UNITED STATES MARINE CORPS
COMMAND ELEMENT
II MARINE EXPEDITIONARY FORCE
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II MARINE EXPEDITIONARY FORCE ORDER 3146.1B

From: Commanding General
To: Distribution List

Subj: SHAREPOINT GOVERNANCE AND MANAGEMENT

Ref: (a) Department of Defense Information Enterprise Strategic Plan for 2010-2012
        (b) NAVMC 3500.54D, "Command and Control Training and Readiness Manual"
        (c) MCO 5210.11F, "Marine Corps Records Management Program"
        (d) MARFORCOMO 5224.1B Continuous Process Improvement
        (e) MCTP 3-30B, "Information Management"
        (f) EIS 2.0 SharePoint Service Operational Plan
        (g) SECNAVINST 5720.47B, "DoN Policy for Content of Publicly Accessible World Wide Web Sites"
        (h) DoD Directive 5400.11, "DoD Privacy Program"
        (i) EIS 2.0 Service Level Agreement (SLA)
        (j) SECNAV M-5210.1, "DoN Records Management Manual"

Encl: (1) Definitions and Acronyms
        (2) Taxonomy
        (3) Annual Site Collection Audit Report Format
        (4) Electronic Records Management Status Report Format
        (5) Appointment Letter Format
        (6) Landing Page Formats
        (7) Site Manager Quick Reference

1. Situation. This Order provides key governing principles and responsibilities for the II Marine Expeditionary Force (II MEF) unclassified and classified collaborative workspace environments. Key terminology associated with this Order is located in enclosure (1).

2. Cancellation. II MEFO 3146.1A.

3. Mission. II MEF establishes and maintains a Non-Secure Internet Protocol Router Network Collaborative Workspace (NIPRCW) and a Secure Internet Protocol Router Network Collaborative Workspace (SIPRCW) on servers provided by the Marine Corps Enterprise Information Technology Service (MCEITS) in order to carry out staff action amongst distributed II MEF units.

4. Execution

    a. Commander's Intent and Concept of Operations

        (1) Commander's Intent. Organize the NIPRCW/SIPRCW and coalition Collaborative Workspace environments in a consistent fashion with easy to use navigation to locate information simply and rapidly. Post and maintain current, accurate and relevant material only. Properly secure and maintain documents using well trained, duly appointed personnel.

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(a) End State. II MEF has quality information to support decision making at all levels.

(2) Concept of Operations. In accordance with reference (a), leaders will leverage the internet-based capabilities available through the NIPRCW and SIPRCW. The NIPRCW and the SIPRCW are the primary means for collaboration and information sharing by all II MEF staff directorates; Major Subordinate Commands / Major Subordinate Elements (MSC/MSE); and as appropriate, external organizations (higher, adjacent, and supporting). MCEITS hosts the II MEF NIPRCW and SIPRCW and ensures server availability and information assurance. The II MEF NIPRCW and SIPRCW are developed and maintained under the central guidance of the II MEF Information Management Officer (IMO), but to the greatest extent possible, development, population, and maintenance of web sites and content is decentralized, with each MSC/MSE and II MEF staff directorates charged and empowered to establish and maintain their respective organizational sites or site collections. Each subordinate commander and II MEF staff directorate principals are considered site owners of their site collections or sites. Site owners are responsible for their site collections and/or sites and further appoint Site Collection Managers, Site Managers, and Alternate Site Managers as appropriate to administer and maintain their local sites and content and enforce relevant policies and processes. When site owners require custom SharePoint portal functionality, navigation, and appearance, they will coordinate with the IMO to gain approval and development assistance.

b. Tasks

(1) SharePoint Governance Roles-specific Tasks. The following roles with associated responsibilities of each are established to support this effort:

(a) Site Owners. Commanders and II MEF General and Special Staff Principals will serve as the site owners of sites that support their command or staff directorate. Site Owners will:

1. Establish and maintain organizational sites on II MEF NIPRCW/SIPRCW.

2. Approve content on sites within their site or site collection.

3. Ensure their sites or site collections follow the guidelines provided in this Order and its references.

4. Appoint, in writing, a Site Manager (SM) and an Alternate Site Manager (ASM) for each of their sites.

5. Ensure SMs and ASMs complete all required certification in accordance with paragraph 4c (3) of this Order.

6. Submit requests to the Information Management Service Desk (IMSD), for all proposed NIPRCW/SIPRCW custom functionality, changes to navigation, or changes to appearance required to support unique staff business processes and requirements.

