



2021

SharePoint, Teams and Viva!

Creating a Modern Teams-First Employee Experience Intranet
Module 2: Document Libraries

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LISTEN



UNDERSTAND



KNOW



CONNECT



C5insight

Creating a Modern Intranet

Module 2: Document Libraries



WHY SHAREPOINT FOR DOCUMENTS?

Should We Really Get Rid of Our File Share?



TEAMS/SHAREPOINT ORGANIZATION

Understanding the Hierarchy



DOCUMENT MANAGEMENT TOOLKIT

Basics of Administering Document Management



INFORMATION ARCHITECTURE AND SCENARIOS

Answering the Question: What Goes Where



ADVANCED DOCUMENT MANAGEMENT

But Wait... There's More!



WHY SHAREPOINT FOR DOCUMENTS?

Should We Really Get Rid of Our File Share?

WHY THIS MODULE?

- Document Management hasn't changed much
- But it is central to SharePoint and your SharePoint planning
- And many companies are still not fully using it, or not using it well

WHY SHAREPOINT?

- Search and Findability
- Metadata and Views
- Versioning
- Co-Authoring
- Alerts, Approvals and Other Automation
- Document Templates

Search – 1:39

Metadata and Views – 1:34

Versioning – 0:48

Co-Authoring – 0:59

Alerts, Approvals, Automation – 2:01

Document Templates – 1:32

WHY SHAREPOINT?

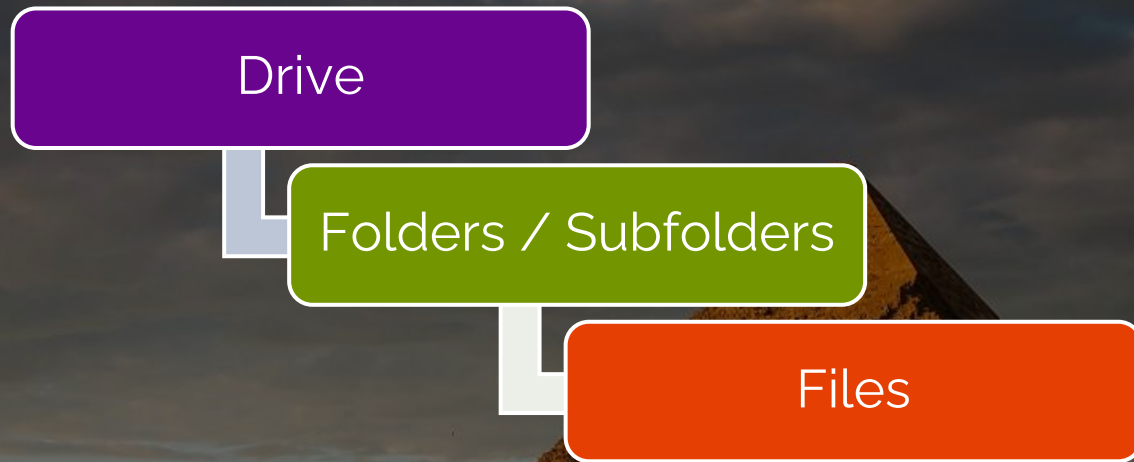
- Local Sync with Hard Drive Optimization
- Simplicity
- Less Duplicate Information
- Fewer Places to Go
- Access Files Anywhere, Any Device
- Security and Backups
- Compliance and Retention
- Flexibility
- Not Just Documents ... Content
- Huge Range of Advanced Capabilities



