



SharePoint Search Schema Configuration Checklist

Phase 1: Planning & Identification

- Identify User Needs: Interview users from 2-3 different departments. What information do they struggle to find? What filters would be most useful to them? (e.g., Project Status, Client Name, Document Type).
- Audit Content: Locate the columns or metadata fields in your SharePoint lists and libraries that contain this critical information.
- Define Naming Convention: Decide on a clear and consistent naming convention for your new managed properties (e.g., `ProjectStatusRefinable`, `ClientNameSortable`).

Phase 2: Configuration & Mapping

- Ensure Content is Crawled: Verify that the list/library containing your target metadata has been recently crawled by SharePoint search.
- Locate Crawled Property: Navigate to the Search Schema settings in the Admin Center and find the corresponding crawled property (e.g., `ows_ProjectStatus`).
- Create New Managed Property: Create a new managed property using your defined naming convention.
- Set Property Characteristics:
 - Type: Select the correct data type (Text, Integer, DateTime, etc.).
 - Searchable: Check if users should find items by searching for words within this field.
 - Queryable: Check if you want to allow advanced queries like `ProjectStatus:Active`.
 - Retrievable: Check if you need to display this property's value in search results.
 - Refinable: Check to make it available as a filter on the results page.
 - Sortable: Check if users should be able to sort results by this property.
- Add Mapping: Map the crawled property you identified to your new managed property.
- Create Alias (Optional but Recommended): If the property is Queryable, create a simple alias (e.g., "Status" for `ProjectStatusRefinable`).



Phase 3: Validation & Maintenance

- Re-index Site/Library: Go to the library/site settings and request a re-index to apply your changes.
- Configure Refiners on Results Page: Edit the search results page and add your new managed property to the Refiners web part. Customize the display name.
- Test Thoroughly: Perform several test searches.
 - Does the refiner appear?
 - Does filtering by the refiner work correctly?
 - Can you use the alias in a query?
 - Do the values appear in the results (if set to Retrievable)?
- Document Changes: Keep a simple log of the managed properties you've created, what they are mapped to, and their purpose.