



HPS Consulting & Integration

# **Global Communities V2 Design Specification**



**Andrew Gent**  
**Global KM Team**  
**HP Services**  
January 21, 2004  
Rev 0.7 (review draft)



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### Introduction

This document describes the design and structure of Global Communities within SharePoint Version 2. The guidelines described within apply to all communities developed for Hp Services and are strongly recommended for other organizations as well.

The first section of this document describes the overarching design principles that tie the communities together. The rest of the document is a detailed explanation of the recommended and required components of a global community, including examples and prototype layouts where appropriate.

### Related Documents

The following documents will be revised to reflect the new functionality and structure of the V2 communities:

- Global Communities: User's Guide
- Managing Global Communities
- How We Collaborate

### Terminology

The subject of this document is *communities of practice*. The communities in question are sociological: groups of people who share a common set of skills, expertise, or roles; for example, people who work with the same technology, within the same industry practice, or in the same profession. The goal of this document is to define a technological infrastructure that can facilitate and encourage the sociological community working together and sharing their combined wisdom.

There are many procedural and cultural aspects to facilitating communities of practice and this design spec will reference those activities where the technical infrastructure can assist or complement them. However, because of the focus on infrastructure, this document will often use the terms *community* and *community of practice* interchangeably to refer to either the individuals within the community or the technology that supports them.



### Design Principles

The following are the design principles for the global communities.

- *For all design decisions, particularly those related to the classification of documents and the structuring of content into topics, the aim is to balance completeness of metadata against:*
  - *Its practical use for locating content by searching or browsing the community space*
  - *The need to keep the process simple for submitting content*
- *The primary audience for a community is the community itself. (It is not outwardly facing; that is the role of the tier 1 intranet site.)*
- *The basic structure, functions, and layout of the communities will be consistent with the V1 design (because the goals are the same and consistency will assist the migration of existing users from V1 to V2).*
- *Wherever possible native V2 functionality will be used and new V2 features emphasized to simplify maintenance and take advantage of new capabilities.*



### Introduction

The goal of the community is to encourage communication and knowledge sharing among the community members. SharePoint Portal Server eliminates the common barriers to knowledge sharing by automating much of the structure, presentation, and management of the information. The point is to make it as easy as possible for individual community members to contribute to the overall knowledge base while maintaining order and direction for the community as a whole.

### Roles & Responsibilities

There are three primary roles in a community of practice:

- Community Leader(s)
- Subject Matter Experts
- Community Members

There are two secondary roles that support the setup and maintenance of the communities and they are:

- Global KM Team
- Technical Support (HPS IT and KMSD)

### Community Leader

The role of the community leader is to act as a facilitator to the community and as manager of the community environment, providing vision and leadership in the organization of the community home page and managing access permissions as needed.

Specifically, the community leader is responsible for:

- Managing the content of the community and facilitating contributions from its members
- Managing the physical structure of the community in terms of topics, document libraries, and folders
- Assigning permissions for individuals to contribute and — in especially sensitive situations — access to the content
- In conjunction with the Global KM team, managing the visual layout of the community and the addition of new functions or capabilities

The community leader will have coordinator privileges over the topics, lists, and document libraries within the community so he or she can manage content and assign permissions to other community members. The Community Leader also has responsibility for and control over the physical structure of the community space (ie. the taxonomy) within the guidelines set out by this document. Responsibility for the visual layout and structure of the community is shared between the community leader (who represents the needs of the specific community) and the global KM team (who manages the global requirements for all communities).



### **Subject Matter Experts**

The role of the subject matter experts (SMEs) is to provide leadership in specific subject areas within the community. This includes finding and publishing content themselves as well as encouraging other community members to contribute.

Usually, subject matter experts will map to one or more topic areas within the community workspace. Subject matter experts will usually be given coordinator access to one or more topics and their document libraries so they can provide access to other community members as authors.

Note that the role here is leadership and mentoring, not managerial. Subject matter experts are expected not only to publish intellectual capital themselves, but to encourage contributions by other community members. Although they will have privileges to control others' contributions and are expected to provide editorial comment where necessary, they should not view themselves as gatekeepers or judges.

The goal is that the role of subject matter expert evolves organically within the community as individual community members are recognized for their achievements and experience within particular areas of expertise. Recognition as a subject matter expert is one of several proof points in the path towards promotion under the corporate technical career path for consultants.

### **Community Members**

It is important to acknowledge the major role that the community members will play. It is vital that the entire community participate, through:

- Submission of news items
- Publishing articles and white papers to the community site or as Knowledge Briefs to the HP Services overall Technology community
- Contributing to the global forums associated with the community
- Publishing profiles and snapshots of projects to the Project Profile Repository and other reusable project documents into the community

### **Global KM Team**

The primary role of the Global KM Team is to facilitate the development of the communities, from their initial design and setup through ongoing use and maturation. The specific responsibilities of the Global KM Team towards this end are:

- Approve the creation of new global communities (this is to ensure fits within the larger scheme for the organization with minimal overlap or conflict and to guarantee that each community has sufficient support within management and the field)
- Work with the community lead and key members to design the community space
- Create and perform the initial configuration of the community



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- Develop custom web parts as necessary based on the community requirements
- Provide consulting and advise on the ongoing management of the community
- Identify and advertise best practices that develop within the communities to the community leaders

### **Technical Support (HPS IT and KMSD)**

[to be supplied]



### The Structure of the Knowledge Network

The individual communities of practice exist within the larger context of all the intellectual property for HP Services — what we refer to as the “knowledge network”. The knowledge network is divided into three tiers:

- Tier #1: Corporate intranet
- Tier #2: Communities of practice
- Tier #3: Team collaboration

Previously, these three tiers were both logically and physically separate, with standard web sites handling tier #1, SPS servers hosting tier #2, and STS servers hosting tier #3.

