



DEPARTMENT OF THE NAVY
BUREAU OF MEDICINE AND SURGERY
2300 E STREET NW
WASHINGTON DC 20372-5300

IN REPLY REFER TO
5200
Ser M6/11UM6007
25 Apr 11

MEMORANDUM FOR ALL BUREAU OF MEDICINE AND SURGERY HEADQUARTERS
PERSONNEL

Subj: POLICY GUIDANCE FOR USE OF MICROSOFT SHAREPOINT AT THE BUREAU
OF MEDICINE AND SURGERY HEADQUARTERS

Encl: (1) Business Rules for Microsoft SharePoint Use Aboard the Bureau of Medicine and
Surgery Headquarters
(2) Bureau of Medicine and Surgery SharePoint Oversight Tiger Team Charter

1. This policy memorandum provides guidance and establishes Bureau of Medicine and Surgery (BUMED) Headquarters policy for use and maintenance of common access card enabled Microsoft Office SharePoint (SP) (versions MOSS 2007 and SP 2010) at this Headquarters.
2. Since Microsoft SP was introduced for internal use to BUMED in July of 2009, the growth of SP as a management tool has been extraordinary. Accordingly, enclosures (1) and (2) are provided as guidance for the structured deployment and maintenance for use of this document management and collaboration tool.
3. This policy memo goes into effect immediately on the date signed and shall remain in effect for three years or until superseded.
4. My point of contact for questions is Mr. Verlin Hardin, at (202) 762-3180.

A. M. Robinson, Jr.
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Business Rules for Microsoft SharePoint Use aboard the
Bureau of Medicine and Surgery Headquarters

1. Introduction

a. Welcome to a new way of doing business at Bureau of Medicine and Surgery (BUMED) using Microsoft SharePoint (SP) software. The two primary versions of SP currently in use at BUMED are Microsoft Office SP Server (MOSS) 2007 and SP 2010. With the introduction of SP at BUMED, gone are the old habits of hoarding information and working through manual, outdated, and inefficient methods of communication, collaboration, and information sharing. 2009 marked the arrival of SP at BUMED and with that arrival, BUMED staff gained the ability to leverage available software tools and to more effectively foster transparency and increase awareness. To this end, BUMED staff that employ SP as part of their normal work process shall adhere to the business rules set forth in the remainder of this document. An important distinction to be made is that this policy applies solely to personnel (military, and Department of the Navy civilian employees and contractors) working at BUMED and will impact only the deployment and use of SP folders found at <https://es.med.navy.mil/bumed/default.aspx>.

b. These business rules shall govern BUMED use of SP. This is a living document; the BUMED SP business rules shall evolve with changes in BUMED's mission and shall be reviewed and updated on an "as-needed" basis. The BUMED SP Portals found at the above link are the new standard for content management and collaboration and shall replace all duplicative legacy portals, intranets, and extranets. It shall fulfill various command needs, including:

- (1) Content management
- (2) Collaboration
- (3) Document storage (with storage limits to be determined by the BUMED SP Oversight Tiger Team (BSOTT)).
- (4) Search
- (5) Workflow
- (6) Business process management
- (7) Regional intranet and extranet sites
- (8) Application integration, including eventually records management system
- (9) Dashboarding, reporting and related Performance Management functions

2. SharePoint Usage

a. General Usage

(1) The BUMED SP tool shall be the primary method for information sharing and document collaboration for all BUMED personnel.

(2) SP sites shall provide access to content that aligns with BUMED strategic goals and objectives.

(3) SP shall be the single point of entry for all BUMED content, including reports, policies, procedures, and announcements.

(4) SP may also be used to host custom applications (as approved by the BSOTT) that facilitate best business practices at BUMED.

b. Site Access and Security

(1) The BUMED SP Homepage shall be made readily accessible to all users working at BUMED who need access to the BUMED SP functionality.

(2) At a minimum, a permission level of “Read Only” access shall be granted to all BUMED SP users for the homepage.

(3) BUMED SP sites shall be used for internal collaboration and information sharing. Any project requiring an additional workspace for their team shall contact the BUMED SP Portal Manager within M6 to set it up and provide support on usage best practices. All site set up for projects and internal initiatives shall be archived or deleted upon completion of the project. BUMED SP sites can be located at: <https://es.med.navy.mil/bumed/default.aspx>

c. BUMED SP Site Access and Permissions

(1) Site access and permissions guidelines shall be standardized using SP Groups and Mail Enabled Security Groups as determined by the BSOTT.

(2) All BUMED personnel shall have “Read” access to the BUMED SP site. BUMED individual “M” Code SP Content Managers shall be provided full control access to every site within the BUMED SP site hierarchy.

(3) It is the responsibility of the Content Manager to ensure all personnel are mapped to the appropriate security group as determined by the BSOTT.

