

How Information Architecture can improve in SharePoint 2013

December 1st, 2012

Virgil Carroll
Principal Architect
High Monkey Consulting
virgil@highmonkey.com

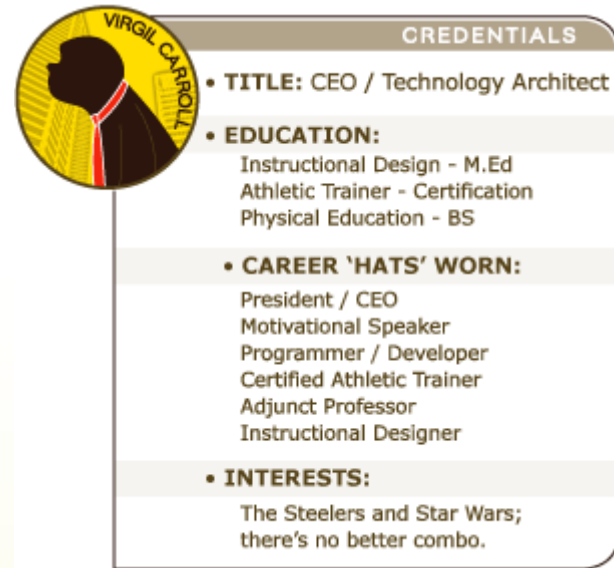
SHAREPOINT **SATURDAY**
■■■■■■■
OTTAWA

Thank you to all of our Sponsors!!



About Me

- From the great State of Alaska
- Masters in Instructional Design (from UAB)
- Taking care of user needs since 1998
- User Experience Advocate
- Certified Athletic Trainer
- Blog: <http://monkeyblog.highmonkey.com>
- Twitter: @vcmonkey



101 SharePoint Usability Tips

Check out my new blog series

- 101 usability tips recorded over 101 days
- Covering design/layout, navigation, content management, forms and more!

<http://monkeyblog.highmonkey.com>

Mobile: <http://www.lowmonkey.com>

Next up: 2010 vs. 2013 Usability Showdown

- Perform usability study on team site
- Both end user and site administrator tasks
- Compare two editions and recommend solutions to usability issues

IMPORTANT NOTES

***Information architecture is
a practice not a strategy***



14022 Lincoln Street NE | Ham Lake, MN 55304



www.highmonkey.com



(763) 201-6040



(763) 450-3850

IMPORTANT NOTES

In IA, there is no single right answer



WHY SHAREPOINT INFORMATION ARCHITECTURE FAILS

#1

***WE FORGOT THAT
SHAREPOINT IS JUST A
TOOL
NOT AN ANSWER***



14022 Lincoln Street NE | Ham Lake, MN 55304



www.highmonkey.com



(763) 201-6040



(763) 450-3850


#2

NO PLAN

(or it was small)



It started out simple

**High Monkey Consulting**

All Sites

High Monkey ConsultingActive ProjectsArchiveSearchVolunteer OrganizationsWSS 3.0 DemoHigh Monkey WSS Demo SiteSite Actions

View All Site Content

Active Projects

- Dooley Petroleum Inc.
- Excel Medical Solutions
- Hammer Residences Inc.
- Minnesota Department of Agriculture
- North Hennepin Community College
- Anoka-Ramsey Community College
- ARCC E-Learning Project
- Griffin Companies
- Human Resources Candidate Tracking
- i3 Solutions
- Japs-Olson Company
- Medtronic
- Michael Foods
- Minnesota Watershed Partners
- Paddock Laboratories Inc.
- Saint Elizabeth Ann Seton Catholic Church
- Scott County
- St Cloud State
- Trustees for Alaska
- University of Northern Iowa
- Winona State University

Archive

- Client Sites
- Partner Sites
- Project Management

Documents

- Prospect Documents
- HMC Project Work Files

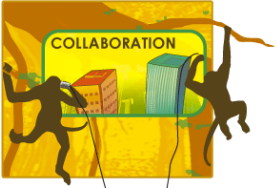
Lists

- Company Listing

Volunteer Organizations

- National Society for

High Monkey Consulting



Welcome to MonkeyPoint.
High Monkey Consulting's Collaboration Portal.

Site and Content Management

- Add a New Company
- View Company Listing

Documentation(not completed)

- Create a new Company Website
- Add / Update External Users

My RegionNorth AmericaAsiaEurope

Compass
Compass
Jeff Flahaven

Groups


- Endovascular Portal Members
- High Monkey Employees
- High Monkey Full Control
- Quick Deploy Users

Content Editor Web Part

To add content, open the [tool pane](#) and then click **Rich Text Editor**.


Image Web Part


To link to an image, open the [tool pane](#) and then type a URL in the **Image Link** text box.