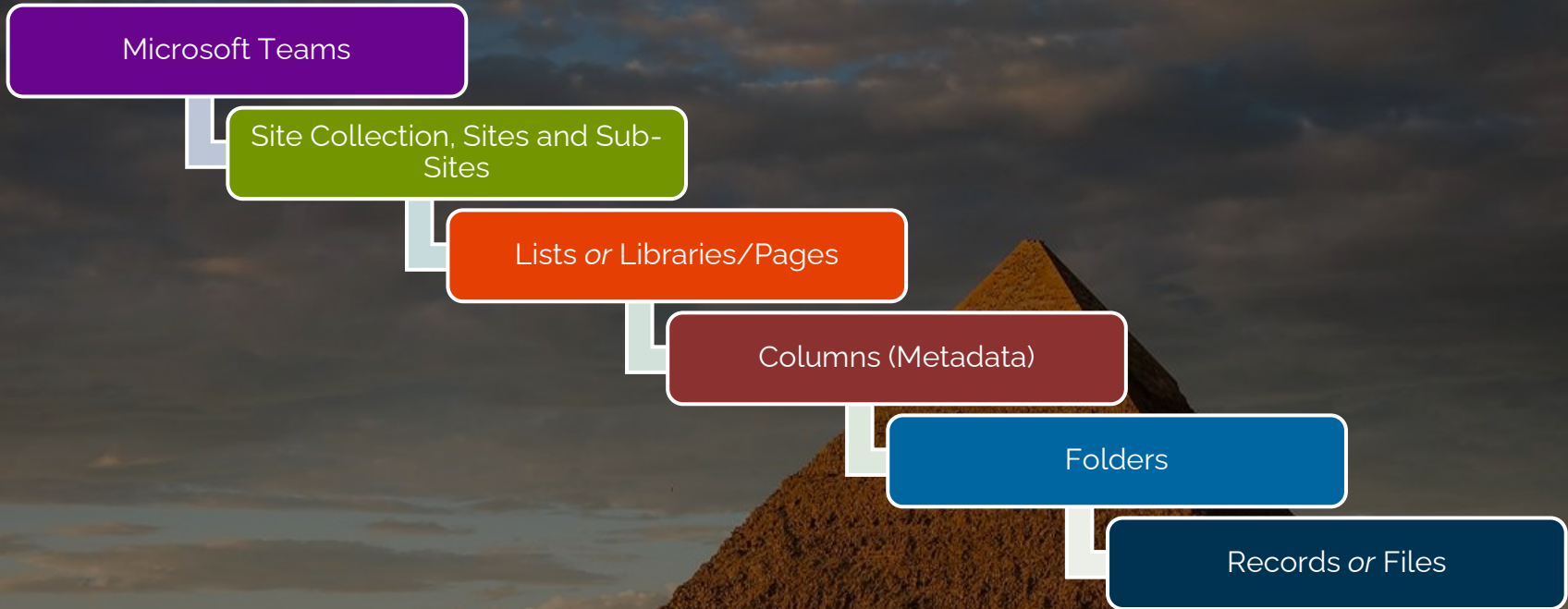
TEAMS/SHAREPOINT ORGANIZATION

Understanding the Hierarchy