With the advent of SharePoint V2, the logical structure remains the same. The goals and intended use of the three tiers remain distinct. The one difference is that, physically, in SharePoint V2, tiers 2 & 3 share a common base, Windows SharePoint Services (WSS).

WSS is the replacement for STS. WSS significantly enhances the reliability and scalability of the base platform through support for clusters, load balancing, etc. SPS will continue as a separate product, but it is now built on top of WSS. This has two immediate consequences on our KM environment:

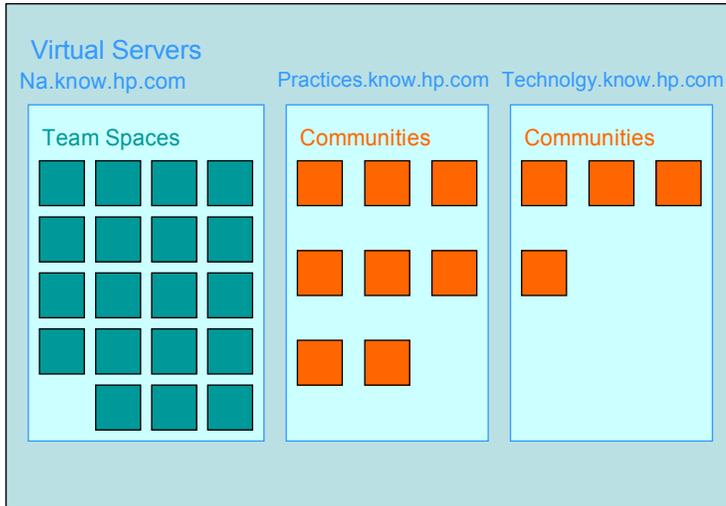
- **Consistency and Ease of Use**  
The HPS communities of practice will have the same built-in capabilities and user interface as the team spaces. This, plus the improved capabilities in V2, should make it easier for both members and maintainers of the communities.
- **A Common Fault-Tolerant Infrastructure**  
V2's support for clustering and other enterprise-scale capabilities allow us to converge all of our current KM infrastructure into 2 or 3 highly reliable server "farms", with capacity to spare.

Physically, there will be one WSS/SPS cluster for each of the major geographies: North America, Europe, and Asia Pacific. Within those server farms, spaces and communities will be organized into groups known as virtual servers. Virtual servers act like a single separate server (for purposes of backup and management).

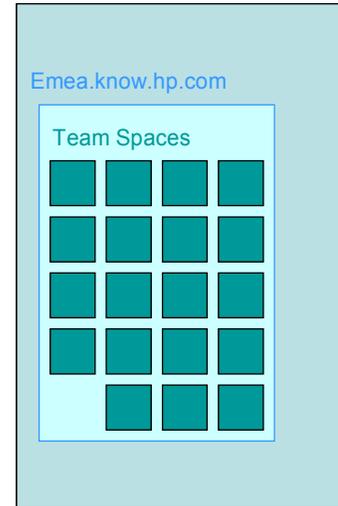
Team spaces will continue to be organized into generic virtual servers based on location (e.g. *americas...com*, *europa...com...*) but communities of practice will now be grouped according to type. So, for example, all practice communities will be on a single virtual server (such as *practices...com*), as will all profession communities (*professions...com*). Within those virtual servers, each community will be a top-level topic.

## Physical Server Farms

### North America



### Europe



### Example Physical Configuration of SharePoint V2 Infrastructure

This change to the physical configuration of the infrastructure should have no impact on the design and management of the individual communities or team spaces. However, it should make the infrastructure more manageable while also making the URLs for individual communities easier to remember (for example, <http://practices.../missioncritical>).

## Community Structure

This section describes how the community spaces are physically structured and provides guidelines for how best to use that structure to support communities of practice.

### The Anatomy of SPS V2

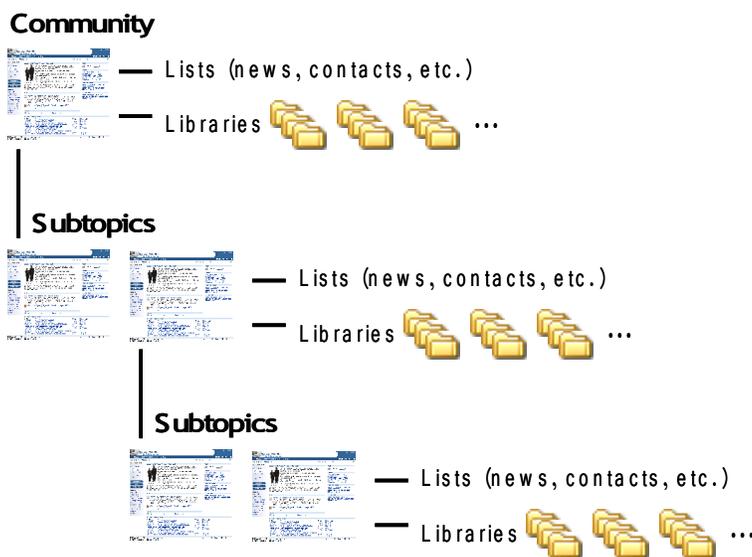
SPS V2 portals are composed of **topics**. Topics are composed of a number of different objects:

- **Web Parts** that perform specific functions (such as lists of links, contacts, news, etc.)
- **Document Libraries** that are a special type of web part that act as a document repository
- **Other Topics** that can be nested to create a hierarchy of subtopics

The primary structure within the workspace is the hierarchy of topics and subtopics; these are displayed as a navigation scheme in the left-hand column.

Topics and subtopics are the primary logical structure within the SPS workspace. They form a logical and physical hierarchy, displayed as a navigation scheme in the left-hand column. Each topic or subtopic has its own functions (web parts) and content (document libraries). Topics also define the scope of permissions: you define permissions to the content at the topic/subtopic level, not at a document library or folder level.