2120 W County Road C | Roseville, MN 55113

@ www.highmonkey.com

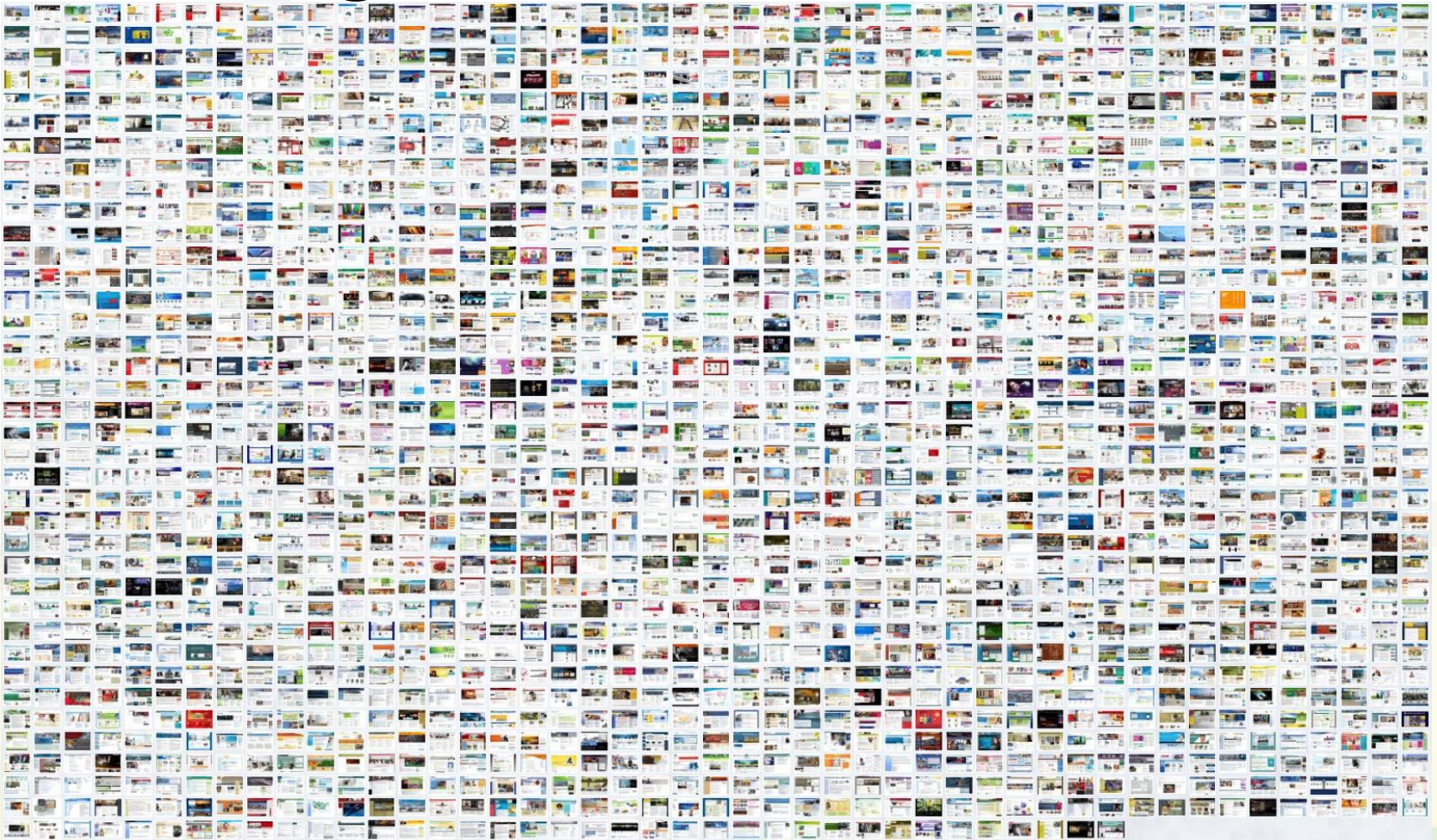
 (763) 201-6040

 (763) 450-3850

Then it grew



Then it got **TOTALLY** out of control!!



#3

***BUSINESS DOES NOT
WORK THE WAY WE
THOUGHT***



14022 Lincoln Street NE | Ham Lake, MN 55304



www.highmonkey.com



(763) 201-6040



(763) 450-3850

#4

***WE THOUGHT
ORG CHART = SITE MAP***

#5

***WE THOUGHT EVERYONE
THINKS ABOUT
INFORMATION AS
LISTS & LIBRARIES
(instead learning from users)***

#6

***WE THOUGHT IT WAS
ABOUT PUTTABILITY,
NOT FINDABILITY***

SharePoint

His stuff

Her stuff

Their stuff

The Man's
stuff

My stuff



#7

***WE STILL DON'T
UNDERSTAND
SEARCH IS NOT ALWAYS
THE ANSWER***

WHAT'S NEW IN SHAREPOINT 2013

(1A EDITION)

What is information architecture?

- The structural design of shared information environments.
- The combination of organization, labeling, search, and navigation systems within web sites and intranets.
- The art and science of shaping information products and experiences to support usability and findability.

What is information architecture?

4 basic IA concepts

- Information
- Structuring, organizing, and labeling
- Finding and managing
- Art and science

IA Breakdown

Business goals, funding,
politics, culture, technology,
resources and constraints

Context

Audience, tasks, needs,
information seeking
behavior, experience

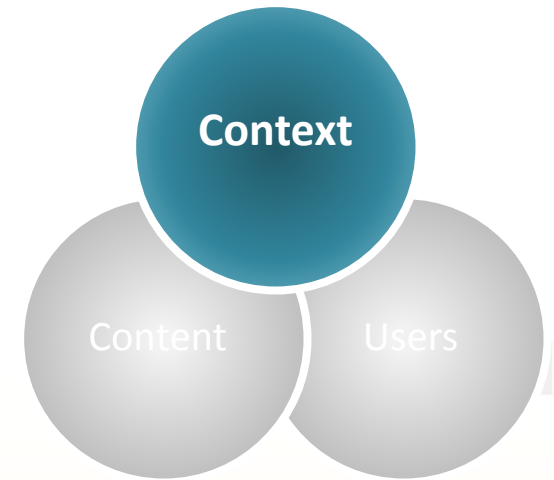
Content

Users

Document / data types,
content objects, volume,
existing structure

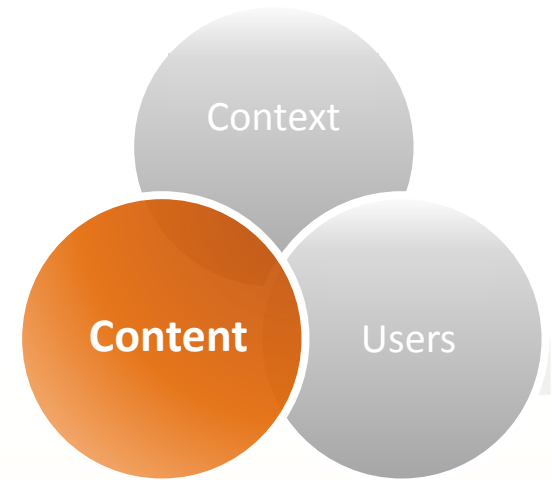
Context

- All web sites and intranets exist within a particular business or organizational context
- Each organization has a mission, goals, strategy, staff, processes and procedures, physical and technology infrastructure, budget, and culture
- the key to success is understanding and alignment



