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How to make SharePoint trouble free

How MetaShare addresses limitations and pitfalls in SharePoint when implementing a document management system.

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1. Challenges with document management in SharePoint

SharePoint is a strong foundation on which you can build your document management system. The problem is that SharePoint also is infamously known for requiring arcane knowledge about the inner mechanisms of the platform. At the same time it is very flexible, perhaps too flexible. When building your information model and permissions, you have many options and not all may work well in the long term.

1.1. Too many options in SharePoint

1.1.1. Sub sites or site collections?

There are two way in which you can build your site topology: with sub sites or site collections. Historically it has been common to create a single site collection and then create multiple sub sites within it. For example, a sub site for each project would be created in the Projects site collection.

This approach, while easy and convenient, comes with its share of problems:

- You are limited in the amount of data that you can store in a single site collection
- All SharePoint groups are managed from the root site instead of the relevant sub site
- Language variations of columns are not propagated to sub sites

Site collections have none of these problems, but SharePoint lacks the proper tools to manage them at scale.

1.1.2. Site columns or list columns?

SharePoint allows the creation of content types and columns at the site or list level. It may be tempting for a site owner to create columns directly in the document library. This is not desirable if you want to build a consistent and reusable information model that is managed centrally. The best way is to publish site content types from the Content Type Hub.

1.1.3. Teams, Groups or Sites?

You can manage access to SharePoint sites in two ways: Office 365 Groups or SharePoint Groups. When creating a Modern Team Site in SharePoint Online an Office 365 Group is automatically created. This comes with a few side effects:

- Other resources that you may not want are created such as an Exchange inbox
- A new Azure Active Directory group is created for each new group
- The document library is used for storing files from Team chats, Planner attachments and more

You probably do not want to clutter your Exchange server and your users' Outlooks with unused inboxes and calendars. If you have a well-structured Active Directory, you should reuse the groups you have rather than create a new group for each Team Site. Mixing your structured documents with the occasional attachments in Teams and Planner is asking for trouble. For example, if you have required fields or Flows running it would apply to the occasional screenshot posted in the chat as well as your health insurance policy.

By creating site collections without Office 365 Groups you get what you need for document management and nothing more. Assigning existing security groups to SharePoint groups keeps your directory nice and tidy and it is easy to add a new user to many sites.

1.1.4. Content types or metadata?

Content types is SharePoint's way of grouping sets of columns that should be used together. Unfortunately, it is common that they are used incorrectly as a substitute for metadata. This makes maintenance difficult because:

- It takes long time to provision new content types to sites
- They are not automatically added to lists
- Cannot be hierarchal
- Impossible to break content type inheritance

1.2. Templates

Centrally managed document templates that are available in all sites is not feasible to configure in SharePoint. Typically, you connect a template to a content type. You are limited to one template for content type. With this method you quickly end up with many identical content types.

Some organizations put their templates in the file server instead. The downside with this is that new documents are created on the users' desktops and is not managed by SharePoint until it is uploaded.

You can add templates to modern document libraries. These are however stored locally in that library and thus are not centrally managed.

1.3. Finding sites

Finding a site that you have not bookmarked is not easy in SharePoint. Delve tries to suggest sites for your users based on their and their colleague's activity. It cannot however predict what site you need to access at any given time. Sadly, there are no built-in tools for browsing all sites available for the current user.

1.4. Managing sites

Making sure your sites are created correctly is very difficult with SharePoint out of the box. First, end users may create site on their own initiative by default. This may cause many sites and groups to be created with the wrong information model and security settings. If you have not disabled this, you may already have many uncontrolled sites in your tenancy.

Site designs are the modern way of creating reusable configurations for new sites. These can include your information model among other things. Creating site designs requires expert level SharePoint developer competence. Problems arise when you have many sites and you need to change something retroactively, adding a new content type for example. This is not easily done with site designs.

