White Paper: Microsoft® SharePoint Design: Best Practices

Overview:
Microsoft SharePoint is a robust web-based software product used for collaboration, file sharing, and online information publishing. The following best practices and lists will help keep your SharePoint sites efficient and organized.

Designing SharePoint Infrastructure
Being a collaboration tool, all SharePoint sites contain a logical infrastructure layout that allows sites to be interrelated in order to share content. When attempting to design a SharePoint infrastructure layout, think of it as a hierarchical organization chart. Do not think of it in terms of web pages, but as a holistic site that is mapped or grouped by your actual business functions.
There are 6 main questions which may be asked to facilitate this grouping:

1. What are the major groups or departments within my business?
2. What would be the top level groupings (i.e. Sales, Marketing, Operations, Projects)?
3. How can these groups be broken into subgroups?
4. Do the subgroups need to be divided further?
5. Is there content that is sensitive and must contain a high level of data security that must be separated from the rest?
6. Can I consolidate any of these groups?

Keep in mind that it is easy to share files and documents within a group, but gets more difficult to pass the information across different groups. For this reason, consolidate as much as possible into the least number of groupings possible. This will limit the need to recreate Web Parts and content located on different sites.

**Top 10 Most Commonly Used Web Parts**

There are many standard Web Parts that come with SharePoint out of the box. Many users only utilize the Document Library Web Part; however there are many others that are helpful including:

1. **Announcements** – Static messages used to announce information.
2. **Links** – This is a standard list used to display hyperlinks that direct users to internal or external Web pages. This can also be used to link users to Shared Network Drive content outside of SharePoint.
3. **Content Web Part Editor** – This is a basic text editor that allows for the use of HTML code for content creation. This can be used to display text, images, hyperlinks, and tables, which provides flexibility that a standard text Web Part does not allow in terms of custom design.
4. **Image Web Part** – Used to insert an image on a page. A picture is worth a thousand words.
5. **Page View Web Part** – This Web Part is used as a window displaying another internal or external Web page. Instead of using a hyperlink to direct a user, this can be used to display the actual page itself from within a SharePoint site.
6. **Table of Contents** – This is a basic listing that can be consolidated to display an overview of site content.
7. **Contacts** – This is a basic list showing key points of contacts for a group or business.
8. **Calendar** – This Web Part displays a calendar which would include key events or milestones for a group or business. Can be displayed in a calendar or list view.
9. **KPI Web Part** – This Web Part is a graphical “dashboard” that displays Key Performance Indicators for a group, business, or project.

10. **Excel Web Part** – When enabled, this Web Part will show basic functionality of Excel including cells, graphs, and pivot tables. There is limited Excel functionality in SharePoint, but the available features can be helpful to display numeric or financial data.

**Permission Management**

Understanding how permissions work in SharePoint is essential. With the increased need for data security, sensitive files need to be kept secure and available only to intended users. Permissions can be set at the site level, the library level, and even the file level. Understanding your data is necessary to set the most effective permission levels.

There are five main questions that can help with setting permission levels:

1. How can I categorize my files by sensitivity?
2. Who are the users that need access to these files?
3. Who are the users that need to be prevented from seeing these files?
4. Who are the users that need to edit data versus simply viewing the data?
5. Can I organize my content in groups that contain sensitive document types?

Once similar groups of users are identified, it is best to create a User Group and add common users to that group. This makes managing permissions much easier across a site because a single group is more efficient to manage than individual users. For example, when an employee leaves the company, the user would simply need to be removed from a group versus being removed from every area that the user was once added to.
Eight Things About SharePoint That Many Users Do Not Know

- **Workflows** – Workflow triggers and resulting actions can be created and implemented within SharePoint. For example, use the Workflow feature for document routing and real-time approvals.
- **Excel Reporting** – SharePoint has the ability to display reports that are created in Excel.
- **Microsoft Access integration** – Access database functionality is available natively from within SharePoint.
- **Microsoft InfoPath Integration** – Data can be collected on online forms and stored within SharePoint, eliminating the need for manual data entry from hard copy forms.
- **SQL Reporting** – Data can be pulled from SQL Databases into SharePoint for easy access and automatic updating.
- **Dashboard and Scorecard Reporting** – Users can build an attractive and functional dashboard of key metrics for a company or business group to track and effectively manage processes from within SharePoint.
- **Meeting Workspaces** – Users can manage meetings, communicate agendas, keep notes, and store conversation topics in SharePoint and reference them at a later date.