



NEEA is a regional alliance of utilities and energy efficiency organizations dedicated to catalyzing a more energy-efficient Northwest for all consumers. We're excited to begin working with you.

This SharePoint Best Practices guidance document is here to help you collaborate with us via SharePoint, which is our go-to file management system for sharing files across and with teams.

Please refer to this information to help you navigate when and how to use SharePoint for working with teams at NEEA, especially if you're new to the platform. Your NEEA point of contact is also available to assist you and to get you started. Please reach out with questions.

Thank you!

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How to Create a New File in SharePoint

Creating a new file is easy to do within SharePoint. The most common Microsoft applications can be accessed directly from a SharePoint library. Whether you choose to create files directly within SharePoint or whether you prefer to upload existing files depends on your working style and preferences. See also [How to Upload an Existing File \(p.4\)](#).

The following information comes from Microsoft Support website (referenced within the footer):

“You can create a new file in a document library without having to leave the library to do so. Some of the most commonly available files include:

- *Word documents*
- *Excel workbooks*
- *PowerPoint presentations*
- *OneNote notebooks*
- *Forms for Excel*

The type of file that you can create depends on the template or templates that your site owner or administrator has associated with the library.”

Adding folders may show up as an option under the **+ Create or upload** button. In most cases, however, **it's better to create organization with metadata (or via a separate library) for future findability and scalability.**

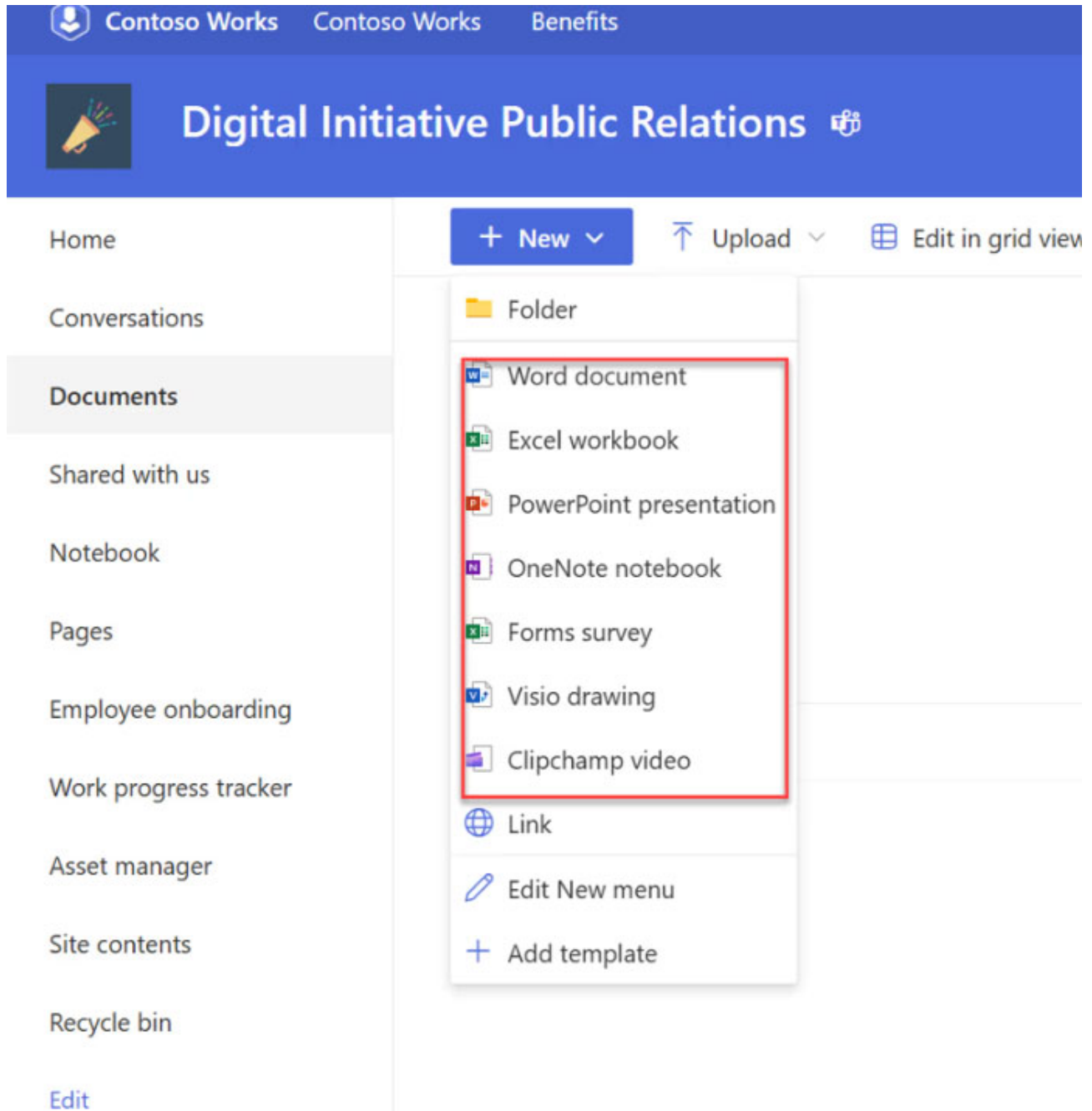
See also: [Advantages of Metadata and Limitation of Folders \(p.13\)](#).

