

NOVEMBER 2023



# SHAREPOINT MANAGEMENT POLICY

VERSION 1.0

PRESENTED BY: ERIC SCHNELL

REVISED BY: ERIC SCHNELL  
NIPISSING FIRST NATION

# 1. INTRODUCTION

In today's digital landscape, clear and standardized organization of information is paramount. As our SharePoint environment grows in both complexity and size, there arises a need for consistent naming conventions and management of SharePoint to ensure that information remains easily findable, comprehensible, and manageable.

This policy is designed to outline an approach to managing our digital workspace. This policy addresses various facets of SharePoint usage, including site creation, renaming, monitoring, and compliance, in addition to guiding the SharePoint lifecycle from inception to retirement. By adhering to these guidelines, we aim to achieve:

- **Streamlined Management:** Facilitating efficient administration and oversight of SharePoint sites, enhancing our ability to manage digital resources effectively.
- **Consistent User Experience:** Ensuring a uniform and intuitive experience for all users, regardless of their department or role within NFN.
- **Compliance and Governance:** Upholding high standards of data governance, security, and compliance with organizational policies.
- **Scalability and Flexibility:** Preparing our SharePoint environment to adapt and scale with the growing needs and changes within NFN.

As SharePoint is a dynamic platform used across various departments for diverse purposes, from team collaboration to document management, this comprehensive management approach ensures that the platform supports our community's goals and evolves as an integral part of our communication and information management strategy.

# 2. OBJECTIVE

The primary objective of this Policy is to establish a cohesive, standardized, and efficient approach to managing SharePoint sites within NFN. Our aim is to enhance the user experience, streamline administrative tasks, and ensure that our digital resources remain organized and accessible for all staff within the organization..

Specifically, this policy seeks to achieve the following:

- **Unified Understanding:** Create a common language and understanding of SharePoint sites, so every member, regardless of their department or role, can navigate the platform with ease.
- **Governance & Oversight:** Ensure a structured approach to SharePoint management, making it easier to audit, monitor, and oversee the platform's usage.

- **Future-Proofing:** As NFN grows and evolves, so will our digital needs. A standardization will make scalability smoother, ensuring that our platform remains organized even as more sites are added.

By implementing and adhering to this policy, NFN aims to make SharePoint not just a tool, but an integral and efficient part of our community's communication, collaboration, and information management strategy.

### 3. SCOPE

This SharePoint Management Policy governs all facets of SharePoint usage and management within the digital landscape of NFN. Its provisions encompass:

- **All Departments:** Every department within NFN that utilizes SharePoint, be it for daily operations, special projects, or administrative tasks, is mandated to follow the guidelines set forth in this policy.
- **All Users:** All staff members, regardless of their role, department, or frequency of SharePoint use, are expected to adhere to the practices and standards outlined in this policy.
- **Entire SharePoint Lifecycle:** This policy pertains not only to the creation and naming of new sites but also to the maintenance, modification, and potential archiving or deletion of existing sites. It guides the entirety of a site's lifespan, from inception to retirement.
- **Management Practices:** While naming conventions are a significant aspect, this policy will also touch upon other management best practices, ensuring SharePoint remains a structured, reliable, and efficient tool for the organization.

### 4. STAKEHOLDERS

Effective management of SharePoint requires collaboration between stakeholders within NFN. This section specifies the responsibilities associated with SharePoint management, ensuring transparency, and accountability.

- **Global SharePoint Administrators (IT Manager and Data Analyst):**
  - Oversee the technical aspects of SharePoint, ensuring its optimal performance, security, and reliability.
  - Provide guidance and support in the creation, modification, and deletion of sites.
  - Ensure compliance with this policy through periodic audits and reviews.

- **Site Admins (IT Support/Global SharePoint Administrators):**
  - Provide necessary technical assistance to Site Owners.
  - Offer support to users facing technical issues or challenges in SharePoint, ensuring a seamless user experience.
  - Provide new member access to SharePoint site as necessary.
- **Site Owners (Directors/Managers):**
  - Ensure that their department's SharePoint sites adhere to the guidelines provided in this policy.
  - Champion best practices within their teams, ensuring all team members are familiar with and adhere to this policy.
  - Responsible for the day-to-day management of their respective SharePoint sites, ensuring site content, naming, and structure align with policy guidelines.
  - Coordinate with SharePoint Administrators for any department-specific requirements or exceptions.
  - Providing new member access to SharePoint site as necessary.
- **Site Members:**
  - Adhere to the guidelines and best practices outlined in this policy when accessing, adding to, or modifying SharePoint content.
  - Report any discrepancies, issues, or potential improvements they notice in the SharePoint environment.

