



Building What's Next.

HOW-TO GUIDE

Making SharePoint Work For You

How to structure it, why folders are usually the wrong answer, and how to turn a document store into something that actually runs your processes.

Structure

Lists vs libraries

Beyond storage

BEFORE YOU START

Most businesses use SharePoint as a big folder.

Which works, in the sense that a filing cabinet works. But it is the least interesting thing SharePoint does, and the reason so many businesses find it underwhelming.

The usual story: files were moved off an old server into SharePoint, the folder structure came with them unchanged, and nothing else changed either. People now navigate the same awkward hierarchy they always did, only through a browser. Nobody is unhappy exactly, but nobody would say it improved anything.

SharePoint is really a platform for holding **information**, not just documents — and once you see the difference, a lot of the spreadsheets and email threads holding your business together have an obvious better home.

Who it is for. Anyone with Microsoft 365 who suspects they are not getting much from SharePoint. No technical background needed; nothing here requires a developer.

How to use it. Sections One and Two cover structure and metadata, which are worth getting right before anything else. Sections Three and Four are where it stops being storage. Section Five covers intranets and where custom work is genuinely justified, and Section Six is the honest list of what goes wrong.

ONE THING TO SAY UP FRONT

You do not need a big project to improve this. Most of what follows is configuration a capable person can do in an afternoon, using licensing you already hold. **Availability depends on your Microsoft 365 licence.**

WHAT THIS GUIDE COVERS

01 Sites, Teams and structure

02 Metadata: describing documents

03 Lists: the underused one

04 Adding process to it

05 Intranets & custom capability

06 What goes wrong

07 Where to start

THE PRINCIPLE

Describe things, don't bury them

A folder can only put a document in one place. A column can describe it a dozen ways at once.

This is the shift worth understanding. In a folder structure, every document must live in exactly one location, so someone has to decide whether the signed Acme contract belongs under Clients, Contracts, or 2026. Whatever they choose, the next person looks in one of the other two.

SharePoint lets you instead **describe** the document: client Acme, type Contract, year 2026, status Signed, owner Priya. It can then be found by any of those, sorted, filtered and grouped – and nobody has to guess where it was filed.

01 Columns beat folders

A few well-chosen columns replace most of a folder tree, and every person gets to organise the same library the way that suits them.

02 Structure follows the business, not the org chart

Sites for real areas of work. Restructuring after a reorganisation is painful, so avoid mirroring reporting lines.

03 If it is a table, it is a List, not a spreadsheet

Anything with rows and columns that several people update belongs in a List. This is the most valuable and least used idea here.

04 Keep it shallow and searchable

Two or three levels at most. Search across SharePoint is genuinely good, so deep hierarchies cost more than they return.

A FAIR CAVEAT

Columns only help if they are filled in. Keep them few, make the important ones required, and offer choices from a list rather than free text – otherwise you get “Acme”, “ACME Ltd” and “acme” in the same view.

SECTION ONE

Sites, Teams & Structure

Get this roughly right and everything else is easier. The good news is that “roughly right” is genuinely enough.

Every Microsoft Team has a SharePoint site behind it. That is the single most useful thing to understand: they are not alternatives, they are the same storage seen two ways. Teams is the conversation and quick access; SharePoint is the same files with proper structure, columns and views.

Use When Notes Team site A group of people working together regularly – a department, a function, a big client. Created with a Team. Members get access as a group, which is what you want. Communication site Publishing to the business: news, policies, handbook, an intranet home page. Most people read; a few publish. No Team attached. Channel in a Team A distinct strand of work inside an existing area. Prefer this over creating another Team. It is the answer to most “where should this go?” questions. Private channel Genuinely restricted work – pay, disciplinary, an acquisition. Use sparingly. Each one adds its own storage and complexity.

GETTING IT RIGHT

☐ Start with four or five sites, not twenty

Departments and major functions. You can always add; consolidating later is much harder.

☐ Name things the way people speak

“Finance” rather than “FIN-OPS-01”. If a name needs explaining, it is the wrong name.

☐ Give every site a named owner

Two, ideally. Someone accountable for access and for what belongs there.

☐ Grant access by group, never person by person

Adding someone to a group is one action; unpicking twelve individual permissions later is an afternoon. Breaking inherited permissions repeatedly is what creates long-term complexity – do it rarely and deliberately.

SECTION TWO

Metadata: Describing Your Documents

Metadata simply means information about a document rather than inside it – which client it belongs to, what type it is, whether it is signed. It is the single idea that separates SharePoint from a network drive.

In practice metadata appears as columns beside each file. Fill them in and one library can be sorted, filtered, grouped and searched a dozen different ways, without anyone having to remember which folder something went into. It also makes SharePoint search dramatically more useful: filtering by client or status finds things a keyword never will – and, later, it is what makes Copilot genuinely useful rather than confidently wrong.

