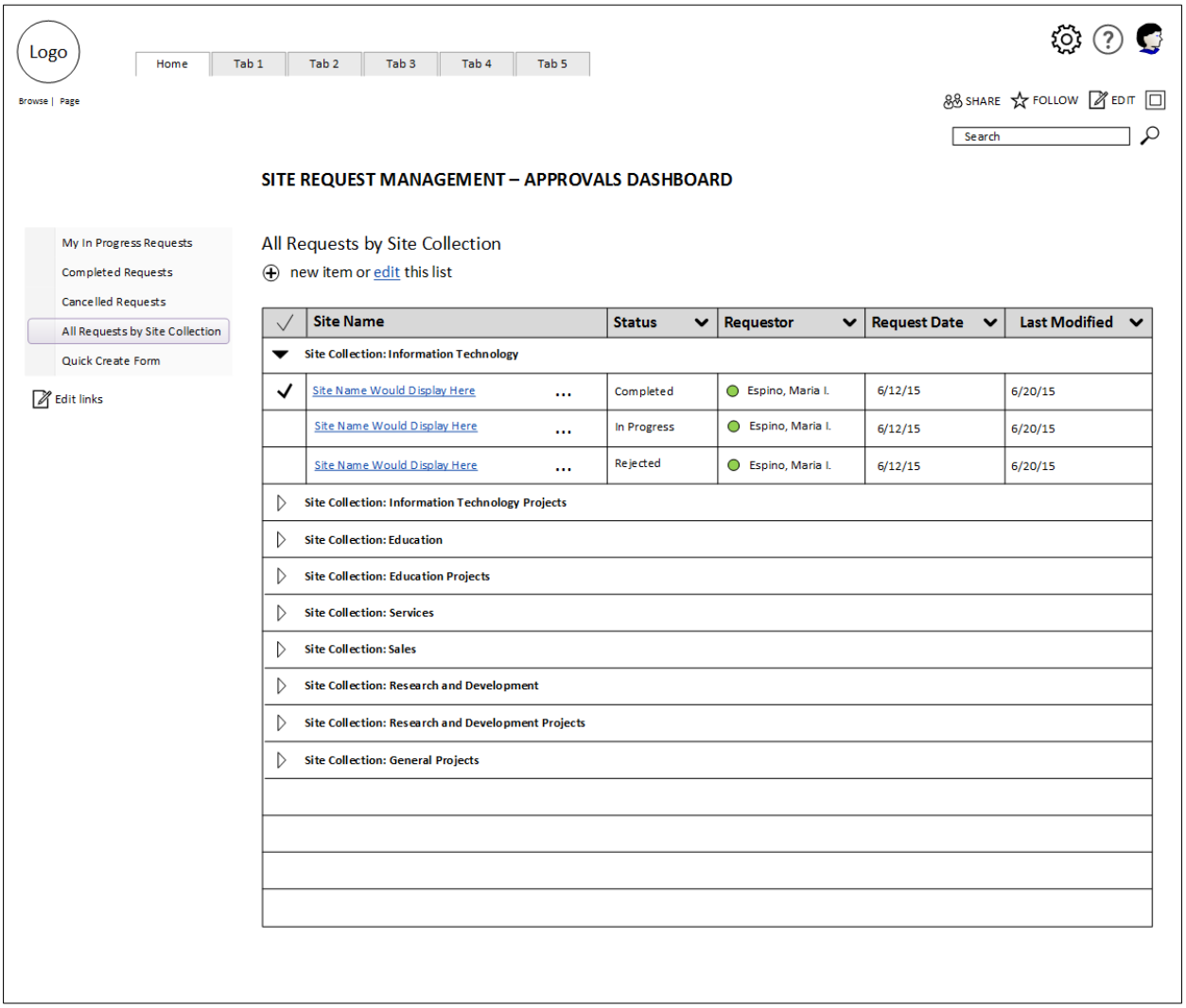


Figure 7.2.2-a: Site Creation Dashboard Wireframe, showing Grouped by Site Collection view.

7.2.3 Employee Dashboard (Views by Status)

All employees will also have a dashboard view for the requests they put in for business lead review. They will also be able to see their Cancelled and Completed requests as well.