3. Content Management

a. Site Management

(1) The hierarchy for BUMED sites is based on “M” Code and sub-divisional branch structures. Each “M” Code shall assign a primary and alternate content manager ultimately responsible for managing the sites associated with their particular Code and in concert with

precepts established by the BSOTT. However, it is the responsibility of all BUMED personnel to ensure information relevant to their area of responsibility is accurate, continually updated/refreshed, and readily available for those who need it.

(2) Site auto expiration: To ensure stale sites are removed and data storage is reclaimed, sites untouched for a period of 90 days or more shall be slated for automatic deletion. Site owners will be notified in advance if their site is slated for deletion and provided with a mechanism to remove it from the automatic deletion list.

(3) Development: The M6 SP Team Leader should be contacted regarding requests for any site development work. Custom Development, such as custom webparts, custom workflows and any functionality requiring deployment of code will be addressed by the M6 SP Team.

(4) Storage Quotes: By default MOSS 2007 imposes a 50MB limit on the size of a single document that can be uploaded into a document library. However, for all sites built in SP 2010, 100MB of storage will be authorized. Team Site administrators will receive alerts when storage is at 90% of quota. If necessary, Team Site administrators will be provided the ability to override storage quotas for sites.

b. File Management

(1) Users are discouraged from using file folders to store documents. Users should 'tag' documents with the appropriate metadata (data about data). Users shall be thorough when filling in metadata (such as document descriptions, keywords, review dates, etc.) and be mindful of files are named.

(2) Users posting files to BUMED sites shall use logical, descriptive terms. For example, a Word file might be labeled "BUMED HIPAA Instruction.doc." Each word separated by a space shall start with a capital letter. (Users must avoid, however, creating document titles in all caps, especially if the title includes an acronym).

(3) Users are encouraged to use SP version control which is built within SP folder lists and libraries to track/manage content updates instead of posting multiple versions of the same document.

(4) File types listed in the default Restricted File Type List shall be blocked from upload. All executable file types (.exe) are restricted. Files that violate copyrights and infringement rules shall be deleted. Users will not be notified when prohibited files are deleted.

(5) Audio and video media files such as (.avi, .mpg, .wmv, .wav, .mp3) which adhere to the BUMED SP folder file size limitation may be posted to document libraries, and viewed through desktop applications such as Windows Media Player. The use of streaming media requires approval by the BUMED COS.

(6) The size limitation on uploads (a single document) shall be 50MB.

c. Content Management Practices.

(1) BUMED SP shall be used as the primary method for disseminating news and information to BUMED personnel.

(2) BUMED personnel shall use SP, (not email) to disseminate, staff, manage, and record completion of tasks not deemed appropriate to include within eKM.

(3) Each "M" Code site shall have a subset of standardized content, agreed to by the BSOTT, to include:

(a) A banner that either contains a blurb about who the Code is and what it does or its mission statement (graphics/colors/symbols optional).

(b) Contact information should include "Single Digit and Deputy phone numbers and email addresses.

(c) An "announcements utility" that enables BUMED Codes to utilize "push" alert features, which allow individuals to establish alerts.

(d) A list of links for the different functional/business areas of the Code, to include a descriptor of what the functions of those areas are

(e) document library, containing items such as Organizational charts, published business rules, or governance policies/instructions.

(f) Personnel contact list that complies with Privacy Act requirements.

(4) Navigation, layouts, themes, and content shall comply, as appropriate, with standards levied by the BUMED COS or business rules to ensure ease of navigation by BUMED content users.

(5) All BUMED personnel shall have the ability to access, and are encouraged to contribute to the:

(a) BUMED Internal Practices site to capture standard processes and policies.

(b) BUMED Wiki's/blogs related to their functional area of responsibility.

d. **Content Recovery.** The BUMED SP tool has a recycle bin feature that is attached to document libraries and shall be turned-on automatically with a retention period of 30 days. Users shall leverage this with the assistance of their content manager when they need to recover a file.

4. Organizational Collaboration

a. Communities of Practice (CoPs)

(1) CoP SP sites shall be the primary venue for collaboration for all BUMED Projects and external Initiatives. These sites have been pre-configured to provide users with the structures, tools, training, and templates to achieve a positive collaborative experience for projects requiring cross functional coordination and interaction.

(2) CoP sites may be short-term or long-term depending on their purpose, and shall be used to generate standardized and repeatable processes within BUMED. Sites shall be used for informal collaboration to address improving processes, products, and situational awareness.

b. Communications and Awareness

(1) Documents requiring distribution, review, or edits shall not be disseminated as email attachments, but shall be posted to appropriate locations on the BUMED SP tool and referenced via hyperlinks in email messages for all personnel with access to the BUMED SP tool.

(2) Email shall not be used for distribution of BUMED All-Hands messages or Regional information.

(3) Utilization of alerts shall be used in lieu of email to notify users of updated information (e.g., an announcement for a specific site).

5. Training and Support

a. General User Training/Capabilities

(1) All BUMED personnel should be competent (competency defined as the “common-man” approach) at using the SP Tool. At a minimum, BUMED personnel shall be proficient at uploading, downloading, and deleting content to include, documents, InfoPath Forms, and list items. M6 will assure that training is provided on an “as-needed-basis” for those personnel who feel their skill-sets need more enhancement. The training syllabus offered will be in accordance with the prescribed Training Plan established by the BSOTT.