(b) <u>Information Management Service Desk</u>. The IMSD is the focal point for all service requests and incident reporting for the NIPRCW/SIPRCW. The IMSD will:

<u>1</u>. Take call and email requests for service and incident reports.

<u>2</u>. Record and track all Service Requests (SR), project requests, and incident reports.

<u>3</u>. Report significant issues to the II MEF Information Management Officer (IMO). These include but are not limited to: command level concerns; standard functionality not working; errors or access loss affecting multiple users; and issues that have an operational impact.

(c) <u>Site Collection Managers</u>. The II MEF Collaborative Services Manager will fill the role of Site Collection Manager (SCM) for II MEF Command Element (CE) sites. IMOs at 2d Marine Expeditionary Brigade Command Element (2d MEB CE), 2d Marine Division (2d MarDiv), 2d Marine Aircraft Wing (2d MAW), 2d Marine Logistics Group (2d MLG), II MEF Information Group (II MIG), 22d Marine Expeditionary Unit (22d MEU), 24th Marine Expeditionary Unit (24th MEU), and 26th Marine Expeditionary Unit (26th MEU) will ensure the role of SCM is filled by a government service or uniform service member. The SCM will supervise site collections within their respective command or staff directorate. Each SCM will have an appointment letter and a copy will be provided to the II MEF IMO. SCMs will:

<u>1</u>. Attend the II MEF Site Collection Manager Working Group (SCMWG) with the II MEF Collaborative Services Manager to provide an update brief that includes NIPRCW/SIPRCW status, SMs and ASMs, attendance at workshops, size and usage trends of sites, and any new or non-standard applications in use.

<u>2</u>. Ensure all SMs in your command or staff directorate are properly certified pursuant to paragraph 4c (3) of this Order. Maintain required certification and appointment letter for all SMs under your control.

<u>3</u>. Ensure all access is controlled by SharePoint groups. Create SharePoint groups and assign them access as needed. Add and remove SMs in SM SharePoint groups as needed.

<u>4</u>. Maintain site structure in accordance with paragraph 4c (4) of this Order to prevent site sprawl. Review enclosure (2) for additional details.

<u>5</u>. Per reference (b), ensure all Site Managers under your control attend annual refresher training. Maintain attendance rosters and record this training on Site Manager list for audit purposes. Reduce access of any Site Managers who have not attended refresher training until it is completed. This refresher training must include a review of local policies and procedures.

<u>6</u>. Assume the role of Electronic Information Systems (EIS) custodian for information residing on the NIPRCW/SIPRCW. Work with Command Designated Records Managers (CDRM) to properly establish electronic records management program. In accordance with reference (c), CDRMs must work closely with EIS custodians to properly manage records. The EIS custodian for

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NIPRCW/SIPRCW is the SM or SCM. The SM and SCM assist commanders, staff officers, and CDRMs to develop and implement information technology solutions that streamline various processes. They share expertise and provide guidance during the lifecycle of electronic records, and ensure proper archival elements are built into new and existing systems.

7. Ensure an annual review is performed of NIPRCW/SIPRCW site collections and corrective action is taken where required in accordance with this governance plan. Provide report to the II MEF IMO using format provided in enclosure (3). Report is due no later than 30 working days after the end of the calendar year.

8. Report significant issues to the IMSD.

(d) Site Managers. The Site Manager provides both user access and command or staff assistance in leveraging SharePoint features in support of command or staff information exchange objectives. Enclosure (4) is provided as a quick reference guide for SMs. Alternate site managers (ASMs) are designated and certified in the same fashion as SMs. ASMs carry out the function of the SM in their absence or as directed by the SM. SMs will:

1. Complete certification requirements and annual refresher.

2. Ensure sites are properly formatted

3. Add and remove Content Managers in content manager SharePoint groups as needed.

4. Ensure all content posted complies with this Order.

5. Attend the workshops convened by the SCM as required. Failure to attend at least one workshop each calendar year will result in loss of Site Manager access until SM attends required workshop.