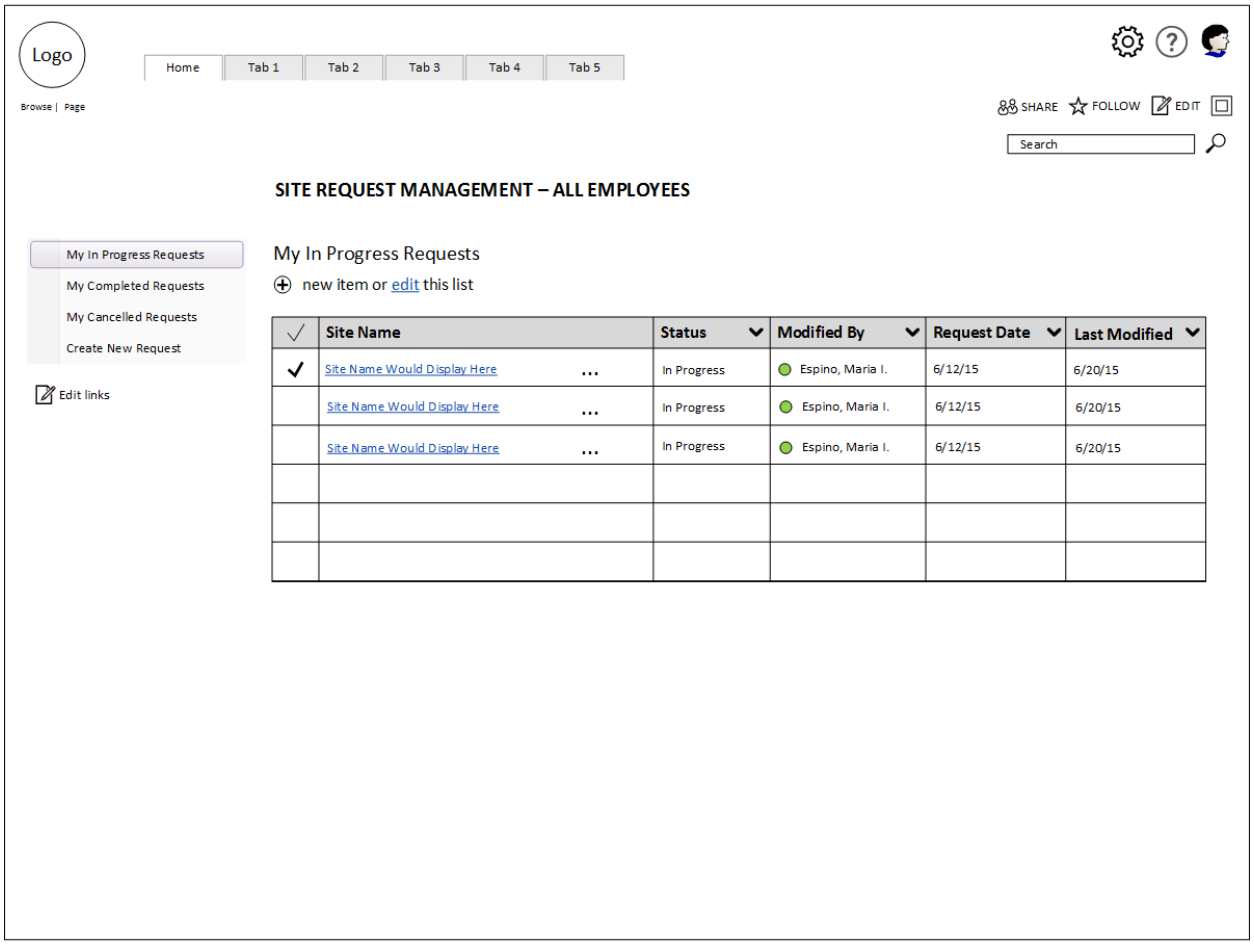
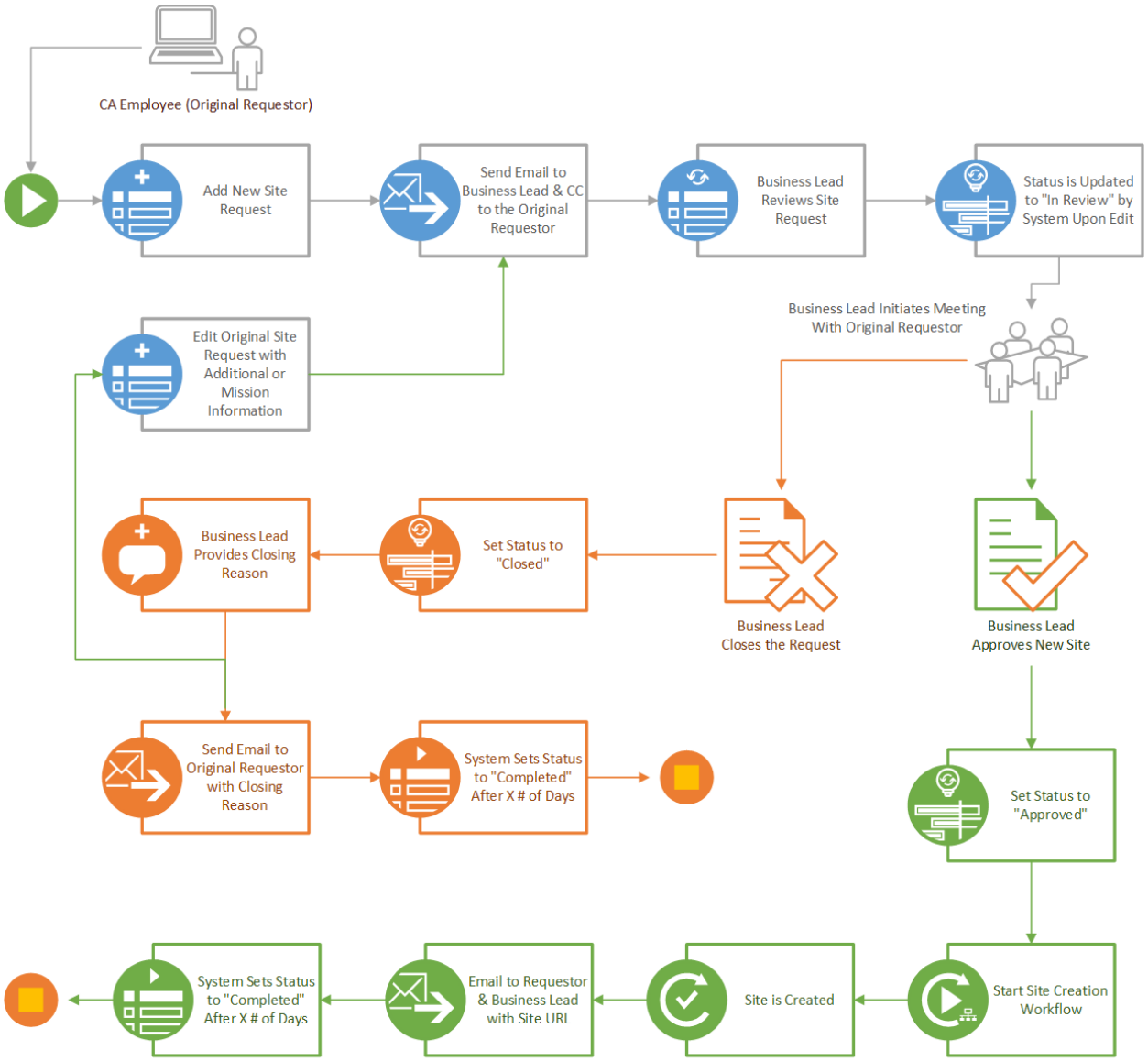


Figure 7.2.3-a: Site Creation Dashboard Wireframe, showing All Employees Dashboard view.

7.3 Approvals Processes

7.3.1 Approval Process for All Employees

The approval process for all employees follows a series of steps in where the original requestor is notified via emails at various stages of the process workflow.



Status Map

New/Submitted
New form has been filled out and has not been reviewed. Business Lead gets an email, a carbon copy is sent to requestor.

In Review (Upon Edit, Auto Switch Status to In Review)
New form has been filled out and the business lead is reviewing with the original requestor.

Approved
Business Lead approved the request and automatically kicks off the workflow and the site is created.

Closed
Business Lead closes (aka rejects) the request and automatically sends a CLOSING email to the original requestor with the comments.

Completed
System changes the status to "Completed" after either an Approval or a Rejection after X # days.

