

# SHAREPOINT GOVERNANCE TEMPLATE

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A SharePoint governance document is a collection of policies and procedures regarding the way that SharePoint is to be configured, used, and maintained within an organization. Unfortunately, there is no such thing as a universal governance template, as every organization's governance needs are different.

The template below contains a sample SharePoint governance plan. While this plan probably won't meet your organization's exact needs, it is intended to provide you with a good starting point in creating your own governance plan. Simply cut and paste the applicable blocks of text into your own governance document, and make any necessary changes (such as replacing <Insert Quota Limit> with 50 MB). Section headers and any values that you may want to change are displayed in bold type.

## SharePoint Policies & Procedures

These policies and procedures for how all the SharePoint servers used by <insert your organization name> are to be configured, maintained, and accessed.

**Effective Date:** <Insert Date>

**Approved by:** <Insert Manager's Name>

### Acceptable Use Policy

Users are required to adhere to all established security policies when accessing <insert your organization name> SharePoint servers. These SharePoint servers are to be used solely for business purposes. The disclosure of any data stored on a SharePoint server, or of a SharePoint server's URL or the credentials used to access a SharePoint server to non employees is expressly prohibited.

### New SharePoint Sites

Although an organization wide SharePoint site is provided, individual teams or departments may request their own personal SharePoint site. Requests for team or department SharePoint sites must be submitted to the <insert name or department> using the New SharePoint Site Request form. All request forms must be signed by a manager. The requested new sites will be created at the sole discretion of the IT department.

### SharePoint Site Modifications

Any requests for modifications to existing SharePoint sites must be submitted to the <insert name or department> using the SharePoint Site Modification form. Requests for changes to the main SharePoint site are generally prohibited, as changes to this site affect the entire organization. Modifications to team or department level SharePoint sites must adhere to the organization's SharePoint Site Modification Policy. **Note: the kit contains a template for creating this policy.**

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## Document Libraries

Document libraries on SharePoint servers are intended for storing business related documents only. Users are forbidden from storing documents of a personal nature in SharePoint document libraries. This includes, but is not limited to, photographs, music, and video files. Any non business related files that are found will be deleted without warning.

## Document Library Quotas

In order to prevent excessive disk space consumption, a quota will be imposed on all users for each document library. The initial quota size will be set at **<insert quota limit>**, but may be adjusted at the administrator's sole discretion based on the organization's needs and the server's capacity.

## Site Audit

In order to prevent the proliferation of unused SharePoint sites, the SharePoint administrator will perform a site audit once every **<insert time period>** months. This audit will consist of verifying that each SharePoint site is still being used. Sites that have not been accessed in **<insert time period>** months or more will be deleted.

## External Data Access

Authorized users may access SharePoint document libraries from outside of the perimeter network providing that the document libraries do not contain:

- Customer data with personally identifiable information
- Confidential business documents
- Financial information related to **<insert organization name>**, its affiliates, partners, or customers

In order to prevent the accidental disclosure of sensitive data stored in SharePoint document libraries, SharePoint servers will not be directly accessible from beyond the network perimeter. Authorized document libraries will be made accessible to users through Outlook Web Access.

## Change Management

All upgrades and modifications to SharePoint servers, individual SharePoint sites, and to Web parts used by SharePoint sites will be logged. Upgrades and modifications must be thoroughly tested before they are placed into a production environment, and the previous version of any modified resources must be archived for **<insert time period>**.

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## SharePoint Servers

SharePoint servers fall under the jurisdiction of the IT department, and are therefore subject to the same IT policies as all other servers. Each SharePoint server will be kept up to date with the latest service packs and security patches. Patches and service packs will be tested and deployed within <insert time period> days of their general availability.