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Example of a document management policy for Office 365

This is an example of a document management policy for Office 365. Use it as a template when you create your own policy.

TABLE OF CONTENTS

1. Introduction	3
1.1. Purpose	3
2. How we manage documents within our organization.....	3
3. Guidelines for our document workspaces in Office 365	4
4. Storage and sharing of documents.....	5
5. Exceptions	6
6. Other digital collaboration and communication	6
6.1. Microsoft Teams	7
6.2. E-mail in Outlook.....	7
7. Non allowed external services	7
8. What document workspaces and teams does our organization have.....	7
9. Learn more about MetaShare	8

1. Introduction

This document is an example of a policy regarding the storage, sharing and management of documents in Office 365. The prerequisite is that Microsoft Office 365, OneDrive, Microsoft Teams (hereinafter referred to as Teams) and MetaShare are technically implemented. Use this document to establish your principles for how to work with documents in your organization.

1.1. Purpose

Our organization handles a large number of documents of various types. Most documents need to be used by different groups, roles, and individuals, both during the work and afterwards.

The need is to be able to create, find, share, change, review, follow up and handle documents, regardless of role and time.

Protecting our information assets is a priority issue for us within our organization. We must be able to trust that the information is always available, correct and protected from unauthorized access.

Our organization uses Microsoft Office 365 as a tool and platform for document management, collaboration, and communication. All documents are stored in Office 365, which means that the information is kept up to date and is available regardless of time, place, and device (work computer, mobile or other mobile devices).

The purpose of this policy is to clearly provide guidelines for which tools and storage locations to use when you create, edit, share, publish or archive documents.

2. How we manage documents within our organization

Our organization primarily stores documents in a common document workspace with, an elaborate navigation structure that reflects the organization's working methods. This to make documents storage and search naturally connected to our business and as user-friendly as possible.

Our organization manages documents in a common workspace for the following reasons:

- It makes it easier to find documents
- It improves internal efficiency and facilitates collaboration - everyone works in a similar manner and can find each other's documents
- It makes it easier to recover and gain control of our important documents
- It increases the documents' reliability and security

- o Important documents should not be lost when someone ends their employment, or a computer is stolen
- o Reduce the number of duplicates and instead work with document versions and gain traceability in the document life cycle

Our organization's document management takes place within the framework of Office 365. The common document workspace is found in MetaShare, an add-on application to Office 365 and SharePoint that simplifies and improves its document management.

In addition to MetaShare, there are two other document management applications in Office 365:

- Microsoft Teams - in Teams you can store and manage the team's common documents and files
- OneDrive - a personal storage space

Documents and files stored in MetaShare, Microsoft Teams and OneDrive are technically stored in SharePoint, but in different document libraries with possibilities for different functionality, metadata, and permissions. For documents stored in Microsoft Teams and OneDrive, there is no common metadata structure in the same way as in MetaShare. Important documents that are managed in Microsoft Teams should therefore be stored in MetaShare, i.e. MetaShare is activated in Teams.

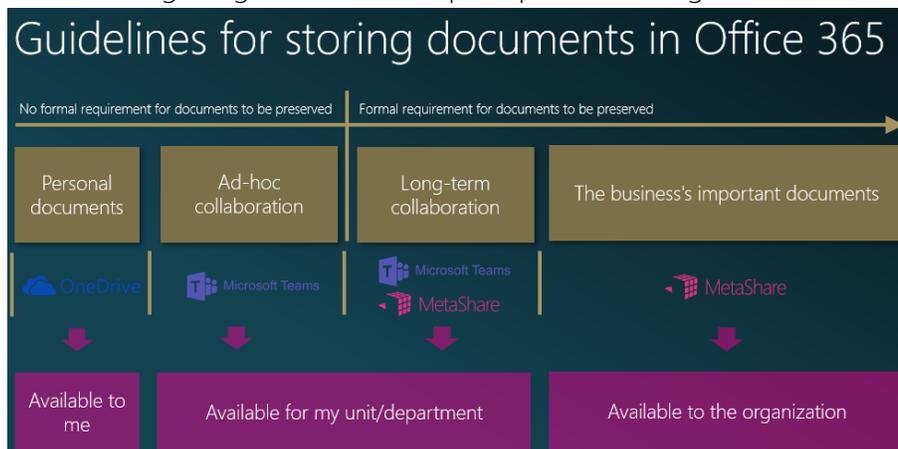
3. Guidelines for our document workspaces in Office 365

Below we describe our guidelines for different document workspaces in Office 365.

The basic principle is that we divide our documents into two overall parts:

1. Documents that our organization does not need to save - they can be deleted
2. Documents that our organization needs to save - they must be preserved

The following image illustrates the principles of the organization's document management:



All documents should primarily be stored in MetaShare, which is the basis for our document management and must be used in daily work. Documents should be created/uploaded there in our everyday work.

4. Storage and sharing of documents

Documents stored in MetaShare, Teams or OneDrive can be shared by two or more people and in different ways. Before we share documents, we must consider what we share and to whom. In our organization, we classify all our documents into three different information classes:

Information Class	Description
Confidential	Access to this document is normally limited to the specific roles that should have access to the document. This document may not leave our organization or be otherwise exposed to external users unless there is agreed support for it. In the case of external sharing, only named individuals should be given permission to the document. Restrictions can be applied by limiting the validity of the sharing and restricting the possibility to edit/download the document.
Internal	This is an internal document that should only be handled by our employees. In the case of external sharing, only named individuals should be given permission to the document. Restrictions can be applied by limiting the validity of the sharing and restricting the possibility to edit/download the document.
Public	This document can be distributed freely.