Work with your NEEA point of contact and/or your program coordinator to learn about any team norms and preferences for working in SharePoint for your specific team/s at NEEA.

To create a new file in a document library, on the main document library menu near the top left-hand side, select **+ Create or upload** and then select the type of file you want to create.

The following screenshot comes from Microsoft Support website (referenced within the footer):

NOTE: Current interface looks slightly different.



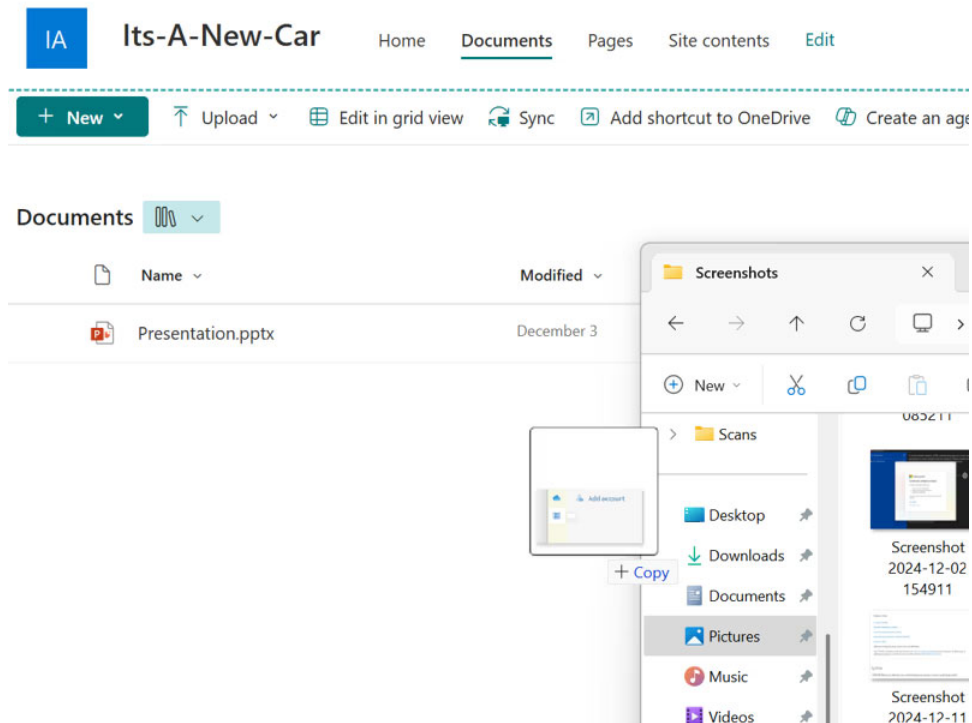
You can also click **"+ Create or upload"** and select the file from your OneDrive / file explorer.

How to Upload an Existing File

If you already have an existing document within your file share system on your computer, you can also share that existing document to SharePoint. It's easy to do!

The following information comes from Microsoft Support website (referenced within the footer):

*“From an open folder on your computer, select the file you want to upload and drag it into the document library. Release the file when **+ Copy** appears.”*



Be sure to name and tag the file with metadata according to your team's norms and naming best practices. If you're not sure, please ask your NEEA point of contact.