Figure 7.3.1-a: Site Creation Approvals Process, showing the process flow for all employee requests.

7.3.2 Approval Process for Business Leads and Support Administrators

The approval for business leads and support administrators is rendered immediately through the workflow upon submission.

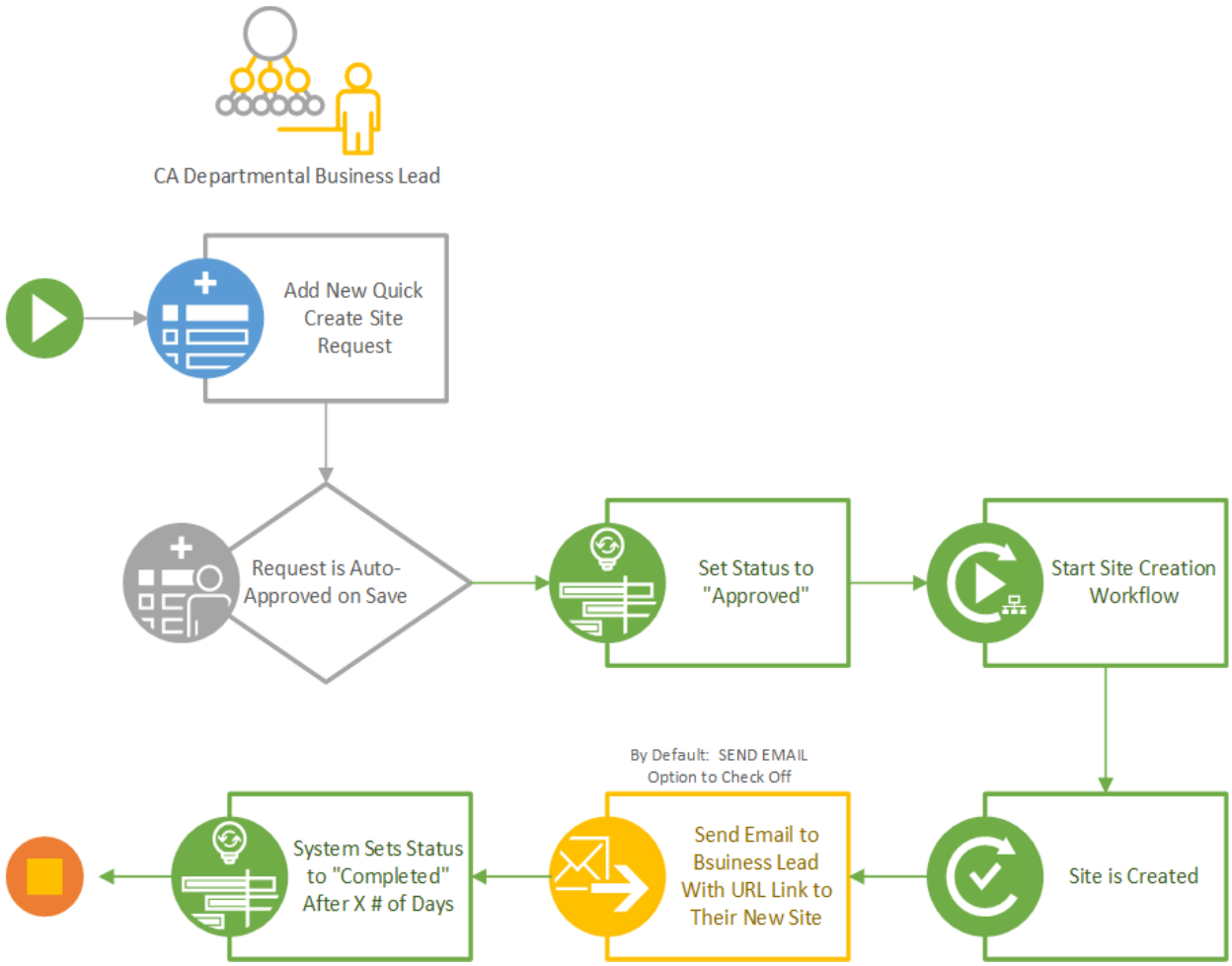


Figure 7.3.2-a: Site Creation Approvals Process, showing the process flow for business leads exclusively.

8 Permissions

There will be several areas that will be security trimmed via permissions in the SharePoint Online environment. Whenever possible we will use Active Directory groups and SharePoint Groups to manage permission levels to the various levels of access.

8.1 Term Store Permissions

The Term Store permissions are granted to only the Term Store Administrators designated in the Term Store Management Tool.

8.2 Content Type Hub Permissions

The Content Type Hub is in its own site collection. As with all Site Collections, you have the standard user permissions available in the Site Settings. The Content Type Hub controls the Global Content Types and therefore should be limited. (TBD)

8.3 Site Collection Permissions

All site collections will use the standard Site Settings Permissions and will have the following options available:

- Site Collection Administrator – This group grants users full control over all websites in the site collection.
- Site Owner Group - This group grants users full control permissions to the site.
- Site Member Group - This group grants users contribute permissions to the site.
- Site Visitor Group - This group grants users read only permissions to the site.

9 Taxonomy and Term Store Meta Data

9.1 Term Store Structure

The Term Store will contain Managed Metadata Term Sets that will be used for terms that cross all site collections as well as for Global Navigation. Once terms have been created in the term store, they will need to be created as a site column and then be published to be available to all site collections.

We will be utilizing the term store for Global Navigation as well. Please see Section 4 for more details.

9.2 Site Columns

Site Columns should be created to be used for managing content metadata in SharePoint.

9.2.1 Global Site Columns

Global Site Columns will be term store terms created as site columns and published in Content Types. These content types are organize under the CA Content Type and Admin groups. The initial Global Site Columns for this phase of the project are listed below, however we anticipate more Global Site Columns will be created as we move into the subsequent phases of this project.

- Artifact Category
- Confidentiality
- Content Context
- Geo
- Include in RSS
- CA Language
- Product Category
- Product Name
- Product Platform
- Product Portfolio
- Record Type
- US State
- Description - Long

If the MMD term is not in one of the Global Content Types, it will still need to be published to make it available to be used in the various site collections. We have created a Publishing Site Columns Content Type for this purpose.