The basic principle is that documents should only be in one place and not copied. It is better and safer to send a link to a document than to send a copy of the document.

Sensitive information such as personal data that needs to be handled in accordance with GDPR regulations, trade secrets or other laws and regulations is classified as confidential.

The following table summarizes how documents are stored and shared within our organization:

Service	Which documents should be stored	How documents should be shared
MetaShare	All documents that may need to be used by someone in our organization, today or in the future. Documents that all employees must be able to access are stored in open workspaces, for more confidential types of documents, these should be stored in workspaces with protected permissions.	The information class of the documents sets restrictions on how they are to be shared. If you are unsure, you should contact our IT-security manager.
Teams	For documents that relate to the team's work but are of minor importance or temporary nature,	All documents are fully accessible to those who are part of the specific team.

<p>(temporary teams, for example a collaboration on a topic)</p>	<p>these are stored in the channel's "Files" tab (temporary documents).</p> <p>If documents are important to our organization, they must be stored in a "Document" tab (a MetaShare tab), see further information under permanent Teams.</p> <p>A temporary team will be deleted when the need no longer exists.</p>	<p>The information class of the documents places restrictions on how they are to be shared. If you are unsure, you should contact our IT-security manager.</p>
<p>Teams (permanent Teams, for example, projects, department, unit)</p>	<p>A permanent team is a space that is used continuously in our business.</p> <p>Channels in these teams are complemented with a "Document" tab (a MetaShare tab) where the channel's documents are stored.</p> <p>The channels' "Files" tab will remain and is only for temporary documents and documents that are attached to the channel's Post tab.</p>	<p>All documents fully available to those who are part of the specific team.</p> <p>The information class of the documents sets restrictions on how they are to be shared. If you are unsure, you should contact our IT-security manager.</p>
<p>OneDrive</p>	<p>Used only for purely personal work-related documents, such as your employment contract, notes from your individual development meetings, etc. Here, you can also store your early work drafts before they are moved to other channels.</p> <p>Important documents for our business may not be saved in OneDrive.</p>	<p>For each document or folder, you can choose to share internally or externally, and you may yourself decide the access rights.</p>

5. Exceptions

MetaShare and other Office 365 products are the platforms we use. However, there may be exceptions. There must be strong and decided reasons for using other solutions, services, and products.

When our organization cooperates with external parties, it may be necessary, for technical or other reasons, to use their system of cooperation. In general, it can be said that if our organization is the principal for a project, the external partners must work in our system and be granted access-rights.

6. Other digital collaboration and communication

In parallel with document management and sharing, we here also described the principles that apply to other collaboration and communication with digital tools within the organization's operations.

6.1. Microsoft Teams

In Teams, so-called teams are created for a group of employees who will collaborate. Within each team, the group can then configure what functionality is needed and how the work is best organized. See also section "4. Storage and sharing of documents".

The idea with Teams is to gather relevant information and functionality in a shared workspace - so that you, who are part of the group, can work wherever you want and easily communicate and chat with colleagues, manage simple notes, plan, collaborate on documents and otherwise work with others favorite apps that the collaboration requires. Teams also include opportunities for remote meetings with audio, video, and screen sharing.

The chat function in Teams makes it possible to reduce the amount of e-mail sent internally. If you want answers from several users quickly, it can be much more practical and efficient to send a question in a team.

6.2. E-mail in Outlook

Outlook is primarily used for communication to and from our organization with external parties.

When we work with documents, it means that:

- Documents that are classified as public can be sent as attachments in an e-mail message, but preferably, if possible, you should share these and send them as links in an e-mail.
- Documents that are classified as internal or confidential must be sent as sharable links, not as attachments.

7. Non allowed external services

We do not save any documents belonging to the organization on any external file storage services such as Dropbox, Google Drive, or your private OneDrive.

We may not use any alternative email services such as Gmail or Hotmail in our daily work.

8. What document workspaces and teams does our organization have

The text in this section describes in which specific workspaces your documents should be stored and managed. Our recommendation, to get a clear description, is to describe which document workspaces and teams you have in your organization.

For example, according to the table below.

<i>Workspace</i>	<i>Will contain the following documents</i>	<i>Should also have a Team in teams?</i>
<i>General</i>	<i>Documents that are common to our organization and should be used in daily work.</i>	<i>No</i>
<i>Management team</i>	<i>Only for the management's internal documentation that should not be shared with the rest of the organization.</i>	<i>Yes, for discussions within the management team. Do not save documents in the "Files" tab</i>
<i>Board</i>	<i>Only for the board's internal documentation that should not be shared with the rest of the organization.</i>	<i>Yes, for discussions within the board that are taken between board meetings. Do not save documents in the "Files" tab</i>
<i>Departments/units</i>	<i>Documents of the departments/units which, for various reasons, are not suitable to have in the "General" workspace.</i>	<i>Yes, for discussions within our departments/units. Documents are managed in separate "Document" tabs (MetaShare tabs).</i>
<i>Projects</i>	<i>The project documents which, for various reasons, are not suitable to have in the "General" workspace.</i>	<i>Yes, for discussions within the project.</i>

9. Learn more about MetaShare

- View demo: <https://metashare.com/en/view-demo/>
- Learn more: <https://metashare.com/en/knowledgebank/>
- MetaShare product site: <https://www.metashare.com/>