

SharePoint document management setup checklist

Article: *How to set up document management in SharePoint*

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1. Create a dedicated SharePoint site for document management

A dedicated SharePoint site should be created for managed business documents rather than using a general team site. This is usually set up by IT or SharePoint administrators. Without a dedicated site, documents become scattered across multiple locations, making governance and control difficult.

2. Design structured document libraries

Document libraries should be organised around business functions, departments, or document types. This structure is normally defined jointly by IT and business owners. Poorly structured libraries make it harder for staff to locate information and encourage the creation of unofficial storage areas.

3. Establish clear folder and metadata standards

Decide when to use folders and when to apply metadata, and document these standards. SharePoint governance teams usually own this. Without agreed standards, libraries quickly become inconsistent and difficult to manage at scale.

4. Configure meaningful metadata columns

Metadata such as document type, owner, status, and review date should be created and enforced. These fields are typically defined by governance or compliance teams. Without proper metadata, filtering, reporting, and lifecycle management become unreliable.

5. Implement document templates

Standard templates should be created for common document types to ensure consistent structure and branding. These are usually developed by governance or communications teams. Without templates, documents vary widely in quality and completeness.

6. Enable version control and history

Versioning must be enabled on all managed libraries so that every change is recorded and reversible. IT administrators configure this. Without version control, teams cannot easily recover from mistakes or demonstrate document evolution.

7. Configure role-based permissions

Access rights should be assigned based on job roles rather than individuals, wherever possible. IT and security teams usually manage this. Weak permission controls increase the risk of unauthorised editing, deletion, or disclosure.

8. Set up approval and publishing workflows

Approval workflows should be used to control when documents become official. These workflows are typically designed by governance teams and implemented by IT. Without formal workflows, documents may be published without proper review.

9. Optimise SharePoint search and indexing

Ensure that document libraries are properly indexed and searchable. SharePoint administrators usually manage this. Poor search configuration leads staff to rely on manual browsing or duplicate files.

10. Enable offline access and synchronisation where appropriate

Configure OneDrive synchronisation for users who need offline access. IT teams usually manage this. Without proper configuration, offline edits can lead to version conflicts and data loss.

11. Establish backup and recovery procedures

Regular backup and recovery processes should be documented and tested. This responsibility sits with IT operations. Without tested backups, critical documents may be permanently lost in system failures.

12. Define retention and disposal rules

Retention periods should be set in accordance with legal and business requirements. Compliance and records management teams usually define these. Without retention rules, organisations risk keeping data too long or deleting it too early.

13. Document governance roles and responsibilities

Clearly define who is responsible for managing libraries, metadata, permissions, and workflows. This is typically recorded in governance documentation. Without role clarity, issues are ignored or handled inconsistently.

14. Train users on document management practices

Staff should be trained on how to upload, classify, and manage documents correctly. This is often led by IT or learning teams. Without training, users bypass systems and undermine governance.

15. Review and improve the structure regularly

Document management structures should be reviewed periodically as the organisation evolves. Governance teams normally lead this. Without regular reviews, systems become outdated and misaligned with business needs.