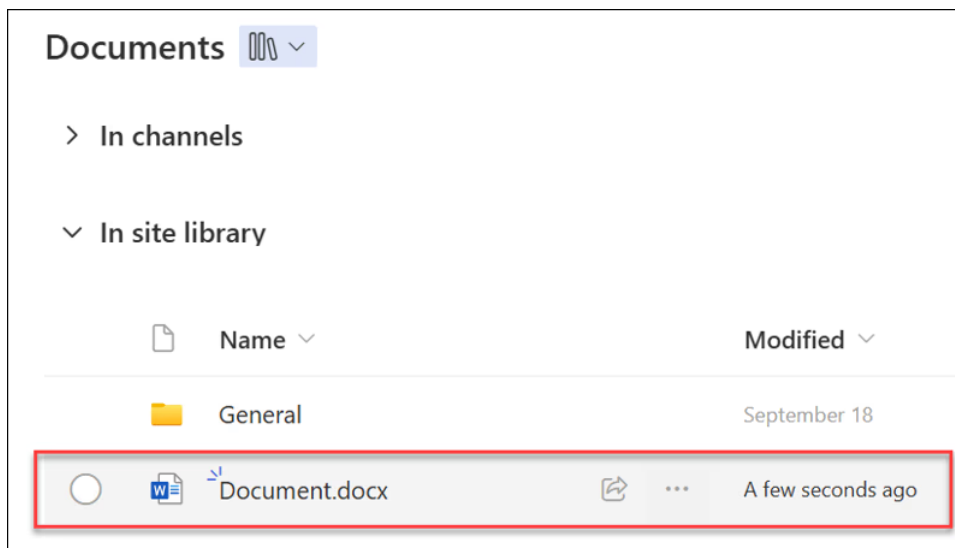
Renaming Your New File

If you've followed the steps above for [How to Create a New File in SharePoint](#), you will need to rename your file for findability later on.

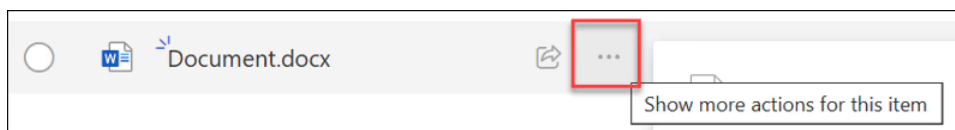
The following information and the example screenshots come from Microsoft Support website (referenced within the footer):

Follow these steps:

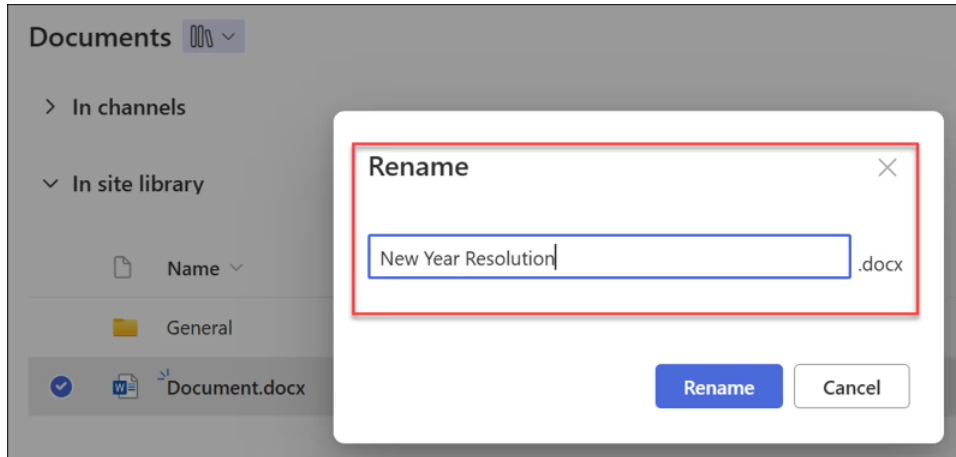
- A new blank file opens in a new tab. Add the text or other items that you want to your file.
- Your new file is automatically saved to the document library and will appear in the list of files. It has a generic file name. Switch back to your document library tab when done.



