CA Technologies

Microsoft Office SharePoint Online 365  
 Information Architecture Design

Version 0.4

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# 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.

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

* 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 user 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.

## 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.

## 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.

## 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) |
| 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. |

# 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.

## Root Level Site Collections

### 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.

### 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.

## 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.

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.

### Microsoft Patched Additions or Changes to Managed Paths

Microsoft continues to innovate and progress in the SharePoint Online space and as such will be introducing changes and updates to the Managed Paths that are available to its hosted solutions clientele.

One such addition that has been talked about is adding a third managed path: /PROJECTS. This new managed path would have immediate optional connections to Microsoft Project Server’s hosted solutions that enable Project Standard and Project Professional features. As CA utilizes its own product/project management tool, CA PPM, we can opt out of the additional features and utilize /PROJECTS as we see fit.

The information architecture detailed in this document has been architected in a way that allows us to leverage this change and move site collections that are relevant to PROJECTS under this managed path as needed to build in more redundancy and viability into our architecture.

# Site Navigation

## 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.

## Integration with SharePoint 2007 Navigation

At release, CA’s SharePoint Online 365 version will only be hosting project sites. As such, the only integration that will be needed will be at the department level on our SharePoint 2007 instance. 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.

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

## Local Navigation

### Department Sites

Business leads would have the ability to define their departmental site navigation as they see fit through the Design Manager.

### Default Local Navigation

Talk about what is the default navigation that rolls out with the templates available to end users.

## Functional Navigation

After much interaction with CA’s employees, they showed a preference to a functional layout versus a straight departmental layout for their site topology.

We have consolidated CA's departments into 4 functional groups, each being a separate SharePoint web application with its own independent content database to preserve the systems stability and performance, as well as provide ease of backup and restore procedures during Disaster Recovery processes.

Each departmental landing page would be tagged as belonging to a main department which in turn is associated to a main functional group. Every site can also be tagged with up to 2 additional sub-departments or sub-functions. The departmental landing pages would pull in the department portal style template that is referenced in the templates section of this document.

SharePoint allows you to move sites within the same web application, or backup and restore a site to another web application. To leverage that functionality and satisfy the requirement of fluidity in CA's organization, official departments and sub-departments may not share one main site, however a department that has sub-functions that are not official departments can. We must be able to move one department site across to another area or underneath another department and keep the information intact.

The four main functional groups are listed below, along with the main departments that would appear under each.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **NEWS** | **DEPARTMENTS** | **EMPLOYEE CENTER** | **RESOURCES** | **SOLUTIONS** |
| » NA  » EMEA  » APJ  » LA | » Administrative Services  » Corporate Communications  » Customer Success  » Education  » Enterprise Solutions and Technology Group  » Finance  » Operations  » Global Information Services (GIS)  » Human Resources  » Legal  » Mainframe  » Marketing  » Sales  » Services  » Strategy and Corporate Development  » Support | » NA  » EMEA  » APJ  » LA | » Business Information  » Systems & Tools  » Quick Reference  » Service Desks  » Social Networks  » Employee Links | » Solutions Workbench  » Solutions Delivery Standards  » Employee Self Service Support |

## Programs

Programs at CA are ongoing campaigns or a strategic initiative that may or may not have several projects and functional teams associated with them.

Currently there is no information available to all employees that gives them a high level view of what a program is about, the team members responsible for the program, and any associated projects on going with that program.

To satisfy that requirement, we are building a separate SharePoint web application with its own content database for Programs as part of top level navigation, next to Corporate, Sales, Services, and Products. These sites would be designed as informational and would feature announcements, calendars, team contacts, and links to any related projects sites associated with it.

The program sites available at launch are listed here:

|  |
| --- |
| **PROGRAMS** |
| » CA Aura  » CA on CA  » Customer Satisfaction  » Leaders at All Levels  » Quality at CA  » IDEA Wall |

# 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.

## 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.

## 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 Human Resources and Information Technology which have world-wide accepted acronyms.

