SharePoint 2010 Quick Reference Card
Content Management (CM) Policies

G3/5/7

1. Single Location Rule

Posting Content:
- Content must be posted in a single location or library.
- If the document exists in the solution, use the Document ID to link a document to a separate library. This creates a dummy copy, not a real copy.

2. Editing Rules

Editing Documents:
- Do not download a copy of a document library to edit the content.
- Edit in place.
- Use the check-out feature to edit the document and/or its metadata properties.

3. Use Document IDs

Document IDs: enables you to assign unique IDs to documents within a site collection. Document IDs create a unique permanent link of the document no matter where the document is moved to.

Remember:
Use Document IDs to link dummy copies from one library location to another library. Document ID linking ensures that changes are syndicated to the dummy copy in real time.

Setting Up Document ID:
1. Enable Document ID Features in the site collection (if necessary).
2. Select Document ID Settings.
3. Make sure to utilize the approved prefixes found in the SharePoint 2010 SOP. TBD

4. Content Management Security Model

Visitor Read: Published Document Only.	**Remember:**
Member Contribute: Draft Item View / Edit	• Everyone plays a role in CM.
Content Owner Publish / Reject Items & Approve	• Content Owners approve the publishing process.
Site Administrator Full Control of Scope	• Members contribute to CM by updating metadata and tagging content.

- Administrators create security models with SharePoint Groups.
- Content Owners are responsible for publishing content to the public.

5. No Email Attachments!

Save server space and everyone else's inbox by sending links to SharePoint Documents instead of email attachments.

Remember: *Avoid the fiasco of email collaboration and versioning madness, by placing team work in SharePoint and sending links to your documents.*

6. Work goes on SharePoint

Team documents must be uploaded/saved/edited directly in SharePoint.

Remember: *You can't collaborate efficiently with your colleagues if your work is sitting in your computer! members!*

7. G3/5/7 Template Rules

G3/5/7 Library Template:

You **CAN** add to the template with extra columns for more detailed classification/sorting functionality. You may **NOT** delete required columns from the template.

8. Content Expiration Policy

1 yr Retention	5 yrs Retention	7 yrs Retention
• Central Document Library • Projects, Reports	• Administration Library • Timesheets, SOP, Travel Requests	• Archives Library • Historical Documents Only

How do I get Support?

1. Use the Search feature on the SharePoint page.
2. Check the User Guides, FAQs, Discussion Groups or videos in the SharePoint Training Site
3. Contact your Site Administrator
4. Contact the SharePoint CM Training Team.

SharePoint CM Training Team

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SharePoint Training Site: https://fcportal.forscom.army.mil/reg/SitePages/Home.aspx