

5 Things to Fix Before You Blame SharePoint

The Tool Isn't Broken—the Habit Is



1. Fix Your File Naming Habits and Use Version Control


✗ Stop naming files `final_final v3. with edits from Bo.docx!`

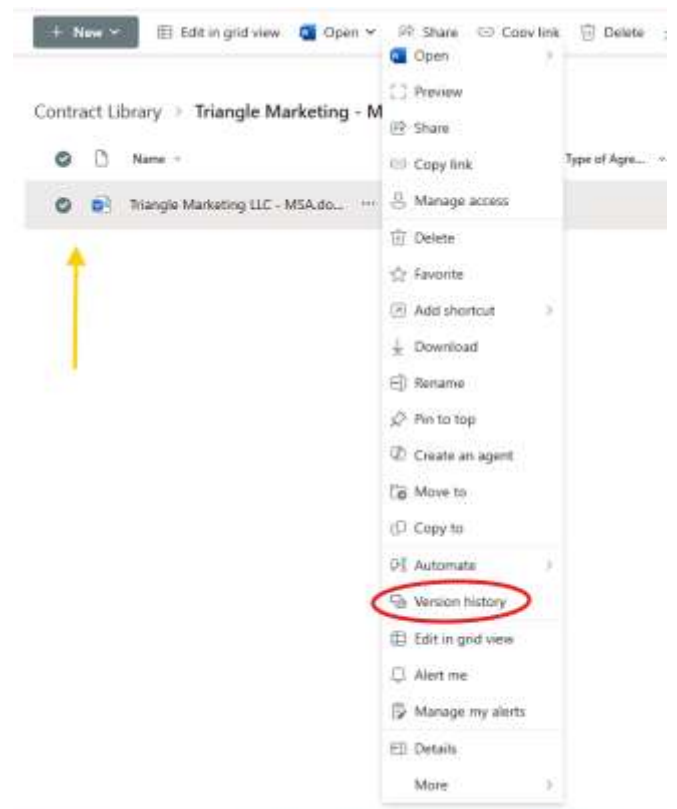
- Create a consistent naming convention.
- Example: [Vendor Name] [Agreement Type] [optional: SOW Number or Amendment Number]

✓ E.g., `Acme SOW No.3.docx`

- Use SharePoint's built-in **version control** setting (usually this is on by default)

the different save points of this file.

- To **view**  the **version history** (and confirm it's on) of any file in this library, check an earlier version, and even revert to an older version,
 - While hovering over the file you'd like to examine with your mouse, click on the ellipsis button [...] next to the document title
 - This opens a long list of all the actions you can take with the file.
 - In the bottom half, click on **Version history**
 - SharePoint will then display a pop-up with all



🔗 There's a lot of sophisticated customization and setup you can do from here that goes beyond the scope of this cheat sheet. Some examples include: (1) automating content approvals with publishing settings; (2) applying comments about the nature of updates and changes to the content that appear in the version history; (3) disabling autosave on documents in a library; (4) locking documents down to

one user at a time making changes; and (5) automating document retention policy periods

2. Use Columns Instead of Folders

Folders hide things. Columns organize them.

To use Columns, you will need to add columns to the document library.

Assuming you have basic permissions, you will see the “+ Add column” next to the out-of-the-box SharePoint columns (Name, Modified, Modified By).

- a. Click on + Add column to open the “Create a column” dialog box
- b. Choose the **datatype** for the column (i.e., text, number, person, etc.)
- c. Click **Next** and give the column a name and a description (optional)
 - o There are often additional settings underneath. For example, the “text” datatype allows you to specify whether the column will allow multiple lines of text or just a single line of text.
- d. Click **Save** and your new column will appear.

👉 Create columns for the elements you wish to track.

3. Shift from Folder-Thinking to Metadata-Thinking

Folders reflect physical cabinets!. SharePoint is not a cabinet. It's a database.

In my opinion, it's a *best-in-class* **document management system** (DMS). You can filter your contract library by any attribute you designate and surface what matters – if you've structured it right.

