SharePoint Information Architecture: The Tools of the Trade

By Steven Pogrebivsky, CEO at MetaVis Technologies

A fair amount of work goes into the role of a SharePoint Information Architect. And every architect should have his tools right? What does Microsoft provide out of the box, to design, deploy and manage an information architecture in SharePoint? Let's have a look.

Enter the SharePoint IA

No matter how you get started, an IA from scratch or a modification of something already existing, the role of the Information Architect is a challenging one. And that means you need a knowledgeable SharePoint IA helping you out. Yes, you still need your Business Architect who understands how the business needs to work, but you also need that SharePoint knowledge to help you figure out how to make it fit.

A SharePoint IA is going to help you identify things such as:

- Site collections and site structure
- Content modeling and Content Types
- Metadata and taxonomy development
- Search integration

A SharePoint IA will document the existing structure, and map it to a new SharePoint 2010 structure. Then he will manage that structure on-going. Now there's a fair amount of documenting happening there -- documenting existing structures from either your SharePoint 2003 or SharePoint 2007 implementation, or from another source (like your file share). And when it comes to documenting anything, the quicker you can do it the better. Keeping that documentation up to date is just as important. All this means a SharePoint IA needs some tools. Unfortunately Microsoft hasn't yet delivered an IA toolkit.

Defining IA in SharePoint - Mostly a Manual Process

For the most part, if you want to document your SharePoint implementation you are looking at a very manual, time consuming process. You can use Microsoft Visio to create your design documents, which is fine if you want to maintain a static view of your SharePoint environment. Visio is primarily used to create workflows for SharePoint, which makes it a great companion tool for SharePoint developers. You could also leverage SharePoint Designer to develop and

implement Content Types and workflows. Designer is a great tool for non-technical power users to build sites, composite apps.

In neither case, however,, can you get a high level view of your environment and how everything fits together. In addition, neither product provides the ability to make changes to the SharePoint environment that not only add new Content Types, workflows, information policies changes, but also move your existing content around to the new structure and clean out the ones you no longer want/need.

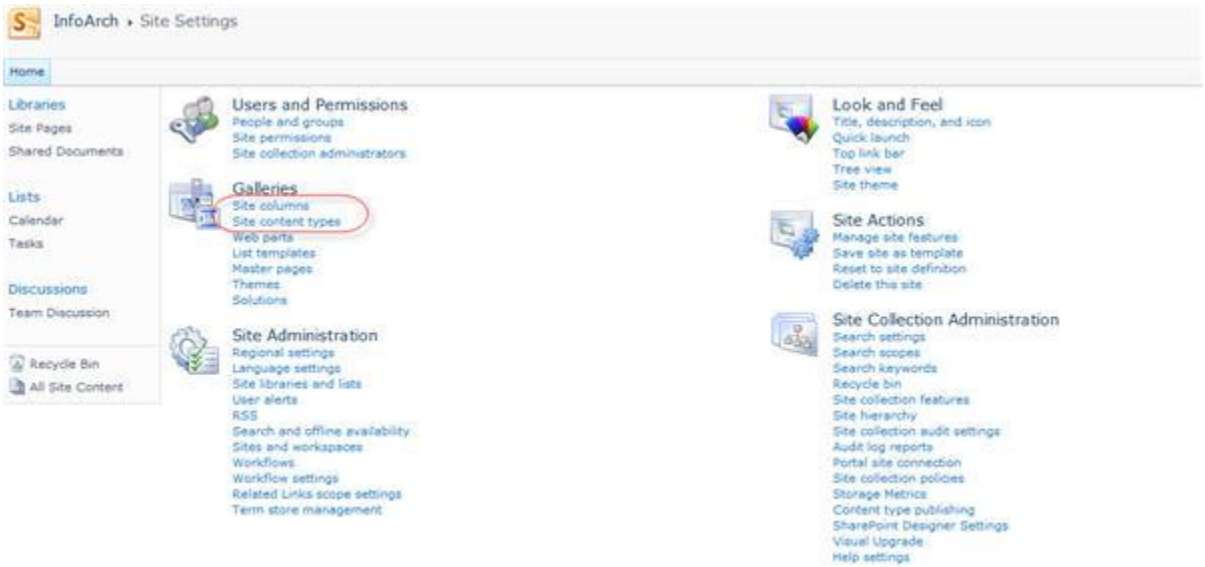
To give you an example of how manual the Information Architecture process will be without a third party toolset, let's examine how we would document Content Types and Metadata.

