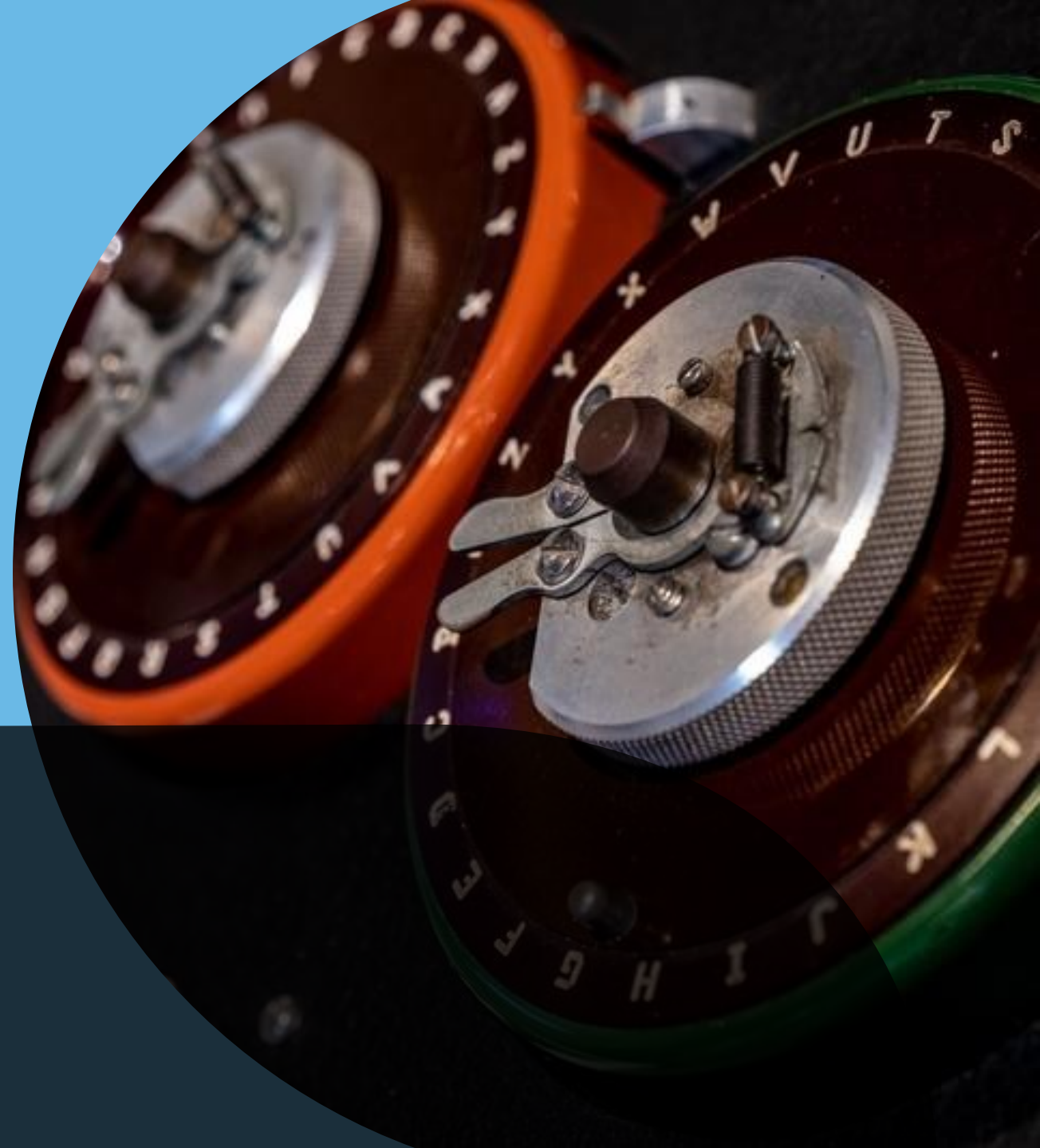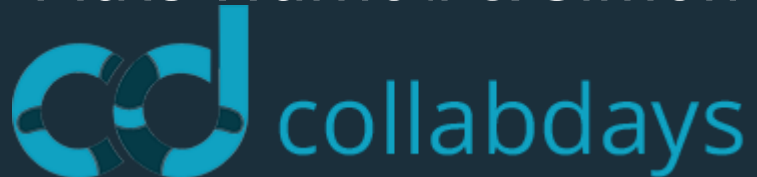# Mastering Content Types in SharePoint Online: Design, Creation, and Practical Use

