



Records Management Guidance

SharePoint and Teams - Best Practices

SharePoint and Teams are two of the standard tools available to county employees that *can* be used to store records. This document provides some basic guidance about how to manage public records within SharePoint or Teams. For more information, see resources section at the bottom.

What are SharePoint and Teams?

These are tools that can be used by work groups to store electronic documents, especially those that need to be **collaborated on** or **shared with more than 3 people**. These files are all **synced (backed-up) to the cloud** and available from other devices. SharePoint and Teams also include other tools that can be useful for communication and/or collaboration. Records are available either through a web browser (Teams or SharePoint) or the Teams application.



Best Practices

- Use [naming conventions](#) and a **consistent folder structure** across your sites or channels
 - Keep your folder structure as simple as possible (**avoid subfolders**)
 - **Crosswalk** your folder structure to your [retention categories](#) and/or your **folders in Content Manager**
 - Develop **standard work** that includes **maintaining SharePoint/Teams sites over time** (roles and responsibilities, identifying when records become inactive, filing to Content Manager, etc.)
 - For records that do not need to be shared with others, consider using [OneDrive](#)
 - For records that have retention value, file to [Content Manager](#)
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Resources

- Technical issues – Submit a helpticket at helpdesk.kingcounty.gov and/or contact KCIT
 - Training – [KCIT Training Hub](#)
 - [Managing Specific Records in Teams \(Chats, Posts, Wikis, Meeting Recordings, etc.\)](#)
 - Agency-specific records or process questions – [Records Management Leads or Agency Records Officers](#)
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King County Records Management Program
206-477-6889 – records.management@kingcounty.gov
www.kingcounty.gov/recordsmanagement

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