There are out of the box site columns that will be used in some of the Global Content Types and are available for use in all site collections. The Description – Short site column was an OOTB site column named Description (single line of text) that we modified the site column name. Then we made the Description – Long (multiple line of text) to be available in the Global Site Columns.

Site Columns in the production environment should be created using PowerShell scripts (see 9.5 below)

9.2.2 Site Collection Site Columns

Each site collection will have site columns which are available only in their respective site collections and to be used for tagging content in those site collections. Global site columns will be available for use in all site collections. Site Collection Administrators will have access to create specific site columns for those site collections they have access to.

9.3 Term Store Synchronization

The initial terms in the production term store will be created using an export/import PowerShell script (insert link here) of those terms created in the test tenant. New terms will be created manually.

The Term Store Term Set for *Full Product Name* will be synchronized with the XMD system. This sync will provide updates/changes/deletions (deprecations) to the Full Product Names in the term store based on the changes in XMD. This update will be processed on a daily basis at a yet to be determined schedule. The full details of this synchronization can be found on the SPOL XMD Sync Process Information.

9.4 Content Types

A content type is a reusable collection of settings applied to a category of content within a SharePoint site. Content types enable you to manage the metadata and behaviors of an item type, such as a document or a list item, in a centralized, reusable way.

We will utilize the Content Type Hub in SharePoint Online. The Content Type Hub is a publishing site collection that contains all global content types which must be initially published to then be available for site collection use, and republished anytime a change is made to an existing global content type or a new global content type is created. We will be enforcing several global content types which should be the parent content type for all new site collection content types. For a Managed Metadata Term to be available to all site collections, it must first be created as a global site column and then published in a content type.

We have created the CA Publishing Content Type for those site columns so they will be available All Site Collection content types will be maintained in their own site collections and should be organized in their own groups.

Content Types in the production environment should be created using PowerShell scripts (see 9.5 below)

9.4.1 Global Content Types

The Global Content Types are:
Group Name: CA Content Types

- CA Document
- CA List
- CA Link
- CA Project

The global content types for page layouts are:
Group Name: CA Pages Content Types

- CA Article Page
- CA Basic Page
- CA Welcome Page

The global content type for publishing Global Site Columns ONLY is:
Group Name: Admin

- CA Publishing Site Columns

The breakdown of site columns in each of the content types listed above are:

Group Name: CA Content Types

CA Document
Parent: Document

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Owner	Person or Group	Optional	
Description - Short	Single line of text	Optional	
Content Context	Managed Metadata	Required	
Confidentiality	Managed Metadata	Required	
Record Type	Managed Metadata	Required	
GEO	Managed Metadata	Optional	
Language	Managed Metadata	Optional	

CA Link
Parent: Link to a Document

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Owner	Person or Group	Optional	
Description - Short	Single line of text	Optional	
Content Context	Managed Metadata	Required	
Confidentiality	Managed Metadata	Required	
Record Type	Managed Metadata	Required	
GEO	Managed Metadata	Optional	
Language	Managed Metadata	Optional	

CA List
Parent: Item

Columns

Name	Type	Status	Source
Title	Single line of text	Required	Item
Owner	Person or Group	Optional	
Description - Short	Single line of text	Optional	
Content Context	Managed Metadata	Required	
Confidentiality	Managed Metadata	Required	
Record Type	Managed Metadata	Required	
GEO	Managed Metadata	Optional	
Language	Managed Metadata	Optional	

CA Project
Parent: Document

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Owner	Person or Group	Optional	
Description - Short	Single line of text	Required	
Confidentiality	Managed Metadata	Required	
Record Type	Managed Metadata	Required	
Artifact Category	Managed Metadata	Required	

Group Name: CA Pages Content Types
CA Article Page
Parent: Article Page:

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Comments	Multiple lines of text	Optional	System Page
Scheduling Start Date	Publishing Schedule Start Date	Optional	System Page
Scheduling End Date	Publishing Schedule End Date	Optional	System Page
Contact	Person or Group	Optional	System Page
Contact E-Mail Address	Single line of text	Optional	System Page
Contact Name	Single line of text	Optional	System Page
Contact Picture	Hyperlink or Picture	Optional	System Page
Rollup Image	Publishing Image	Optional	System Page
Target Audiences	Audience Targeting	Optional	System Page
Hide physical URLs from search	Yes/No	Optional	System Page
Page Image	Publishing Image	Optional	Article Page
Page Content	Publishing HTML	Optional	Article Page
Summary Links	Summary Links	Optional	Article Page
Byline	Single line of text	Optional	Article Page
Article Date	Date and Time	Optional	Article Page
Image Caption	Publishing HTML	Optional	Article Page
Browser Title	Single line of text	Optional	Page
Meta Description	Single line of text	Optional	Page
Meta Keywords	Single line of text	Optional	Page
Hide from Internet Search Engines	Yes/No	Optional	Page
Record Type	Managed Metadata	Required	
GEO	Managed Metadata	Optional	
Include in RSS	Choice	Optional	

Group Name: CA Pages Content Types
CA Basic Page
Parent: Basic Page

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Owner	Person or Group	Optional	
Description - Short	Single line of text	Required	
Content Context	Managed Metadata	Required	
Confidentiality	Managed Metadata	Required	
GEO	Managed Metadata	Optional	
Record Type	Managed Metadata	Required	
Language	Managed Metadata	Optional	

Group Name: Pages Content Types

CA Welcome Page
Parent: Welcome Page:

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Comments	Multiple lines of text	Optional	System Page
Scheduling Start Date	Publishing Schedule Start Date	Hidden	System Page
Scheduling End Date	Publishing Schedule End Date	Hidden	System Page
Contact	Person or Group	Hidden	System Page
Contact E-Mail Address	Single line of text	Hidden	System Page
Contact Name	Single line of text	Hidden	System Page
Contact Picture	Hyperlink or Picture	Hidden	System Page
Rollup Image	Publishing Image	Hidden	System Page
Target Audiences	Audience Targeting	Hidden	System Page
Hide physical URLs from search	Yes/No	Optional	System Page
Page Image	Publishing Image	Optional	Welcome Page
Page Content	Publishing HTML	Optional	Welcome Page
Summary Links	Summary Links	Optional	Welcome Page
Summary Links 2	Summary Links	Hidden	Welcome Page
Browser Title	Single line of text	Optional	Page
Meta Description	Single line of text	Optional	Page
Meta Keywords	Single line of text	Optional	Page
Hide from Internet Search Engines	Yes/No	Optional	Page
Record Type	Managed Metadata	Required	