Mats Warnolf & Simon Hudson

collabdays

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Mastering Content Types in SharePoint Online: Design, Creation, and Practical Use

Enhance collaboration through structured content management

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Microsoft®
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Mats Warnolf

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I am an IT consultant with specialized expertise in Microsoft 365, productivity solutions, and cloud-based transformations.

With 35 years of experience, I have led numerous organizations through Microsoft 365 implementations, focusing on security, governance, and enhancing collaboration.

I am a podcaster (Office 365-podden),
I am a Conference Speaker (Teamsdagen, SEF, ESPC…),
I am a Microsoft MVP,
and a Microsoft Certified Trainer.
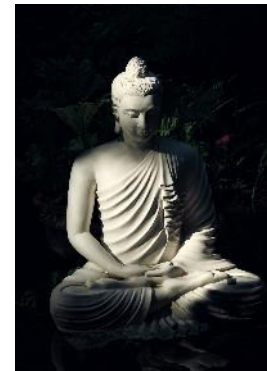
Agenda Overview

Session format
- Conversation and demo
- We plan to record the session via Teams and provide a summary with the slides on run.events

- Understanding Content Types
- Key Benefits of Content Types
- Practical Challenges and Adoption
- Implementing Content Types Effectively
- Practical Demonstrations and Use Cases
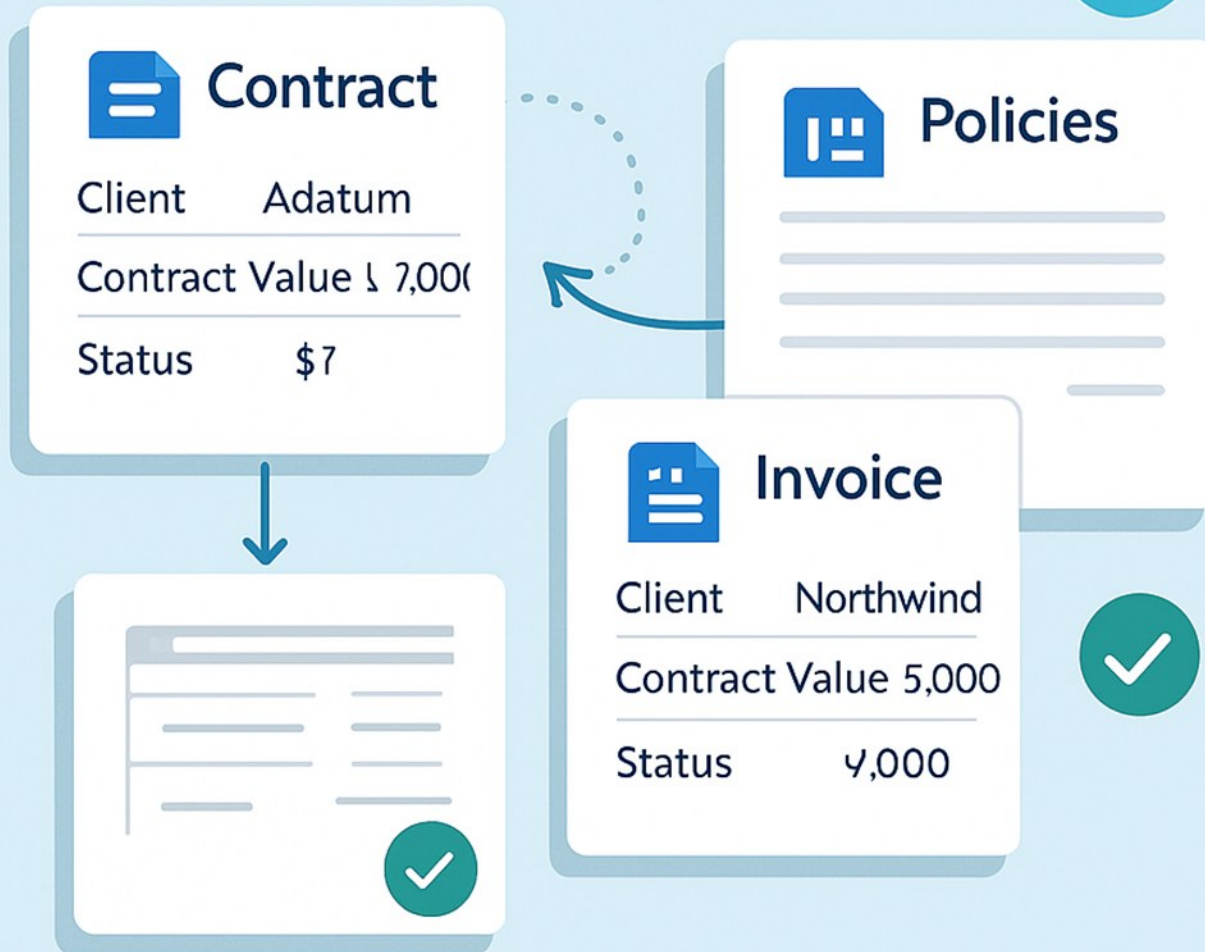- Strategic Considerations and Next Steps