URL paths should never be created utilizing CAPITAL letters 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>

Any subsequent areas would have the following URL's with the optional addition of proposed vanity URL’s that can be configured and utilized for easier access through mobile devices via our Network Services department.

|  |  |
| --- | --- |
| **AREA** | **SAMPLE VANITY URL** |
| NEWS | news.ca.com |
| DEPARTMENTS | departments.ca.com |
| EMPLOYEE CENTER | employees.ca.com |
| RESOURCES | resources.ca.com |
| SOLUTIONS | solutions.ca.com |
| PROGRAMS | programs.ca.com |
| OneCA HELP | onecahelp.ca.com |

# Custom Branded Pages and Page Layouts

## 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:

* Global navigation that reflects the 7 main areas:
  + NEWS
  + DEPARTMENTS
  + EMPLOYEE CENTER
  + RESOURCES
  + SOLUTIONS
  + PROGRAMS
  + ONECA HELP
* The page header will use the approved corporate logo as defined below:

{Insert Approved Logo Here}

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

{Insert Sample Navigation Here}

* The colors used will reflect the various shades of gray that appear in the Creative Brief, approved by CA.

{Insert Color Pallette Here}

## Content Page Layout for the News Landing Pages

The content page of the overall news landing pages for the portal needs to provide the following custom elements:

* {details here}

## Content Page Layout for the Departments Landing Page

The content page of the DEPARTMENTS landing page for the portal needs to provide the following custom elements:

* {details here}

## Content Page Layout for the Employee Center Landing Page

The content page of the EMPLOYEE CENTER landing page for the portal needs to provide the following custom elements:

* {details here}

## Content Page Layout for the Resources Landing Page

The content page of the RESOURCES landing page for the portal needs to provide the following custom elements:

* {details here}

## Content Page for the Projects Landing Page

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

* Area Title
* Introduction to Projects section verbiage
* Links to sorting by either Department Name (default), an A-Z alphabetical listing, and by project type (Client-Funded, Enterprise, or Other).
* Department Sort: List all MAIN departments in alphabetical order in a two-column set up.
* Alphabetical Sort: Displays a menu separating groups of letters at the top that when clicked would filter by the group of selected letters. ABC (default) | DEF | HIJ |KLM |NOP |QRS |TUV |WXYZ
* Type Sort: Displays a menu separating the three types that when clicked would filter the by the selected type. Client-Funded (default) | Enterprise | Other
* Aggregated list of recently updated Project sites.

# 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.

## 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:

* Announcements
* Documents
* Events Calendar
* Contacts
* Tasks
* Links
* Discussions
* Surveys

## Publishing Site Template

The departmental site template, formerly coined as a mini-portal, will be used to present information about a specific department or function within a department for an intranet divisional portal. It will be used for all sites created under DEPARTMENTS, NEWS, RESOURCES, and any APPLICATIONS (such as Solutions Workbench for example).

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

* Main Image or Banner
* Department Statement (Could be key objectives, about the department, or mission statements, etc. etc.)
* Announcements
* Department Contacts
* Events (Calendar)
* Quick Links
* Photo Album
* Images Library
* Custom Left Navigation

The left navigation of a department site template would be an automated list of sites that are housed architecturally underneath that site.

Site Managers have the ability to close, modify, or add web parts into the web part zones and modify their departmental home pages as they see fit, within the limits of governance.

## Department Listing or Site Directory Page Template

Department Listing or a Site Directory page would require a template that would either:

1. aggregate site names that would display as links to those sites under a site directory,
2. or pull from a list that would display the department name and link to the department’s home page.

## 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.

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.

## Decision Meeting Workspace Site Template

A Meeting Workspace site provides tools to help teams reach and record decisions and record action items. This is a good template to use if you want your team to stay focused on the outcome of the meeting.

Select this site template when you want to create a site that is ideal for reviewing documents and recording any decisions that are reached at the meeting. This template will require the following SharePoint out of the box features to be optionally provided to users requesting such a site:

* Meeting Objectives
* Attendees List
* Agenda
* Documents
* Tasks
* Decisions List

Site Managers have the ability to close, modify, or add web parts into the web part zones and modify their decision meeting workspace sites as they see fit, within the limits of governance.

## Document Center Workspace Site Template

A Document Center can help you create a large-scale authoring environment in which users actively edit a large number of documents. Versioning is enabled, and typically ten or more previous versions of each document exist. Documents are checked in and out frequently and workflows are used to control their life cycles. Twenty or more content types might be in use in the site.

Select this site template when you want to create a single site to centrally manage all of the documents in your department. This template will also require the following SharePoint out of the box features to be optionally provided to users requesting such a site:

* Announcements
* Documents
* Relevant Documents (Creates personalized view of documents checked out by, created by, or last modified by the current user.)
* Upcoming Tasks
* Tree View Left-Hand Local Navigation (Folder-like navigation.)
* Major and Minor Versioning
* Required Check Out
* Multiple Content Types

Site Managers have the ability to close, modify, or add web parts into the web part zones and modify their document center workspace sites as they see fit, within the limits of governance.