- If you don't see your files in the library, [refresh the browser](#).
- To rename your file, select the ellipsis [show more actions](#) next to the document, then select [Rename](#).



- Enter a name, then select **Rename**.



Additional steps may be required:

For example, **you may be asked to complete additional metadata**, or information about the file for better findability later on. Metadata includes information such as *Who authored a file?* or *What kind of work?* does the file represent. This information is critical to keeping information organized and searchable. Please reach out to your NEEA contact person and/or program coordinator with any questions. Thank you!

For more information on best practices for naming files see [Best Practices for Name Column \(p. 7\)](#).

Best Practices for Name Column

What is the Name Column?

- In SharePoint **lists**, "Name" is usually the **Title** column renamed.
- In SharePoint **document libraries**, "Name" is the **file name** (system-managed).
- The name column is often:
 - The **default link** users click
 - Used in **search results**
 - Referenced by **Power Automate, forms, and integrations**

Implication: Treat the name column as a primary identifier, not a catch-all field.

Key principle = Treat the file name as a stable identifier, NOT as metadata.

- On document libraries, "Name" is the file name (system managed) which can be renamed.
- Keep it short, clear, and human readable, most important identifiers first.
- Use metadata columns to capture items that truly aren't the name of the file
 - Examples: dates, version number, status (draft, final, etc.)
- Avoid acronyms that are not commonly used or understood by your teammates.
- The name column should be searchable and descriptive and can be supplemented with notes if needed.

Keep File Names Simple and Stable

Best practice

- Short, descriptive, and durable over time
- 3–8 meaningful words max

Good

- Budget Summary.xlsx
- XYZ Case Study.pdf
- Program Charter.docx

Avoid

- Long descriptive phrases
- Names that will change frequently (status, dates, people)

Why?

- Renaming files breaks shared links that people have copied and shared

Good example: Program Name XYZ Report

Example of what not to do: Report_Update_v3_Final_Approved_03-12-25_Jsmith

Avoid Special Characters and Versioning Text:

- Avoid: # % & ? / \ : *
- Avoid versioning words like:
 - Updated, Draft, Approved, Final
 - v1, v2, v3
 - Review dates
 - Owner initials
 - Updated

Why? Version history already exists in SharePoint.

Instead, use the following metadata to add more detail about the file:

- Version History (already built-in with SharePoint and replaces v1, v2, v3, etc.)
- Choice column: *Document Status (updated, draft, approved, final)*
- Date column: *Relevant Date*
- Person column: *Asset Owner*

For sorting reports in a meaningful way consider the following example:

Use a consistent date format in name:

- DD-MM-YYYY - XYZ Report

Share Links, Not Attachments

SharePoint is our go-to file management system for sharing files across and with teams.

When do I use SharePoint?

- If someone on your team needs to review a document or provide input on it, put it on SharePoint.
- By default, information on SharePoint is available to everyone at NEEA unless permissions are changed. Using SharePoint ensures that only the correct folks can access information.
- It's OK to put working files or drafts on SharePoint.

Do not send attachments! Instead, share links.

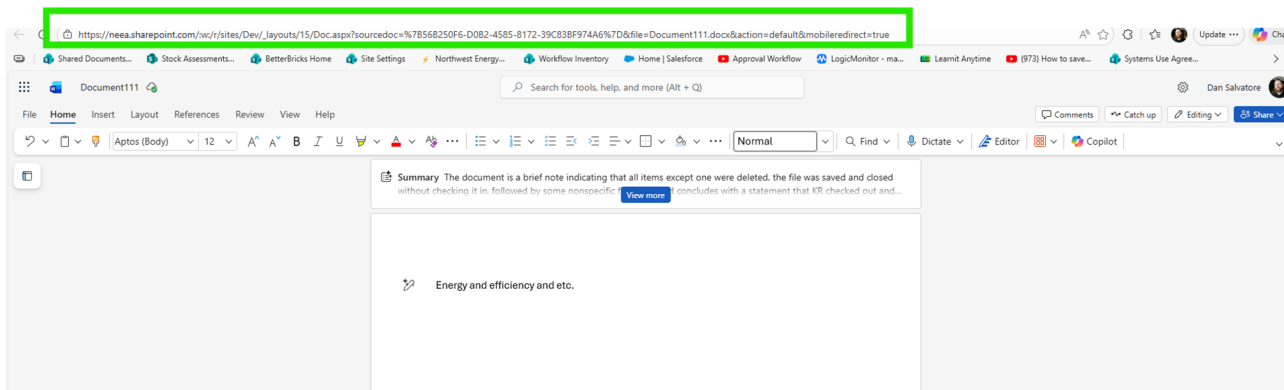
- Sharing links means that documents are **findable and searchable** within our document management system.
- Sharing links allows for **real time updates**, co-authoring in documents, and the ability to review with comments.
- Sharing links **limits version control issues** as versioning is already built in for SharePoint.
- Sharing links ensures that **only folks who should have access to information will be able to access it.**