6. Maintain a desktop procedure. This must contain a copy of the site manager's training certificate and appointment letter.

7. Notify your SCM prior to transferring or deploying.

8. Report significant issues to the SCM.

(e) Content Managers. Anyone posting documents is considered a Content Manager of that site. All site Content Managers will:

1. Ensure all content posted complies with this Order.

2. Notify the SM prior to transferring or deploying.

3. Report significant issues to the SM.

(f) Site Users. Site Users are anyone having read access to a site. If access is required to a site, contact the site's SM.

(g) CDRM. The AC/S G-1 is the process owner for records management and appoints the CDRM. In accordance with paragraph 4c (1) of reference (c), the unit CDRM works closely with the EIS custodian to properly

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establish electronic records management program. To comply with the intent of reference (c), the CDRM will convene annual working groups with the SCM. A report will be provided to the unit IMO and AC/S G-1 describing the current state of electronic records management and plans to improve using the format in enclosure (5). Report is due no later than 30 working days after the end of the calendar year.

(2) <u>II MEF IMO Collaborative Services Manager</u>

(a) <u>Coordinate with service provider</u>. Coordinate with NIPRCW/SIPRCW service provider, MCEITS to ensure the service meets the needs of II MEF. The SharePoint service provider installs, configures and maintains the II MEF NIPRCW/SIPRCW environments and provides user access accounts.

(b) <u>Governance</u>. Develop, distribute, and enforce II MEF NIPRCW/SIPRCW governance standards and content policies.

(c) <u>Service Requests</u>. Assign and monitor service requests for NIPRCW/SIPRCW environments and coordinate with II MEF G6, MCIEAST and MCEITS as required.

(d) <u>Certification</u>. Coordinate with MSC IMOs and Director, Marine Air Ground Task Force (MAGTF) Integrated Systems Training Center (MISTC) EAST as needed to ensure II MEF SCMs, SMs, and ASMs are certified.

(e) <u>SCM</u>. Assume the role of SCM for the II MEF Command Element (CE) sites. Convene Site Collection Manager Working Groups with MSC SCMs as required.

(f) <u>Continuous Process Improvement (CPI)</u>. Establish methods to improve the effectiveness of collaborative services and associated business processes as directed by reference (d). This will include establishing metrics for tracking outages, usage statistics, compliance with this Order, and collection sizes. Site Manager Workshops will be conducted to improve sites.

(3) <u>II MEF General and Special Staff Principals</u>

(a) Appoint in writing a SM and an ASM for each site that supports your staff directorate. . A copy of all appointment letters will be maintained by the Site Owner, the staff Knowledge Management Officer (KMO) and the II MEF Collaborative Services Manager. Enclosure (6) is a template for use in generating appointment letters.

(b) Establish and maintain organizational sites on the II MEF NIPRCW/SIPRCW. The site taxonomy will follow the outline in enclosure (2). Site formats will adhere to enclosure (7) of this Order.

(c) Ensure SMs and ASMs complete all required certifications in accordance with paragraph 4c (3) of this Order.

(d) Coordinate with the II MEF IMO via the IMSD on all proposed NIPRCW/SIPRCW custom functionality, changes to navigation, or changes to appearance required to support unique staff requirements.

(e) Ensure all sites under your control are maintained IAW the references.

(4) Major Subordinate Commands and Major Subordinate Elements

(a) Appoint, in writing, a SCM for each site collection, a SM and an ASM for each site belonging to the command. A copy of all appointment letters will be maintained by the MSC IMO. Enclosure (6) is an example of an Appointment Letter.

(b) Establish and maintain organizational sites on II MEF NIPRCW/SIPRCW. The site taxonomy will follow the outline in enclosure (2). Site formats will adhere to enclosure (7) of this Order.

(c) Ensure SCMs, SMs and ASMs complete all required training

(d) Coordinate with the II MEF IMO via the IMSD on all proposed NIPRCW/SIPRCW custom functionality, changes to navigation, or changes to appearance required to support unique staff requirements.