Document libraries and lists then provide secondary structures, in which you manage the content and functions for that topic. It is possible to further divide the content within libraries into folders. However, this distinction is not visible by default and should not be used for any structure that is important to the members of your community.





### The Structure of the Communities of Practice Under SPS V2

This section describes how SPS V2 will be used to structure the Communities of Practice within HP Services. The following sections provide further additional best practices.

#### Communities

Each “Community” within Tier 2 will be a top level topic under one of several portals. Communities will be grouped by type, so that practice communities belong to one portal, profession communities to another, etc.

Note that the grouping of communities within portals is purely for convenience of management and to provide meaningful, human-readable URLs (such as <http://practices...com/fsi>). Global search will allow direct access to content across all of the portals.

#### Market Segments, Offerings, and other Major Topics

Subtopics will be used for major subject areas within each community. Examples of major subject areas include market segments for practice communities or individual technologies or technology areas within the technology communities.

Information can be further subdivided within a topic through the use of subtopics. So, for example, within a Market segment such as automotive, each market offering for that segment can have its own subtopic.

#### When to Use Topics

The key to deciding when to use topics/subtopics or not is that **topics have their own identity**, with a unique “page” and separate web parts, document libraries, etc. Use topics to segment information when you have a distinct logical subject that has its own identity and multiple types of information associated with it.

For example:

- You **would not** use a topic just for “customer presentations”, where a document library is sufficient
- But you **would** use a topic for a marketing initiative that involves presentations, a schedule for events, list of target customers, and a discussion forum

Similarly:

- You **would not** use a topic for training events, where an event list is sufficient
- However, you **would** use a topic for a certification program that involves a schedule for training, preparatory materials, a contact list, and a signup form.

#### Documents, Document Libraries, and Folders

Within each topic or subtopic, you organize your documents into document libraries and within those libraries you can use folders to further sort the documents. The key point is that each document library represents a distinct type of document and can have different metadata associated with it (as described in



the guidelines later). For example, you can have libraries for “Customer Presentations”, “White Papers”, “Project Documents”, “Downloads”, etc.

### **Avoid using Folders When Structuring Your Information**

Use multiple document libraries when sorting documents for the members of your community (that is, the readers or browsers), where they will browse through the libraries or you can display summary information about each on the topic page.

You can subdivide documents within a library into folders. However, the folder view is not the default view and navigating by folders is not user-friendly. Use folders only to segment the content for management purposes. For example, to separate project documents by project, geography, or by year. Do not use folders where the segmentation is important information for the reader.

Finally, always change the name of the document library from the default (“Shared Documents”) to a title that more clearly describes the content. For example, if your library will contain sample project documents, consider naming the library “Project Samples”.

### **News, Contacts, Links, etc.**

In many cases, where in SPS V1 content had to be maintained as files, such as internet shortcuts for links, STS V2 now provides standard lists. Wherever possible use the built-in V2 features to maintain content. This simplifies both the maintenance as well as the usability (through standard displays) of the information.

Examples of the content that should be maintained in standard SPS V2 web parts include: news, contacts, related links, and events.

### **Securing Sensitive Information**

By default, the communities of practice are open for read access to all HP Employees (that is, anyone with an HP corporate account) and you are strongly encouraged to leave as much information accessible to the larger audience as possible.

However, there may be times when you will need to secure sensitive information to a more restrictive audience for business reasons. This can be done by placing such information into a restricted topic.

As mentioned earlier, permissions are defined at the topic or subtopic level. In most cases, this is done to assign authoring or coordinator rights. (For example, you can use topics to assign a subject matter expert coordinator access over his or her topic of expertise.)

You can also use topic-based permissions to restrict access. For example, if you wish to restrict access to an SDK or selective training materials to a group smaller than all HP employees (such as HP Services and selective contractors). Note that access to all of the content within the restricted content — including links, contacts etc — is restricted, not just access to the documents.



### **Basic Guidelines for Structuring Information within the Communities**

The following are some common sense rules for how to structure information within the communities of practice. Although the specific topics will be unique to each community, there are some basic rules that good topic design should follow:

#### **Use subtopics only if you have two or more categories**

A single subtopic is an orphan. If you only have one subtopic, the content of that subtopic should be merged with the current level content. Consider using a separate document library rather than a subtopic. The one exception to this rule is if you have sensitive IP you wish to protect, in which case using a single subtopic for the sensitive content (such as *for instructors only* or *SDK*) makes sense.

#### **Do not use more than 8 to 10 subtopics at any one level**

Too many subtopics make it hard for users to distinguish between them; too few indicate that the structure is too deep. There are no hard limits (the old adage “seven plus or minus two” could apply here), but if you have more than 8-10 subtopics, consider grouping them into a smaller set of logical groups.

#### **Use subtopics for major areas of focus within the community; use document libraries for managing/structuring documents**

Remember that topics and subtopics have their own web “page” including their own functions (news, links, etc). Use subtopics for subject areas that require their own separate identity. If you only need to manage documents (such as separating templates from presentations) use separate document libraries.

One way to tell you need a topic rather than a just a document library is if the subject has related, non-document, content such as separate applications, news, links, contacts, etc.

#### **Do not overuse restricted topics**

Restricted topics are useful for protecting sensitive intellectual property, but too many restricted areas will give the impression that the content is “locked down” and will discourage submissions from other community members. It is important to balance the protection of the intellectual property from improper access against the fact that the community exists to encourage information sharing among all of its members. A good practice is to make clear in the interface what sections of the community are available for general posting to counterbalance any restrictive sections in the community space.