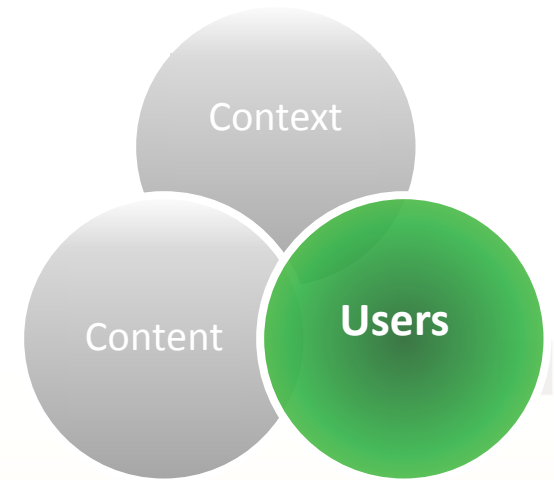
Content

- Includes documents, applications, services, schema, and metadata that people need to use or find on your site
 - How much content do you have?
 - What are the formats your content is in?
 - Who owns your content?



Users

- Every user has different experiences and abilities to draw from
- Every user has different needs and wants
- Do you know how your users use your site now?

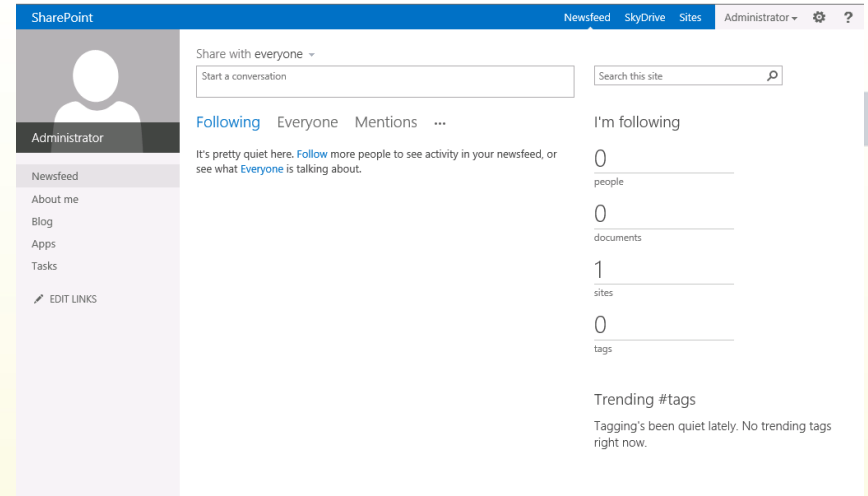


What's new in SharePoint 2013

- Information?
 - Nothing
- Structurally?
 - Not much
- Navigation and labeling
 - Quite a bit
- Finding and managing
 - GAME CHANGER

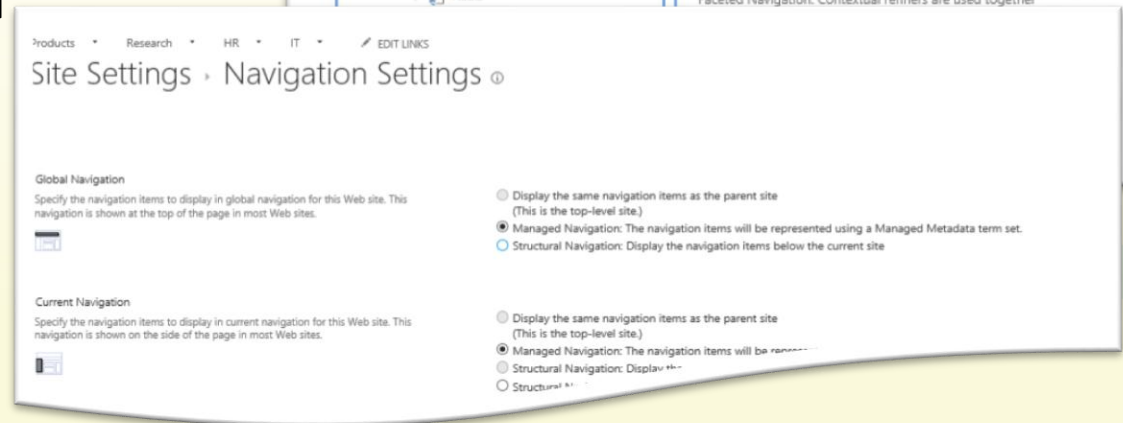
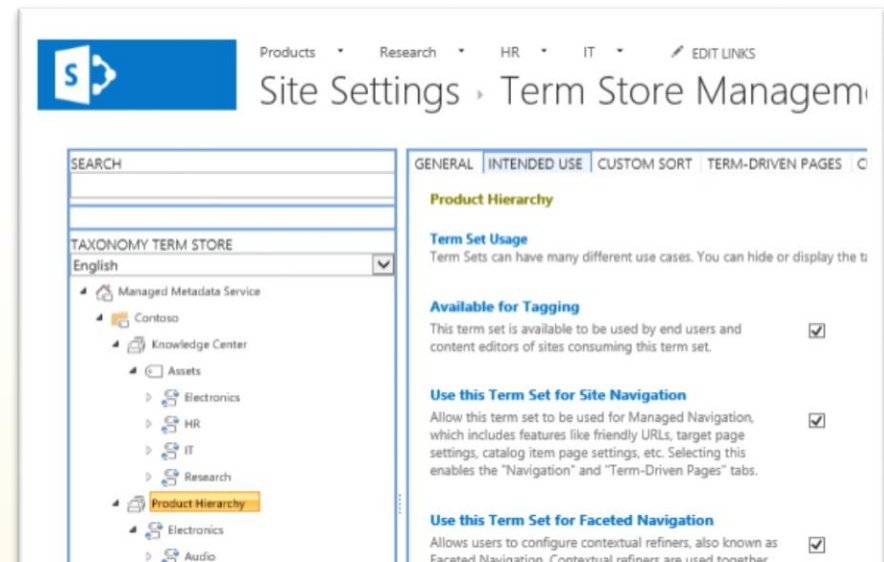
Structurally

