



Tips for SharePoint team Web sites

At J Costa Consulting, we have consultants and employees located in various countries. Because we work together on a lot of documents, we need a central location where we can store and edit these documents as well as keep track of our schedules. To work together as efficiently as possible, we use a team Web site created with SharePoint Services. Team sites work great if you have team members working in different locations, or even if your team is all in one office.

In this paper, I'm going to give you 7 tips we've learned in setting up and using our team Web site. These tips can help you get up and running productively as quickly as possible with your site.

Note: Windows SharePoint Services is a great, and underused, tool for managing teams and team projects. You can use it to create a team Web site to track objectives and projects, as well as have a central location for storing and collaborating on documents.



Example of a team Web site created with Windows SharePoint Services.

1. Create folder names that are clear and consistent

Organize site folders by whatever makes the most sense for your team. The key is to be clear and, above all, consistent. For example you could choose to organize:

- By department
- By objective
- Alphabetically
- By clients
- By project

We also create a new Document Library folder in SharePoint for each project. We can store all of our files related to a project in a Document Library. This not only helps keep our files organized, but makes it easier if a project is reassigned for the new owner to take ownership of all the associated materials. Learn how to [add a new Document Library folder](#).

2. Develop standards for naming files

Decide as a team how you want to name your files. For example, you can insist that a date be attached to each file, or that the person who created the file put their initials in the file name. Also, you can take advantage of the fact that you can use long file names for files and SharePoint folders. Be sure to publish your naming structure so that everyone on the team knows what it is. Above all, be consistent in reinforcing and using this naming convention. This is critical. We've found that if you don't, your team won't know how find files and therefore won't use the site effectively.

3. Keep only the latest versions of files

Develop an archive folder system for keeping previous versions of files for historical or version control needs. We keep only one current version in our "active" folders. This clears up any possible confusion over which version of a document should be used, particularly when your team members download files to their computer to work on while they're traveling or working out of their office.

If your team members do copy files onto their computers, you need to take extra precautions to ensure you only have the most current versions of their files on the team Web site. If team members keep versions of files on their computer, they should change the file name. That way, if they upload the file at a later date, they will not overwrite something on the team Web site that might have been edited in the meantime.

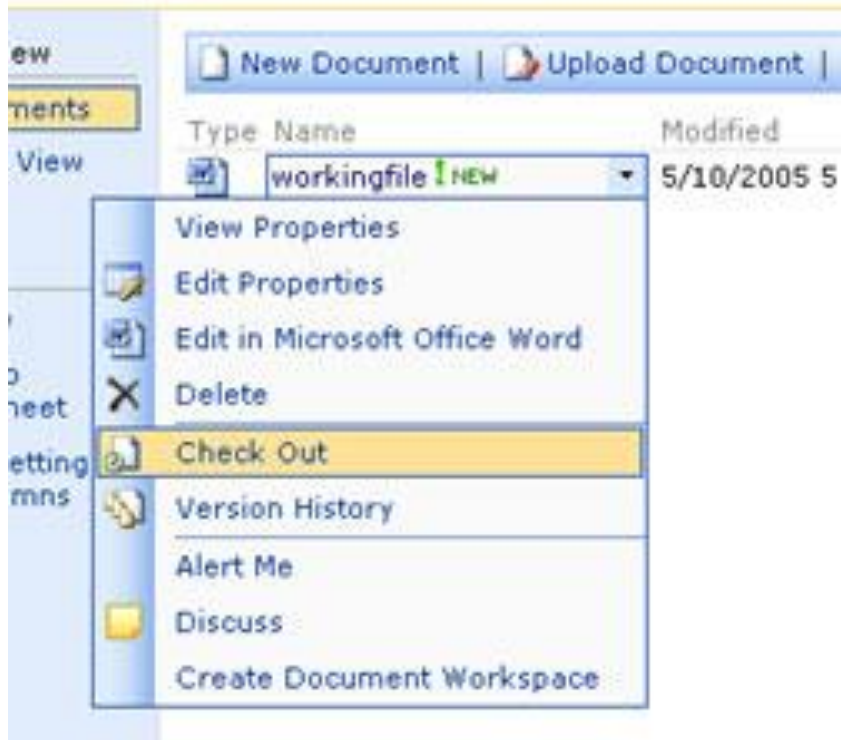
4. Give clear ownership of each section of the team Web site

Give each folder a single owner who can add files to it. We find that this ensures the integrity of naming and file structures within each section of the team Web site. Multiple people may edit documents in various folders, but we make sure no one else uploads new documents or creates new folders inside a folder owned by someone else.

5. Check out and check in files

You will probably have a number of files (like sales data) that are accessed and edited by several team members. While SharePoint won't allow multiple people to save an open file, it is possible for a person to open a file while someone else is editing it. Unless the file is checked out, you run the risk of more than one person working on the same file. One or more people may end up doing work that can't be properly saved. And if a user doesn't check the file back in, then others can't access it. Learn how to:

- [Check in and check out files.](#)
- [Open, edit, and save a file in SharePoint.](#)



Make sure you check out files on your team Web site before working on them.

6. Clearly describe folder contents

As people on the team change, they will need to know what they can expect to find in different Document Library folders. Because we include a clear description of each folder, the new team member knows what's in each folder and can find the documents they need to get up to speed a lot faster. This has been really useful to us when an account grows large enough that we add another consultant to the team. We also modify the descriptions when we complete a project. We designate the library as containing archive information rather than active information.



Clearly describe each folder in your Document Library.