# Site Creation

## 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.

* Site Name (adhering to proper naming conventions)
* Site URL (adhering to proper URL formats)
* Site Manager Name
* Site Manager Email
* List of Content Contributors (emails or network names)
* Selection of site type; which may require a separate form depending on the type:
  + Team Site
  + Blog
  + Wiki
  + Department Site
    - Reporting Manager's Name for Approval
  + Program Site
  + Project Site
    - Project Type; drop down selection (Client-Funded, Enterprise, Other)
    - PTR #; single-line input text
  + Document Center Workspace
  + Decision Meeting Workspace
* Drop down selection of main departmental parent would be required for all sites.
* Drop down selection of up to 2 additional departments or sub-departments that the site can be tagged under are optional for all sites.
* Drop down selection that allows the user to associate this new site to an existing program for all sites.
* Checkbox that allows a site to be marked as "Private".
* Checkbox that allows a site to be excluded from the Site Directories.

## Additional Site Management Tools

The following is a list of additional site management tools that CA would need to properly manage their site farm in addition to the site creation request form mentioned above.

* Modify the meta data on an existing site.
* Add a new department or sub-department.
* Modify/Delete an existing department or sub-department.
* Add a new Program.
* Modify/Delete an existing Program.
* Move a site to a new department or sub-department.
* Archive a site to the provided archiving solution.

# 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.

## Term Store Permissions

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

## 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)

## 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.

# Taxonomy and Term Store Meta Data

## Term Store Structure

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

## Site Columns

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

### Global Site Columns

Global Site Columns will be term store terms, then will need be created as site columns and published in Content Types. These content types are organize under the CA Content Type and Admin groups. Current Global Site Columns are:

* Artifact Category
* Confidentiality
* Content Context
* Geo
* Include in RSS
* Language
* Product Categories
* Product Name
* Product Platform
* Product Portfolio
* Record Type
* State

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.

### 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.

## Term Store Synchronization

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](https://caone.sharepoint.com/teams/gisprojects/ECM/SPO365/Shared%20Documents/SPOL%20XMD%20Sync%20Process%20Information.docx).

## 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 site column and then published in a content type. We have created the 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.

### Global Content Types

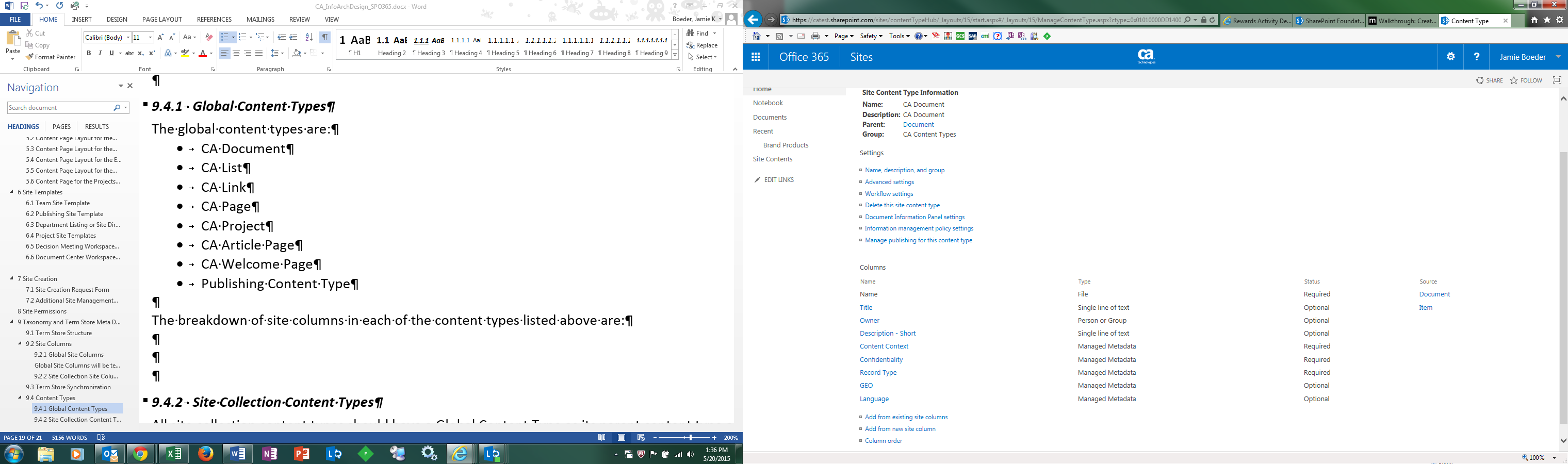
The global content types are:

* CA Document
* CA List
* CA Link
* CA Page
* CA Project
* Publishing Site Columns
* CA Article Page
* CA Welcome Page

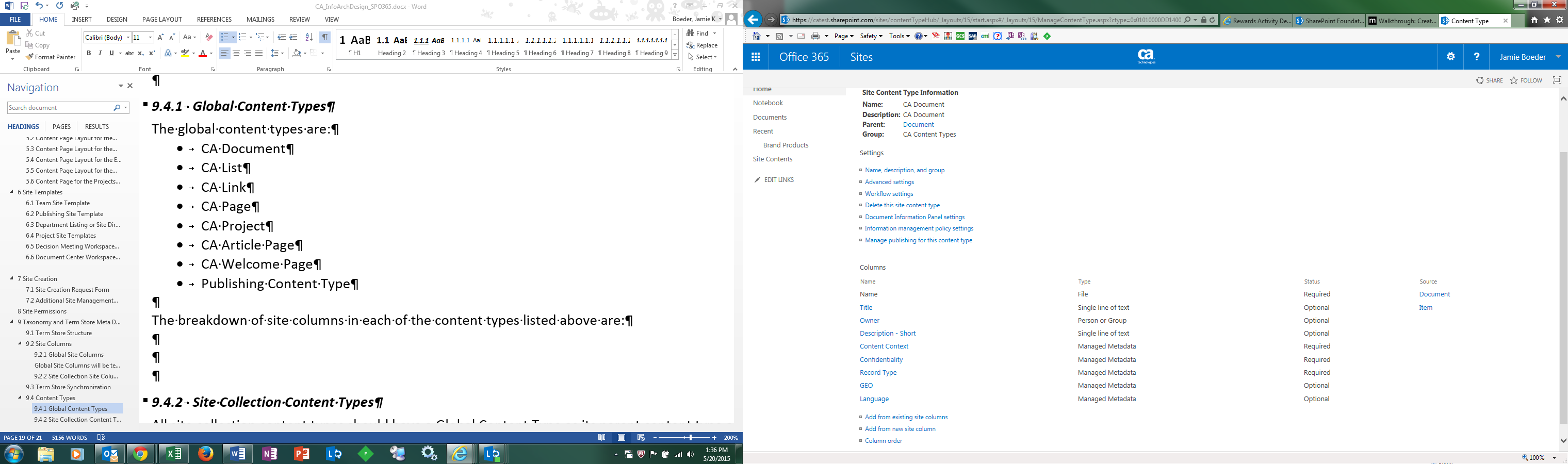
The breakdown of site columns in each of the content types listed above are:

Group Name: CA Content Types

CA Document  
Parent: Document



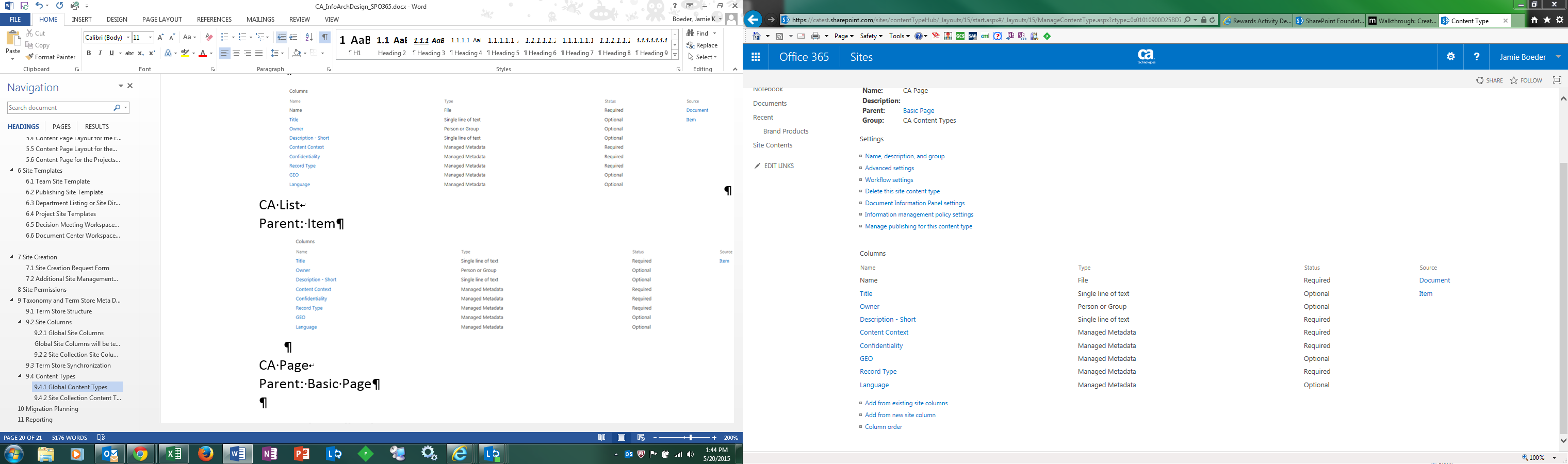
CA Link   
Parent: Link to a Document



CA List  
Parent: Item



CA Page  
Parent: Basic Page

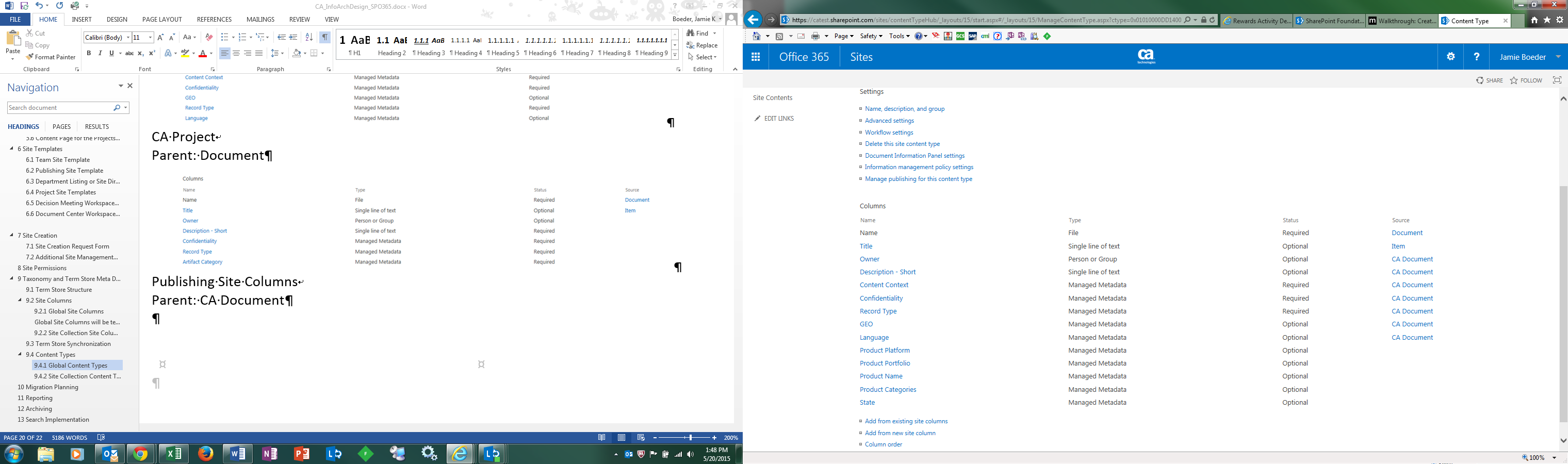


CA Project  
Parent: Document



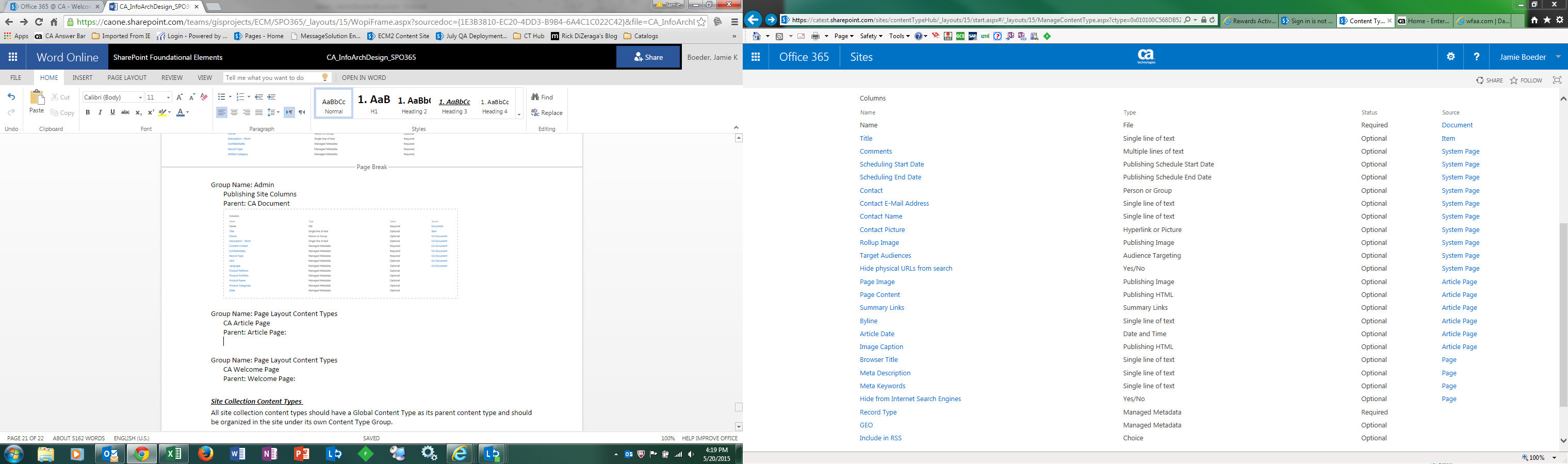
Group Name: Admin

Publishing Site Columns  
Parent: CA Document



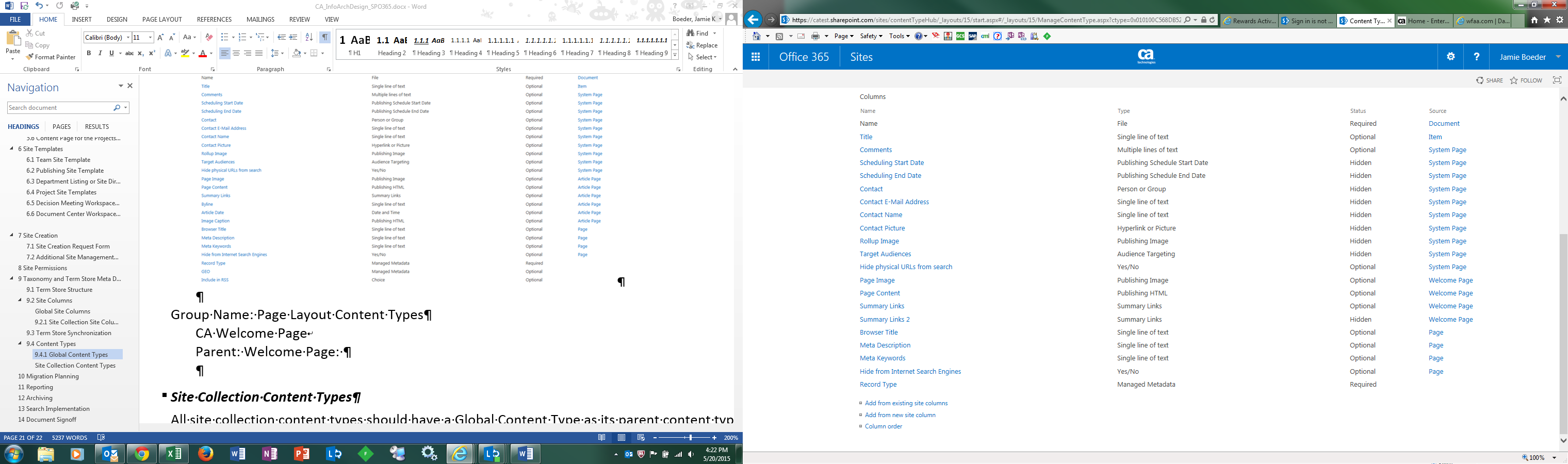
Group Name: Page Layout Content Types

CA Article Page  
Parent: Article Page:



Group Name: Page Layout Content Types

CA Welcome Page  
Parent: Welcome Page:



### 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 under its own Content Type Group.

# Archiving

# 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 Representative** |  | **EMC2 Representative** |
| Full name |  | Full name |
|  |  |  |
| Title |  | Title |
|  |  |  |
| Signature |  | Signature |
|  |  |  |
| Date |  | Date |