## 5. SITE NAMING CONVENTION GUIDELINES

To maintain consistency, improve searchability, and facilitate easy navigation within our SharePoint environment, it's important that all users adhere to the following naming convention guidelines:

- **Descriptiveness:** Names should be descriptive enough to convey their purpose or content at a glance.
- **Length:** While being descriptive, try to keep names short and to the point.
- **No Special Characters:** Avoid using special characters like !, @, #, \$, %, ^, &, \* in names. They can create issues with searches and external integrations.

- **Site Collections:** Must contain a prefix as defined within this policy.
- **Document Libraries:** Name should reflect the content type or purpose.
- **Lists:** Name should indicate the type of data or its use.
- **Folders within Libraries:** Limit the use of folders where possible. Document Libraries should be as flat as possible and favor meta data over folder structures for organization. Never create folder structures within a document library more than 3 folders deep, including the root folder.
- **Files:** Begin with a date in YYYYMMDD format for easy sorting, if applicable. E.g., "20230101-MeetingNotes.docx".
  - Be explicit with versions, if needed. E.g., "Proposal-v1.0.docx" or "Report-FinalDraft.docx".
- **Groups and Permissions:**
  - Name should indicate the department, followed by the role or level of access. E.g., "HR-Editors" or "Marketing-Viewers".

## 6. PREFIX DEFINITIONS

- **ARCHIVE – Archived Site:**  
A site that contains historical or outdated data and documents which may no longer be active or frequently accessed, but are preserved for record-keeping, compliance, or reference purposes. The content within an Archived Site is typically set to a read-only mode to prevent modifications, reflecting its static nature. Archiving sites can help in decluttering the active SharePoint environment while ensuring that past records are still accessible when needed.
- **CF – Central Filing Site:**  
A centralized repository designed to store and manage essential documents and files for the department or committee managed by Administration. These sites primary stores digitalized paper based documents, but may include other digital records. These sites are for record keeping purposes and do not store working documents. They should be easily accessible via the Central Filing HUB site and organized systematically.
- **COM – Communications Site:**  
A site designed primarily for broadcasting information, news, updates, or announcements to all staff. This type of site ensures that employees are kept informed about company updates, events, or important notices. These sites could be managed by individual programs, departments, or from core administration.

- **DEP – Department Site:**  
A dedicated space for individual departments, acting as a hub for all related files, content, policies, and resources. These sites are designed for collaboration among staff within the same department. Under most circumstances, this does not involve cross department collaboration.
- **HUB – Hub Site:**  
A central site that connects and organizes other related sites in SharePoint. It allows for easier navigation, content discovery, and search across associated sites, ensuring a consistent look and feel.
- **ORPH – Orphaned/Duplicated Site:**  
A site that has lost its primary purpose or has been superseded by another site. This could be due to duplication, project completion, or departmental changes. Such sites may be flagged for review, archiving, or deletion.
- **PRG – Department Program Site:**  
A site specifically dedicated to a particular program or initiative run by a department. Programs often span longer durations than projects and can be recurrent or continuous, like training programs, annual department campaigns, or long-term strategies. The site consolidates resources, schedules, and communications for these ongoing or recurrent departmental activities.
- **PROJ – Project Site:**  
A site established to support specific, short- to medium-term objectives with a defined start and end. Projects are typically unique and non-recurrent endeavours aimed at achieving a particular outcome, such as launching a new product, organizing a one-off event, or completing a specific task. The site houses all project-specific documents, tasks, timelines, and communication, providing a centralized platform for project team members.
- **TEAM – Team Site:**  
A collaborative platform tailored for specific teams within the organization. It facilitates team communication, document sharing, task management, and other collaborative activities, fostering unity and efficient team operations.
- **TEST – Test Site:**  
A sandboxed environment used for trying out new features, layouts, or functionalities before they are implemented in the live SharePoint environment. It provides a safe space for experimentation without affecting the main sites.
- **RES – Resource Site:**  
Designed to aggregate and provide streamlined access to essential data resources that are available organization-wide. While it shares similarities with a Communications Site in its broad

accessibility, its primary focus is on housing and organizing data materials, ensuring unified access and promoting efficient information retrieval for all users across the organization.

