

Choosing the Right Site Template

SharePoint Server 2010 Enterprise Edition offers 24 site templates out of the box. Trying to figure which template is the right template to create is more than a bit challenging, particularly if you've not seen the templates in use. However, after a relatively short list of yes-no decisions, you can generally identify the best fit for a given situation.

The first question to ask yourself is whether you want to configure the site from scratch. That is, do you want to go through the trouble of creating all the lists, libraries, workflow associations, etc., that you want in the site? If you're willing to do all the work yourself, you can start with a blank site. In most cases you can add everything in the other templates to the site via features once the site has been created. That being said, it's not always the best approach to take the time to manually configure things for every site you want to create.

The next key decision to ask yourself is whether the site is going to be a communication site. That is, are more people going to be reading the content than collaborating on its creation? This is sometimes a difficult question because you may want to allow many people to look at the outcome or you may want to ensure that folks have access to see the current thinking. However, in both of these cases, the key purpose for the site is the generation of the content. There's generally no "polishing" that goes on before the information goes to a wider audience. Communication sites are generally designed so that the primary activity in the site is publishing the information – which was developed elsewhere.

One specific type of communications site is a Blog (short for weB LOG). Blogs are like a journal in that they are ordered mostly by chronology, with the latest blog posts being listed first. Blogs are good replacements for emails from senior management, but they're also difficult to organize by categories. If you're trying to capture a sequential chronology then a blog is a good fit, but if not, you'll need to choose between other options.

If you decide that the site that you want is a communication site but not a blog then you must ask yourself whether the information is structured or unstructured. Structured information is important when the key criterion is the ease with which a visitor can consume the information. Structured information is easier for the visitor to consume because it follows a repeatable pattern. Unstructured data is more difficult for the visitor to consume – but sometimes the lack of structure is essential. In some cases it's impractical to create a structured data repository because you don't yet know enough about the data that you're trying to communicate. For instance, consider if you were living in a time before automobiles were common. You would have a hard time figuring out the right kinds of information to store about cars today to organize it in a way that would make sense to the 21st century consumer. If you need to learn more – or if you need to make the creation of the data more important than the possible consumption, you'll need to use some sort of unstructured approach.

On the unstructured side is the Wiki (Hawaiian for "quick"). The benefit of a Wiki is that it's easy for users to form links to other documents in the Wiki. The disadvantage is that its *ad-hoc* nature can make it difficult to locate the specific information you want – even when you know the material exists.

A sample from The SharePoint Shepherd's Guide for End Users: 2010,
<http://www.sharepointshepherd.com>

On the structured side of communications sites, you have SharePoint Server's publishing site templates. These templates allow you to control structured web content. The only remaining decision is whether you want the approval workflows to come out-of-the-box or whether you want to create your own approval workflows.

Going back to the top, if the site isn't a communication site then you might ask yourself whether the site is a search site. That is, is the purpose of the site to help users leverage search to find the content they want? This could include the use of facets, advanced metadata searching, or whatever is necessary to help the visitor find what they're looking for. If the site you're creating is a site for search, you'll need to further decide whether it should be a basic search center or whether the site should leverage FAST. If you've got FAST, you're likely to use it – and if you don't, well, it's probably a basic search site for you.

If the site isn't a communication or a search site, then perhaps it's a site that's designed to support a meeting. That is, SharePoint is capable of managing agenda items, action items, issues, and supporting materials for meetings. If you're looking to support a physical meeting, you may want to choose one of the SharePoint meeting templates. Like sites in general, the first question you may want to ask yourself is whether you want to configure features individually. In other words, if you want to customize the meeting site yourself, you may want to select the blank meeting site.

The next key question about meetings is whether the audience will be a large number of parties who will need to register, need directions, etc. For instance, you might decide that the company picnic fits the category of a meeting that contains a large number of people. For these types of situations, you might try the social meeting workspace.

If it is, instead, a meeting that is an operational meeting – and is therefore recurring – you might want to pick the multipage template because it will allow you to break the meetings into meaningful groups on individual pages.

The final decision to make about a meeting site is whether the site will be used primarily for the recording of decisions – a common problem in most organizations – or whether the site will be focused on the execution of the meetings. If the site is for the recording of decisions, then the decisions meeting workspace is probably more appropriate – and if not, the basic meeting workspace will probably work well.

If a site isn't for communication, search, or for a meeting, there are really only two questions left. First, if the site is for the management of a large number of documents (tens or hundreds of thousands), then you might consider a document center which will have automatically activated some of the core features that a large document library might use. Alternatively, you're talking about some sort of site that supports a team or a group of people. In SharePoint terms, a team site should be used to support key teams while the Group Work Site is designed for more transient teams that are formed, dissolved, and forgotten. The Group Work site is prepopulated with a set of lists appropriate for a temporary work team.

The diagram below demonstrates the flow of decisions to lead you to a specific template. It should be noted that this list is not exhaustive. Some templates, like the web database templates, have a very specific use and if they fit your specific needs, then by all means use them as the starting point of your site; however, there are some cases where the sites are not intended to be created directly or are not inherently more useful than one of the sites identified below.