THE BUILDING BLOCKS, PLAINLY

TermWhat it means**Use it for**
ColumnA single piece of information about a file – client, status, date, owner, value.
Everything. Four or five per library is usually plenty.
Choice columnA fixed dropdown rather than free typing.
Status, type, department. Prevents “Acme”, “ACME Ltd” and “acme” all existing.
Content typeA named kind of document with its own columns and template – Contract, Invoice, Policy.
Where different document types need different information captured.
Managed metadataA shared list of approved terms, defined once for the whole business.
Client names, sites, product lines – anything used in several places that must stay consistent.
Default column valueA column filled in automatically based on where a file is saved.
Making metadata effortless: drop a file in the Acme folder, client is set for you.
Sensitivity labelA marker for genuinely confidential material, which can also control access.
The small number of things that truly warrant it – not everything.

SECTION TWO

Metadata In Practice

Metadata only pays off if it gets filled in and then actually powers something people use. These four rules are the difference.

- ☐ **Keep it to four or five columns**
The most common failure is fifteen optional columns nobody completes. Fewer, and required, beats comprehensive and ignored.
- ☐ **Use choices, not free text**
Every free-text column becomes inconsistent within a month, and inconsistent metadata is worse than none.
- ☐ **Set defaults so people do not have to think**
Default values by folder or library mean metadata gets captured without anyone consciously adding it.
- ☐ **Tell people version history exists**
A surprising number of businesses still keep duplicate copies simply because nobody realised every saved version is retained and restorable in two clicks.
- ☐ **Give the term list an owner**
If client or site names are shared across the business, one person should be responsible for adding to that list. Otherwise it fragments quietly.
- ☐ **Review the columns after a month**
Any column still empty on most files is either unnecessary or badly named. Remove it or fix it rather than leaving it.
- ☐ **Build the views people asked for**
“Awaiting approval”, “My open jobs”, “This month”. Metadata is only visible value once it powers a view somebody uses daily.
- ☐ **Let metadata drive retention and reporting**
Once type and date are captured consistently, you can retain, archive and report on documents by rule rather than by hand.

FOLDERS ARE NOT BANNED

Keep folders where a genuine boundary exists – one per client or per job, particularly if access differs. What to avoid is folders **inside** those describing year, status or document type. If you find yourself creating the same sub-folders repeatedly, those are metadata, not folders. The repetition is the clue.

SECTION THREE

Lists: The Underused One

If you take one idea from this guide, take this. Most businesses run several things on shared spreadsheets that would work far better as a List.

A List is a table that lives properly online: several people can edit at once without conflicts, each entry has a history, fields can be required, and you can build views, reminders and approvals on top. It is the difference between a spreadsheet emailed around and a small system.

If you currently have...A List does this better because... An asset or equipment spreadsheetEach item has a history, an assigned owner, and nobody overwrites anybody. A holiday or absence trackerPeople submit their own; approval and notification can be automatic. A job, order or enquiry logStatus views replace filtering by hand, and two people can update it simultaneously. A risk, issue or complaints registerRequired fields mean entries are complete, and every change is recorded — which matters in an audit. A contract or renewal listReminders before dates pass, instead of someone remembering to check. A starters and leavers trackerEach step ticked off, visible to everyone involved, with nothing lost in an inbox. An old Access databaseOften inherited, running on one PC, and understood by nobody. Many are simple enough to rebuild as a List — accessible anywhere, backed up, and with no single machine to worry about.

HOW TO START

Take your most-argued-over spreadsheet and rebuild it as a List. It takes under an hour, needs no developer, and is usually the moment people understand what SharePoint is for.

SECTION FOUR

Adding Process To It

Once information is structured, you can put process around it. This is where a document store becomes something that runs part of the business.

REALISTIC ADDITIONS, IN ORDER OF EFFORT

- ☐ **A form instead of an email request**
Microsoft Forms feeding a List. Requests arrive complete and in one place, rather than as twelve differently-worded emails.
- ☐ **Notifications when something changes**
“Tell the team when a job moves to Ready”. A Power Automate flow, built in minutes, that removes a whole category of chasing.
- ☐ **Approvals that leave a record**
Submitted, routed, approved, recorded – with a date and a name attached. Far easier to audit than an inbox.
- ☐ **Reminders before dates pass**
Renewals, reviews, certifications, insurance. The system remembers so nobody has to.
- ☐ **Documents generated from data**
A List entry populating a Word template – useful for quotes, certificates and standard letters.
- ☐ **A Power BI view over the List**
Once the data is structured and consistent, reporting on it is straightforward rather than a monthly export.

THE ORDER MATTERS

Structure first, then process. Automating on top of a muddled library preserves the muddle in code – the same reason we say to simplify a process before automating it.

SECTION FIVE

Intranets & Custom Capability

Everything so far uses SharePoint as it comes. Sometimes that is not quite enough – and there is a well-trodden path between “standard” and “bespoke software” that most businesses never hear about.