Pay it forward

Understanding Content Types

Mastering Content Types in SharePoint Online

Contract

Client	Adatum
Contract Value	↓ 7,00(
Status	$7

Policies

Invoice

Client	Northwind
Contract Value	5,000
Status	4,000

Defining Content Types and Their Purpose

Definition of Content Types

A SharePoint Content Type is a blueprint. It tells SharePoint,

"This is what a contract (or invoice, or policy) looks like."

It saves time, reduces errors, and keeps your content organized.

It tells the user what the document is.

They are NOT a File Format

Content types are separate concepts from file formats which specify data encoding methods.

Comparison

Feature	Default "Document" Content Type	Custom "Contract" Content Type
Name	Document	Contract
Purpose	General-purpose file storage	Standardised handling of contracts
Template	Blank Word document (optional)	Pre-filled contract template (e.g., NDA)
Metadata Fields	Title	- Title - Client Name - Contract Value - Start Date - Expiration Date - Contract Type (e.g., NDA, MSA) - Status (Draft, Active, Expired) - Responsible Department - Legal Contact
Retention Policy	None by default	Custom retention (e.g., 7 years after expiry)
Workflows	None	Approval workflow, signature tracking
Content Type ID	Built-in	Custom (inherits from Document)
Reusability	Basic	Reusable across libraries and sites
Governance	Minimal	Enforces structure and compliance

Mastering Content Types in SharePoint Online

Design, Creation and Practical Use

Key Benefits of Content Types

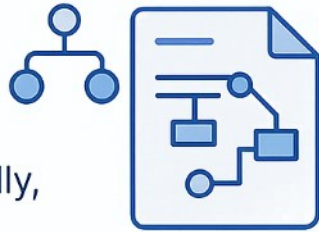# Consistency, Standardisation, and uniform Metadata

Benefits of Consistency

Consistency ensures documents are labelled uniformly, improving organisation and retrieval efficiency.

Logical vs Physical Organisation

Logical organisation structures data meaningfully, while physical organisation concerns storage location and format.

Uniform Metadata Elements

Uniform metadata includes supplier details, dates, and expiry, ensuring clarity and standardisation across documents.

Enhanced Search, Discoverability, and Organisation

Tailored Document Templates

Templates customized for specific content types improve consistency and streamline document creation.