- Some new templates of significance
 - Community Site / Portal
 - eDiscovery Center
- Some new structure changes of significance
 - HTML instead of XSLT
 - Design Manager
 - Display templates



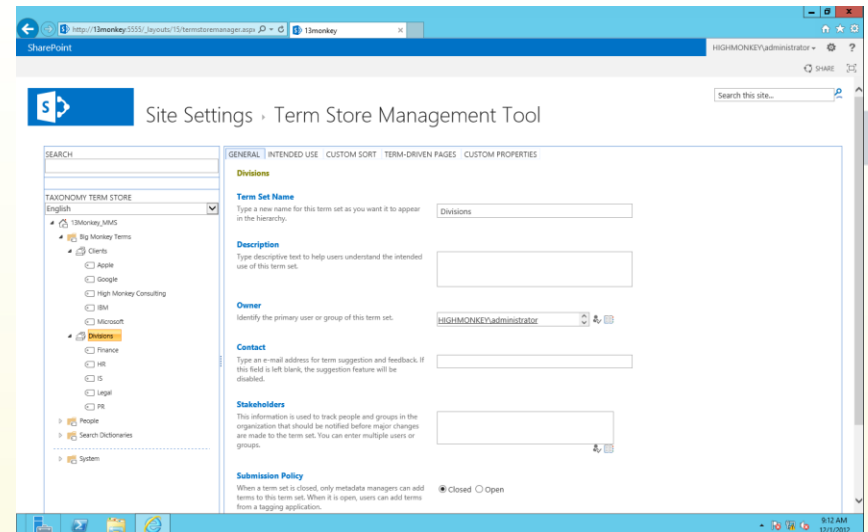
Navigation and labeling

- Managed Navigation
 - By term set (can be dedicated or combined)
 - Will take careful planning and understanding
- Faceted Navigation
 - Used to filter search results
- Inline navigation editing



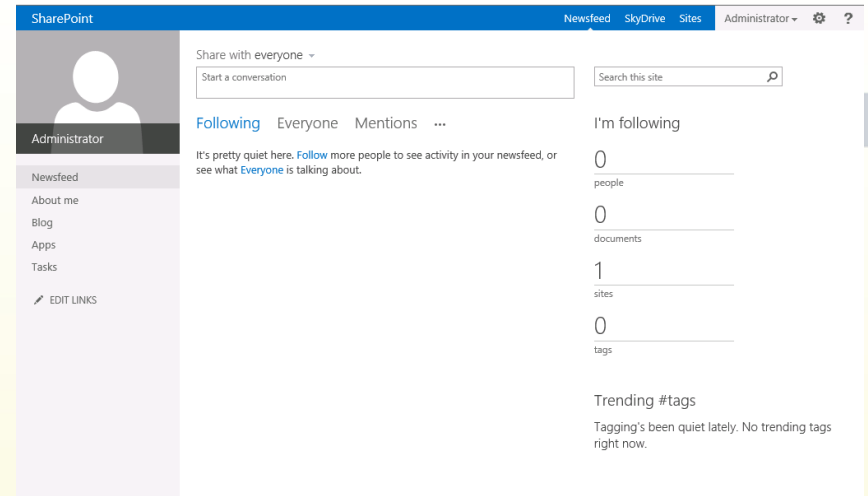
Navigation and labeling

- MMS has some new features
 - Custom Sort Order
 - Custom Properties
 - Pinning of Terms



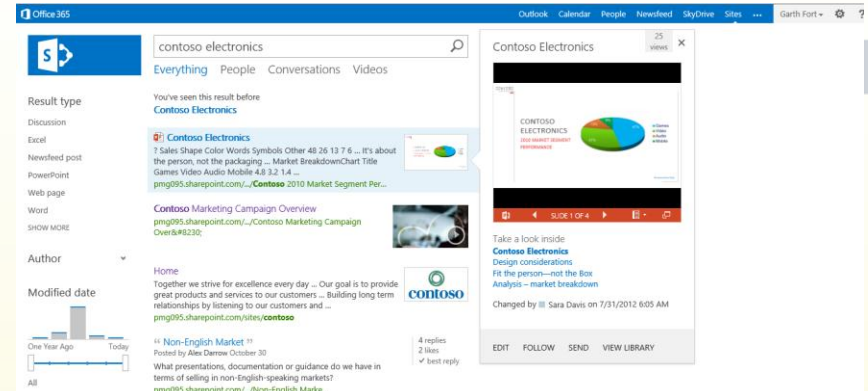
Finding and managing

- 2013 makes it easier to change the look-n-feel
 - HTML throughout
 - Better mobile support
- Managing information
 - Document Sets
 - Create a folder inside
 - Support for OneNote
 - Workflow
 - Better move information



Finding and managing

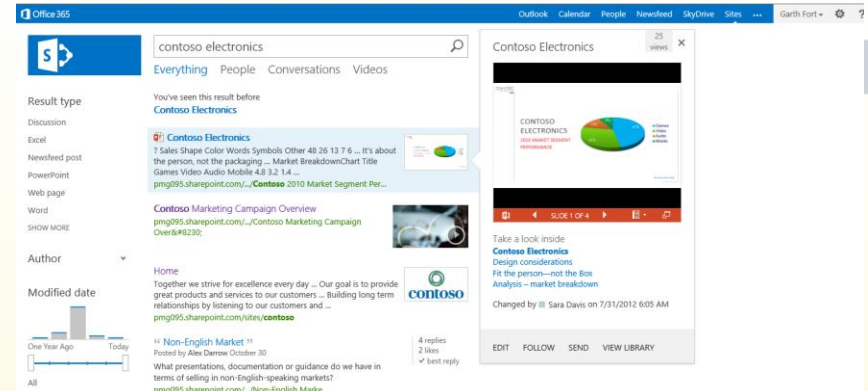
- Its all about search!
 - FAST Search Integration
 - Better results
 - Cooler refiners



