MetaShare®

| metashare.com | Document Management in Office 365 |

This article is intended for organizations who use Microsoft

Office 365. It will explain the different possibilities in Office 365

together with the add-on MetaShare.

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# 1. Document management in Office 365

The transition to Office 365 has provided a new platform for document management. Organizations should now save and manage their documents in Office 365 instead of the file server. The benefits of using Office 365 for document management are many.

There are many applications in Office 365 that manage documents, and it's easy to get lost and not apply the right method for document management in Office 365.

SharePoint in Office 365 has features for document management but these need to be configured and there is not any out-of-the-box solution for document management.

MetaShare is a package solution that turns SharePoint into a full-featured document management solution. MetaShare will help and simplify for the organization and its users to work with documents in Office 365.

To start with simple document management in Office 365, this is what you should do:

- Use *OneDrive for Business* only as "My Documents"
- Use *MetaShare* for your crucial business documents (if not MetaShare, use a document library in standard SharePoint and make sure to configure this properly.)
- Use *Teams* or a regular *SharePoint* site for enhanced collaboration needs

## 1.1. OneDrive for Business

OneDrive for Business replaces the home directory as well as the desktop with a personal/private document library. It is primarily used to save personal content such as early drafts and documents that do not need to be shared with others. If you need to share documents with others, it is primarily done in a common document storage area in MetaShare or Teams.

You use OneDrive for Business for:

- Early draft documents that you work with
- When you cannot identify an existing document workspace where your document belongs
- When you temporarily need to work off-line from your desktop computer
- For personal documents

## 1.2. MetaShare

MetaShare is the organization's common document library. MetaShare should be used for storing the organization's crucial documents so that your colleagues can find and collaborate in them. A workspace in MetaShare can also apply to a team, a department, a project, etc.

With MetaShare you will:

- reduce time by making it easier to find documents in Office 365, with the help of metadata.
- increase the reliability of documents by eliminating document duplicates.
- increase the users' efficiency, using MetaShare's smart document management functions.
- reduce risks for your organization by gaining control over document

*"MetaShare has enabled us to leverage the power of SharePoint for document management and collaboration and tagging which has eased document finding and search"*
Lumumba Juma, International Institute for Democracy and Electoral Assistance (International IDEA)

This is how it works – watch video



## 1.3. Microsoft Teams

If you, in a workgroup, a project, or a temporary work need to collaborate around a small number of documents that are not important to the organization, but you need to use collaborative features such as common calendars, project plans, tasks and communicate with your colleagues through chat, then the preferred application in Office 365 would be Microsoft Teams.

You use Microsoft Teams when:

- You need to collaborate on documents where reuse is not the main goal
- You need other collaborative functions like communication, tasks, calendar, etc.
- You want to invite external individual participants
- If there are many documents - you should consider using MetaShare.

When you are done working with your documents in Microsoft Teams and you want to make certain documents easier accessible for all your colleagues, they should be moved to an appropriate MetaShare workspace.

## 2.    Document Management settings

SharePoint in Office 365 is not pre-configured for document management. When you create different Team in Microsoft Teams or different SharePoint sites in Office 365, a unique document library is created per site. These document libraries are independent of each other and depending on which document management settings you want to apply; they must be configured by document library.

Provide homogeneous metadata fields for all document libraries in your Office 365. Use managed metadata fields that are linked to SharePoint's taxonomy in SharePoint's term store and then published them to all sites.

This should be done homogenously throughout Office 365, when you use common document libraries. (One Drive for Business cannot be configured). MetaShare will help you set this up and automatically apply rules to all workspaces.

- Apply metatags that are relevant for you. Read more about metadata, From folder structure to metadata structure. Start easy, use MetaShare basic set up or create your own.

## 3.    Starting with your document management in Office 365

In this chapter, we list what you need to do, not how to practically set it up.

When using MetaShare, Teams or SharePoint you need to set up basic rules.

- What teams/workspaces should be created? Do not make it free for your users to create teams/workspaces.
- Try to limit the number of teams/workspaces, especially teams/workspaces that are common for the organization, team, department etc.
- Try to define workspace categories/configurations, for example, common share, department, teams, legal, project that are aligned with your business.
- These could be different reasons to use different workspaces.
    - **Access and permission reasons**
      For example, the documents in the management team should only be accessed by members of the management team.
    - **Collaboration reasons**
      In projects, you may want to work in an area where you only see the documents related to the project. Project members get a clearer view of the project documentation and other workspaces will not be cluttered with documents that may only be temporary, such as meeting notes, working documents, etc. In addition, projects often have the need to set individual access-rights, and these workspaces may also have different information models (different metadata, different views, and different filters).
    - **Logical reasons**
      Documents of certain types, such as agreements may be added to a specific workspace, so that you get a logical structure over all the contracts, no matter what area they belong to. In these workspaces you can also have other metadata to tag the documents with.
    - **Document volume reasons**
      If there are many documents that need to be organized, they could be stored in an own workspace. In these cases, you need to find appropriate filters and metadata tags that will help you find and organize these documents.

## 4. Learn more about MetaShare

- View demo: https://metashare.com/en/view-demo/
- Learn more: https://metashare.com/en/knowledgebank/
- MetaShare product site: https://www.metashare.com/