By default, site owners are granted Full Control permissions on their site collection. This presents great risk. Such a user may:

- Accidentally change security settings
- Accidentally delete the entire site
- Accidentally delete document libraries and their content
- Break the information model

1.5. Inconsistent user experience

Working with documents is a different experience depending on the context. The Modern document library, classic document library and Files tab in Teams are technically interfaces for the same thing but the user experience is quite different.

Searching in SharePoint Online is difficult since you cannot tell in which context you are searching. Sometimes you search within a library, sometimes within a site or sometimes globally. The search box looks the same in all these cases. We cannot really blame the users for their confusion in this case.

The process of uploading documents to SharePoint can be very hard to grasp for users that has a long experience of working with file servers where you browse to a location and save the file there. In SharePoint you upload first and then set the file's metadata.

2. This is how MetaShare makes SharePoint trouble free

MetaShare is an app for document management in Office 365 that enhances SharePoint. It is a part of document management together with OneDrive, Teams, Office Groups and SharePoint. MetaShare will help and simplify for the organization and the users' work with documents in SharePoint.

This is how MetaShare is configured to apply a homogeneous standard on metadata and document management settings.

2.1. Organized workspaces

When you create a workspace in MetaShare an associated site collection is automatically created for you. This is a standard Team Site without any custom code uploaded to it. The site is merely configured according to one of your workspace configurations. We use the default document library for file storage so there is no confusion as to where a document should be saved when using the Save As function in Office for example.

The workspace configuration specifies what content types that should be added to the library and what filters and columns that should be visible in the view.

If you make a change to a configuration it is automatically propagated to all existing workspace. No need to employ a developer just to add a new content type to a set of sites.

2.2. Security

Rather than giving owners Full Control we add a custom permission level called Administrate. This grants the owners the same permissions as member plus managing members of groups and discard checked out documents. This way owners can manage permissions in a safe manner there is no risk of breaking or incorrectly deleting the site.

In MetaShare you specify a separate administrator user that is added as site collection administrator to all sites that MetaShare creates. This account is only intended for troubleshooting purposes and should not be used on a regular basis.

2.3. Information model that scales

A traditional file server uses a folder hierarchy, and uses one dimension for finding documents. Someone designs the folder hierarchy for the organization's, and think it is the most logical structure for the documents. The problem is; this is rarely quite logical.

A multidimensional structure makes it possible to store, search and filter documents, not just in one dimension – but also in several dimensions. Dimensions that are important for your organization.

MetaShare encourages you to build your information model multidimensional and according to best practices. This means that content types are created and published from the content type hub, the taxonomy is built in the term store and managed metadata columns are used to tag documents. This way your information model is robust and can be changed without much effort.

You can also use the same taxonomy to tag workspaces. This way your users can filter their way to the workspace they need to work in. If you have a large set of documents with the same metadata, consider adding them to a workspace that is then tagged with those common values.

2.4. Templates

In MetaShare document templates are associated with terms rather than content types. This takes the way the limitation of one template per type. A term can have many templates and one template can be associated with many terms. You can also have general templates that are not associated with any term.

These associations are then shown as suggestions when creating documents within a MetaShare workspace. For example, if the document is tagged with the term *Letter*, the users will be suggested one or more letter templates.

We have no restrictions on what templates can be used with the terms. Consequently, the users are not blocked from creating documents, even if your configuration is not completely right.

Since it is so easy to create a document from a template, users are encouraged to create new documents that are stored within SharePoint from the beginning. No more forgetting to upload a file to the document management system.

2.5. Consistent user experience

In MetaShare you create and find workspaces and documents the same way. This means that you will spend less time training your users.

You are always searching within the context of the current screen (i.e. a workspace) with an option to expand your search to a wider scope.

Auto tagging is a feature in MetaShare that makes the process of uploading documents much more natural. You can start by selecting one or more filters and then those will be prefilled in the upload form. This workflow is similar to how you work on a file server where you browse first and then save.

3. 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/>