Finding and managing

Search Results

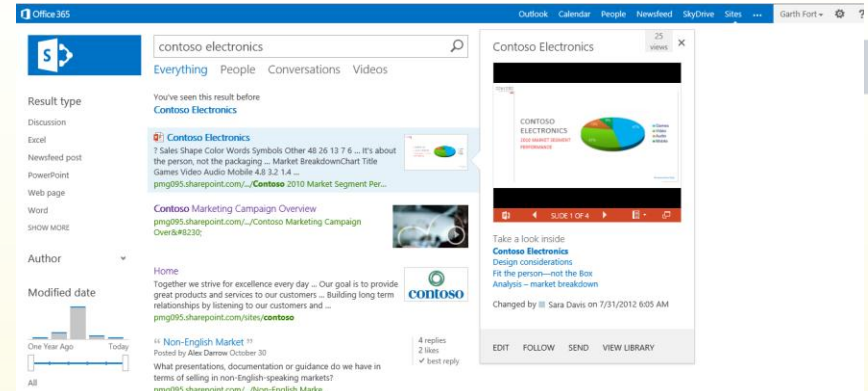
- Search query history
- Search Refiners
 - Determine specifically what refiners to show
 - Enter your own value
 - Graphical histograms
- Query Rules
 - Group specific search results
 - Tie to specific search terms or patterns



Finding and managing

Search Results

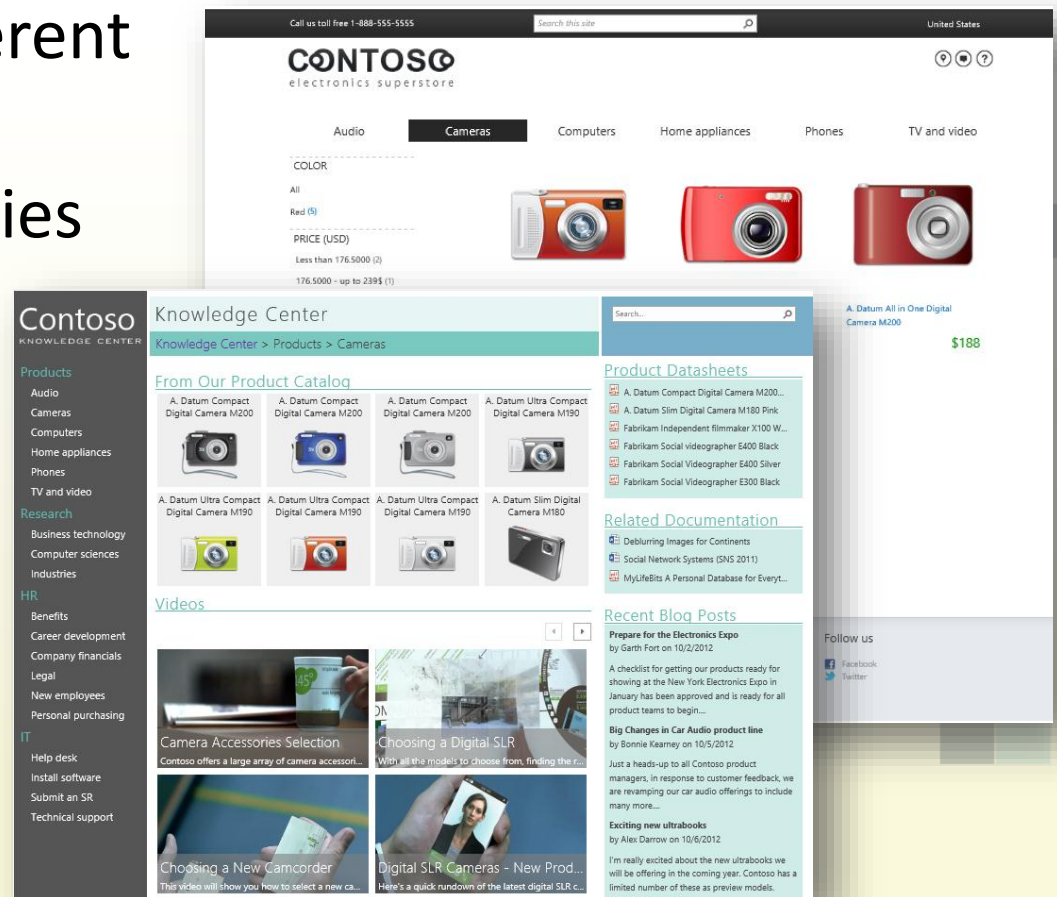
- Search query history
- Search Refiners
 - Determine specifically what refiners to show
 - Enter your own value
 - Graphical histograms
- Query Rules
 - Group specific search results
 - Tie to specific search terms or patterns



Finding and managing

Content Search Web Part

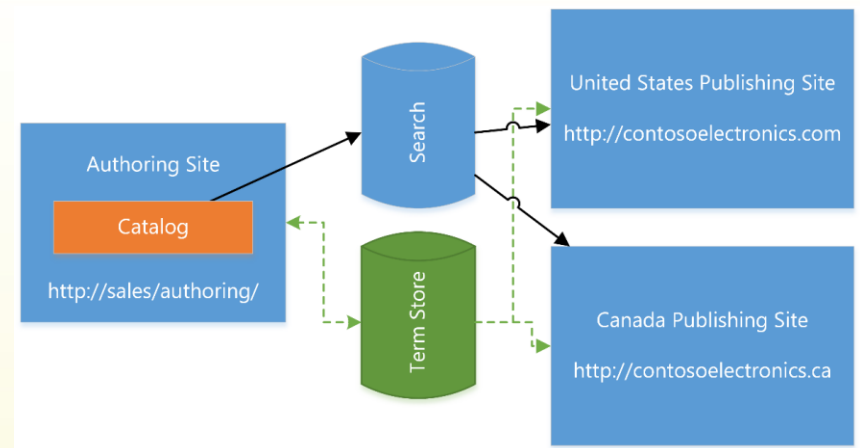
- Same content, different display
- Build complex queries based of metadata and query rules
 - Query builder tool
- Create custom refiners



Finding and managing

Cross Site Collection Publishing

- Use search to surface content throughout the organization without boundary concerns
- Content must be in a 'Catalog'
- Enable continuous search crawl for 2 minute content refresh
- Requires publishing features



