

Brigade wide document libraries

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Responsible work team: **Policies and Procedures Management Team**

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1 Introduction

- 1.1 This policy explains the structure and purpose of the brigade wide documents (BWD) site in SharePoint Online. BWDs is the definitive, authoritative area for collections of final documents. This policy provides guidance to users on the process for storing and searching for copies of final documents that fit the agreed definition.

Definition

- 1.2 A brigade wide document is a final document or record, which is part of a collection of similar documents in a library, which will be accessed by more than one department. Some brigade wide document libraries (BWDs) may be available to staff on a restricted access basis especially where they contain documents which are protectively marked.

2 Structure

- 2.1 The BWD structure was agreed following departmental consultation. The knowledge management team is responsible for managing the structure and setting up sites, sub-sites and libraries. The structure can be subject to change. Sub-sites and libraries can be renamed, added or deleted. The knowledge management team is responsible for updating the structure following agreement with the department requesting the change.
- 2.2 Some libraries that contain lots of documents use classifications, this groups relevant documents together. Classifications are added manually to the profile form and the wording must be exact for the documents to be able to be grouped by classification (e.g. 'health and safety' and 'health & safety' would make two different classifications).
- 2.3 Several libraries from different sub-sites can link to the same document.

3 Library ownership and owner responsibilities

- 3.1 Each library must be owned by a department and the department must nominate an administrator who will be responsible for the library. The administrator must ensure the library content is up to date and all documents have followed the correct formatting and naming conventions as laid out in this policy and appendix. They are also responsible for ensuring the library content is reviewed on a regular basis and all out of date documents removed in conjunction with records policies.

4 Access and permission rights

- 4.1 Some BWD libraries have restricted access e.g. LFC papers, and will only be accessible to selected groups. Requests to restrict access to a library should be made to the knowledge management team who will then make this arrangement with ICT.

5 Standard library views

- 5.1 Standard views have been set for BWD libraries, providing users with key information to help when searching for documents. The standard view for a particular library can be altered, with the agreement of the knowledge management team, to include other profile form information as required. Each column can be sorted alphabetically in ascending or descending order.

6 Document formats

- 6.1 Appropriate document formats are detailed in paragraph 11 of appendix 1. In addition the size of each document is important and should be no larger than 1mb approximately (if possible), when

uploading multiple documents to SharePoint Online if the size exceeds 50mb the process will be cancelled. Documents will automatically be set as read only.

7 Naming conventions

7.1 Naming conventions must be set and agreed for each library. The way documents are named can affect the way they are displayed within the library and it is good practice to discuss the different methods available with the knowledge management team prior to uploading multiple collections of documents. Different naming conventions are advisable (e.g. numerical, date, alphabetical) depending on the collection, by ensuring the documents are listed correctly will help users locate them when not using the search facility.

8 Document management

8.1 Refer to paragraphs 8, 10, 15 and 16 of appendix 1 for required document management standards. The knowledge management team will upload collections of documents as well as subsequent versions and can assist authors with cross referencing and researching information.

