■ SharePoint EDMS (Enterprise Document Management System) – Expanded Blueprint

1. Site Collection Design

• EDMS Hub Site as the umbrella portal for navigation, branding, and search.
• Department/Function Sites (HR, Legal, Finance, Projects).
• Use Team Sites for collaboration, Communication Sites for reference.
• Apply standard site templates for consistency.
• Governance policies for site/library creation.

2. Document Libraries & Metadata

• Use metadata and content types instead of folders.
• Content Type Hub for centralized management.
• Sample content types: Contract Document, Policy Document, Report.
• Document sets for grouping related files.
• Default metadata values to reduce errors.

3. Security & Permissions

• Role-based access via Azure AD groups.
• Groups: Owners, Members, Visitors.
• Sensitivity labels for confidentiality levels.
• IRM for restricted libraries.
• Quarterly permission audits.

4. Version Control & Document Policies

• Enable major/minor versions, restrict draft visibility.
• Check-in/Check-out for critical libraries.
• Retention policies via Microsoft Purview:
- Contracts → 7 years post-expiration.
- HR Records → 10 years post-termination.
- Finance Reports → 5 years post-year end.

5. Workflows & Automation (Power Automate)

• Document approval with conditional routing.
• Expiry alerts via email and Teams.
• Metadata capture via Power Apps forms.
• Auto-generate contract numbers.
• Sync approved policies to portal.

6. Search & Navigation

- Managed metadata with synonyms.
- Refiners by Department, Status, Document Type.
- Saved searches for frequent queries.
- Hub navigation for departments, department nav for libraries.

7. Compliance & Records Management

- Automated retention and legal hold policies.
- Audit logs in Microsoft 365 Compliance Center.
- Records declaration to lock critical docs.

8. User Experience

- Modern SharePoint pages with Quick Links, Highlighted Content.
- Mobile access via SharePoint app.
- Teams integration with EDMS libraries as tabs.
- Training videos and champion sessions for adoption.

9. Governance & Maintenance

- Governance committee with IT + department admins.
- Document workflows and metadata changes.
- Monitor growth: library threshold 30M items.
- Apply retention to manage data lifecycle.

■ End Result (Enhanced)

Your SharePoint EDMS will deliver:
- Centralized, metadata-driven document management.
- Automation-first processes for approvals, expiry, and compliance.
- Granular security with Azure AD + Purview.
- User-first navigation and modern UI with Teams integration.
- Governed, scalable, and future-proof EDMS with retention and auditing built-in.