The most common example is an intranet. Out of the box you can build a perfectly good communication site: news, policies, a staff handbook, links to the systems people use. For many businesses that is the right answer and it costs nothing but an afternoon.

Where more is warranted, SharePoint can be extended rather than replaced – a properly branded intranet, custom pages, or purpose-built components sitting alongside the standard ones. This is done with the SharePoint Framework and React, and the important point is that it stays **inside** the Microsoft environment you already own: same security, same permissions, same login, same governance.

THE THREE LEVELS, IN ORDER

Standard, configured well

A communication site with news, policies, a handbook and quick links, using built-in web parts and your logo and colours. No development, no ongoing cost. Always try this first – it is enough more often than people expect.

Extended with the Power Platform

Forms, Lists, approvals and dashboards embedded into the site, so the intranet does things rather than only telling people things. Still configuration rather than code, and still no ongoing development cost.

Custom components, where they earn their place

A fully branded intranet home, a client or supplier portal, a dashboard pulling several systems together, or an interface the standard web parts cannot express. Built in React on the SharePoint Framework – an extension of the Microsoft ecosystem, not a separate application to maintain.

SECTION FIVE

When Custom Is Justified

Custom work should unlock something specific rather than simply look more impressive. These are the cases where it genuinely earns its place.

☐ The experience matters to adoption

A staff-facing intranet people are meant to use daily. If it looks like an untouched template, they will not.

☐ People outside the business will see it

A client or supplier portal carries your brand. Standard SharePoint chrome is not always appropriate.

☐ The standard web parts cannot express it

A specific dashboard, a particular interaction, information pulled from several systems into one view.

☐ It replaces something worse

A custom component that retires a spreadsheet, an inbox process or a paid third-party tool usually pays for itself.

THINGS WE ARE TYPICALLY ASKED FOR

WhatWhy standard parts fall short Branded intranet homeCompany identity, a proper landing page, and navigation shaped around how staff actually work rather than the default template. Client or supplier portalExternal users seeing only their own documents and updates, without giving them the run of your SharePoint. Operational dashboardOne view drawing on a List, a line-of-business system and a report, rather than three places to check. A specific interfaceA booking screen, an inspection form, a job board – where the interaction matters and standard web parts cannot express it.

AND WHEN IT IS NOT

If the honest answer is that a well-configured standard site would do, that is what we will recommend – it is cheaper, quicker and easier to live with. Custom work should unlock something specific, not simply look more impressive. The tool depends on the problem.

SECTION SIX

What Goes Wrong

Eight things we see repeatedly. Most are easy to avoid and awkward to undo.

- ☐ **The old file server, copied across unchanged**
The most common one. A migration is the single easiest moment to fix a structure that grew for a decade — copying it preserves the problem permanently.
- ☐ **A Team for every conversation**
Sprawl. Fifty Teams with three files each, and nobody can remember which one anything is in. Use channels.
- ☐ **Folders fifteen levels deep**
Usually inherited. Long paths cause sync errors, and nobody navigates that far — they just re-create the file.
- ☐ **Columns nobody fills in**
Too many, all optional. Keep them few, make the key ones required, and use dropdowns rather than free text.
- ☐ **Permissions granted file by file**
Convenient once, unmanageable at fifty. Always by group, at site or library level.
- ☐ **Business files still in personal OneDrive**
It works until that person leaves. Then the tender, the contract or the pricing sheet leaves with them.
- ☐ **Everything synced to every laptop**
Slow machines and sync conflicts. Sync only what people genuinely need offline.
- ☐ **Rolled out with no explanation**
Thirty minutes showing co-authoring, views and version history changes adoption more than any amount of configuration.

SECTION SEVEN

Where To Start

You do not need a project. Four steps, in this order, will move most businesses a long way.

01

Get shared files out of personal OneDrive

Start here regardless. It is the change with the clearest risk attached, and it needs no design decisions.

02

Agree four or five sites and who owns them

An hour's conversation. Match the real shape of the business, not the org chart.

03

Convert one spreadsheet into a List

The most-argued-over one. This is the step that changes how people think about the platform.

04

Show everyone three things, once

Sharing links instead of attachments, editing together, and version history. Thirty minutes, and it is where adoption is won or lost.

For a business of twenty to fifty people, steps one and two are typically a day between them, step three an hour, and step four a single half-hour session. None of it requires a project, a budget approval or a supplier — which is the main reason it is worth doing before considering anything larger.

WHAT GOOD LOOKS LIKE A MONTH LATER

People find documents without asking, nobody emails attachments internally, at least one spreadsheet has been retired, and the phrase “is this the latest version?” has stopped being a daily question.

NEXT STEPS

Start with one spreadsheet.

Rebuilding a single well-argued-over spreadsheet as a List is the fastest way to see whether any of this is worth your time. It costs an hour and nothing else.

If you would like help with the structure, or with turning something manual into a proper process, we are happy to talk it through. No commitment, and no obligation to have us build anything.

And if the honest answer is that you need to tidy up rather than build anything, we will say so.

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