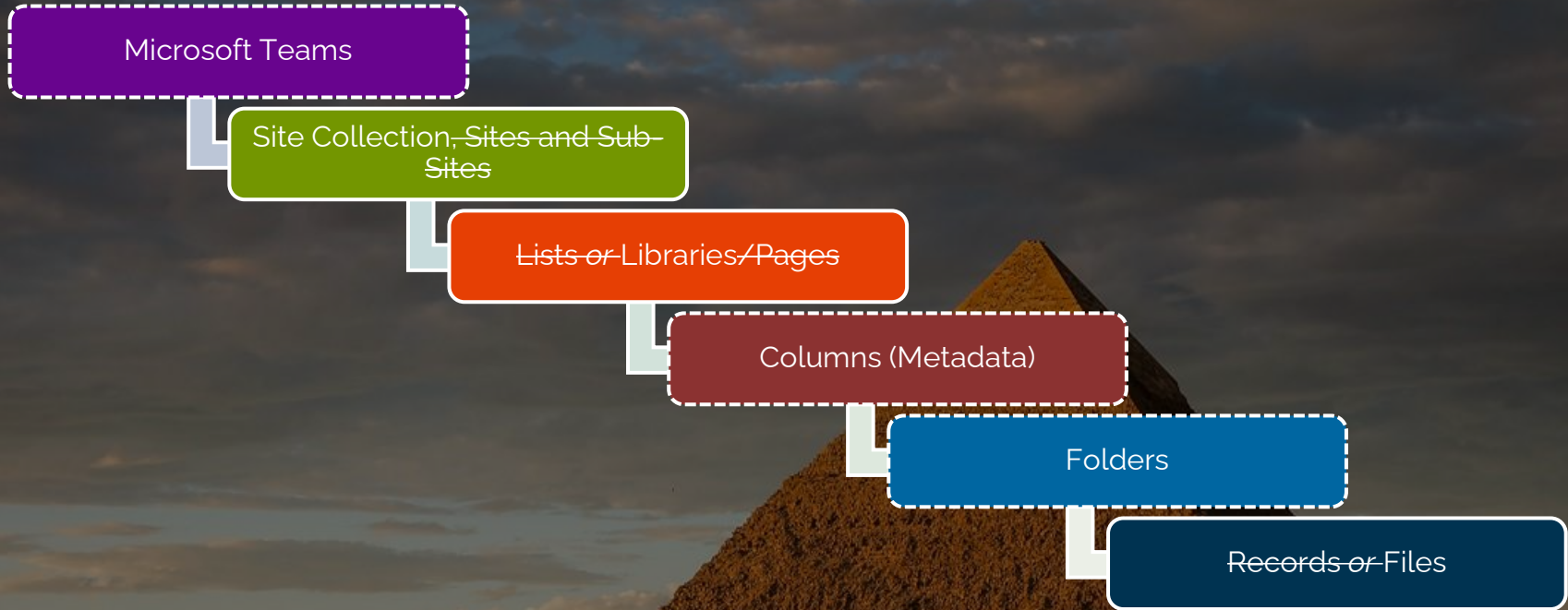
FILESHARE STRUCTURE



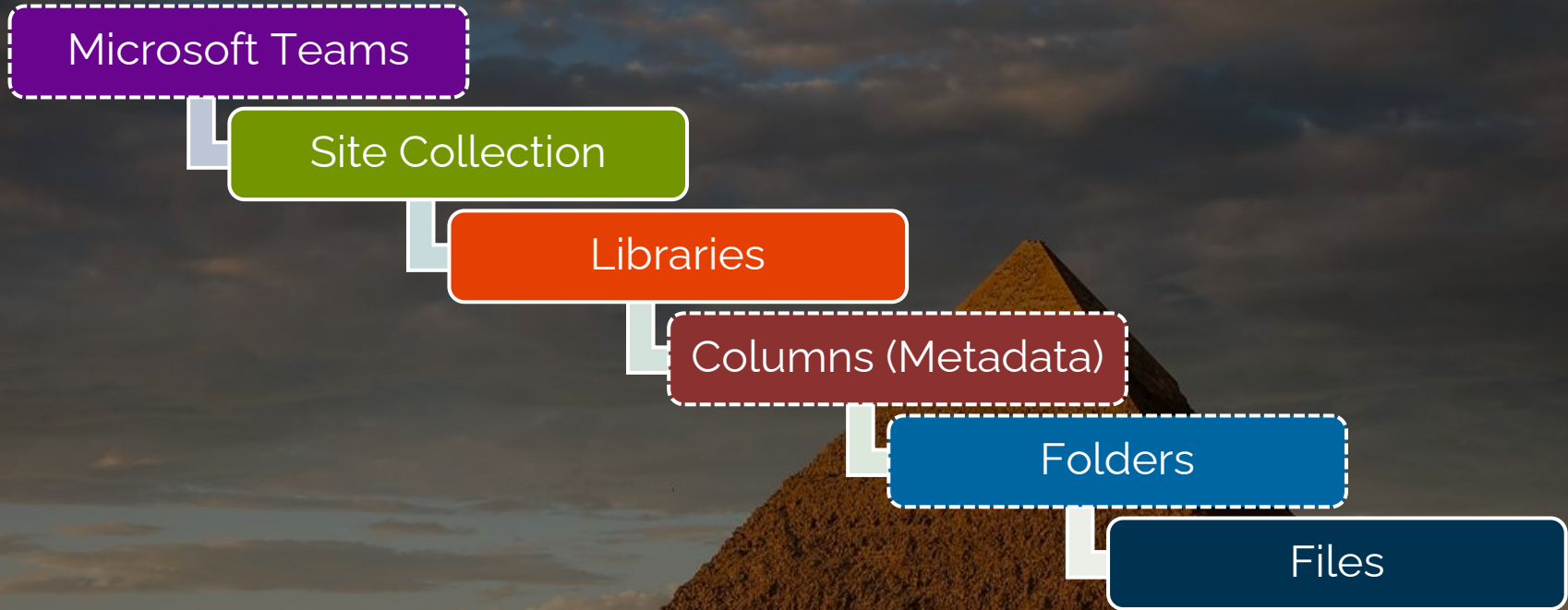
HOW IS SHAREPOINT ORGANIZED?