Group Name: Admin
CA Publishing Site Columns
Parent: CA Document

Columns

Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
Owner	Person or Group	Optional	CA Document
Description - Short	Single line of text	Optional	CA Document
Content Context	Managed Metadata	Required	CA Document
Confidentiality	Managed Metadata	Required	CA Document
Record Type	Managed Metadata	Required	CA Document
GEO	Managed Metadata	Optional	CA Document
Language	Managed Metadata	Optional	CA Document
Product Platform	Managed Metadata	Optional	
Product Portfolio	Managed Metadata	Optional	
Product Name	Managed Metadata	Optional	
Product Categories	Managed Metadata	Optional	
State	Managed Metadata	Optional	

9.4.2 Site Collection Content Types

All site collection content types should have a Global Content Type as its parent content type and should be organized in the site collection under its own Content Type Group.

All site collection lists, libraries and links web apps should have the corresponding global content types enabled and included by default in all those types of web apps included in each site.

NOTE: Content Types and the site columns associated with the global and site collection content types will be used as refiners for search results.

9.5 Site Columns and Content Type Create/Delete Scripts

For consistency, all content taxonomy in the Content Type Hub of the production environment will be created using PowerShell scripts.

- Process for Creating/Deleting Site Columns
- Process for Creating/Deleting/Publishing Content Types

10 Reporting

10.1 Microsoft Reporting Options

There are a number of reports that are available from SharePoint that we can use to meet several of the requirements listed above:

- Audit Log Reports (by Site)
  - Content Viewing
  - Run A Custom Report

- Audit Log Reports (by Site Collection)
  You will need to establish the Site Collection Audit Settings prior to using these reports so that the system will capture the specified events you would like the audit logs to report on and the date range that the system should retain.

  - Content Activity Reports
    - Content Viewing - This report shows all events where a user viewed content in this site.
    - Content Modifications- This report shows all events that modified content in this site.
    - Deletion - This report shows all events that caused content in this site to be deleted or restored from the Recycle Bin.
    - Content Type and List Modifications - This report shows all events that modified content types and lists in this site.

  - Information Management Policy Reports
    - Policy Modifications - This report shows all events related to the creation and use of information management policies on content in this site.
    - Expiration and Disposition - This report shows all events related to the expiration and disposition of content in this site.

  - Security and Site Setting Reports
    - Auditing Settings - This report shows all events that change the auditing settings of Microsoft SharePoint Foundation
    - Security Settings - This report shows all events that change the security configuration of Microsoft SharePoint Foundation

  - Custom Reports
    - Run a Custom Report - Manually specify the filters for your Audit Report which include:
      - Opening or downloading documents, viewing items in lists, or viewing item properties
      - Editing items
      - Checking out or checking in items
      - Moving or copying items to another location in the site
      - Deleting or restoring items
      - Editing content types and columns

- Searching site content
- Editing users and permissions
- Editing auditing settings and deleting audit log events
- Workflow events
- Custom events

- Popularity and Search Results
  - Usage Reports
    - Usage - This report shows historical usage information about the site collection, such as the number of views and unique users. Use this report to identify usage trends and to determine times of high and low activity.
    - Number of Queries - This report shows the number of search queries performed. Use this report to identify search query volume trends and to determine times of high and low search activity.

  - Search Reports
    - Top Queries by Day - This report shows the most popular search queries. Use this report to understand what types of information visitors are seeking.
    - Top Queries by Month
    - Abandoned Queries by Day - This report shows popular search queries that received low click-through. Use this report to identify search queries that might create user dissatisfaction and to improve the discoverability of content. Then, consider using query rules to improve the query's results.
    - Abandoned Queries by Month
    - No Results Queries by Day - This report shows popular search queries that returned no results. Use this report to identify search queries that might create user dissatisfaction and to improve the discoverability of content. Then, consider using query rules to improve the query's results.
    - No Results Queries by Month
    - Query Rule Usage by Day - This report shows how often query rules fire, how many dictionary terms they use, and how often users click their promoted results. Use this report to see how useful your query rules and promoted results are to users.
    - Query Rule Usage by Month

- Popularity Trends (by Site Collection and by Site)
  - Usage - This report shows historical usage information about the site, such as the number of views and unique users. Use this report to identify usage trends and to determine times of high and low activity.

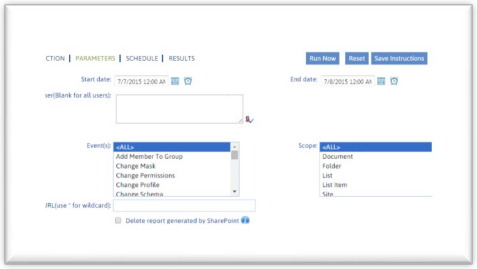
- Storage Metrics (by Site Collection)

10.2 Control Point Reporting Options

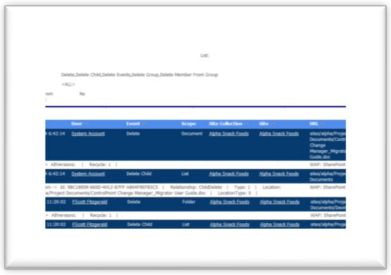
We will be using the Office 365 version of Metalogix Control Point reporting.

The reporting options available with this tool are:

- Audits and Alerts
  - **Audit Log Analysis** lets you view selected events written to the SharePoint Audit Log and extends SharePoint's built-in audit logging by letting you easily view entries written to the audit log:
    - Focused analysis on specific event types and adjusted scope to include only certain objects (sites, lists, documents, etc.)
    - Data collected by SharePoint is saved to a document library at the root site of each site collection
    - Time scope dependent on how many days audit data is retained
    - Contains the following information on event:
      - Date and time
      - User responsible
      - Event type
      - Scope
      - Name of site or site collection
      - URL