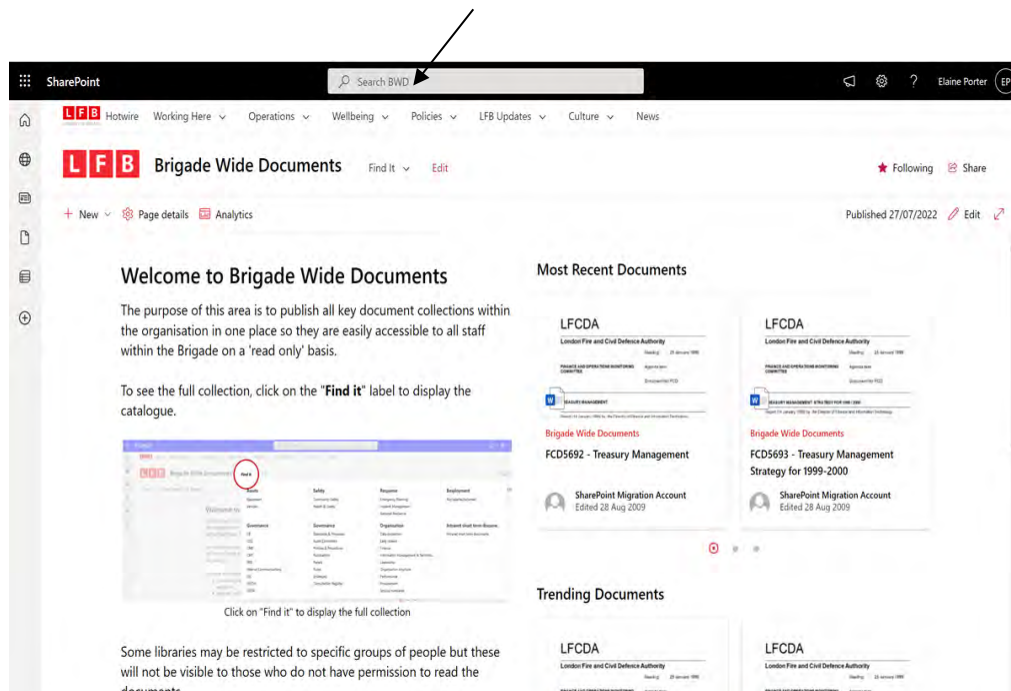
9 Records management

9.1 The standards detailed in paragraphs 13 and 14 of appendix 1 should be followed for records management.

10 Searching

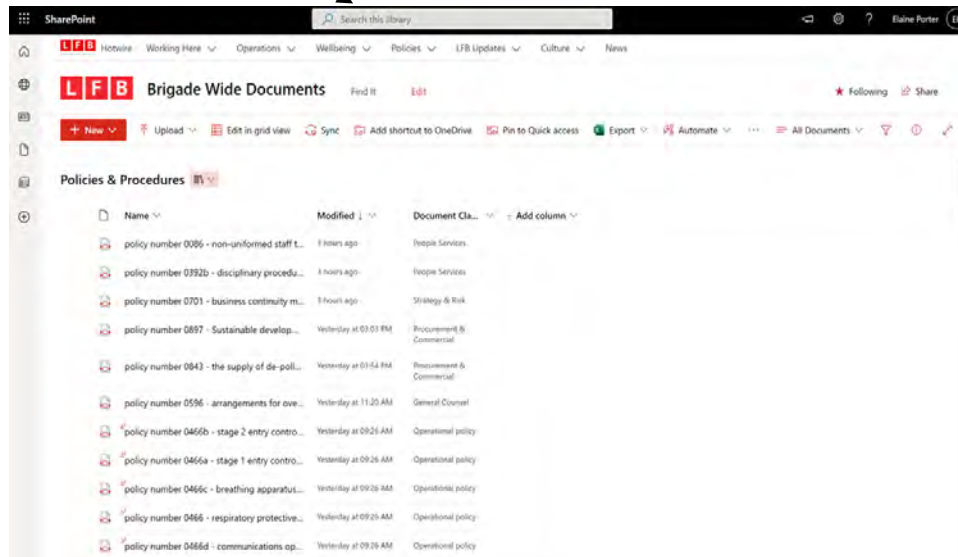
Search all BWD documents

10.1 The entire BWD site can be searched from the homepage using the search field 'Search BWD'.



Search within a document library

- 10.2 Alternatively, you can search within the specific library you are in, the search field will change to 'Search this library'.



General search tips

Refinement area	Use the refinement area to narrow down the results
Use Boolean operators	Boolean operators are used to narrow or expand the results. Capitalisation does not matter in search except for operators. For Boolean operators to work correctly they need to be written in capitals
	A N D Use AND to narrow your search results. The returned search results include all of the free text expressions
	N O T Use NOT to narrow your search results. The returned search results do not include the specified free text expressions or property restrictions
	O R Use OR to expand your search to include more terms. The returned search results include one or more of the specified free text expressions or property restrictions, e.g. "Project plan" OR "Business Case"
Use wildcards	Use a wildcard (*) if you want to be sure to get variations of the term you are looking for or if you are not sure about the spelling, e.g. <i>operation*</i> to search for all items starting with the word <i>operation</i>
Use double quotes	Use double quotes (") to find exact phrases if you are sure about the phrase, e.g. " <i>business intelligence</i> "
File names	When naming content, use whole words and use underscores to separate those words. This is due to word breaking, which splits the file name into real words. For example, <i>Expense_Claims_Report_Q4_2013</i> ① is better file name than <i>ExpClaimRpt-2013Q4</i> ②. If a user types in " <i>expenses</i> " or " <i>claims</i> " or " <i>report</i> " or " <i>Q4</i> " or " <i>2013</i> " in search, the first document will be found, but the second would not.
Title property*	Make sure you update the 'Title' property from within a document. This property is what search uses (out of the box) to display results, not the file name. If the 'Title' property is not filled in correctly, SharePoint Online will either show the bad title or arbitrarily use content from within the document for displaying search results. This can confuse and make you think the search engine is bad!

Appendix 1 - Standards for documents in brigade wide document (BWD) libraries

Purpose

1. To establish standards¹ that ensure consistency in the production and publication of corporate documents which are easily accessible to all staff through the brigade wide documents (BWD) area or Hotwire.