WHAT MAKES AN IA STRATEGY REALLY WORK

How users look for information

- The too-easy information seeking model

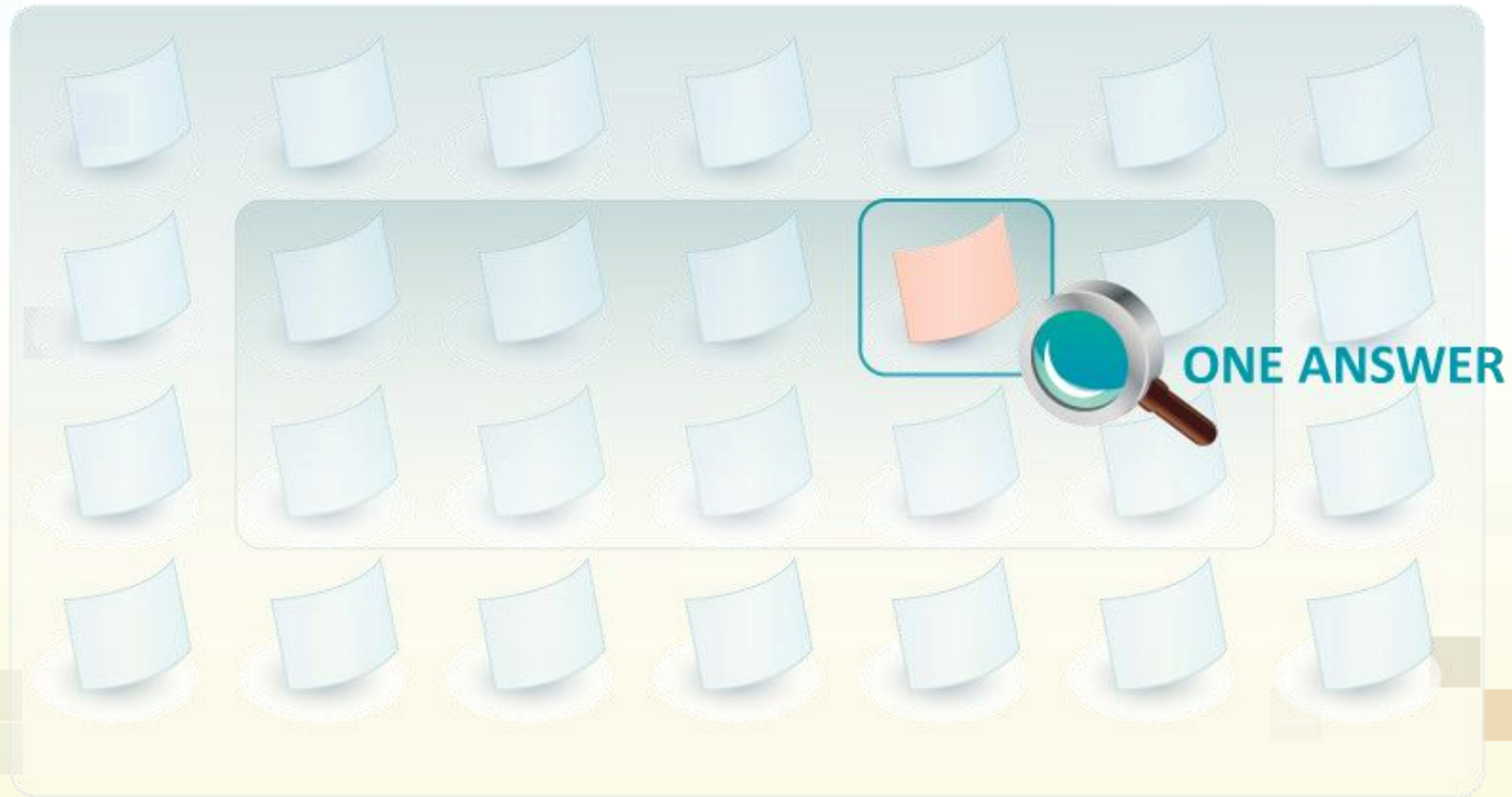


Why doesn't this model work?

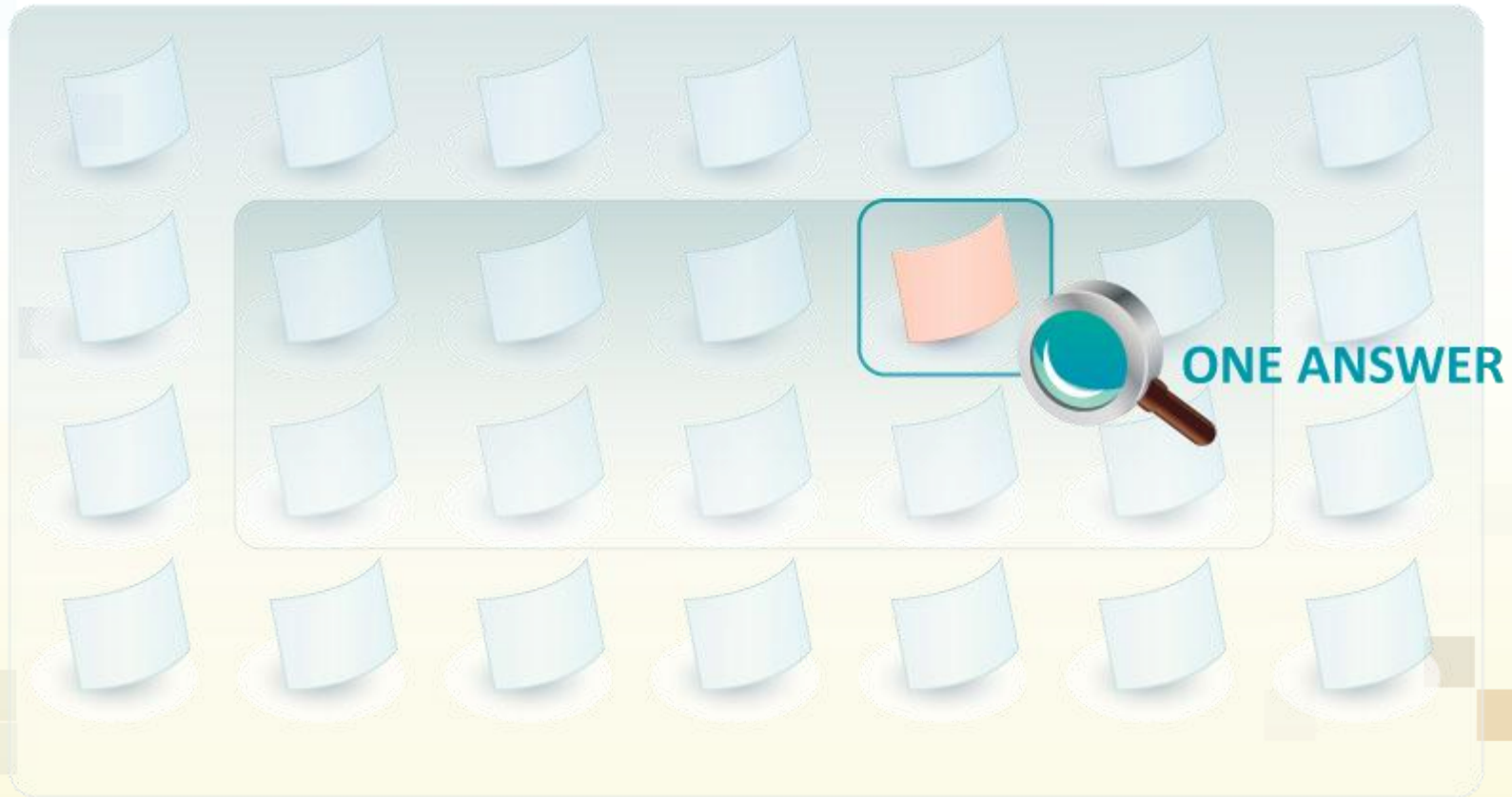
- Most users don't know what they're looking for
- Most users don't know how to search
- Most users don't have the patience for complicated systems