HOW IS SHAREPOINT ORGANIZED?



HOW IS SHAREPOINT ORGANIZED?





DOCUMENT MANAGEMENT TOOLKIT

Basics of Administering Document Management


TEAMS, CHANNELS AND FOLDERS

- Team = A SharePoint Site
- Channels in a Team = Folders in a SharePoint Library



Teams Channels and Folders – 1:15

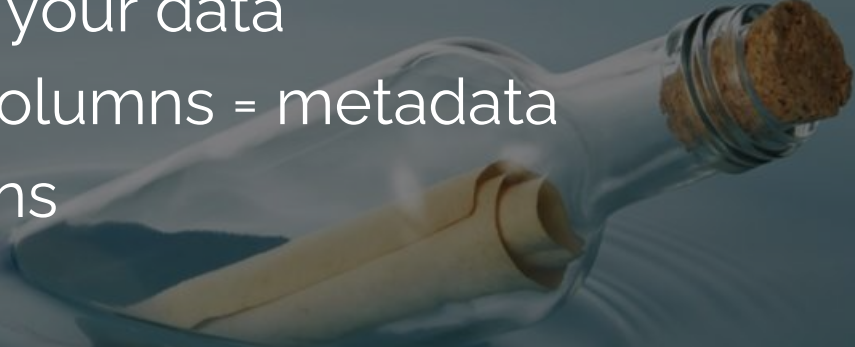
TEAMS, CHANNELS AND FOLDERS

- Worst Practices
 - Only a General Folder
 - Sub-Folders in the General Folder
 - Files in the Library Not in Folders (Channels)
 - Best Practices
 - Rename Channels NOT Folders
 - Keep Users in Teams as Much as Possible
 - Minimize the Use of Sub-Folders
- 
- A glass bottle with a cork and a rolled-up scroll inside, resting on a dark surface. The bottle is tilted, and the scroll is visible inside. The background is a dark, textured surface.

TEAMS, CHANNELS AND FOLDERS

- Reminders
 - Channels are for topical conversations and files
 - The General Channel has different administrative options than other channels
 - It's okay to have a "Misc" or "Other" channel
 - There are some things (particularly when it comes to administration) that can only be done in SharePoint (not Teams)

WORKING WITH METADATA

- What is Metadata
 - “Data about your data”
 - Additional columns = metadata
 - Adding columns
 - Column types
 - NOTE: New columns are applied to an entire document library (not just a folder)
- 

Creating Columns – 2:23

JUST ADD FILES!

- Sample files have been provided to you for this Team
- Using the folders you can drag/drop them into the appropriate SharePoint folder
- You'll need to download and unzip them in order for drag/drop to work
- Add metadata to the columns on your own (using Grid View will go faster)
- You can do this while I play the next video

Metadata Column Types – 2:08

CREATING VIEWS



- What is a View?
 - A way to filter, sort, group and select columns in a document library.
 - You can define multiple views for each document library.
- Types
- Grouping
- Formatting