#### **Do not create empty topics**

It is sometimes tempting to create a structure before actually having the content to fill it. Avoid creating topics unless you already have content to fill them! Topics with no content cause frustration and anger for anyone who encounters them. Worse yet, their frustration will lead them to suspect that other topics – that **do** contain useful information – are also empty.



## Metadata

*Metadata* is the set of properties that are associated with a document and describe its contents. In SharePoint V2, metadata is stored as the “columns” in the document library. All the documents within a single document library have the same properties (ie. columns), although each document has distinct values for those properties.

Metadata is important because it helps members browse through the community contents and make informed decisions about which document to read. Also, the metadata can be useful in helping refine the scope of a search; for example, searching for documents that are specific to the financial industry. Finally, there are certain metadata properties that are used to help identify and automate specific tasks, such as review and expiration dates.

The key is to provide enough metadata to support the major concepts members of the community will use to look for content and any special requirements (such as document retention) while keeping the number of metadata properties small and their meaning clear. Metadata is no use if authors cannot or will not fill out the fields.

### Required vs. Optional Metadata Properties

To provide consistency and to facilitate advanced cross-community searches, all communities will have a common set of metadata. The metadata can be subsetted (as described below) for different types of document libraries, but in all cases, where properties are defined for the document library, the standard metadata properties are required to be filled out.

### Standard Metadata Properties

The following table describes the standard metadata properties. For a detailed description of the allowable values for each property, see Appendix: Metadata.

Property	Type	Description
Title	Text	Descriptive name of the document
Document Author	Text	Name of the document's author(s)
Description	Text	Summary description of the document's contents.
Document Type	List, single value	The type of document (e.g. white paper, project proposal...)



invent Language	List, single value	The language in which the document is written.
Country	List, single value	The country of origin of the document.
Industry	List, multiple values	The industries to which the document applies
Client	Text	The name of the client (for project documents)
Project ID (EID/WBS)	Number	The project ID (for project documents)
Confidentiality	List, single value	The confidentiality of the document, as defined by the corporate security guidelines ( <a href="http://legal.../labels.asp">http://legal.../labels.asp</a> )
Retention Period	List, single value	The length of time to retain the document. After the retention period, the document must be reviewed for further retention or archiving. (See the document retention policy for details.)

## Standard Subsets of Metadata

Not all metadata properties apply to all types of documents. For example, solution delivery materials do not have a specific project ID (eid/wbs) or client name associated with them. Similarly, whitepapers are not usually country specific.

To accommodate these variations, there is one core set of metadata properties that apply to all documents and three standard subsets to be applied to document libraries based on the type of documents they will contain. The standard subsets apply to the following types of document:

- Project & Proposal
- Solution Delivery
- General (white papers, articles, training, demos, etc)

## Core Properties

The core properties that must be applied to all document libraries are:

- Title
- Document Author
- Description
- Document Type
- Language
- Confidentiality
- Retention Period



Subsets

The standard subsets are described in the following table.

Property	General	Project & Proposal	Solution Delivery
Title	X	X	X
Document Author	X	X	X
Description	X	X	X
Document Type	X	X	X
Language	X	X	X
Country		X	X
Industry		X	X
Client		X	
Project ID (EID/WBS)		X	
Confidentiality	X	X	X
Retention Period	X	X	X

When adding a new document library, one of the three subsets must be chosen based on the expected content for that library. (For example, choose the solution delivery metadata when creating document libraries for delivery materials and presentations in a topic related to a specific market offering; but choose the general metadata when creating a document library for presentations in a profession community.

Community-Specific Extensions to the Standard Metadata

All of the standard properties and their allowable values are maintained by the KM program team. These metadata properties will be implemented when new communities are created.

Individual communities cannot modify these standard properties or values.

However, there may be instances where a community needs additional or different metadata associated with its documents. For these instances, there are two types of extensions that are allowed:

- Community-specific properties
 

For communities that have uniquely different types of intellectual capital, new properties can be added to the document metadata. These properties are used in addition to the standard metadata properties. The new properties must not conflict with existing property names or values. They must be unique entities.
- Community-specific values to standard properties
 

In some instances, a community may need additional values in the allowable list for existing properties. In these cases, the community can extend an existing property by adding unique values to the existing list. (For example,



adding a *Quarterly Report* value to the *Document Type* property.) Note that only additions can be made to the list of allowable values. No changes to spelling or existing property values are allowed. (See below for more information about extending standard properties.)

In either case, no changes to the metadata should be made without first notifying the HP C&I KM team. Working with the KM team is necessary, not so much to “bless” the extensions but to avoid duplication of effort and to propagate useful innovations from one community to the others.

### **Changing the Standard Metadata**

In the rare instances where changes to the standard metadata are required (for example, where an additional property value is needed, such as a new Industry), the community leader should contact the KM program team. After review by the KM team and all community leaders, if the change is seen as beneficial, it will be made by the KM team and automatically propagated to all existing and future communities.

## Community Interface

The previous sections have discussed the inner workings of the community, the technical underpinnings and processes that make it work. However, the first visible and perhaps most crucial aspect of the community is its user interface or “topic pages”.



**hps community Project Management**

global search:

Practice Portal **Communities** News Site Directory My Site Site Settings Help

You are in: Project Management

**Current Location**

- Home
- Communities
  - Project Management
  - Presentations
  - Project Documents
  - Whitepapers

**Contribute**

**Discuss**

**Subscribe**

**Actions**

- Add Listing
- Add Person
- Create Subarea
- Upload Document
- Change Settings
- Manage Security
- Manage Content
- Manage Portal Site
- Add to My Links
- Alert Me
- Edit Page

**Welcome to the Project Management Community**

The PM Community is designed to support one simple mission - allow project managers to share and discuss their experiences. The mission is supported by this PM Community with two features:

**Forums** - allow project managers to communicate with others using a electronic discussion board

**Document Sharing** - allow project managers to publish documents created while performing their jobs

To participate in the discussion forum, click on the "Forums" link near the top of the PM Community web page.

