SharePoint Best Practices

SharePoint allows you to store all of your content online, so you can access, manage and share it from anywhere. The following best practices aim to help you make the most of this tool.

Folders

1. Identify folders by subject or project, not by person (ex: Bob's Files).

2. Do not create folders more than five levels deep. Burying records makes them harder to find.

3. Use standard departmental or group abbreviations, such as SOM for School of Medicine or LITS for Library and Information Technology. Otherwise avoid acronyms. Consider appending "Public" to the names of broadly-shared folders as a reminder to users that contents will be accessible to others.

4. Share folders at the highest level to ensure collaborates have full context. For example, don't share only the "Fiscal Year 2016" folder underneath the "[Department Name] Budget." However, do recall that SharePoint employs cascading access: a user granted access to a folder has access to all records and other folders contained within it.

5. Look for opportunities to combine folders. Instead of creating a separate folder for all projects, create a top-level Projects YYYY folder and nest each project-specific folder underneath.

6. Designate two administrations within your department to create and manage a department folder with all working unit folders underneath. This may include management folder for department managers collaborative work and project folders for all department projects. Administrators are responsible for monitoring new folder creation and instructing creators when folder placement or naming is not in line with department guidelines.

7. Create sub-folders based on the criteria you will use to track and apply retention to the information. That may be by academic or fiscal year, contract close out date, or partner departments.

Retention and Archival Practices

1. Consider the university's retention schedule when creating folders. Use the records series established on the schedule as guides to group like records. This will simplify records destruction.

2. To avoid clutter, at close out of a project, committee work group, or initiative, the owner/leader should communicate to the group that they will un-share the folder.

The leader is responsible for managing the content according to the University's retention schedule.

3. Create an "Archive" and "Destroy" folder for finished products. Move records that need to be maintained permanently into the "Archive" folder. Move non-permanent records into the "Destroy" folder. Within the "Destroy" folder, sort projects by their eligible destruction date.

4. Individuals no longer employed by the department or University should be removed from all SharePoint accounts as part of regular clean up procedures.

5. Folders owned by a departing employee should be transferred prior to separation to ensure on-going maintenance. This includes employees changing positions or departments within Emory.

File naming

A file name is the principal identifier for a record. Especially when dealing with electronic records, a unified naming system helps place records in context. Records that are named using a consistent, logical system can be more easily located and shared among users. It is recommended to create department or office-wide file-naming procedure or carry existing paper procedures into your electronic content.

1. Keep file names simple and short, but meaningful. As a rule, file names shouldn't be longer than 25 characters.

2. File names should outlast the records creator. File names must make sense to staff members once the file creator is no longer available, so avoid abbreviations or acronyms that aren't universally understood.

3. Use only alphanumeric characters (a-z and 0-9), avoiding special characters (\/:*?""<>|[]&$,).

4. Use leading zeros with sequential numbers to ensure that the files sort in order.

5. For dates, use four digit years, two digit months and two digit days. For best results when sorting, always lead with the year, rather than month or day.

Metadata

Metadata is data describing the context, content, and structure of records and their management through time. Effective metadata relies on a structured format and controlled vocabulary that is commonly understood among its creators and users. Because digital records can only be accessed using hardware and software, the role of metadata in electronic records is vital. Consider the metadata automatically captured by Box when creating and searching for documents.

1. Do not include version numbers in the file name (ex: PolicyUpdates_ver4.docx). Box will track versions for you under Properties > Version History.

   - Note: To use version control, under the original document, select Upload New Version. Do not upload new versions as separate documents.

2. Do not include author identification in versions (ex: PolicyUpdates_av.docx). Box will track authors for you under Properties > Version History.

3. For an added layer of information, you can create and add tags to your documents and folders. Tags let you to mark and sort related documents that might not be saved in the same folder.