FINDABILITY MODELS

Sometimes you're just looking for
one answer (*known-item*)



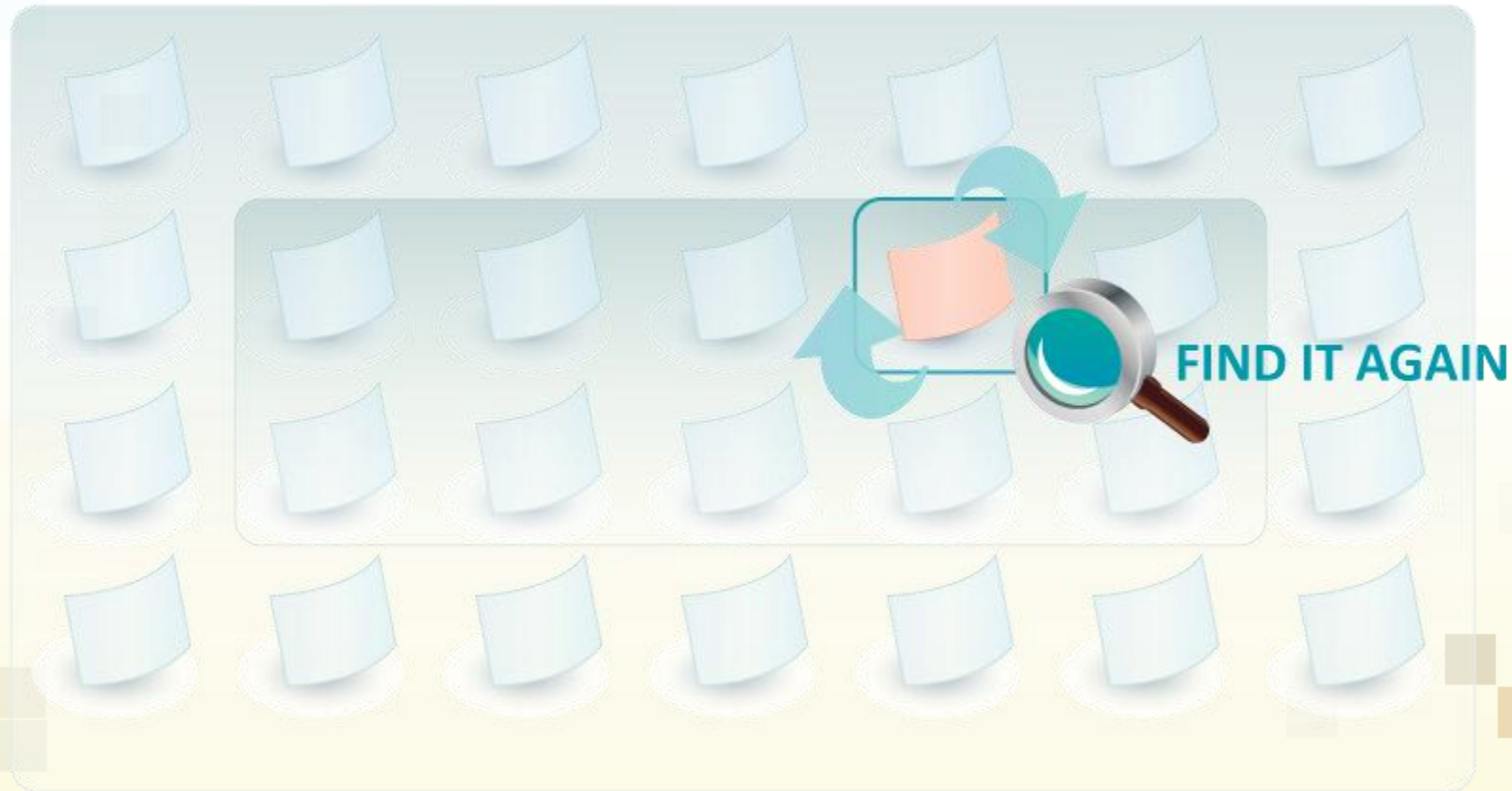
Sometimes you want to investigate *(exploratory)*



Sometimes you want to find everything
(Don't know what you need)