Quick Create a View (Grouping) – 1:22

Create a View (Filter @Me) – 1:30

Editing a View (Folders) – 2:06

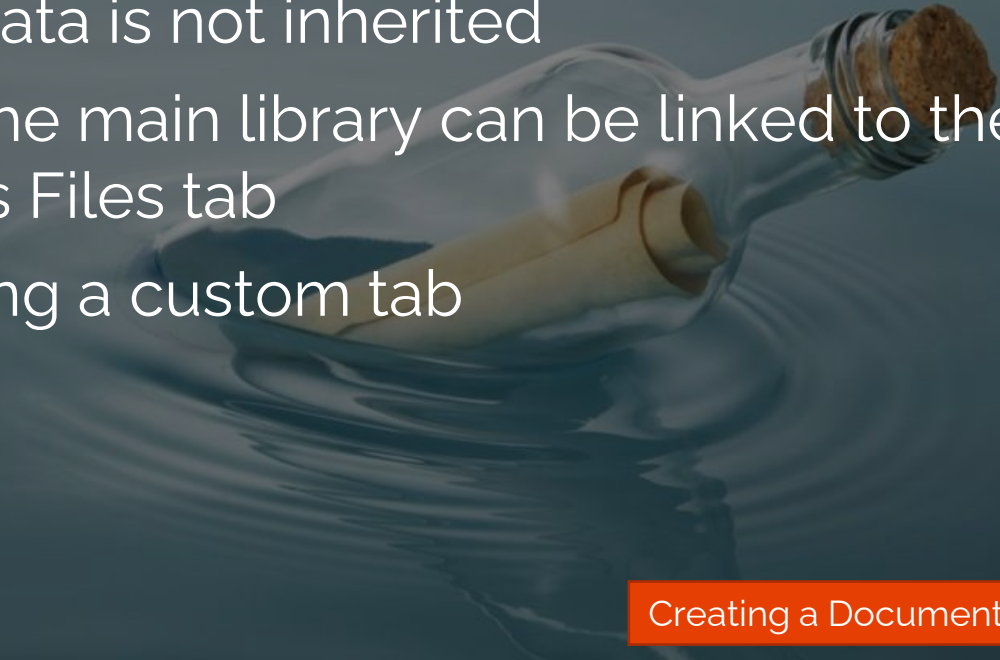
Formatting Views – 2:08

Other View Settings (Total, Filter Pane) – 1:28

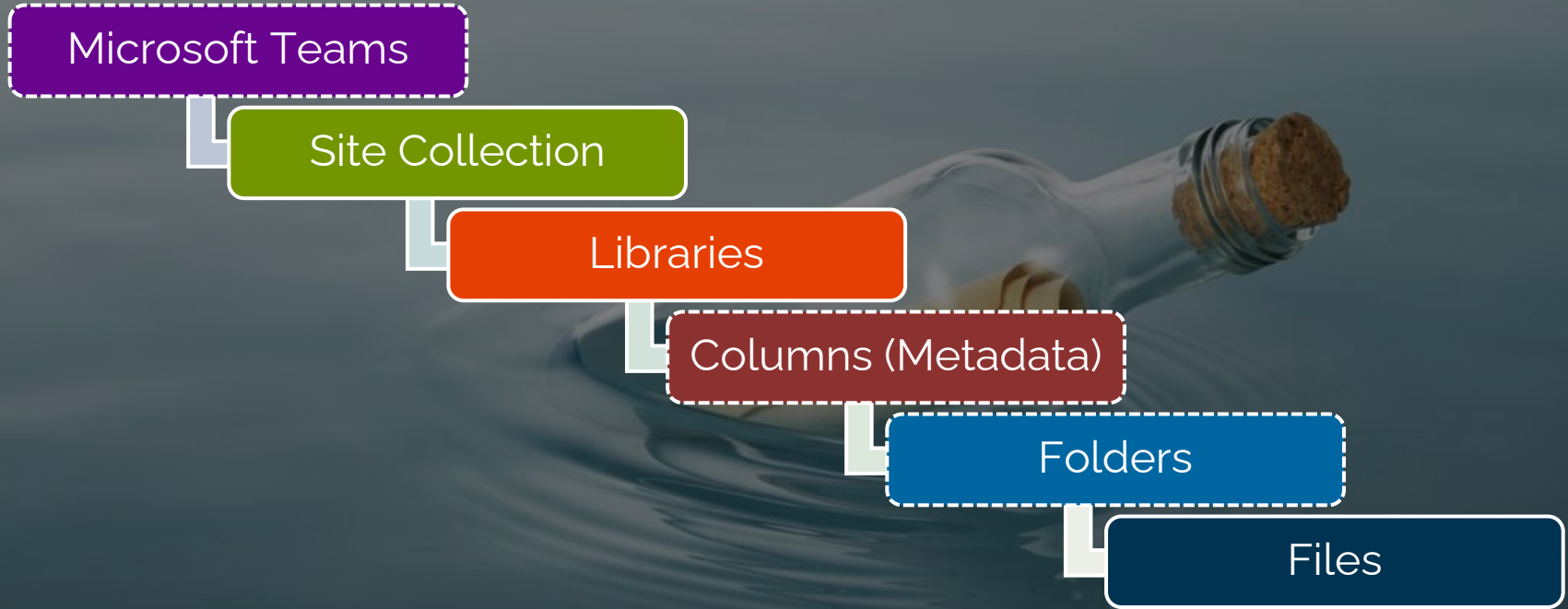