Documenting your Content Types in SharePoint

If you want to know what your Content Types are in your current SharePoint implementation, then you have a manual task ahead of you. This task requires that you manually click through every site collection and site you have to document the Content Types and their columns. As you document, you get a picture of the relationship between existing Content Types and the overlapping of columns (metadata) between collections and site.

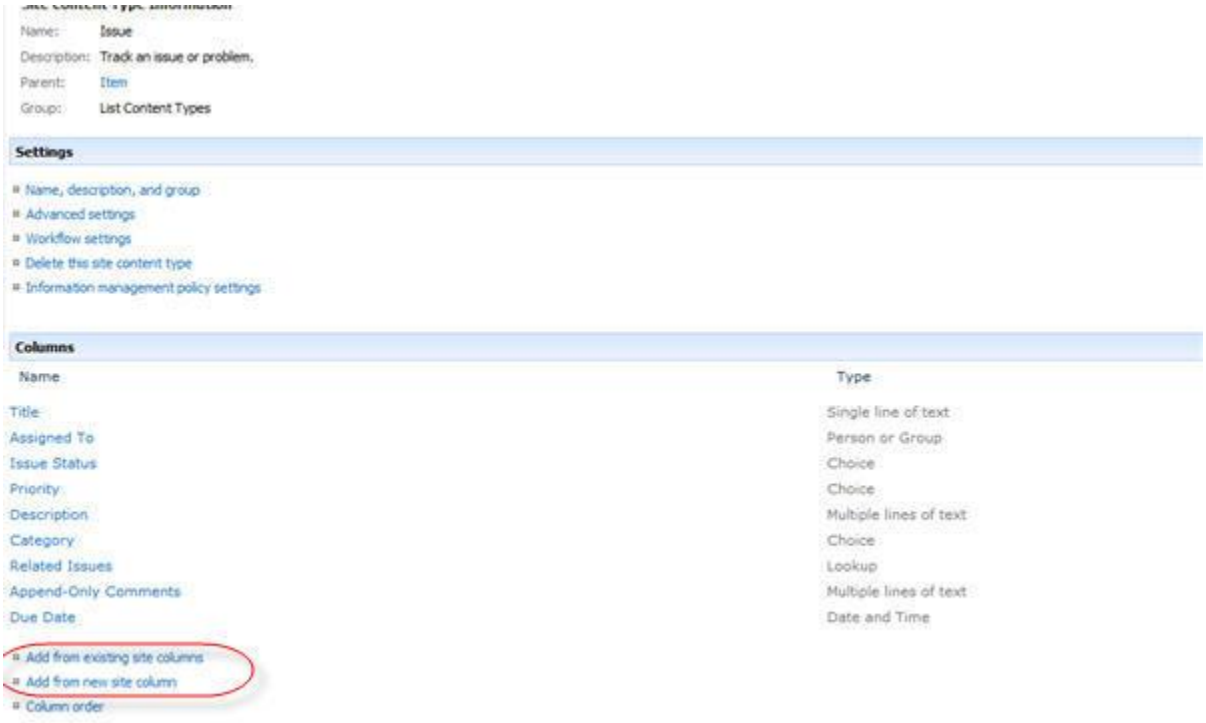
Here are the basic steps:

Select you site and go to Site Actions, Site Settings.



