Conceptual Comparison: Old System vs. New SharePoint Structure (with Definitions)

1. Old System (Likely Current State)

- **Structure:** Primarily **Folder-Based Navigation**. Deep, often inconsistent folder hierarchies are the main way to organize and find files.

```
\\NetworkShare\DepartmentX\
    ├── Projects\
    │   ├── Project_Alpha\
    │   │   ├── Contracts\
    │   │   │   ├── Draft_Contract_v1.docx
    │   │   │   ├── Signed_Contract_FINAL.pdf
    │   │   │   └── Old_Versions\
    │   │   │       └── Draft_Contract_v0.9.docx
    │   │   ├── Reports\
    │   │   │   ├── Status_Report_Jan.pptx
    │   │   │   ├── Status_Report_Feb.pptx
    │   │   │   └── Final_Report_pending_approval.docx
    │   │   └── Meeting_Minutes\
    │   │       ├── Meeting_2024_03_15.docx
    │   │       └── Meeting_2024_04_10_Actions.docx
    │   └── Project_Beta\
    │       ├── Design_Docs\
    │       │   └── Initial_Specs_v2.docx
    │       └── Requirements\
    │           └── User_Stories_Final.xlsx
    ├── Policies_Procedures\
    │   ├── HR\
    │   │   ├── Leave_Policy_2022_Update.pdf
    │   │   └── Onboarding_Checklist_2023.docx
    │   └── IT\
    │       ├── Password_Policy_OLD.docx
    │       └── Acceptable_Use_Policy_v3.pdf
    └── Teams\
        ├── Team A\
        │   ├── General_Files\
        │   │   └── Team_Lunch_Ideas.xlsx
        │   └── Presentations\
        │       └── Q1_Review_Slides.pptx
        └── Team B\
            ├── Important_Docs\
            │   └── Strategy_Notes_Draft.docx
            └── Reference\
                └── Vendor_Contacts.xlsx
```

- **Organization Principles:** Relies heavily on folder names and hierarchy for context. Finding files depends on knowing *where* it was saved (browsing). Often leads to duplication (saving the same file in multiple relevant folders).
- **Metadata:** Minimal or inconsistent use of file properties. Search is often limited to filenames and file content.
- **Governance:** Decentralized; practices vary significantly across teams/locations. Little central oversight on naming, structure, or lifecycle.
- **Locations:** Disparate locations (Network drives, individual PCs, various Teams sites, older SharePoint).
- **Key Term Definition (Old System):**
  - **Folder:** Think of this like a traditional manila folder in a physical filing cabinet. It's a container used to group files. Its main purpose is basic organization, but finding things requires knowing exactly which nested set of folders holds the document. Relying only on folders often leads to very deep, complex structures that are hard to navigate and manage.

2. New SharePoint Online Structure (Proposed)

- **Structure: Hub & Spoke Model** with **Metadata-Driven Organization**. Relies less on deep folders, more on site structure, libraries, content types, and metadata columns for context and retrieval.

Markdown

[Org Hub Network] (Conceptual Grouping, e.g., Intranet Home)

```
└── **[Department/Function Hub Site (e.g., HR Hub)]** (`Hub Site`)
    │   *Shared Navigation, News Rollup*
    │
    ├── **HR Portal** (`Communication Site`)
    │   └── **Policies Library** (`Document Library`)
    │       │ *Content Types:* Policy Document, HR Form
    │       │ *Metadata / Site Columns:* Policy Type, Status, Owner, Review Date, Audience
    │       │ *Views:* All Policies, Policies Up for Review, Forms by Type
    │       │   │
    │       │   ├── 📄 Leave_Policy.docx (Metadata: Type=Policy, Status=Active, Review=2025-12-01, Audience=All Staff...)
    │       ├── 📄 Expense_Form.xlsx (Metadata: Type=HR Form, Status=Active, Owner=Finance...)
    │       └── 📄 Onboarding_Checklist.docx (Metadata: Type=Policy, Status=Active, Owner=HR...)
    │
    └── **HR Team Collaboration** (`Team Site` - for HR Dept internal work)
        └── **Recruitment Documents Library** (`Document Library`)
            │ *Content Types:* Job Description, Candidate Resume, Offer Letter
            │ *Metadata / Site Columns:* Position ID, Candidate Name, Status, Hiring Manager, Date Applied
```

```
            │   *Views:* Active Candidates, Offers Pending, By Position ID
            │
            ├──  📄 JD_SharePointLead.docx (Metadata: PositionID=123, Status=Approved...)
                    ├──  📄 Resume_JaneDoe.pdf  (Metadata: PositionID=123, Candidate=Jane Doe,
Status=Interviewing...)
                        └──  📄 Offer_JohnSmith.pdf (Metadata: PositionID=456, Candidate=John Smith,
Status=Offer Extended...)


  └── **[Department/Function Hub Site (e.g., Projects Hub)]** (`Hub Site`)
      │   *Shared Navigation, News Rollup*
      │
      ├── **Project Alpha Site** (`Team Site`)
      │   └── **Deliverables Library** (`Document Library`)
      │       │   *Content Types:* Contract, Report, Meeting Minutes, Specification
      │       │   *Metadata / Site Columns:* Project Phase, Document Type, Status, Client, Approval Date
      │       │   *Views:* Active Contracts, Draft Reports, Approved Deliverables by Phase
      │       │
      │       ├──  📄 Signed_Contract.pdf (Metadata: Phase=Execution, Type=Contract, Client=ABC
Corp, Status=Active...)
      │               ├──  📄 Status_Report_Jan.pptx (Metadata: Phase=Execution, Type=Report,
Status=Approved...)
      │               ├──  📄 Meeting_2024_03_15.docx (Metadata: Phase=Planning, Type=Minutes,
Status=Final...)
      │               └──  📄 Functional_Specs_v1.docx (Metadata: Phase=Design, Type=Specification,
Status=Draft...)
      │
      └── **Project Beta Site** (`Team Site`)
          └── **Working Documents Library** (`Document Library`)
              │   *Content Types:* Design Document, Requirements Doc, General Document
              │   *Metadata / Site Columns:* Discipline, Status, Owner, Related Task ID
              │   *Views:* Documents By Discipline, My Draft Documents
              │
              ├──  📄 Initial_Specs_v2.docx (Metadata: Discipline=System Design, Status=Draft...)
              └──  📄 User_Stories_Final.xlsx (Metadata: Discipline=Requirements, Status=Approved...)
```