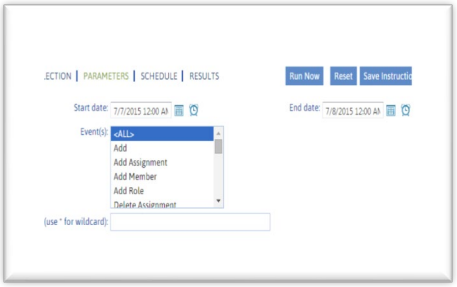


Report Configuration Page

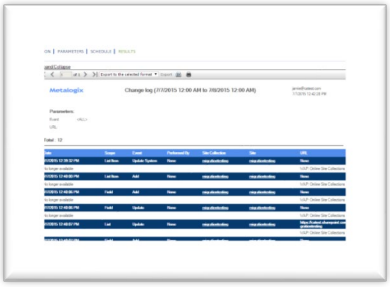


Report Printout

  - **Change Log Analysis** lets you view the contents of SharePoint change logs for one or more selected event types



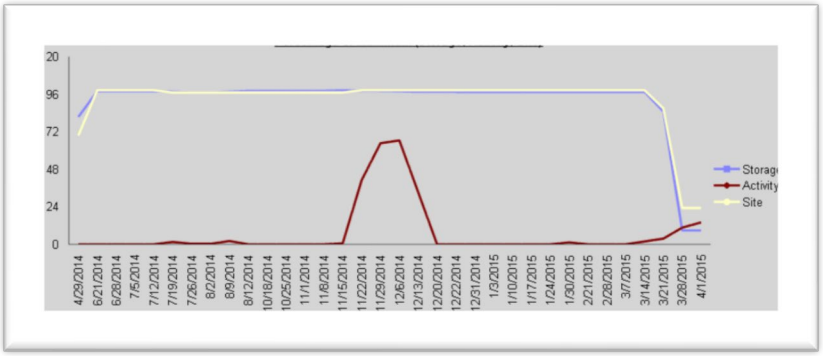
Report Configuration Page



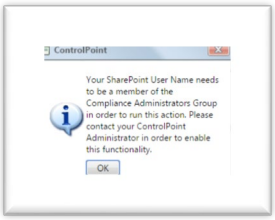
Report Printout

  - **Trend Analysis for Activity** lets you analyze trends by activity:
    - over a specified time period
    - by farm, web application, or site collection

NOTE: You can only analyze trends for one object at a time

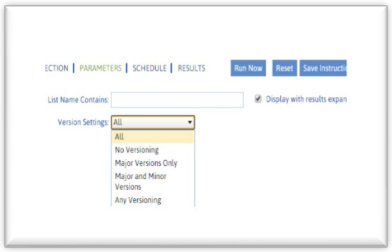


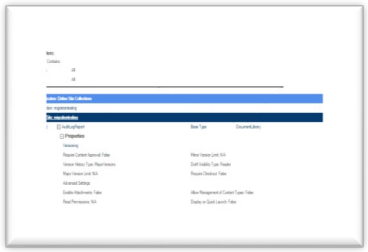
- Compliance
  - **Compliance Summary** allows members of the *ControlPoint Compliance Administrators group* to view and take action on Content Analysis scan job results returned by Metalogix Cloud Services via the Compliance Summary page:
    - view the details of a Compliance Action job
    - apply Compliance Actions
    - view detailed information about scan results for individual items
    - if you are also a member of the ControlPoint Quarantine Administrators group, manage quarantined items
    - Save items of a particular severity level as a selection that can be used to perform ControlPoint operations.



Error Message Screen

- Configuration
  - **List Properties** analysis provides information about one or more lists in your farm, including:
    - the properties of the list, including versioning and advanced settings
    - Audit settings that are/are not enabled for the list.

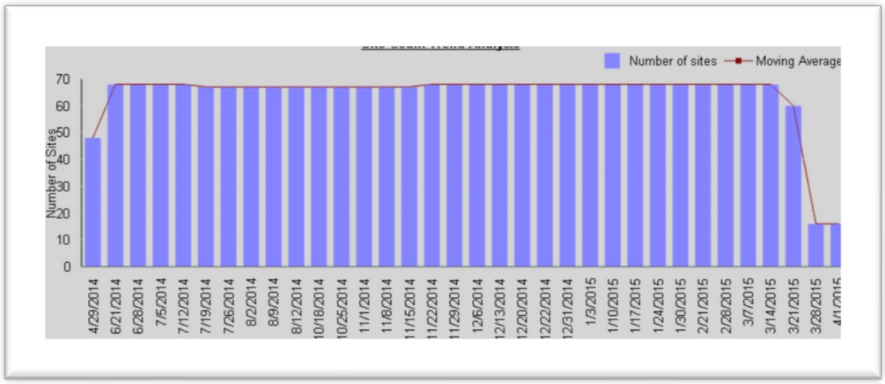




Report Configuration Page *Report Printout*

- Sites
  - **Trend Analysis for Site Count** lets you analyze trends by site count:
    - over a specified time period
    - by farm, web application, or site collection

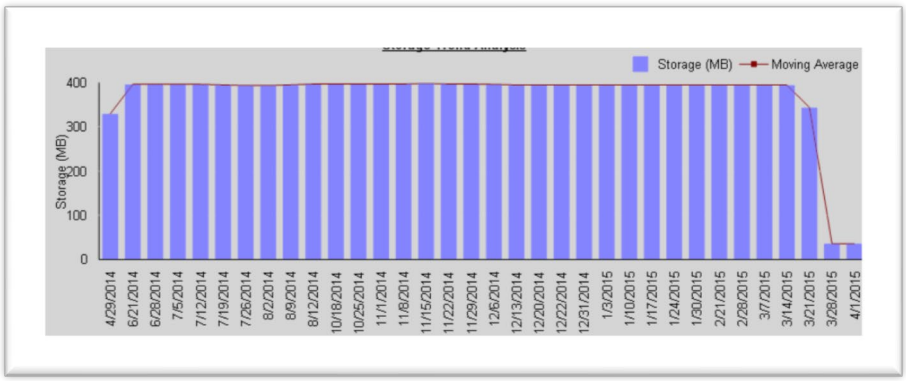
NOTE: You can only analyze trends for one object at a time



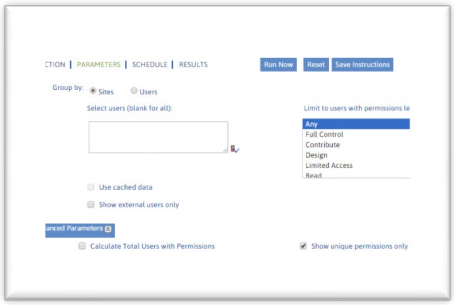
- Storage
  - **Site Collection Storage Analysis** provides storage statistics for selected site collections *(located in the ControlPoint Interface 'Resource' section)*