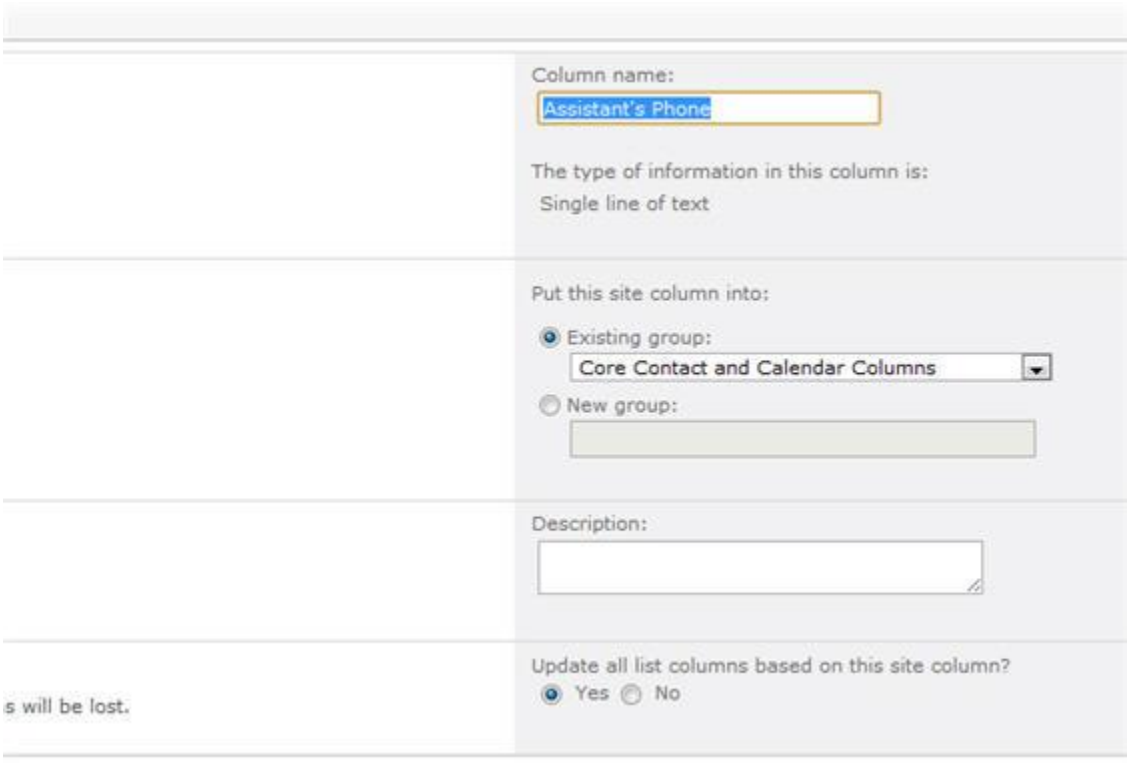
In the Galleries section, select Site Content Types (below we show a subset of existing Content Types):

To view all the details of Content Type, simply click on it. In the view below, you see a list of the content columns used for that Content Type. But you aren't finished yet. You need to know if that Content Type was created from scratch or selected from a list of existing Content Types -- you are trying to map the current structure right?