To put in a detailed description of a Document Library:

1. Click on the Document Library you want to edit.
2. In the Document Library you want to edit, in the left navigation, click **Modify Settings and Columns**.
3. On the **Customize** page, in the General Settings section, click **Change General Settings**.
4. This takes you to the **Document Library Settings** page, In the Name and Description section, type in the description of the folder. Click **OK**.

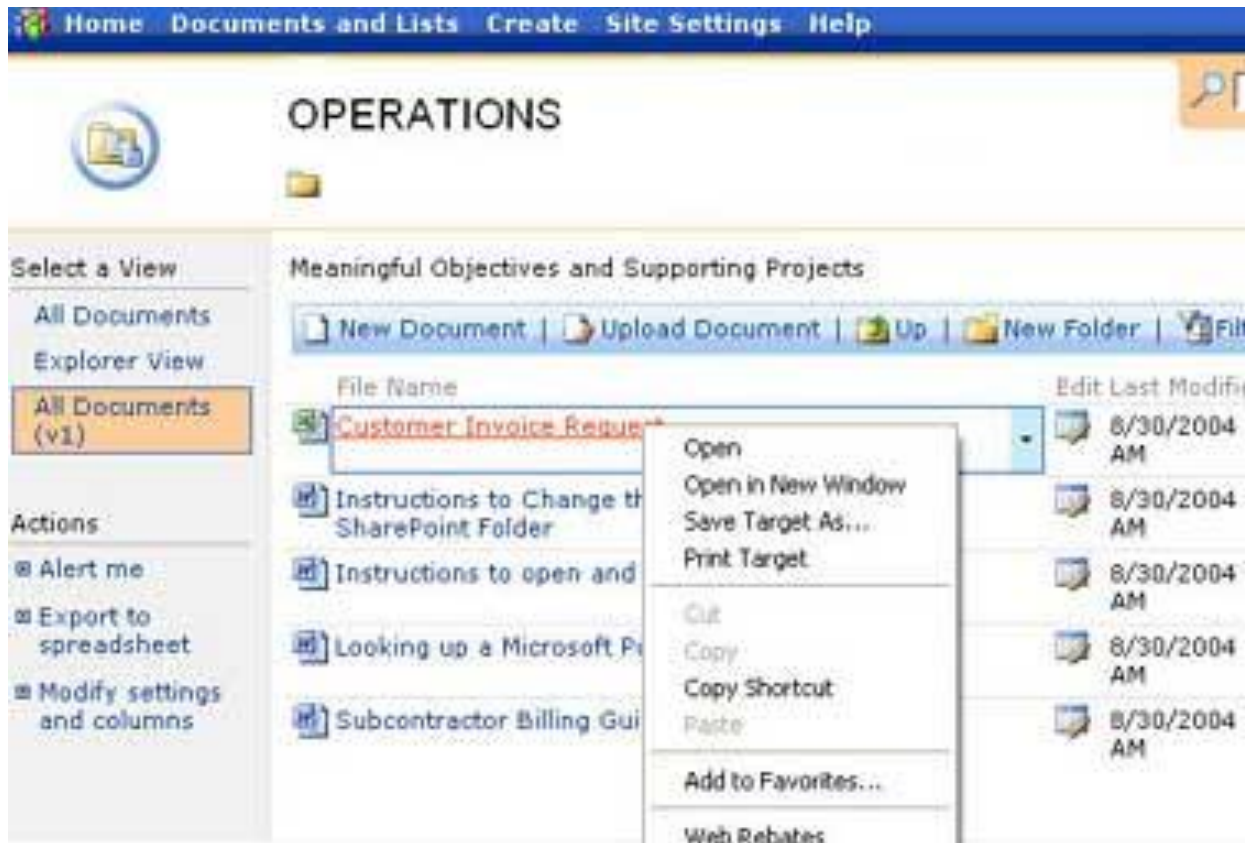
7. Link to files in SharePoint folders

When you're working on a project, it's easy to just insert a file from the team Web site into an e-mail. By sending out different versions of the same file, however, you could end up with multiple versions of the same document. It's far more reliable to just insert a link to the document in your e-mail. You can also put links to SharePoint documents into a task in Microsoft Office Outlook, or into an appointment on your calendar.

If you store multiple copies of a file on your team Web site, it's also easy for one copy of the file to get modified and leave the others out of date. Instead, we make sure we only have one version of a document and link to it from other places when necessary.

To put a link to file on your team Web site into any Microsoft Office document:

1. Locate the document you want to create a link for. Put your cursor over the document name until the file name turns red.
2. Right-click on the red file name and in the drop-down menu and click **Copy Shortcut**.
3. With your mouse cursor in the body of your task, appointment, contact, documents folder, or in another file, right-click and click **Paste**. This will paste the link. When you click on the link, it will open the actual document.



Put links to documents on your team Web site rather than putting different versions in multiple locations.

To put a link to file on your team Web site into another part of the Web site:

1. Locate the document you want to create a link for. Put your cursor over the document name until the file name turns red.
2. Right-click on the red file name and in the drop-down menu and click **Copy Shortcut**.
3. Navigate to the folder you want to include the link in. Click **New Document**. SharePoint will open a new document called "template.htm" in Microsoft Word.
4. Paste the shortcut into the new document. Select all of the text and right click on it.
5. Click **Hyperlink...** and type in the text you want in the **Text to display** box (for example, "Click here to see the final version of this presentation.") Click **OK**.
6. Save the file. When anyone opens this file, clicking the link will take them to the current version of the referenced file.

I hope sharing some of the lessons will help you get a head start on your own team Web site.

J Costa Consulting is available to discuss your collaboration solution strategy and provide you with the services required to implement and maintain your system. Contact us at (305) 926-2732