Collaboration Project Best Practices
Technical Recommendations

Web Browser

The Collaboration project is a web based solution; Internet Explorer is the Web Browser of choice for editing pages and working with Web Parts. When working with Web Part zones, the “Drag-and-Drop” feature only works with Internet Explorer.

Other browsers such as Mozilla Firefox, Google Chrome and Safari should work just fine. It’s recommended to always keep the browsers updated to the latest version.

Systems

The Collaboration sites can be accessed from anywhere if Internet access is available. No VPN access is needed. The sites can be accessed through any “Internet” ready system like PCs, desktops, laptops and mobile devices (i.e. tablets and cell phones).

For editing files, such as Microsoft Word documents or Excel spreadsheets, it’s recommended to use desktops and laptops; editing such files through a tablet may or may not be supported depending on the tablet’s capabilities. Editing files through a cell phone is not supported.
General Recommendations

Site Owner Back-Up

A site owner back-up is recommended, the back-up can be another staff person who can have ‘Full-Rights’ to the site.

A member can be appointed to assist with site content, make sure the appropriate access like ‘Contribute’ or ‘Edit’ is granted. Do not grant ‘Full-Rights’ to a member.

Word vs PDF?

It’s important to always maintain the integrity of your data and documents. If your documents are for “Reference Only” or for download purposes, we suggest converting your documents to a .pdf format, this way, you prevent users from updating your documents with erroneous information.

No more ‘attachments’!

Lead and entice your members to your Collaboration site. Do not send attachments anymore. Always include document links or item links in your communications with anything related to your Collaboration site.
Naming Convention (Naming files, pages, etc....)

When naming anything in SharePoint, it’s important to use short and concise names. SharePoint doesn’t like spaces and replaces them with %20. Please use an ampersand (-) to replace spaces when naming your files whether it’s a page, library, list or subsite. We suggest renaming your Microsoft files that way as well.

Examples:
Policy-Statement-2017.docx
TR-Alcohol-Use.pdf
DPAC-Meeting.xlsx

Pilot Groups

When a Collaboration site is intended for a large audience, it’s recommended to work with a small group of people such as a committee; this way you can gage what to expect when rolling out the site to the entire group.

Site Layout & Structure

The layout and structure of a Collaboration site plays a major role in how your members can easily access the data and content they’re looking for. Keep your site up to date with the latest content, and information. If you’re unsure of how to best set up the layout and structure of your collaboration site, it may be helpful to draft or sketch the layout of your site prior to building it. Seek assistance from the SharePoint administrator and he will provide the assistance needed.