- **Organization Principles:** Relies on **Metadata** (tags like 'Document Type', 'Status', 'Project ID', 'Review Date') for classification and filtering. Finding files uses **Search** and predefined **Views** that filter/sort/group based on metadata. Reduces duplication; one file exists, tagged with all relevant metadata. Folders used sparingly, if at all, for broad categorization or unique permissions.
- **Metadata:** Rich, structured, and consistently applied via **Content Types** and **Site Columns**. **Managed Metadata** for standardized terms (e.g., departments, statuses).
- **Governance:** Centrally defined policies (roles, site creation, naming, lifecycle, permissions, sharing). Hub sites provide consistent navigation/branding.

- **Locations:** Unified within the planned SharePoint Online Hub/Site structure.
- **Key Term Definitions (New System):**
  - **Hub Site:** Think of it as a **connecting point or umbrella** for related websites (Sites). It provides shared navigation (like a common menu bar), branding, and allows news and activities from associated sites to roll up, creating a cohesive experience for a major division, department, or function (like HR or Projects). It helps organize groups of sites.
  - **Site (Team Site / Communication Site):** This is a **dedicated website** for a specific purpose, team, department, or project.
    - A Team Site is primarily for **collaboration** within a group where most members contribute content (e.g., a project team working site).
    - A Communication Site is more for **broadcasting** information to a wider audience, with fewer content creators (e.g., the main HR Portal for all employees). Sites are associated with a Hub Site for overall structure.
  - **Document Library:** This is like a **smart, super-powered folder or filing cabinet** within a Site. It's where you store files, but unlike a simple folder, it can be configured with specific settings like version history tracking, approval workflows, and crucially, custom Metadata columns and Content Types.
  - **Metadata:** These are **smart labels or tags** applied to files. Instead of just a filename and a folder location, files get descriptive information (like 'Document Type: Contract', 'Status: Approved', 'Client: Globex Corp', 'Review Date: 2026-01-15'). This allows for powerful searching, sorting, and filtering, making it much easier to find information without digging through folders. Think of it as adding searchable keywords and properties directly to each document.
  - **Site Column:** This is the **reusable definition** for a specific piece of Metadata that you want to use consistently across multiple Document Libraries within the same Site. Think of it like creating a master template for a label. For example, you define "Document Status" once as a Site Column (with choices like Draft, Approved, Archived), and then you can reuse that *exact same field* in the Contracts library, the SOPs library, and the Reports library within that site. This ensures everyone uses the same terminology and options, promoting consistency. Site Columns are the building blocks for structured metadata.
  - **Content Type:** This acts like a **template or blueprint for a specific kind of document** (like a "Contract" or an "SOP"). It bundles together:
    - A specific set of Site Columns (metadata fields) relevant to that document type (e.g., a Contract needs 'Client Name' and 'Effective Date', while an SOP needs 'Version' and 'Approved By').

- - Optionally, a standard document template (e.g., a pre-formatted Word doc for contracts). Using Content Types ensures consistency when creating new documents and makes applying the correct metadata much easier.
  - **View:** This is a **saved way of looking at the files** within a Document Library. Instead of just seeing a list of all files, you can create custom views that use the Metadata to automatically sort, filter, and group documents (e.g., "Show me all Contracts expiring this year", "Group reports by Status", "Filter for my documents"). Views essentially replace the need to browse through complex folder structures.

Key Takeaway: The new system uses **Sites** (connected by **Hubs**) containing **Libraries**. Files are described using **Metadata**, defined consistently via reusable **Site Columns**. These columns are bundled into **Content Types** for different kinds of documents. Users find information using **Search** and custom **Views**, not folder trees.