Which documents are included in the scope of these standards

2. Documents covered by these standards are those:
 - identified as within 'collections of documents used across the brigade that are final and agreed versions' (i.e. a brigade wide document collection). These documents will be stored in the brigade wide document libraries within SharePoint Online; and
 - that do not fall within the definition above for a brigade wide document collection but need to be accessed across the brigade via Hotwire. These documents will be held within the Hotwire content management system or saved in the intranet short term documents library in BWDs, as determined by the Communications Department web team.
3. Examples of these documents are:
 - BWD – LFC, committee, panel papers, policies and procedures, service or user guides (including guidance notes), corporate publications, training manuals, codes of practice, financial regulations, strategies, health and safety risk assessments and other collections of key documents as defined, from time to time, by the knowledge management team. The emphasis here is that documents are part of a complete or growing collection.
 - Hotwire – short shelf life (often single) documents not part of a larger collection, like event plans, schedules and documents associated with, or supporting, communications messages of different kinds (e.g. articles in Shout online), emails, briefing notes, ad-hoc guidance notes, and questionnaires.

What documents are not included within the scope of these standards

4. Documents which contain personal and sensitive data or are informal or draft publications and any other single documents that do not fit the definitions in paragraph 2 or 3 above. These documents will not be available via SharePoint Online BWD libraries or Hotwire. Requests for document collections to be included within a SharePoint Online BWD library should be addressed to the knowledge management team.

Linking to documents via Hotwire

5. Links to documents residing in SharePoint Online BWD libraries will link directly to the individual documents within the BWD area.
6. Links to all other documents, that do not form part of BWD libraries collections, will link directly to the individual document stored in the Hotwire content management system or those saved in the intranet short term documents library in BWDs, as determined by the Communications Department web team.

¹ Additional standards apply for policies and procedures see Policy number 370 – Policies and procedures guidance

Departmental 'common' and 'public' areas on SharePoint Online

7. Documents that fall within the definition of a brigade wide document should not be stored in the department or directorate common or public area but should be in the relevant brigade wide library and made available to all staff.

Document formatting

8. All documents² available via BWD area and Hotwire must be properly identified with date of publication, the document owner at team level (e.g. knowledge management team) and a revision date (where the document is an updated version of an original document).
9. Document naming conventions will follow those set out in this policy and also in Policy number 576 - Records Management Strategy Guidance 2: Creating new documents or saving records.
10. Where appropriate documents will be reviewed one year after the publication date.
11. Documents will be in standard Microsoft Office format for Word, Excel or PowerPoint, or Adobe portable document format (PDF). No other format will be allowed and documents in other formats must be converted to PDF before they will be made available via the BWD area or Hotwire.
12. Where possible, particularly for new documents, only images obtained from the LFB image library to which the LFB holds the copyright or it is clear that permission has been given, will be permitted for use.

Records management

13. Documents declared as records in the BWD area will be dealt with using appropriate LFB records management policies.
14. Where documents have a format different to the one that is in the BWDL, departments will have a responsibility to ensure they keep the original format of the documents in their own SharePoint Online sites as a record.

Document ownership

15. Content of a document is the responsibility of the appropriate head of department.
16. Documents for publishing in BWD area or on Hotwire should have gone through the proper management and other approval processes to ensure the validity of content.

² Some document collections will have published standards (e.g. policies and procedures, LFC/committee papers).

Document history

Assessments

An equality, sustainability or health, safety and welfare impact assessment and/or a risk assessment was last completed on:

EIA	07/09/11	SDIA	26/05/2023	HSWIA	25/05/2023	RA	
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Audit trail

Listed below is a brief audit trail, detailing amendments made to this policy/procedure.

Page/para nos.	Brief description of change	Date
Throughout	This policy has been reviewed as current . Paragraph 10.1 updated. Removing concept search reference and replacing with SharePoint 2013.	17/01/2014
Page 6	'Subjects list' table - template updated.	23/12/2014
Pages 3-4	This policy has been reviewed as current, minor changes made to searching section and where short term documents are saved.	07/02/2017
Throughout	This policy has been reviewed as current, minor changes made to searching section and where short term documents are saved.	22/01/2020
Throughout	Amendments made due to the introduction of SharePoint Online (SPO).	18/08/2022
Throughout Page 8	Reviewed as current with minor changes made. SDIA and HSWIA updated.	05/06/2023

Subject list

You can find this policy under the following subjects.

Brigade wide document libraries	Databases (LFB)
Information sharing	Policy and procedure management
Records management	

Freedom of Information Act exemptions

This policy/procedure has been securely marked due to:

Considered by: (responsible work team)	FOIA exemption	Security marking classification