To view documents already published, use the Site Index, the list of Last Documents Published, or the Search feature.

To share your own documents, first decide on the destination folder, using the Site Index. Next, open that folder with your browser. Then follow the instructions under "How to Contribute". If you have any questions, contact one of the Community Coordinators listed under "Feedback", or use the special PM Community Help Discussion.

**Feedback**

Please send questions or suggestions to Linda Caswell or Henry Pozzeita.

**Contacts**

- Andrew Gent (+1 363 57834763)
- Bruce Karney (+1 363 57834763)
- Craig Gilbert (+1 363 57834763)
- Kevin Heldt (+1 363 57834763)
- Kevin Laahs (+44 363 57834763)
- Joe Public (+1 363 57834763)

**Other Communities**

- Microsoft Technologies Community
- Dotnet Community
- Enterprise Architecture Community
- Knowledge Briefs

**Related Links**

- PM Community Help Discussion
- SharePoint Portal Server Overview Tours
- Portal Status Page

**News**

**Explore the portal with the Quick Start Guide**  
The Quick Start Guide is the right place to begin your exploration of the portal and its features. It leads you through tasks to customize the appearance and structure of the portal site and helps you configure key services for search and user access. Click the links in the Portal Quick Start Guide to get started with your new portal site.

**Welcome to Microsoft Office SharePoint Portal Server 2003**  
You can use the News Web Part to share information with portal users. To view the complete news item, click the headline.

**Events**

8/11/2003 2:00 PM PM Methodology Virtual Classroom **NEW**

**Last Documents Published**

Author	Title	Size	Published on
Paul Black	Global Method PM Survival Guide	31KB	Jul 17, 2003
Ray Essen	Meeting Agenda & Minutes	128KB	Jul 10, 2003
Tom Mecca	Integrated Project Tracking and Control Workbook	248KB	Jun 27, 2003
Ray Essen	Program Risk Log (Financial) Transition Management	87KB	Jun 17, 2003
Terence Reynolds	Communication Plan with Involvement Table	169KB	Jun 17, 2003
Paul Black	Global Method PM Survival Guide (KB0736)	31KB	Jul 17, 2003
Ray Essen	Meeting Agenda & Minutes (KB0432)	128KB	Jul 10, 2003
Tom Mecca	Integrated Project Tracking and Control Workbook (KB0763)	248KB	Jun 27, 2003
Ray Essen	Program Risk Log (Financial) Transition (KB0442)	87KB	Jun 17, 2003
Terence Reynolds	Communication Plan with Involvement Table (KB0847)	169KB	Jun 17, 2003

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For technical issues, please go to [SharePoint Support](#)

You are currently on **Houston, TX** farm

### Sample Community Page

The sample page demonstrates the basic layout and “look & feel” for community pages (although the content is provided for demonstration purposes only). The following sections describe the required and recommended components for the home page and subsequent topic pages in more detail.

### Required Interface Components

To provide consistency, context, and a common navigation scheme, all pages within a community of practice are to have the following items. All of the required items either appear by default in SPS or are applied and maintained by the KM team when the community space is created.

- **The standard community banner**

Each community will have a standard banner to identify it as a member of the HP Services knowledge network. The banner complies with stylistic guidelines set by the KM program (including a monochrome photographic image, the



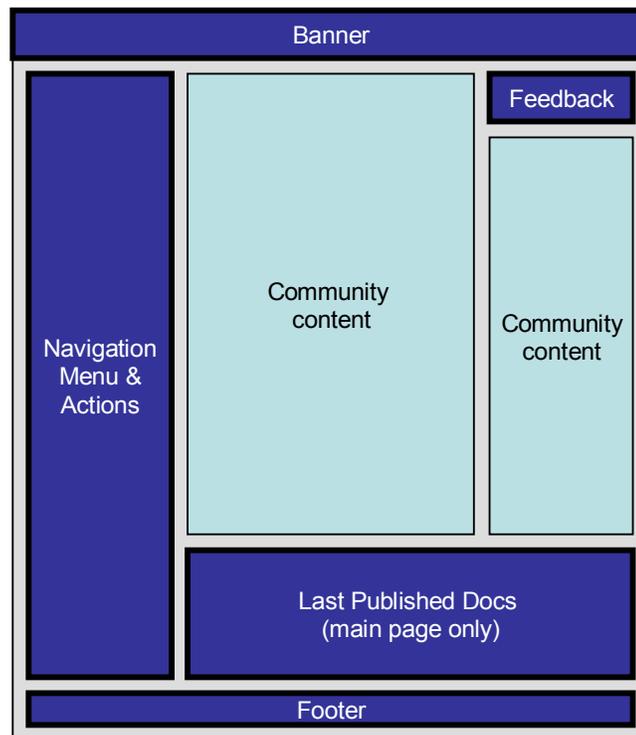
community title, the KM global navigation tab on the right and a global search entry box).

- **The standard stylesheet**  
The stylesheet defines the fonts, sizes, colors, and positioning attributes for all web parts.
- **The standard SPS menu bar**  
The menu appears automatically as part of the SPS portal and provides access to global functions related to the community.
- **The standard left-hand navigation & action menu**  
The left hand side of the page is reserved for the navigation menu, which helps user's navigate the hierarchy of topics and subtopics, and actions that the user can perform. This column is provided automatically by SPS and its contents will change depending upon the current location within the community hierarchy and the user's permissions.
- **The standard footer**  
All community pages will display a standard footer at the bottom of the page providing a link for administrative support and other server-specific information.

In addition to the preceding components that are required for all community pages, the main or "home" page for each community must have two additional required components:

- **An email contact**  
Each community must have a front-line contact. This will usually be the community leader and a link to that contact must appear on the home page under *Feedback* in the top right under the SPS menu bar.
- **Last Published Documents**  
The Last Published Documents web part lets frequent visitors see what new documents are available since their last visit. The list of latest documents appears at the bottom of the page before the footer.