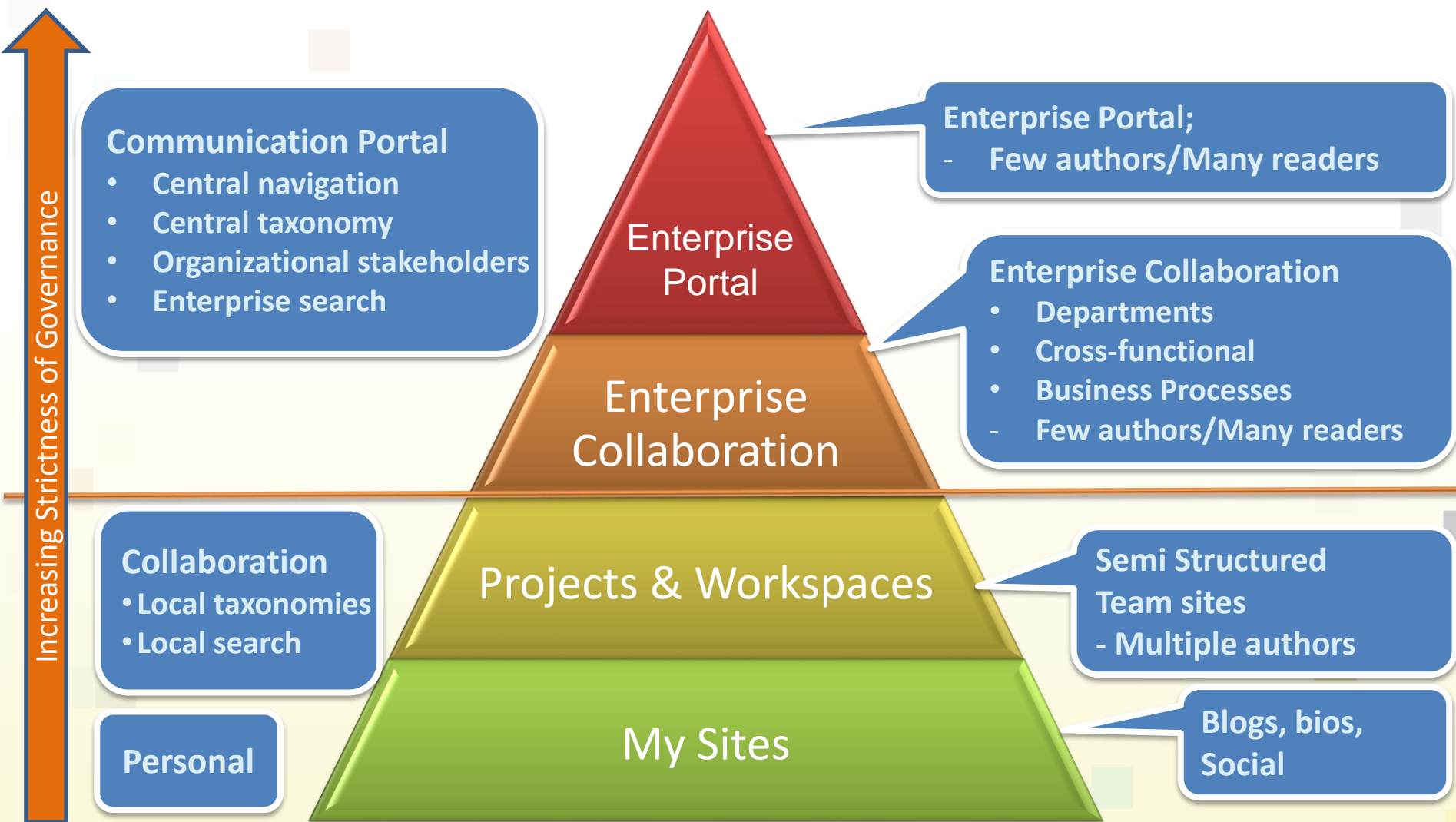


Sometimes you need to find it again (*Re-finding*)



BREAKING SHAREPOINT IA DOWN

Typical SharePoint Information Architecture Areas



Above the Line Enterprise Portal

- Many consumer, few contributors
- Examples: Company communications, employee relations, sales & marketing, human resources
- IA rules
 - Content tends to be highly controlled & published via established processes
 - Content is published via a 'push' method
 - Ability to interact is 'locked down'
 - Information is well defined and frequently accessed
 - Access to SharePoint publishing support feature set

Above the Line

Enterprise Collaboration

- Many contributors, mature processes
- Examples: Help desk, Job request, Process tracking, Document Management system
- IA rules
 - Processes have been refined and well documented
 - User interaction is well defined and tested
 - Contributors are well trained
 - Access to the full SharePoint feature set

Below the Line

Projects & Workspaces

- Many contributors, no control
- Examples: Team sites, Temporary projects, Departmental sharing
- IA rules
 - Tightly governed and ‘locked down’
 - Contributor can do what they want, but have limited abilities
 - Support is minimal
 - Does not participate in Enterprise processes (i.e. global search, managed metadata practices, retention policies)
 - Access to limited SharePoint feature set

Below the Line

My Sites

- No central administrative control
 - Every 'My Site' owner is a site collection administrator
- Social / Organizational interactions
- Personal storage

10 SHAREPOINT IA TIPS TO LIVE BY

10 SharePoint IA Tips to Live By

- Design
 - Alternate row colors on long lists for readability
 - Beware of extreme themes
- Navigation
 - Use descriptive names in your navigation
 - Avoid too similar navigation names
 - Test your links
- Information Management
 - Use the multiple upload dialog
 - Separate grouped list views
 - Use sensible list / column names
- Forms
 - Always right justify buttons
 - Group form fields

Remember to fill out your evaluation forms to win some great prizes!

&

Join us for SharePint today!

Date & Time: Dec 1st, 2012 @6:00 pm
Location: Pub Italia
Address: 434 ½ Preston Street
Parking: On street with meters \$
Site: <http://www.pubitalia.ca/>

QUESTIONS??

Virgil Carroll, President
High Monkey Consulting
virgil@highmonkey.com

763-201-6040

Blog: <http://monkeyblog.highmonkey.com>

Twitter: @vcmonkey