A **report** would be a document you can produce periodically and easily that provides a snapshot of the contracting function, so you can see how it develops over time. Think about what a report would look like to help you decide on the columns that are important to you.

Do you need to report on the **volume** of types of agreements? Or perhaps on the amount of **time** that's elapsed from request to execution? Do attorneys you work with wish to instantly know the list of contracts currently on their plate?

The columns are the most basic building blocks to create a data-driven legal function.

Here are some suggestions to get you started:

Column Name	Datatype	What it's for
Name	Text	The name of the contract (use your simple naming convention)
Vendor Name	Text ⁱⁱ	The name of the other party. Single line of text.
Agreement Type	Choice ⁱⁱⁱ	Use a set list of the types of agreements the department drafts.
Contract Status	Choice	Decide what the workflow steps are and make a list (e.g., new, waiting (on others), sent for execution, fully executed, terminated)
Assigned to:	Person	Pick a person in the organization who is responsible for doing the drafting work
Request Date:	Date/Time	This can also be the timestamp when the record is created in SharePoint
Effective Date	Date/Time	The agreed Effective Date of the contract
Execution Date	Date/Time	The date the contract was fully executed
Version No.	Built-in Column	You only need to surface this column to display how many versions there are of a given file ^{iv}

There are many options but start simple. You can add complexity as you go with SharePoint, especially if you're starting from a new library without much data in it.

☞ My actual columns tend to be far more numerous, but that's because I also use Power Apps and Power Automate to automate some data entry. **You** want to strike a balance between detail and what's manageable in terms of clerical overhead if folks will be filling in new requests and updating status changes manually (which is often where everyone starts). Don't worry, there will be opportunities to add automation features to what you start with. Build a good foundation first.

4. Learn What NOT To Do

✗ **Avoid using folders**, but if you do, don't nest folders more than one level deep^v.

✗ **Don't “save as” – this creates multiple versions and chaos.**

👉 This may be the **hardest habit to break!** But resist the urge to “save as” and rename! Instead, re-open the draft where it is in SharePoint and continue working. Version control is working behind the scenes.^{vi}

✗ Don't rely on long, human-written filenames for metadata. Use your naming convention and version control instead.

✓ **Let SharePoint do the work (version control).**

5. Start with Just One Library

Create **one** clean document library. Add 5-6 smart columns. Upload a few contracts using your new naming + structure. **Teach a colleague.** Build confidence through clarity.

Need Help?

Hi, I'm **Bo Kinloch** – an in-house attorney with years of experience in a legal systems design. I help legal teams make SharePoint work like the contract platform they wish they had.

DM me on [LinkedIn](#) or visit legalpowerops.com for more resources.

ⁱ In a deeper dive in another more advanced resource, I will show you how to model the conventional way a contract appears as a *physical* folder in a file cabinet. Because of the simple elegance of design for multi-document information, this will be one place where I think it is beneficial to **break** the “**never folder**” rule!

ⁱⁱ In a more sophisticated contract library, I'd recommend setting this up as a **lookup column** that looks up a separate list: the list of all the counterparties you have contracts with (like an address book).

ⁱⁱⁱ If you wish multiple admins to be able to do some **data governance** on the list of “types of contracts,” a **lookup column** is also a better choice than a **choice column** here. But choice columns are simpler when you're starting.

^{iv} I will show you how to show/hide many of the built-in SharePoint columns that are available in a more advanced resource.

^v Because contracts often include multiple documents, there are several ways to work in SharePoint to easily reflect that. In a more advanced post/resource, I will show you my favorite hybrid of data and folders: the **Contract Folder**, which is a custom **Content Type** in SharePoint.

^{vi} OK. **There is nuance here**. There are tricks to use to put a draft from a third party, and they've inevitably changed the file name, back on the "top" of one document version control list. Also, if you turn the autosave feature "off," and with a couple of other settings changes, you can "force" SharePoint to make the user leave a comment before saving a new version. That way you're more likely to get meaningful information about what the different versions represent. I'll cover this in a later resource.