The following wireframe diagram illustrates the location of all of the required components of a community page.



### Required UI Components of a Community Page

If and when any additional required components are defined or modified, the changes will be implemented for all of the existing communities by the KM program team.

### Recommended Layout of the Community Topic Pages

Beyond the required components described in the preceding section, the content and layout of the community topics are at the discretion of the community leader. Each community can layout their topic pages the way that best suits their members. However, there is significant benefit to having common types of information appear in the same place across communities (and across web sites) so members can quickly recognize content by repeated patterns.

The following recommendations are based on best practices across the industry and within the HP Services communities thus far. Unless a community has a specific reason for arranging their content differently, the following general layout is strongly encouraged.

### General Guidelines

The required components appear at the top, left, and bottom of every page. They provide a common UI throughout the community site and are consistent with all other knowledge network resources.

SharePoint divides the rest of the window into two columns. We recommend that the columns each contain a specific type of content:



- **Area 1: center column**  
This column should be used for the primary community content. If you have a welcome message, or a brief description of your community, this is where it should go. At a minimum, you can use the standard SPS *announcements*, *news*, and *document library summary* web parts here to preview the topic content.
- **Area 2: right hand column**  
This column should be used for related materials, including contacts, links to external resources, etc. Specifically, the first web part in the column on the main page should be the *Feedback* web part. If you use *Related Links*, they should appear at the bottom of the column.

Again, each community will have different requirements and may decide to arrange these web parts differently as their needs dictate. (For example, the technology community emphasizes generation of intellectual capital, so a list of authors occupies area 1.) Also, to balance out the columns, some web parts may be moved between areas 1 & 2. However, the required components (*Feedback* and *Last Published Documents*) must appear in their standard locations when used.

### Recommended Layout for the Main Community Page

There are a number of components that are frequently found on Community pages. These include welcome text (summarizing the purpose of the community), contacts, news, announcements, related links, and so on.

There are standard lists and web parts for storing and displaying this information within SharePoint. The communities have also developed common practices for positioning this information<sup>1</sup>. Not all of these pieces of information are necessary for all communities. Include only the information you need. However, if you do have information that fits into these categories, we strongly recommend the following practices in terms of style and layout:

- **Welcome text** — Keep it short (2-3 sentences). Put it at the top of the middle column.
- **Contacts** — Place a list of contacts immediately under the *Feedback* web part, as the second item in the right hand column.
- **News** — Put it towards the bottom of the middle column, but before *Last Published Documents*.
- **Announcements** — It is not necessary to have a separate announcements web part. If you do not have many events, they can be included under *News*. But if you do have a significant number of events, include *Announcements* immediately after *News* in the center column.
- **Related Links** — Put related links at the bottom of the right hand column.

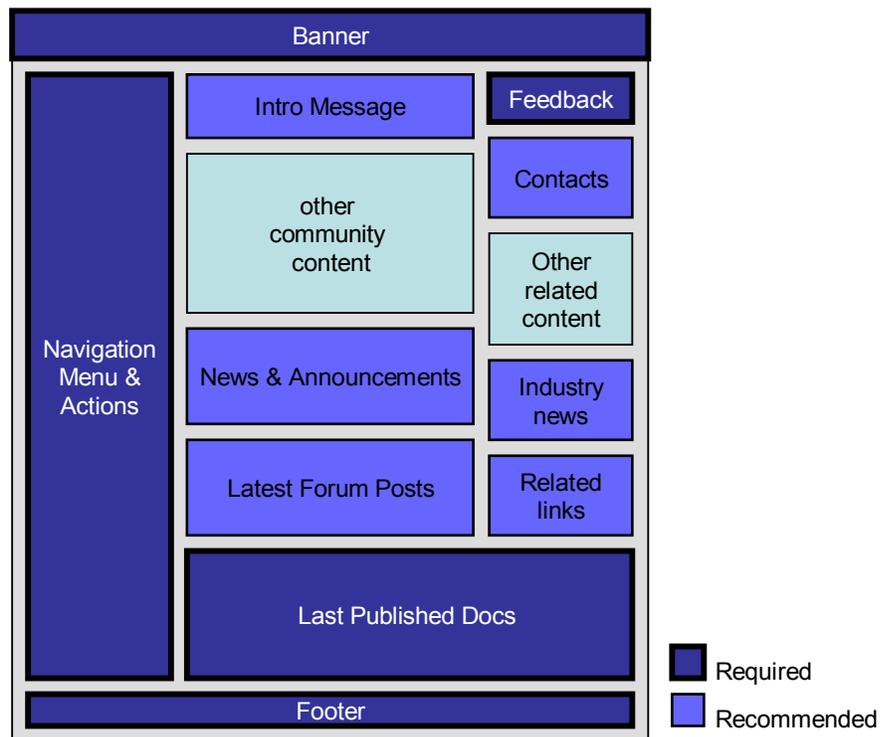
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<sup>1</sup> Many thanks to the community leaders and facilitators who helped shape and drive the V1 communities over the past two years. Their efforts were instrumental in creating and refining the best practices that this document attempts to capture.

In addition to the traditional elements of portals and web sites, there are two new components that we would encourage communities to consider including:

- **Latest Forum Posts** — similar to *last published documents*, the *latest forum posts* provides a list of the most recent entries in the forums associated with the community. This gives members a quick summary of activity without having to go to the forums themselves, just as *last published documents* does for the community space itself. Because of its summary nature, if this list is included in the community main page, we recommend it being at the bottom of the middle column.
- **Industry News** — Many communities have associated industry topics (such as security or wireless), web sites, and news sources. These are usually listed under *related links*. However, if the news source provides an RSS<sup>2</sup> feed for syndicating the news, a summary of the latest news items can be included directly on the community page. If a community chooses to include industry news, we recommend putting it in the right-hand column, above *related links*.