(e) Ensure all sites under your control are maintained IAW the references.

c. Coordinating Instructions

(1) Communication with the IMSD. All communication and requests for assistance must go through the SM or ASM, SCM, then the IMSD at iimefimservicedesk@usmc.mil.

(2) Access Control. All access to the NIPRCW/SIPRCW is controlled using SharePoint groups. When personnel transfer or deploy, they must be removed from SharePoint groups by the local SM.

(a) Site Collection Managers. SCMs will be placed in the SCM access SharePoint group. They will have the ability to create SharePoint groups, assign permissions to SharePoint groups, add members to SharePoint groups, and add new sites.

(b) Site Managers and alternate site managers. SMs and ASMs will be placed in the SM SharePoint group. They will have the ability to modify pages, add web parts, and add content managers to contributor SharePoint groups.

(c) Content Managers. Content Managers will be placed in contributor SharePoint groups. They will be able to post documents and modify calendars and other lists they are given access to.

(d) Site Users. Site Users are anyone having read access to a site. The "visitors" SharePoint group encompasses Site Users. This SharePoint group will have read access to all areas of the site not specifically restricted. Users will contact their Site Manager to request access to restricted content.

(3) Certification. In accordance with reference (b), all SMs must complete formal training prior to being given SM privileges. This training is provided by MISTC-East, MISTC-West, and Coastal Carolina Community College (SharePoint Power User Course). Certificates from these three sources will

be accepted. Sustainment training is required to retain the SM Role. This training shall be coordinated by the SCM.

(4) <u>Web Portal Structure or Taxonomy</u>. The approved II MEF NIPRCW/SIPRCW site taxonomy is provided in enclosure (2). SCMs will coordinate changes or additions to sites in this taxonomy with the II MEF IMO in accordance with paragraph 4c(1) of this Order.

(5) <u>Site Format</u>. To facilitate staff collaboration, the II MEF site design, layout, navigation, and color scheme will be uniform across all sites. This improves efficiency, and improves the overall effectiveness of the portal in providing quality information to support decision making processes.

(a) <u>MSC / Regiment / Group Landing Page</u>. Enclosure (7) contains a template for MSC, Regiment and Group landing pages. MSC, Regiment, Group landing pages will include the following:

<u>1</u>. Commander's Mission Statement.

<u>2</u>. Photos / Bios of Commander and key command personnel.

<u>3</u>. CCIRS, Battle Rhythm, Commander's Guidance and Policies.

(b) <u>Battalion, Squadron, Department, Command Element Landing Page</u>. Enclosure (7) contains a template for a Battalion, Squadron, Department, and Command Element Landing Page. Department/CE landing pages will have the following:

<u>1</u>. Commander's mission statement.

<u>2</u>. Organizational chart.

<u>3</u>. Battle rhythm.

<u>4</u>. Key personnel.

<u>5</u>. Applicable orders/directives.

<u>6</u>. Important links.

<u>7</u>. Site Manager/Alternate Site Manager shall appear at the bottom right.

(c) <u>Unit, Section Landing Page</u>. Enclosure (7) is the template for a standard unit landing page. Every unit landing page must include the following:

<u>1</u>. Mission statement.

<u>2</u>. Site Manager/Alternate Site Manager shall appear at the bottom right.

(6) <u>Content</u>. In accordance with reference (e), "Information is a valuable commodity, bringing with it an added dimension of both situational context and technical complexity. It is an asset that must be effectively managed by aligning people, technology, and process to allow warfighters to

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compete successfully." As such, information should be tailored for the intended audience, and meet the specified requirements of the commander.

    (a) <u>Quality Information</u>. Inaccurate or irrelevant information is worse than no information at all. Sites must contain quality information to properly support decision making processes of commanders throughout II MEF. Pursuant to reference (f), sites must be reviewed routinely (at a minimum monthly) to ensure posted content is current, accurate, and relevant. Reference (c), chapter (4) provides the procedure for electronic records disposition.