What are some examples of exceptions?

- Sending final drafts to external audiences that do not have a collaborative role in the file or access to our SharePoint.
- Sharing is one-time, one-directional and their needs are view-only.

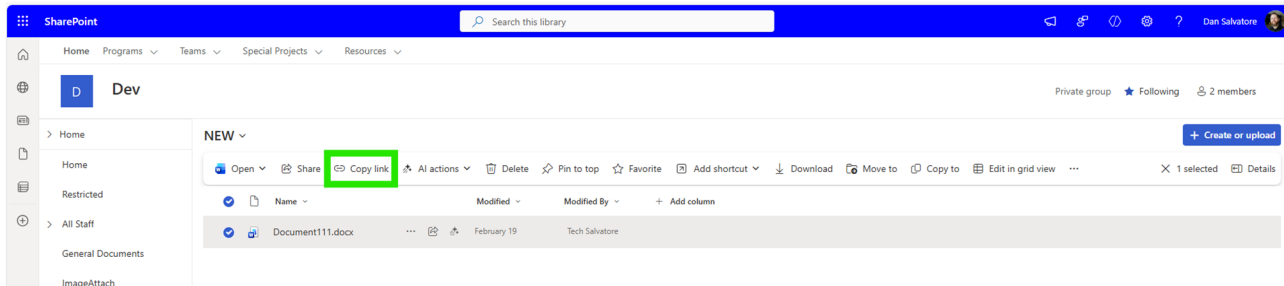
How to Share Files on SharePoint

If a file is open in the browser, copy the link from the address bar, then paste that in an email or Teams message.



Another way to share files is to select the file you want to share.

On the top menu, select **Copy link**.



Reference: This document was developed with assistance from Microsoft Copilot and edited, reviewed, and validated by NEEA staff.

Co-authoring: What is it? How does it work?

Co-Authoring is a feature in SharePoint Online that allows multiple users to edit and collaborate on documents in real time. Documents within a SharePoint Online document library are enabled with co-authoring by default. This means that when multiple users edit one document, whether it's on Word, Excel or PowerPoint, the changes made by each user will be reflected to everyone else who is using the document at that time **in real time**.

Best Practices When Co-Authoring in SharePoint

- Use comments.
- Communicate with your team members who are working in the same file as you.
- Turn track changes on via the Review tab.

Co-Authoring in Word

- Word documents are one of the most used files that coworkers use to co-author. When two or more users are editing a Word document at the same time, they can see who is currently working on the document as well as see the changes that are being made to the document as they are happening.
- **Icons of folks who also have the file open are visible in the top right.** You can hover over their name to expose an option to click to go to the location they are in the file.
- When using Word Online, the notification will appear at the top right-hand corner of the page near the 'Share' button when another author has made an edit at the same time.

Co-Authoring in Excel

- The co-authoring feature for Excel works for the desktop app as well as Excel Online. When edits are being made to an Excel spreadsheet, the cells that the changes are being made to are highlighted and the name of the user making the changes also appears next to the cell. You will see the co-author's changes reflected when they leave the cell.

Co-Authoring in PowerPoint

- Similarly to Word, PowerPoint also shows who is currently working on the document as well as displaying the changes that are being made to the document as they are happening.
- When using PowerPoint, the notification will appear at the top right-hand corner of the page near the 'Share' button when another author has made an edit at the same time.
- You can tell what slide a co-author is working on because their photo will display on that slide in the left side scroll.