The following diagram illustrates the layout for required and recommended community main page components.



<sup>2</sup> RSS is an XML document description that is an industry standard for syndicating news and related links. Many news sources, including Cnet and the New York Times, provide summaries of their news in RSS format.



### Required and Recommended Layout for the Community Main Page

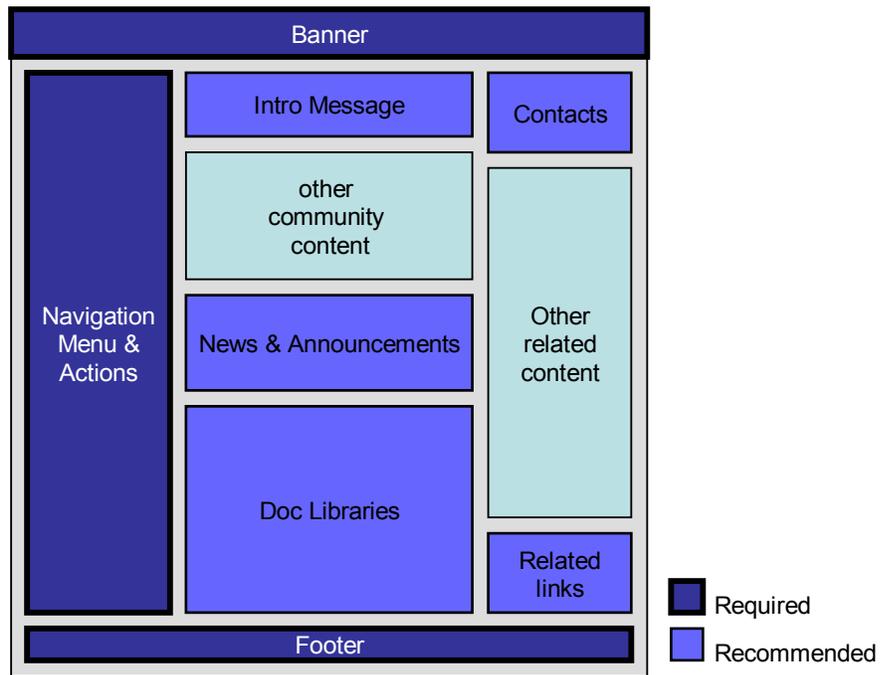
#### Recommended Layout for the Subtopic Pages

Subtopic pages are not as easy to classify as main pages. Each topic or subtopic may address a completely different goal within the community, and as a result would require different content, different functions, and different presentation.

However, that said, the basic rules still apply concerning the presence and layout of required components and recommended components. Required components must appear in the same location as on the main page. If there are similar components as recommended for the main page, they should appear in the same relative location on subtopic pages. For example:

- **Introductory message** — if the subtopic requires descriptive text, it should appear at the top of the middle column.
- **Contacts** — if there are topic-specific contacts, they should be listed at the top of the right-hand column.
- **Related Links** — if there are topic-specific links, they should be listed at the bottom of the right-hand column.
- **News & Announcements** — If there are topic-specific news items, they should be listed in the middle column.
- **Document Libraries** — Finally, if the subtopic contains document libraries and you want to summarize their content on the subtopic page, they should be treated similarly to *last published documents* and should be listed at the bottom of the middle column.

The following diagram illustrates the layout of required and recommended components for community subtopic pages.



**Required and Recommended Layout for the Community Subtopic Pages**



## Appendix: Metadata

The following is a detailed description of the metadata properties and their allowable values. The default value appears in bold red text. All properties are required. (Asterisks following an allowable value indicate the value has been added for compatibility with K-Net data.)

Property	Description	Allowable Values
<b>Title</b>	The title of the document	(text)
<b>Document Author</b>	The author's name	(text)
<b>Description</b>	A brief abstract summarizing the document's contents	(text)

<b>Document Type</b>	The type of document it is	<ul style="list-style-type: none"> <li>• Business Plan</li> <li>• Code Sample</li> <li>• Customer Presentation</li> <li>• Customer Requirements</li> <li>• Demo</li> <li>• Design Specification</li> <li>• Executive Solution Summary</li> <li>• Functional Specification</li> <li>• Marketing Brochure</li> <li>• Pricing Worksheet*</li> <li>• Project Briefing</li> <li>• Project Closeout Report</li> <li>• Project Plan</li> <li>• Project Status Report</li> <li>• Project Work Breakdown</li> <li>• Proposal Letter and/or Package</li> <li>• Resume</li> <li>• Sales Guide</li> <li>• Service Delivery Guide</li> <li>• Service Description</li> <li>• Service Level Agreement</li> <li>• Software Kit</li> <li>• Solution Proposal Letter</li> <li>• Solution Proposal - Template</li> <li>• Standard Installation Procedure</li> <li>• Standard Operating Procedure</li> <li>• Statement of Work</li> <li>• Statement of Work - Template</li> <li>• Statement of Work - Third Party</li> <li>• Summary of Applications</li> <li>• Technical Manual</li> <li>• Training Curriculum</li> <li>• Training Material</li> <li>• White Paper</li> <li>• Win/Loss Report</li> <li>• Other</li> </ul>
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		<ul style="list-style-type: none"> <li>• Other - Project Deliverable</li> <li>• Other - Solutions Document</li> <li>• Other - Template</li> </ul>
<b>Language</b>	The language the document is written in	<ul style="list-style-type: none"> <li>• <b>English</b></li> <li>• Arabic</li> <li>• Chinese*</li> <li>• Czech</li> <li>• Danish</li> <li>• Dutch</li> <li>• Finnish</li> <li>• French</li> <li>• German</li> <li>• Greek</li> <li>• Hebrew</li> <li>• Hindi</li> <li>• Hungarian</li> <li>• Italian</li> <li>• Japanese</li> <li>• Korean</li> <li>• Mandarin</li> <li>• Polish*</li> <li>• Portuguese</li> <li>• Russian</li> <li>• Slovak</li> <li>• Spanish</li> <li>• Swahili</li> <li>• Swedish</li> <li>• Turkish</li> <li>• Yugoslavian*</li> </ul>
<b>Country</b>	The country to which the document applies.	<ul style="list-style-type: none"> <li>• <b>All - Worldwide</b></li> <li>• Algeria</li> <li>• Argentina</li> <li>• Australia</li> <li>• Austria</li> <li>• Bangladesh</li> <li>• Belgium</li> <li>• Bolivia</li> <li>• Brazil</li> <li>• Bulgaria*</li> <li>• Burundi</li> <li>• Cameroon</li> <li>• Canada</li> <li>• Chile</li> <li>• China – Peoples Republic of*</li> <li>• Columbia</li> <li>• Costa Rica</li> <li>• Croatia*</li> <li>• Cuba</li> <li>• Czech Republic</li> <li>• Denmark</li> <li>• Ecuador</li> <li>• Egypt</li> <li>• El Salvador</li> <li>• Estonia*</li> <li>• Fiji</li> <li>• Finland</li> </ul>



