

SharePoint and meaningful folder structures

SharePoint is a widely used program from the global market leader Microsoft, which was first developed to manage personal and business documents in the cloud. SharePoint made it possible to store, organize, share and access both information and documents regardless of location. As Microsoft has continued to expand the software, it has been able to grow SharePoint from a file storage system to a full-fledged content management system (CMS). As a result, the tool has been voted one of the best software products for creating private websites.

It was specifically designed for smaller organizations and companies with heterogeneous target groups in order to merge diverse customer groups into one easy-to-maintain and easy-to-manage area. For user companies, SharePoint is an extremely flexible solution that helps them digitize their processes, including communication. This can significantly improve business performance. The following features distinguish the SharePoint software, as they support the implementation of these rather complex goals within the company.

The essential core functions of the CMS SharePoint

But what makes SharePoint so special and why is it worthwhile for companies to use the software? To find out, we will take a look at the various core functions of the CMS:

1. A key strength of sharepoint is its ability to manage business documents. In addition to storing an unlimited number of files in the MS Cloud, the software captures all modifications, includes multiple permission levels and various structures of metadata.
2. In addition to document management, sharepoint can be used to maintain lists that are critical to the success of individual business processes. These lists contain the contact data of the stakeholders in a project.
3. Sharepoint is not only suitable for storing data, but is also a good solution for creating, distributing and sharing informative and communicative content within the intranet. This keeps all employees optimally informed.
4. Sharepoint can be complemented by other Microsoft products such as Power BI - an evaluation tool - MS Teams - a communication app - and the MS Cloud onedrive. In this way, various Microsoft applications can be integrated together in sharepoint.
5. Hierarchical authorization system can be divided into several levels, which provides the highest level of management security. Owners of a file are given "full control", while employees can be assigned an edit function and visitors a read function.

Because the SharePoint app is responsive, it can be accessed from mobile devices. But SharePoint not only displays content responsively, it allows users to interact with web pages and files.

Use SharePoint as a DMS

Even though SharePoint was initially designed as a CMS with collaboration and business applications, it can also be used as a document management system. Companies that use SharePoint as a document management system (DMS for short) want to structure their company data in an ideal way. The reason is that the system can be mapped using vectors as well as folders, lists and/or tables. It revolves around the creation of a data structure, which the enterprise data clearly to sort. The structure helps to manage the data efficiently and to allocate them according to content.

Similar to the SEO of websites, the SharePoint DMS can be enriched with metadata. In the SharePoint DMS, documents can be uploaded or downloaded via the metadata. This can be controlled by defining release processes. Access rights are defined, which allows risks of data corruption to be regulated. Since SharePoint has many content management functions, the tool is basically also suitable as a DMS. However, whether the software can be used as a DMS should be decided in advance on the basis of a concrete requirements profile.

Determine the optimal folder structure

Especially against the background of constantly growing data volumes and the increasing importance for good teamwork, a good DMS is indispensable. An essential point represents a clear data structuring. Companies using SharePoint can use the following methods for structuring:

- Assign naming conventions for documents
- Choose correct folder structures
- Classify documents by content types and properties (metadata)
- Using various websites, libraries and lists that are based on SharePoint

At this point, we will explicitly look at the correct folder structure in order to highlight when it is expedient to implement folder structures. They are particularly suitable in the case of a clear number of data and in cases where data on a website that is accessible to many is only to be released to a limited group of people.

In the meantime, digital folders have replaced the classic folder - that much is clear. Digital folders make it possible to structure and store digital documents. These folders can be subdivided even further so that a folder hierarchy can be created. One of the strengths of MS SharePoint is the option to assign permissions. For this, however, it is necessary to clearly name the folder structure created and to choose a structure that is as logical as possible.

It is known from industrial psychology that the human short-term memory can only remember seven folders - a fact that cannot be changed for genetic reasons. This must also be taken into account. In addition, the filing of data is handled very differently from person to person, some sort the data

horizontally, others vertically and still others prefer a minimalist structure. Despite all this, a sensible folder structure should satisfy the following three basic criteria:

1. Clarity - the chosen folder structure should be clear. Translated into practice, this means that the ideal folder structure should only include as many folders as can be captured at a glance. Only in this way can data be found reliably.
2. Traceability - it is important to name each folder clearly. Abbreviations or unclear titles should be avoided. The individual folder levels should also not be too nested. The structure used should be intuitively understandable even to outside users.
3. Speed - an effective folder structure is characterized by how quickly searched objects can be found. The searched file should be accessible with only three clicks. From the top to the relevant folder should go over a maximum of three levels.

In MS SharePoint, the content types for which common rules must be defined are of interest for the optimal structuring of everything. For a suitable structuring, existing data must be analyzed and it must be clarified for which user groups this data is relevant. The right data structure is then selected according to their needs. Once a data concept has been developed, the relevant data must be transferred to the new structure and incorporated. Since document management is a process that is subject to constant change, the selected structure should be continuously reviewed for optimization possibilities.

Organize documents in SharePoint via metadata?

An alternative for using digital folders in structuring data in MS SharePoint is categorization via metadata. They are a flexible instrument of structuring to store data without folder structure in a DMS. Columns are created as sorting and filtering criteria - for example, the categories "Document type", "Location" and "Department". This categorization serves as a filter for all documents, and the views can be saved. Each user can prepare them according to his needs.

However, there are some basic rules to follow when using metadata in the organization of corporate documents. If these are not taken into account, it may happen that the implementation becomes extremely expensive without adding any business value. Therefore, it should be noted that it is time-consuming and labor-intensive to prepare the topic correctly and strategically. In addition, employees must consistently support this approach and the handling of keywords must be done over a longer period of time.

Even if metadata in existence brings many advantages such as high flexibility and better findability, it should not be used if access permissions are to be assigned. Here, structuring in folders has a clear advantage, since a more generalized assignment of access permissions is possible. With metadata, it is primarily the structuring of the document type that causes problems here. Anyone who wants to take full advantage of structuring using metadata should have thought about these points in advance.