The View from Teams – 1:46

ADDING LIBRARIES

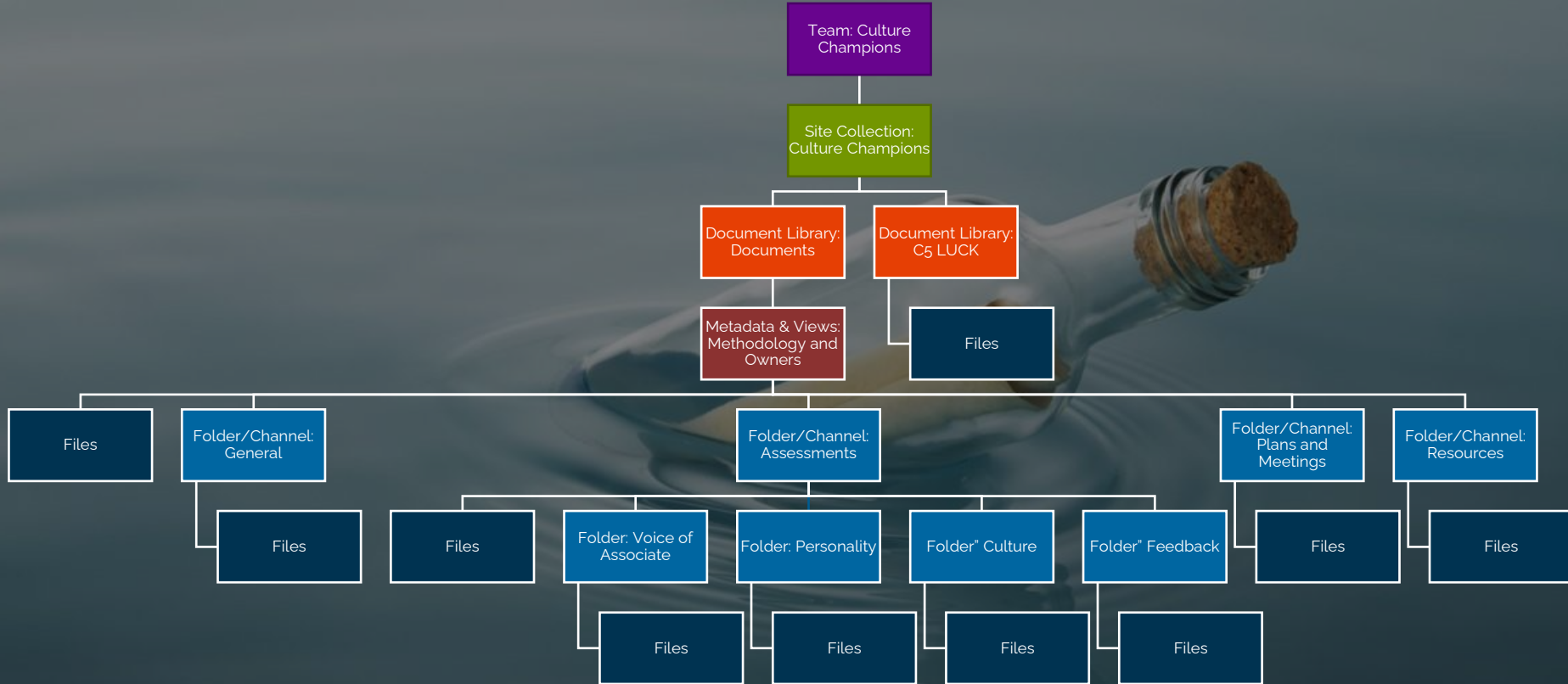
- Adding a library to a site
- Metadata is not inherited
- Only the main library can be linked to the Teams Files tab
- Creating a custom tab