(2) BUMED M-Code Content Managers shall be proficient at reviewing documents, adding and removing permissions to their sites, and adding additional sites, lists, and document libraries.

(3) BUMED M-Code Content Managers shall meet periodically with the M6 SP Team Leader and of course the BSOG to identify issues or complaints and determine possible solutions.

(4) Content Managers shall set up an issues area on their departmental site and train their departments to use the tool for reporting complaints and issues.

(5) BUMED personnel requiring SP training shall request training sessions from the M6 SP Team Leader or M-Code Content Manager (as appropriate).

b. BUMED SP Tool Support. BUMED SP Tool assistance is available via <https://supportcenter.med.navy.mil>. All requests for support or training shall be coordinated through the BUMED M6 SP Team Leader.



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**BUREAU OF MEDICINE AND SURGERY SHAREPOINT OVERSIGHT
TIGER TEAM CHARTER**

1. Purpose

This charter establishes the Bureau of Medicine and Surgery (BUMED) SharePoint (SP) Oversight Tiger Team (BSOTT). The BSOTT is an oversight body that monitors, informs and provides coordination of all SharePoint (SP) activities across BUMED Headquarters (HQ). While SP is a tool commonly used throughout the Navy Medicine enterprise, the BSOTT will limit its oversight responsibilities to HQ only. The BSOTT will recommend to the Deputy Chief, Information Management/Information Technology/Chief Information Officer (BUMED-M6) investment proposals concerning data integration and business intelligence solutions that meet HQ requirements and as required, integrate with SP end-user applications across the Budget Submitting Office-18 enterprise. Furthermore, the BSOTT will develop and execute plans to evaluate as required, enhancements to the SP portals/folders established for use by the HQ. SP is one of the many applications in the Microsoft Office Suite of tools used at HQ and supports all HQ Strategic Plan Goals and Objectives.

2. Background

BUMED manages many activities that benefit from using SP as a workgroup/team communications platform, and have developed numerous SP sites. Likewise, commands throughout Navy Medicine have developed their own SP sites for their business purposes. These sites are run by several versions of SP, in varying formats, and using various business rules. As a result, there is a need for a formal centralized approach to managing SP at HQ and across the enterprise to ensure continuity and readily shared information. These issues have been raised by the Corporate Executive Board (CEB) and Assistant Deputy Chiefs (ADCs) resulting in recommendations for the formation of a Tiger Team as the vehicle to address the issues.

3. Scope

The BSOTT will oversee activities pertaining to identification of requirements, development of new capabilities and functionality, investment/funding requirements, and deployment and sustainment of SP at HQ. As necessary, the BSOTT will provide oversight for new development activities and execute a plan of action and milestones (POA&M) to successfully provide the BUMED CEB with the information needed to make informed investment decisions related to SP business decisions which impact HQ. At a minimum the BSOTT will as needed, address the following matters regarding SP deployment at BUMED:

- Ensure solutions align with goals, policies and mandates set by DoD, DON, and MHS.
- Identify solutions that will be evaluated using existing COTS/GOTS prototypes and evaluate solutions based upon established evaluation criteria.
- Outline costs, including O&M costs, related to each solution.
- Present findings and recommendations, as required, to the CEB.

4. Deliverables

The BSOTT will produce, within the scope of their authority and influence, decisions on how best to employ SP throughout the HQ. In those instances where issues are forwarded to the BSOTT for mitigation and/or endorsement, or in cases where the BSOTT must refer decisions to the CEB for decisions, the BSOTT will produce a thorough analysis of alternatives and options/recommendations for consideration by the CEB.

5. Metrics

As with PowerPoint, Outlook or Word, SP is a tool in the Microsoft Office Suite of tools. Further, while SP is a relatively new tool being employed at BUMED, it has been part of the Navy Medicine inventory since 2001. Accordingly, the success of the BSOTT will likely be measured in terms of employee overall satisfaction with the SP tool, as well as the ability of SP to serve as an enterprise-wide collaboration and business intelligence tool.

6. Milestones N/A

7. Membership

Team Member	Role/Responsibility
M6 Representative	Lead
M1 Representative	Member
M3/5 Representative	Member
M4 Representative	Member
M09B Representative	Member
M08 Representative	Member
M00WII Representative	Member
M00C Representative	Member
M09B4 Representative	Member
M09B7 - Communications Representative	Member
M09B15 - ITACS Representative	Member
BUMED SP Deployment Project Lead/SMEs	Ad-Hoc Members

8. Meetings, Records & Timelines

The BSOTT will commence work on 16 May 2011 and meet periodically as situational needs require. The BSOTT will be disbanded on or about 16 May 2012 or earlier if determined feasible by the CEB. The BSOTT will post status reports on the esPortal and provide necessary information and updates to the CEB on an as needed basis.


K. A. FLAHERTY
Deputy Chief