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- France
- Germany
- Greece
- Greenland
- Guatemala
- Hong Kong
- Hungary
- Iceland
- India
- Indonesia
- Ireland
- Israel
- Italy
- Ivory Coast
- Japan
- Kazakhstan\*
- Korea
- Latvia\*
- Lithuania\*
- Libya
- Luxembourg
- Malaysia
- Mexico
- Morocco\*
- Netherlands
- New Zealand
- Nicaragua
- Nigeria
- Norway\*
- Pakistan
- Palestine\*
- Panama
- Paraguay
- Peru
- Philippines
- Poland
- Portugal
- Romania\*
- Russia
- Singapore
- Slovakia
- South Africa
- Spain
- Sweden
- Switzerland
- Taiwan
- Thailand
- Turkey
- Uganda
- Ukraine\*
- United Arab Emirates\*
- United Kingdom
- Uruguay
- USA
- Venezuela
- Vietnam



<p><b>Industry</b></p>	<p>The industry to which the document applies.</p>	<ul style="list-style-type: none"> <li>• Zimbabwe</li> <li>• <b>All Industries</b></li> <li>• Aerospace</li> <li>• Air Transportation*</li> <li>• Automotive</li> <li>• Chemical</li> <li>• Consulting*</li> <li>• Construction</li> <li>• Consumer Packaged Goods</li> <li>• Discrete Manufacturing</li> <li>• Education</li> <li>• Electronics</li> <li>• Electronics - Semiconductor</li> <li>• Financial Services</li> <li>• Government – Defense</li> <li>• Government - Federal</li> <li>• Government - Local, Municipal</li> <li>• Government - State, Province</li> <li>• Government - Other</li> <li>• Healthcare</li> <li>• Information Technology</li> <li>• Manufacturing</li> <li>• Media and Entertainment</li> <li>• Metal and Glass</li> <li>• Mining</li> <li>• Petrochemicals (Oil, Gas)</li> <li>• Pharmaceutical</li> <li>• Process Manufacturing</li> <li>• Public Transport</li> <li>• Retail</li> <li>• Securities - Finance</li> <li>• Securities</li> <li>• Service Providers - General</li> <li>• Service Providers - ISP</li> <li>• Service Providers - NSP</li> <li>• Service Providers - ASP</li> <li>• Telecommunications</li> <li>• Travel – General*</li> <li>• Travel – Hotel and Leisure*</li> <li>• Utilities</li> <li>• Wireless Communications*</li> <li>• Other*</li> </ul>
<p><b>Client</b></p>	<p>The client's name (for project documents)</p>	<p>(text)</p>
<p><b>Project ID (EID/WBS)</b></p>	<p>The project ID</p>	<p>(text)</p>
<p><b>Confidentiality</b></p>	<p>The security level of the document</p>	<ul style="list-style-type: none"> <li>• <b>HP Restricted</b></li> <li>• HP Confidential</li> <li>• HP Private</li> <li>• Unrestricted</li> </ul>
<p><b>Retention Period (in months)</b></p>	<p>How long the document should be retained before the author is notified.</p>	<ul style="list-style-type: none"> <li>• 1</li> <li>• 3</li> <li>• 6</li> <li>• 12</li> <li>• <b>18</b></li> </ul>



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		<ul style="list-style-type: none"><li>• 24</li><li>• 36</li></ul>
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## Appendix: Defining Security for Large Groups

Security permissions can be assigned per topic based on individual NT credentials (domains\username) or through the use of Microsoft active directory security groups. It is possible to define your own security groups through the use of the `xxxxxxxxxxxxxx` (<http://xxxxxxxx.com>).

However, several large groups have already been defined to support security settings requested by the HP Services C&I practices. Those security groups are described in the following table. Note that these groups have been set up primarily to create groups that exclude contractors, partners, or clients who may have HP corporate accounts.

Group	Description	Active Directory Group Name
<b>All HP Employees</b>	All regular HP employees, excluding contractors.	HPEmp
<b>All HP Services Employees</b>	All regular HP Services employees, excluding contractors	HPSEmp
<b>All HPS C&amp;I Employees</b>	All regular HP Services Consulting & Integration employees, excluding contractors	HPCIEmp

## **Appendix: Outstanding Design Issues**

[to be supplied]

**Contribute, Discuss, and Subscribe Buttons**

**Metadata Simplification**

**Forums: embed or summarize?**