HOW SHAREPOINT IS ORGANIZED



WHAT WE BUILT





INFORMATION ARCHITECTURE AND SCENARIOS

Answering the Question: What Goes Where

INFORMATION ARCHITECTURE

- Everything has a place
- Knowing where to put and categorize things
- Knowing where to find things

SCENARIO: CONTOSO EVENTS

- Attends many events – a few big ones annually and many smaller one-off events
- Speaks, Contributes, Sponsors, Learns, Networks

SCENARIO: CONTOSO EVENTS

Information Architecture Options Considered

1. Event SharePoint Site (not Team)
2. Team per Event
3. Event Team, Channel per Event
4. Event Team
 - Channel per Annual Event – Folders per Year
 - Channel for Other Events – Folders per Event

SCENARIO: CONTOSO SOPs

- Departmental Standard Operating Procedures in a Single Location
- Dozens of SOPs and Constantly Evolving
- 8 Departments
- Each Department as Unique SOP Categories
- Departments May Have Different SOP Security

SCENARIO: CONTOSO SOPs

Information Architecture Options Considered

1. SOP Team, Channels per Department
2. Department Teams, SOP Channel
3. SOP Site (no Team), Doc Library per Department
 - Cross-linked to Departmental Teams
 - Create an SOP channel with visibility to Site