Improved Search and Tagging

Consistent tagging enhances search accuracy, making documents easier to find across systems.

Organised File Libraries

Transforming unstructured files into well-organized libraries reduces time spent hunting for documents.

Flexibility, Scalability, and Reusable Structures
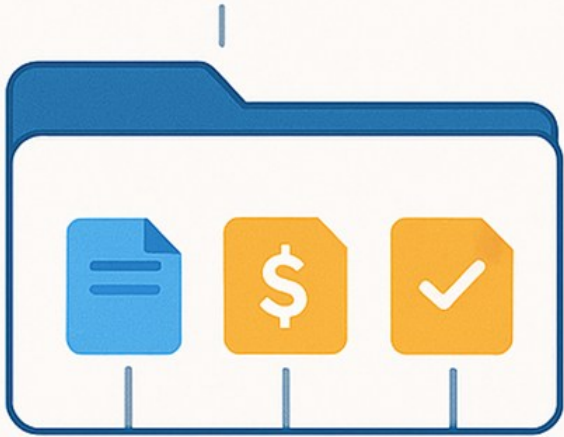
Content Flexibility

Supports multiple content types in one library without causing fragmentation, improving organisation and access.

Improved Findability

Custom views such as all files, invoices, and purchase orders enhance ease of finding information quickly.

Scalable Structures

Defined structures can be reused across multiple sites and customised for different departments efficiently.

CONTENT FLEXIBILITY

IMPROVED FINDABILITY

IMPROVED FINDABILITY

SCALABLE

CONTENT TYPES IN SHAREPOINT ONLINE

Workflow, Compliance, and Governance Integration

Workflow and Compliance Integration

Approval workflows are directly connected to specific content types to streamline processes and ensure compliance.

Content Retention Policies

Retention schedules can be assigned to content types to maintain regulatory and organizational compliance.

Enhanced Governance

Integrating workflows and compliance leads to improved governance and better management of content lifecycle.

Minimising Folder Dependence in SharePoint Online

Alternatives to folders, such as dynamic views and metadata-driven organisation

Folders and Findability

Minimising Folder Dependence

Reducing the use of traditional folder systems helps simplify file organisation and enhances accessibility.

Alternatives to Nested Folders

Using alternatives to deeply nested folder structures prevents complexity and improves quick file retrieval.

Using Views for Organisation

Views offer dynamic ways to organise and access files without relying on folder hierarchies.

Summary of Benefits

Productivity

- Saves time, reduces errors, keeps content organized.
  - Tells you what the document is.
- Drives consistency
  - Standardisation across sites and libraries
- Improves findability
  - Tailored search, tailored aggregation
  - Views, groups and filters
  - Enhances Copilot & agents

Information Architecture

- Minimises need for folders
- Avoids column sprawl
- Tailored templates

Compliance

- Supports efficient workflows
  - Supports compliance and business processes
- Supports Retention rules
- Underpins lifecycle management

Practical Challenges and Adoption

User Adoption and Training Hurdles

Adoption Challenges

Users often face practical challenges that hinder adoption of new systems, impacting overall success.