## **7. PROCEDURE FOR CREATING NEW SITES**

The following details are used to standardize processes for creating new SharePoint sites within NFN, conforming to the organization's governance and IT policies. This procedure specifically excludes Team sites, which are defined as ad-hoc sites created directly through the Teams app without falling under any of the predefined prefixes in this policy.

- 7.1. Request Submission:** Managers, or employees under the direction of their managers, are responsible for initiating requests for new SharePoint sites. Such requests are to be submitted through the IT Support Ticket Software, clearly stating the purpose and specific requirements of the site.
- 7.2. Manager Approval:** All requests must be approved by the manager responsible, ensuring the proposed site aligns with the departments goal and objectives.
- 7.3. IT Department Review:** The IT Department reviews each request. Additional clarifications or adjustments to the request may be required before the deployment of the new site.
- 7.4. Site Deployment and Configuration:** Once approved, the IT department will create and configure the SharePoint site in accordance with the naming convention guidelines and prefixes defined within this policy.
- 7.5. Assignment of Site Owner or Administrator:** The Manager initiating the request will typically be assigned as the Site Owner. Additionally, IT Staff may be designated as the Site Owner or Administrator as necessary to ensure the effective management and oversight of the SharePoint site.
- 7.6. User Training and Access Control:** Training will be provided as necessary to effectively use the new site. Access to the site will be managed based on defined stakeholders outlined within this policy.
- 7.7. Documentation and Record Keeping:** The IT Department is responsible for maintaining detailed records of the site creation process, including the request and approvals. IT will periodically audit site permissions and flag discrepancies as necessary.

## 8. PROCEDURE FOR RENAMING EXISTING SITES

When renaming existing SharePoint sites within NFN, ensure that all changes adhere to the established naming conventions and prefixes defined within this document.

- **Manager Initiated Requests:** should submit their request through the IT Support Ticket Software. The proposed revisions must comply with the Naming Convention Guidelines and Prefix Definitions as outlined within this policy.
- **IT Department Review and Implementation:** Will ensure policy compliance and the appropriateness of names. IT May periodically modify existing SharePoint site names if deemed a more appropriate names applies based on rules defined within this policy. Any changes made to the site name will be communicated to the site owner.

## 9. MONITORING & COMPLIANCE

This section describes the mechanisms and practices NFN employs to monitor SharePoint site usage and ensure compliance with the organization's SharePoint policies and standards.

### Monitoring Procedures

**9.1.Regular Audits:** The IT department conducts regular audits of SharePoint sites to verify compliance with the established naming conventions, site ownership rules, and other policy guidelines. These audits aim to identify any deviations or non-compliance issues that require attention.

**9.2.Usage Monitoring:** The IT department utilizes tools and software to monitor the usage patterns of SharePoint sites. This monitoring helps in understanding how the sites are being used and identifying any unauthorized or unusual activities.

### Compliance Measures

**9.3.Policy Adherence:** All managers and site owners are responsible for ensuring that their SharePoint sites comply with NFN's policies, including naming conventions and access controls. Non-compliance with these policies may result in corrective actions, as deemed necessary by the IT department.

**9.4.Corrective Actions:** In cases of non-compliance, the IT department will collaborate with relevant managers and site owners to rectify the issues. This may involve site restructuring, renaming, reassigning site ownership, or other necessary adjustments.



## 10. FILE NAMING GUIDELINES

This section describes the file naming guidelines that every manager should consider when managing SharePoint sites that they own.

**10.1.Descriptive Naming:** Choose names that are descriptive of the content or purpose of the file or site. Avoid highly generalized words like "stuff," "other," or "information," which are too vague and can lead to misuse or confusion.

### 10.2.Column Naming:

- **Display Names:** Ensure display names for columns are clear and represent the data being captured. Avoid ambiguous titles.
- **Use of Descriptions:** Where abbreviations are used, expand on their meaning in the description to aid user understanding.
- **Reflect Data Type:** The title should correspond to the data type, ensuring clarity and consistency.

### 10.3. List and Library Naming:

- **Short and Clear Titles:** Opt for shorter names while ensuring clarity. This is important as the URL gets encoded based on the title, and there's a maximum length for the URL part of the library.
- **Avoid Redundant Words:** Eliminate unnecessary words to keep URLs concise and meaningful.
- **URL Length Considerations:** Be mindful of the overall URL length, as it affects the space available for folders and document titles within SharePoint.

*Approved this 19<sup>th</sup> day of December, 2023*