  - **Trend Analysis for Storage** lets you analyze trends by storage:
    - over a specified time period
    - by farm, web application, or site collection

NOTE: You can only analyze trends for one object at a time

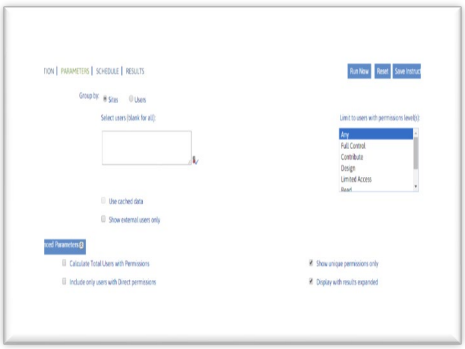


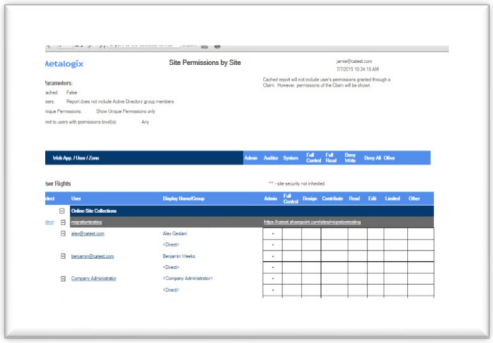
- Users and Security
  - **Site Permissions Analysis** *(located in the ControlPoint Interface 'Resource' section)* lets you examine the permissions that users have for selected sites



Report Configuration Page

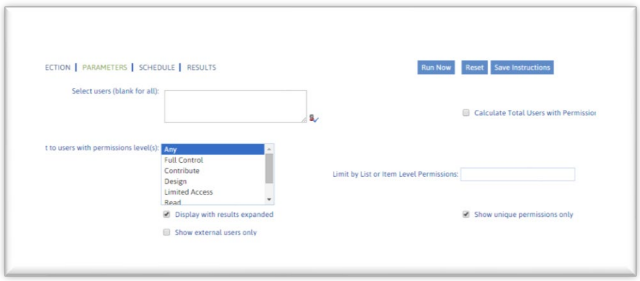
  - **Site Permissions** shows the permissions of users for selected sites





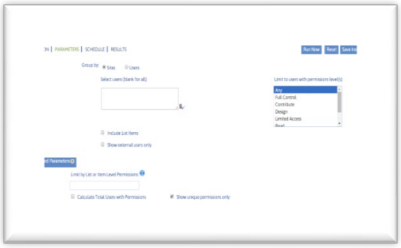
Report Configuration Page *Report Printout*

  - **Site List Permissions** shows user permissions for individual lists and list items within a site

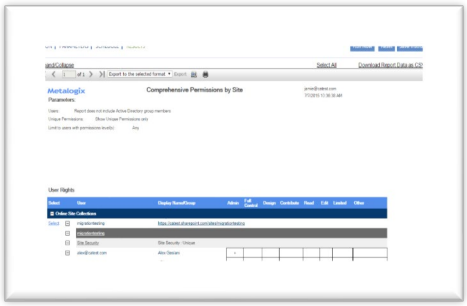


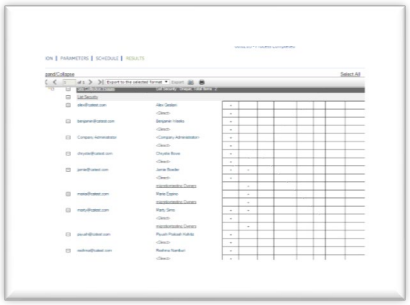
Report Configuration Page

- **Comprehensive Permissions** shows permissions for all sites, lists, and optionally list items within a single result set
  NOTE: In addition to showing user permissions at the individual site level, all Site Permissions analyses include any Web application policy permissions users may have



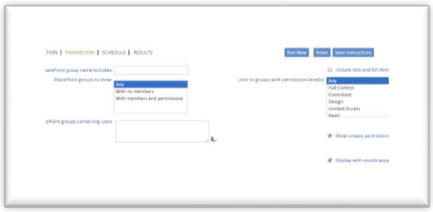
Report Configuration Page



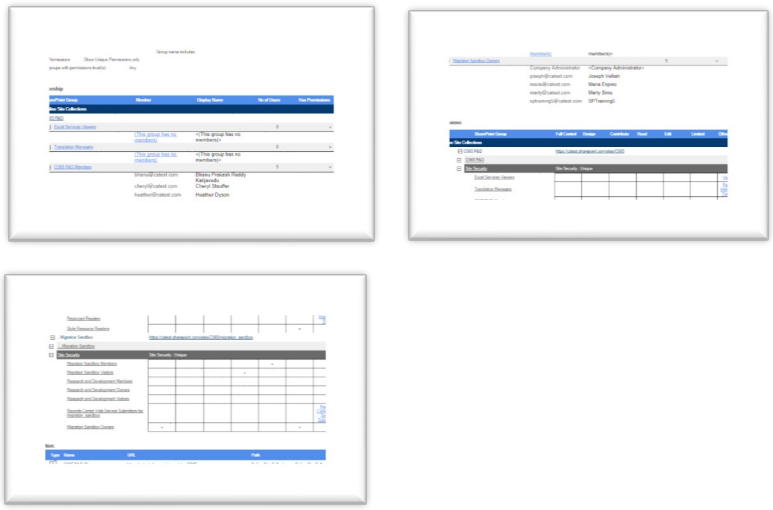


Report Printout

- **SharePoint Group Analysis** provides details about membership and permissions of SharePoint groups within one or more site collections and/or sites



Report Configuration Page



Report Printout

10.3 Addendum

Below are User Stories/Use Cases defined for each high level business requirement to clarify what business users need and why they would use them. This will provide insight for test cases for the reporting requirements.

