
Quick Guide: Planning Our SharePoint Information Architecture (IA)

1. What is Information Architecture & Why Does It Matter for Us?

- **What it is:** Simply put, IA is how we organize our digital documents and information so that everyone can find what they need easily and efficiently. Think of it as creating the logical blueprint for our new digital filing cabinet.
- **Why it Matters:** Our current way of managing documents is often inconsistent and scattered across different locations (network drives, Teams, etc.). This makes finding information slow, increases the risk of using outdated files, and won't support our planned company growth. Good IA is crucial to:
 - **Save Time:** Reduce time wasted searching for documents.
 - **Improve Consistency:** Ensure documents are described and managed similarly across teams.
 - **Support Growth:** Create a scalable system ready for more users and information.
 - **Reduce Risk:** Make compliance easier and ensure people use the right information.

2. Key Concepts We'll Be Using (Your Input is Vital!)

We need your expertise to define these building blocks for your department's information:

- **Content Categories:** What are the main *types* of documents your team uses? (e.g., Monthly Reports, Client Contracts, Standard Operating Procedures, Project Plans, Meeting Minutes, HR Forms). We need to identify these distinct categories.
- **Metadata (The "Smart Labels"):** This is the most important concept! Instead of relying only on folder names, we'll add descriptive labels (metadata) to each file. Think of tags like:
 - Document Status: (e.g., Draft, Approved, Archived)
 - Department: (e.g., Finance, HR, Operations)
 - Client Name: (e.g., Globex Corp, Initech)
 - Project ID: (e.g., PJT-101, PJT-102)
 - Review Date: (e.g., 2026-05-01)
 - *Why?* These labels allow us to easily sort, filter, and search for documents later, drastically reducing the need for complex folder structures. *We need your help identifying the most useful labels for your key documents.*
- **Site Columns (Reusable Labels):** To ensure consistency, we define these metadata labels once at a site level (as a Site Column). For example, we define

"Document Status" with its specific choices (Draft, Approved, Archived) once, and then reuse that exact same field across different document libraries within the site. This stops different teams from using slightly different terms for the same thing.

- **Content Types (Document Blueprints):** Think of this as a pre-defined package for a specific *type* of document. It bundles together:
 - The specific set of metadata labels (Site Columns) that are relevant for that document type (e.g., a 'Contract' Content Type needs 'Client Name' and 'Expiry Date', while an 'SOP' needs 'Version' and 'Review Date').
 - Optionally, a standard document template (e.g., the official company template for contracts).
 - *Why?* When someone creates a "New Contract", SharePoint automatically prompts them for the right metadata and uses the correct template. *Your input helps define these essential blueprints.*
- **Managed Metadata (Standard Company Lists):** For certain labels where we need absolute consistency across the *entire organization* (not just one site), we use central lists called Managed Metadata. This is perfect for things like official Department names, Office Locations, or perhaps standard Project Codes. It ensures everyone spells "Finance" the same way, for example.
- **Views (Custom Filters/Sorts):** These are saved ways to look at documents within a library. Instead of digging through folders, you'll use Views like "My Draft Reports", "Contracts Expiring This Year", or "All Approved SOPs". Views use the metadata labels to automatically filter, sort, and group documents for you.
- **Sites & Hubs (The Structure):** Our overall plan uses dedicated websites (Sites) for departments/functions/projects, logically connected via central Hub Sites. The IA components above (metadata, content types, etc.) live within these Sites and Libraries.

3. Your Role & IA Best Practices for SMEs

Your knowledge of your department's work is crucial for designing effective IA:

- **Think Like Your Users:** How do you and your colleagues *really* look for information today? What terms do you use? What information helps you distinguish between documents?
- **Identify Key Info:** Focus on the essential 3-5 metadata labels needed for each major document type. What information absolutely helps someone find it or understand its context?
- **Help Define Standard Terms:** What are the common statuses, categories, document types, etc., specific to your area? Your input is vital for building useful

choice lists (especially for Managed Metadata).

- **Prioritize Usefulness:** Help us focus on metadata that provides real value for finding documents or managing processes (like review dates). Avoid suggesting labels that are "nice to have" but won't be consistently filled out or used.
- **Embrace Fewer Folders:** Get comfortable with the idea that metadata and views will be the primary way to find things. Help identify where shallow folders might still be essential (e.g., for specific security needs), but challenge deep nesting habits.

4. The Goal

By working together to define these IA elements based on how we actually work, we can build a SharePoint repository where information is structured logically, easy to find and use, consistently managed, and ready to support our company's future success.

This guide aims to provide the necessary background for the IA-related questions you'll be asked. Please refer back to it as needed!