Training Needs

Effective training is essential to help users overcome difficulties and improve system use.
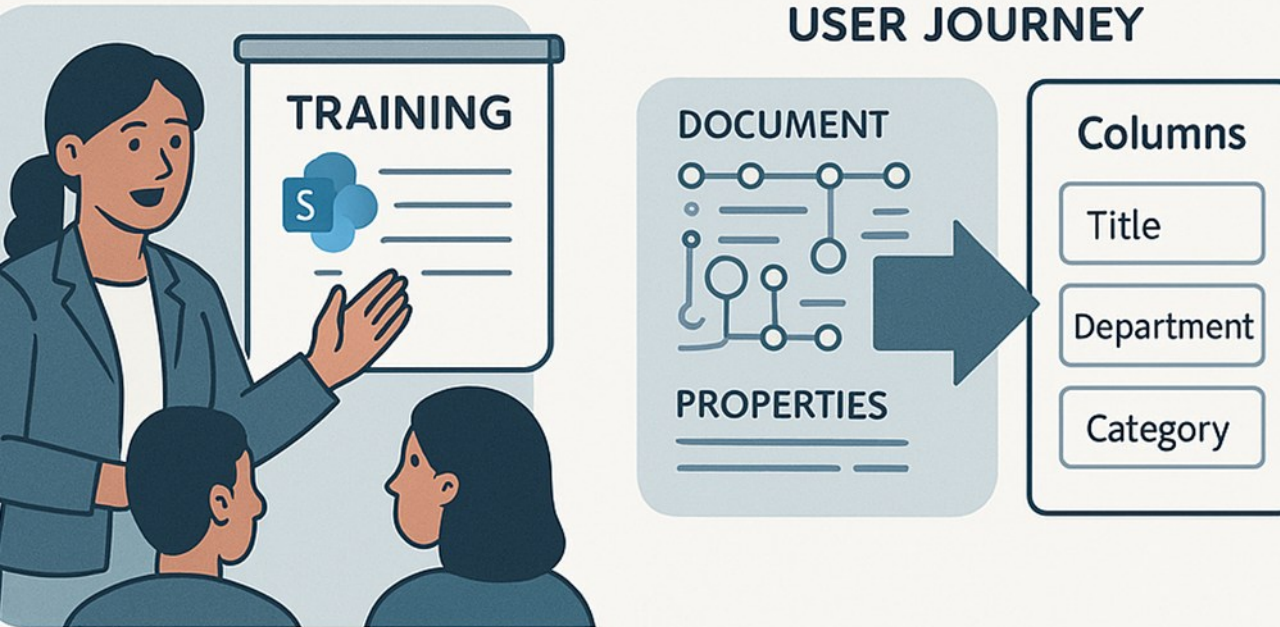
Complexity Barrier

Initial system complexity and excessive required metadata fields create barriers to user acceptance.

User Journey Awareness

Designing with user journey in mind reduces friction, mapping document properties to simpler SharePoint columns.

Pitfalls: Overuse, Complexity, and Over-Engineering

Overuse of Content Types

Not every scenario requires a unique content type; overuse complicates user experience.

Cognitive Load and Defaults

Too many choices can overwhelm users, causing reliance on default content types.

Risks of Over-Engineering

Striving for perfection may hinder progress; over-engineering complicates content planning.

Implementing Content Types Effectively

Planning, Defining, and Adding Content Types

Planning Content Types

Effective planning of content types ensures they meet organisational needs and structure content systematically.

Defining Content Types

Content types can be defined on specific sites or centrally in a content type hub for reuse and consistency.

Adding to Lists or Libraries

Once defined, content types are added to lists or libraries to manage and organize content efficiently.

Best Practices: Phased Approach and Stakeholder Engagement

Planning and Stakeholder Input

Begin with thorough planning that incorporates valuable stakeholder input to ensure alignment and support.

Build a Compelling Case

Develop a clear and persuasive rationale to justify the project and gain stakeholder confidence.

Mitigate Downsides

Identify potential risks early and implement strategies to mitigate possible negative impacts.

Pilot and Iterate

Test solutions through pilot projects and refine approaches based on feedback and results.

Practical Demonstrations and Use Cases

Real-World Examples: HR, Contract, and Project Management

Human Resources (HR)

HR manages employee relations, recruitment, training, and organisational development in businesses.

Contract Management

Contract management involves overseeing agreements, ensuring compliance, and maintaining records throughout contract lifecycles.

Project Management

Project management plans, organises, and supervises projects to meet goals within time and budget constraints.

Unlock more of SharePoint's potential with Content Types

Streamlined Content Management

Mastering content types helps organisations organise and manage documents efficiently within SharePoint Online.

Enhanced Compliance

Using content types enforces compliance policies and ensures regulatory standards are met across the organisation.

Improved User Experience

Customised content types simplify workflows and provide users with a smoother, intuitive SharePoint experience.

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