Business Requirement	User Story/ Use Case
BR30-0 Need ability to have reporting on 'social' interactions to have visibility in usage and value - system shall allow administrators to generate reports showing # of ratings, # likes across the entire system for a period of time and drill down to show Top 10 or 15 items that have most ratings, and/or likes as specified by report executor for the period of time	1) As a business Lead (aka site collection admin) I would like to run a report at will to see which content is resonating and engaging users most – i.e. how social interactions are growing w.r.t number of ratings, comments, likes across my site collections for a period of time. a. As a business Lead (aka site collection admin) I would like to be able to see Top 10 or 15 items that have most ratings, comments, likes for the period of time across the site collections I have site collection admin access to. 2) As an E2 Governance Leadership team member (Education E2 team or GIS Admins) I would like to run a report at will to see which content is resonating and engaging users most –i.e. how social interactions are growing w.r.t number of ratings, comments, likes across the system for a period of time. a. As an E2 Governance Leadership team member, I would like to be able to see Top

	10 or 15 items that have most ratings, comments, likes for the period of time system wide.
BR32-0 To be able to run 1 report system wide which shows the activity of each site collection and the trending over a certain period of the usage for each site collection	1) As an E2 Governance Leadership team member (Education E2 team or GIS Admins) I would like to see site collection usage and trends for a period of time for all sites collections in one report to see how much different business functions are using – are some business areas not utilizing OneCA, or some are very much active. This report can be scheduled to run regularly/monthly, or at will – but should not have to be requested each for a GIS admin to run it each time. For example: Is GIS extremely active in storing, collaborating and sharing content all year round while Finance is primarily trending high usage at the end of each quarter only?
BR35-0 Ability for site owners, and site collection administrators to generate reports at site level and site collection level to understand usage on a site - unique/distinct Business users and hits for a specified period of time (snapshot) -Needs to be scalable by site collection or site for particular time period - Needs to be able to exclude indexing system generated hits	1) As a business Lead (aka site collection admin) I would like to run a report at will to see usage at the site level across all sites in my site collection for a specific period of time so I can sort and see the top X accessed sites in the time period I specified to understand which sites are most/least utilized in my organization. Usage will exclude indexing system generated hits. 2) As a business Lead (aka site collection admin) or a site owner for a single site, I would like to run a report at will to see usage for a specified site for a specific period. For example, my organization is launching a program and we want to see how many people are accessing that site during the initial launch, and down the road as the program matures. Usage will exclude indexing system generated hits. a. The report should display unique/distinct users hits for the time period as well. For example, for site A there were 350 hits today, and of those 201 unique hits/users. Usage will exclude indexing system generated hits.
BR37-0 Ability for site owners, and site collection administrators, GIS Admins to generate	1) As a business Lead (aka site collection admin) I would like to run a report to see trending usage at the site level across all sites in my site collection

TRENDING reports at site level and site collection level to understand usage on a site - unique Business users and hits. -Needs to be scalable by site collection or site for particular time period -Needs to be able to exclude indexing system generated hits	for a specific period of time on a daily, weekly or monthly basis - that I specify at run time of the report. I should also be able to specify on all user hits, or just unique hits for the daily, weekly or monthly trend cycle. This report may need to be a schedule only run report if performance needs dictate that and that is acceptable. Usage will exclude indexing system generated hits. 2) As a business Lead (aka site collection admin) or a site owner for the site, I would like to run a report at will to see trending usage for a specified site for a specific period time on a daily, weekly or monthly basis - that I specify at run time of the report. I should also be able to specify on all user hits, or just unique hits for the daily, weekly or monthly trend cycle.. For example, I want to see the trending of the usage on a particular program site but only unique users each day (trend cycle) for a month time period. Usage will exclude indexing system generated hits.
BR39-0 Ability to audit site and site collection activity, for example, who modified site settings. System shall allow site owners and administrators to audit activity in sites and or site collections they have access to. At a minimum the audit report shall be able to be scoped to audit the following activities: 1) When and who viewed content in the site 2) When and who deleted content in the site 3) When and who updated content in the site	1) As a business Lead (aka site collection admin) for my site collection I would like to see audit activities as follows: a. When and who last modified site settings b. When and who viewed the content c. When and who deleted the content d. When and who last modified the content Example scenario: Someone put confidential information in a site that many people had access to, and the site owner has addressed that but we need to see who accessed that content prior to it be removed/secured. 2) As a site owner for my site I would like to see audit activities as follows: a. When and who last modified site settings b. When and who viewed the content c. When and who deleted the content d. When and who last modified the content Example scenario: I have only given a few people full access to my site, and noticed that more people have privileges and they should not – in order for me to manage my site I need to understand who is making what changes.

BR43-0 Ability to have a report on the configurations of a particular site or collection of sites. System shall provide ability to generate a report for the site collection showing all the sites and for each site showing all document libraries and lists Report shall be able to be configured to show following information about a site/s: 1) List of administrators 2) URL for site collection 3) List of owners for each site in the site collection 3) Space Used 5) Search setting 6) Last time accessed 7)Last time modified 8) List of Document Libraries & Lists in each site and the following information for each: i. Size	1) As a business Lead (aka site collection admin) for my site collection I would like to run a report at will to see all sites and the following details for each site. a. Site Collection URL b. Site Collection Administrators c. Site Owners d. Space Used e. Search Setting f. Last accessed g. Last modified h. List of Document Libraries & Lists i. Size of each Reason: To manage and keep my site collection better governed, I need to see this information holistically in 1 report to analyze content in my site collection and able to make decisions and reach out to site and content owners 2) As a site owner for my site I would like I would like to run a report at will to see the following details for the site a. Site URL b. Site Owners c. Space Used d. Search Setting e. Last accessed f. Last modified g. List of Document Libraries & Lists i. Size of each Reason: To manage and keep my site c better governed, I need to see this information holistically in 1 report to analyze content in my site and able to make informed decisions and reach out content owners within my site.

11 Document Signoff

All parties hereby acknowledge that they have read and do understand this *Information Architecture Design (IAD)* and all attachments hereto, and agree to all terms and conditions stated herein. This *IAS* document constitutes the final and approved Informational architecture for CA's SharePoint 2007 Migration project and satisfies the requirements in the original SOW in regards to documentation. Any changes requested after the signed dates listed below will require a change management process which may require additional time and budgeting allowance.

IN WITNESS WHEREOF, the parties hereto each acting with proper authority have executed this Information Architecture Requirements document.

CA Technology Representative	**CA Business Representative**
Robert Udovich	Donna DiBenedetto
Full name	Full name
Sr. Director, Global Information Services	Sr. Director, Education
Title	Title
Robert Udovich	Donna DiBenedetto
Signature	Signature
Date	Date