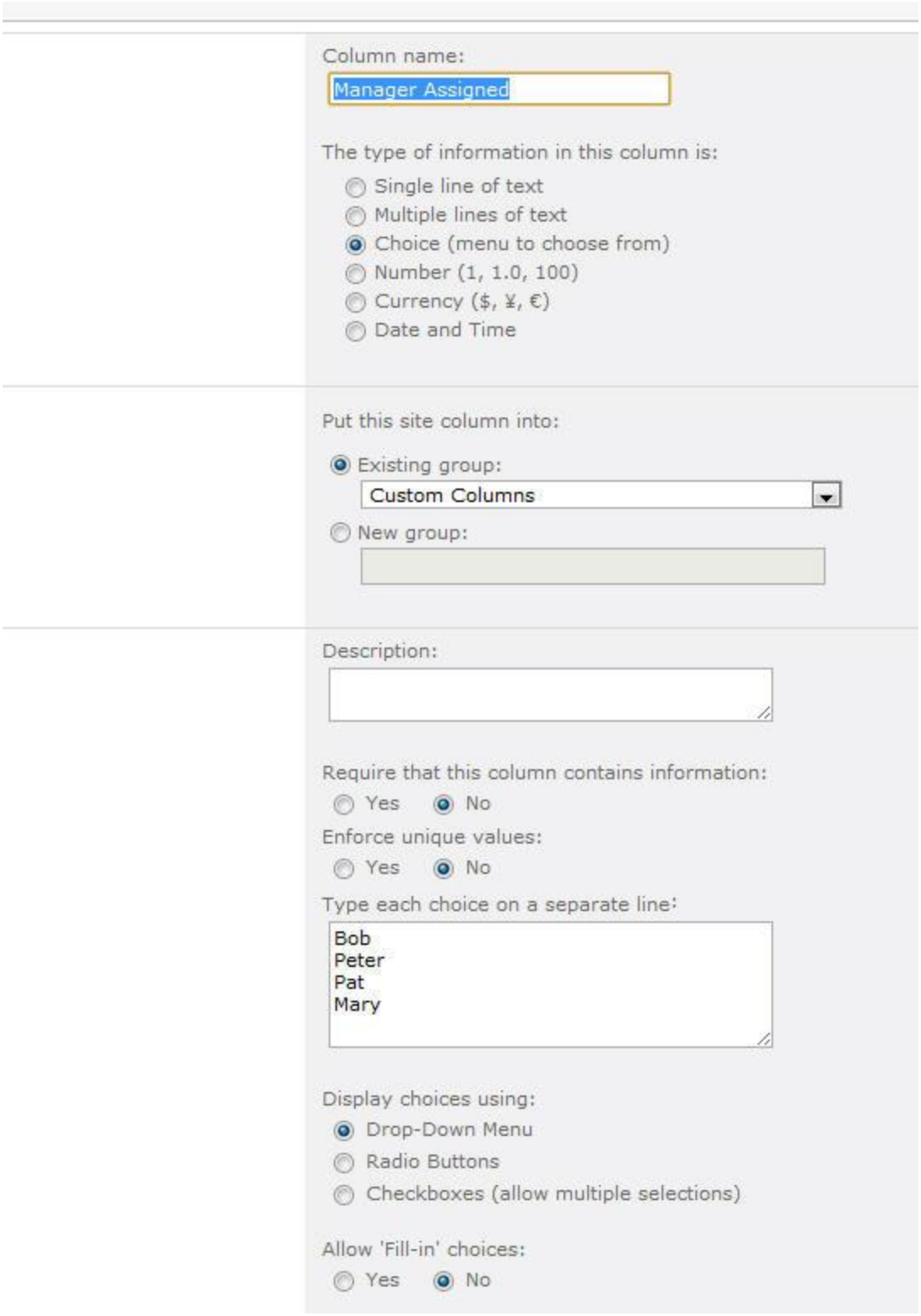


So you have to click on each column in the list.

Depending on whether it's a custom one you created for this Content Type or one you inherited from an existing Content Type column, you get two different views:



(A defined column)



(A custom created column)

Congratulations, you have documented your first Content Type. Now go do that for every Content Type you have in this Site. Then go to the next site and do the same thing. Don't stop until you have it all documented. Once it's documented, put it into a visual that makes it easier to see the relationships between Content Types and associated columns, Visio would work here. Note that you'll also need to document any associated workflows, templates used and information policies applied.

But Wait, Your IA Isn't Done Yet

What you have done so far is document your existing information architecture (again assuming you are currently using some version of SharePoint). Now you need to map it to a new, improved IA that works with SharePoint 2010. This includes identifying collection level Content Types that can be used throughout different sites, defining standard metadata to use in your Content Type columns, and more.

What tool does Microsoft provide to do redesign your structure quickly and easily? Again you could use Visio here. But keep in mind it's a read only design. Once you finalize it, then it needs to actually be implemented in the SharePoint environment -- again, another manual process that can be tedious and take a lot of time.

And then what happens if you implement this new information architecture and need to change it? Well, you'll have to look at all your existing IA documents, note where all the appropriate changes need to be made (and in what order), update the documentation and then head over to SharePoint to implement the changes.

The Ideal SharePoint Information Architecture Tool

I'm tired just writing that process. A SharePoint Information Architect has better things to do then spend his time doing manual tasks that, with the right tool, he wouldn't have to do. Here we are talking quickly document and visualize the existing environment in real-time, make any changes necessary and automatically have the SharePoint 2010 environment updated and content migrated over. And when a change needs to happen, just open up that living documentation, make the required changes and tell the tool to implement them - no manual SharePoint task required.

Now that's the tool I would want as a SharePoint IA. Wouldn't you?

About the Author

Steve Pogrebivsky is an expert in information management and content management systems with over 20 years of experience. As co-founder and CEO of MetaVis Technologies, he is responsible for overall management and product strategy for the company. Steve has worked at a number of technology companies developing software for content management systems and enterprise integration. Steve was a co-founder of Stelex Corporation, a software and services vendor to FDA regulated industries. Steve developed and managed many of the company's product and service offerings from its launch in 1991 to its acquisition in 2002.

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