NAVIGATION

Microsoft Teams

Site Collection

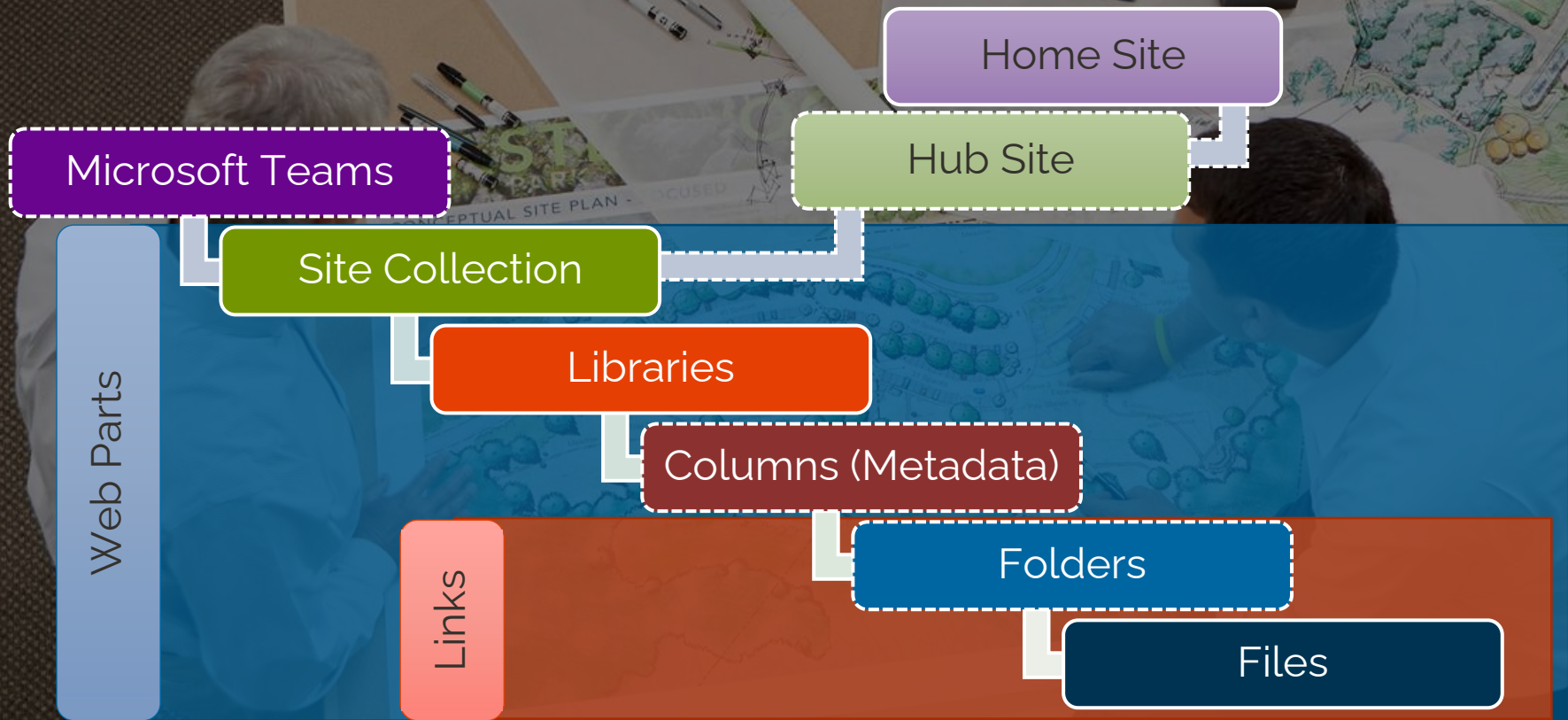
Libraries

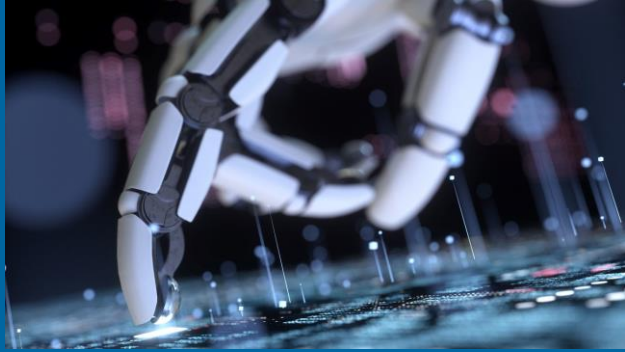
Columns (Metadata)

Folders

Files

SEARCH, DISCOVERY, FINDABILITY





ADVANCED DOCUMENT MANAGEMENT

But Wait ... There's More!

TEMPLATE LIBRARY

- Setting Up a Template Library
 - AKA Organizational Assets Library
 - Document Templates (in Office)
 - Images (in SharePoint)
 - All Organizational Assets Must be on One Site
- PRO-TIP: Requires Power Shell, Ask Your Admin
- Link to step-by-step directions at the end of this module

Organizational Assets – 4:29

OTHER ADVANCED CAPABILITIES

- Library Column (Standard Metadata)
- Site Column (Applies to All Libraries in a Site)
- Content Type (Different Columns Depending on Type)
- Managed Metadata (aka Taxonomy, Folksonomy, Tagging)
- Content Type Hub (Central Types Published to Sites)
- Document Sets (Similar to Folders, But With Metadata)

MODULE 2: HELPFUL LINKS

- [Renaming Channels will Rename Folders](#)
- [Limits and specifications for Microsoft Teams](#)
- [Create an organization assets library](#)
- [6 reasons why you need to embrace SharePoint Content Types](#)
- [Create and edit content types - SharePoint](#)
- [Add a content type to a list or library - SharePoint](#)
- [Add columns to a content type - SharePoint](#)
- [Document sets - the hidden gem of SharePoint](#)
- [Create, upload, and share files in a document library](#)
- [Document collaboration and co-authoring](#)



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REFRESH & RECHARGE