



# SharePoint

## Review From A Customer



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## Review by a Real User

Verified by IT Central Station



Technical Writer at a tech company with 501-1,000 employees

**Monique Every**

### **WHAT IS OUR PRIMARY USE CASE?**

We use SharePoint as a document management solution. It has allowed us to centralise and more efficiently manage our templates, letterheads and other company-branded elements. Our Document Library is a central repository for our user manuals making it easy for consultants to access the right information for each implementation. We also use SharePoint to manage our policies and procedures.

### **HOW HAS IT HELPED MY ORGANIZATION?**

SharePoint has streamlined our documentation management process by allowing us to automate several functions. The version control function has been particularly useful, helping us keep detailed records of changes to documentation. This has removed the risk of human error and streamlined the process. The ability to review the notes for each version has and to easily revert to a previous version has proven useful. SharePoint has also helped us improve the accessibility of official company documentation across our different teams. In conjunction with SharePoint Designer, we've also been able to create a social hub on our SharePoint homepage where we can share news, photos, and company announcements.

### **WHAT IS MOST VALUABLE?**

SharePoint's document management and workflow features have proven to be the valuable. We have been able to implement a reliable, easily accessible document library with version control (previously managed manually) and an announcements workflow that allows us to communicate site specific news easily.

### **WHAT NEEDS IMPROVEMENT?**

I find the search feature in SharePoint foundation to be limited to the basic document properties. This is at odds to the type of customization that you can apply in the library. For example, we added a field to specify the department but found that the field had little or no bearing on the search results. We found it hard to determine how SharePoint uses the document properties in the search, and whether it uses anything beyond the document title. Once we had a better understanding of Foundation's limitations, we updated our properties accordingly, with a strong focus on the document title property as a search term. This involved an extensive rework of our existing documentation structure and naming conventions to better suit SharePoint. Despite these changes, we still can't seem to get our version of SharePoint to return meaningful results, even when searching an exact document title. I realize that this is a limitation of the version that we are using but I would like the Foundation search criteria to be more clearly defined so that document managers know what they are working with from the start.



### **FOR HOW LONG HAVE I USED THE SOLUTION?**

One to three years.

### **WHAT DO I THINK ABOUT THE STABILITY OF THE SOLUTION?**

We have had no stability issues that I am aware of.

### **WHAT DO I THINK ABOUT THE SCALABILITY OF THE SOLUTION?**

So far, we have not had any issues with scalability. We are investigating upgrading to the Enterprise edition in the future, so this may change.

### **HOW ARE CUSTOMER SERVICE AND TECHNICAL SUPPORT?**

Our technical support is all in-house, so I can't really supply a meaningful response. I have found a wealth of support information (on SharePoint blogs and forums) which has helped me troubleshoot a variety of issues.

### **WHICH SOLUTION DID I USE PREVIOUSLY AND WHY DID I SWITCH?**

As already mentioned, our previous documentation solution was manual, using a folder structure accessible through Windows Explorer. The switch to SharePoint was motivated by the desire to improve availability of our documentation and to streamline our document management processes.

### **HOW WAS THE INITIAL SETUP?**

Initially, I was only involved in the setup of the document management portion of our site. I found it very user-friendly and easy to configure. Since then, I have been involved in the setup and maintenance of a second site from scratch. Although certain aspects have been quite easy to configure, I experienced a lot of difficulty when working with user permissions and content types. The content types were difficult to configure initially. When I need to edit or update certain properties, I could not determine where, or how, to change them. We eventually decided to remove them from our implementation.

### **WHAT'S MY EXPERIENCE WITH PRICING, SETUP COST, AND LICENSING?**

I'm not able to offer an informed opinion about pricing, but if you are looking for a robust document management system, the Enterprise edition might be the better choice. The metadata features promise to improve the document search function. The built-in document management workflows seem very promising. These are the features motivating our desire to upgrade.

### **WHICH OTHER SOLUTIONS DID I EVALUATE?**

We considered replacing our SharePoint system with Atlassian Confluence. Although it does offer basic document management, it is not robust enough to meet our document management needs. SharePoint has built in document management functionality, while Confluence relies on macros and third-party apps. We felt that the risk of relying on potentially unsupported apps outweighed any other benefits. We still use Confluence as a collaborative work space and will be using the Confluence wikis as our knowledge base solution.



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### **WHAT OTHER ADVICE DO I HAVE?**

Our implementation could have been improved by a more detailed implementation plan that mapped out the exact use of each area and how to use it. With this in mind, I would recommend that anyone who is considering SharePoint plan their implementation thoroughly before beginning.

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