Co-Authoring in OneNote

- OneNote can also be used for co-authoring as it uses a similar notification process when two or more authors are editing the same page and is available on both browser editing as well as the desktop application.
- The notification on OneNote will appear at the top right-hand corner of the page near the 'Share' button when another author has made an edit at the same time.
- Co-authored additions are noted with a vertical line and the author's initials. A page or notebook that has been edited since you last viewed it will be noted with a dot next to its name.

This document was developed with assistance from Microsoft Copilot and edited, reviewed, and validated by NEEA staff.

Co-authoring and versioning

- One concern that SharePoint users may have with co-authoring is the process in which versioning works to ensure that the changes being made to a file can be traced back. When two or more people are editing a file at the same time, the file is saved every minute or so to ensure that all the changes are being fully processed and updated. **Whichever user is the last to make changes at the time that the file is saved, their name is the one that is registered in the version history.**

Advantages of Using Metadata

- Metadata allows for adding **multiple dimensions of information**.
- By using metadata, you can create an **unlimited number of views** by whatever properties you have tagged.
- It's much **easier to change/edit metadata** than to change a folder structure.
- File URL: Moving a file from one folder to another means change of file URL (links break). **Links don't break when you change the metadata field.**
- Metadata enhances the ability of the search function.
- Metadata allows for scalability for programs/projects with consistency even with key staff turnover.

Limitations of Using Folders

Here are the limitations you would face if you only use folders in SharePoint:

1. Can Lead to Deep and Complex Hierarchies

One of the major drawbacks of relying too heavily on folders is that it can result in **deeply nested structures**. Changing a folder structure is difficult.

A nested folder structure is not always intuitive. **Nested folders can make navigation difficult and can become time-consuming and confusing for users.**

For instance: Within a document library for finance documents, you might have a:

- Folder for each fiscal year
- Within each year, subfolders for each month
- Within each month, further divisions for types of reports

2. Inefficient Search Capabilities

When documents are buried within multiple layers of folders, search functionality can sometimes be less efficient. **Searching within a library does not search within the folders of the library**, unless you deliberately open a folder to search within it.

Imagine you're looking for a specific receipt in a document library for finance documents: If you don't know which folder or subfolder it's stored in, you might find yourself clicking through numerous folders before locating the right one.

3. Less Flexibility in Data Categorization and Redundancy

Relying solely on folders can **limit how you categorize** and view data.

For example, in a document library for photos: If photos are organized by event type in folders, it becomes challenging to view them by other criteria (date or photographer) without duplicating the photos in multiple folders. **You can't sort and filter folders**: If your files are nested in the folders, you can't leverage sorting and filtering capabilities of document library columns (unless you are just sorting and filtering in a particular folder).

Metadata: Tag Two Things!

In SharePoint, tagging two (or more) things isn't redundant; it's how SharePoint is designed to work well at scale.

You tag two things in SharePoint because different tags serve different purposes:

- One helps people **find** content; people don't search the same way.
- Another helps systems **organize, filter, automate, or govern it**.

A single tag almost never satisfies all needs.

Current best practice recommendation is to always tag two things!

Different metadata answers different questions.

Each metadata column should represent **one dimension** of information.

Answer the two questions *Who? Or Which Team? And What kind of work is this?*

- **Functional Area** → *Which cross-functional team member does it relate to?*
 - *This is different than Asset Owner (the person who drafted the file) as people within a role may change more frequently than roles change.*
- **Category** → *What kind of work does this document represent?*
 - This varies by team; examples include items such as meeting notes, presentations, reports, research, reference material, photo, etc.

If you only tag one:

- You can answer *What is it?* **or** *What it's for*, but not both.

Filtering and views work best with multiple fields

SharePoint's real power shows up when users:

- Filter
- Sort
- Build views
- Use search refiners

Two metadata fields allow:

- Combination filtering (for example *Functional Area = ABC and Status = Final*)
- Cleaner library views (for example by *Functional Area*, by *Category*, by *Asset Owner*)
- Better search results without relying on file names

Search relevance improves dramatically

Microsoft Search prioritizes **structured metadata** over content guessing.

When documents are tagged with multiple, well-defined fields:

- Search results are more accurate
- Users can refine search without retyping keywords
- Large libraries don't degrade into clutter

Think of metadata as **signals** to SharePoint search—the more meaningful signals, the better the match.

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