    (b) <u>Best Practices</u>. Reference (f) delineates best practices such as: avoid the use of folders in document libraries; avoid using spaces in the title names of lists and libraries; avoid uploading very large files. Pursuant to reference (f) the following will be adhered to on the NIPRCW/SIPRCW: the maximum file size that can be uploaded is 250 MB; folders will not be used in document libraries; names of sites, lists, and libraries will not contain spaces or other special characters except for the underscore (_). Exceptions may be granted with appropriate business justification through the II MEF IMO. Filtered views of libraries and lists will be used in lieu of folders.

    (c) <u>Classification</u>. The II MEF SIPRCW, the classified environment, is cleared for up to SECRET information. The II MEF NIPRCW is cleared for information up to the Unclassified for Official use only (FOUO) level.

    <u>1</u>. Reference (f) contains the procedure for handling spillages. This procedure will be adhered to in the event data is found on the SIPRCW above SECRET or if data is found on the NIPRCW above FOUO.

    <u>2</u>. In accordance with reference (g), information posted or maintained on the II MEF NIPRCW is assumed to be, and will be treated as FOUO and will not be released to the public until reviewed and approved for public release by the Unit Derivative Classification Authority and the II MEF Public Affairs Officer in conjunction with the Information Owner.

    (d) <u>Sensitive Information</u>. In accordance with reference (h), any list, library or document containing classified or sensitive information must have appropriate access restrictions placed on it. Sensitive information includes Personally Identifiable Information (PII) and Protected Health Information (PHI) that falls under the Health Insurance Portability and Accountability Act (HIPAA).

    <u>1</u>. <u>PHI</u>. Pursuant to reference (i), PHI is not allowed in NIPRCW/SIPRCW environments. PHI includes, but is not limited to, medical test results, dental records, health records, and shot records.

    <u>2</u>. <u>PII</u>. Pursuant to reference (f), PII information is allowed in the NIPRCW/SIPRCW environments. Pursuant to reference (h), appropriate administrative, technical, and physical safeguards shall be established to protect PII. PII includes but is not limited to social security number; age; marital status; family information; race; salary; home phone numbers; other demographic, biometric, personnel, medical, and financial information.

3. <u>Safeguards</u>. Appropriate safeguards include establishing a special permissions group for any area of a site that contains sensitive information. This will contain a by-name list of all personnel who have access to the sensitive information. Access to these lists must be removed when personnel leave the unit or no longer need access to the information to perform their assigned duties.

(e) <u>Prohibited Items</u>. Scrolling text, twirling images, large icons and pictures are distracting, will cause pages to load slower, offer little or no information, are inappropriate to the intended purpose of the portal and will not be used. A small unit icon, not to exceed 60x60 pixels, can be used in place of the default site icon. Background images will not be used unless authorized by the unit IMO. Pursuant to reference (g), commercial logos and links to commercial sites can be interpreted as an official endorsement and are therefore not authorized. This includes, but is not limited to links to non-government weather information, news channels, charitable institution advertisements, and logos from government contracted companies.

(f) <u>Naming Conventions</u>. Reference (c) states that using proper naming conventions "ensures easy identification, access, and irretrievability." Content posted will follow proper naming conventions. This includes not using spaces or special characters in titles of sites, lists, libraries, documents or other site content. Use an underscore (_) to separate words in titles if separation is needed.

(g) <u>Required Metadata</u>. Metadata is information used to properly categorize and find information. Reference (c) lists required metadata for all records to support the records management process as follows: SSIC, status (i.e., permanent or temporary), retention period, disposal date, official author, date finalized, disposal action, and disposal authority.

(h) <u>Electronic Records Management</u>. References (j) through (f) provide guidance on electronic records management.

<u>1</u>. Reference (j) provides SSIC codes to be used when posting records to a SharePoint site. Reference (j) states that long term and permanent records are to be transferred to Federal Records center in accordance with their disposition and retention schedule. Temporary records are to be deleted when they reach their expiration date. The number and volume of long-term or permanent Department of the Navy records are to be reduced, but also increase the significance of those to be preserved.

<u>2</u>. Chapter 3 of reference (c) provides specific guidance on electronic records management requirements using SharePoint. It describes in detail how to configure SharePoint for storage of records. This configuration must be adhered to for all temporary and permanent records stored on the NIPRCW/SIPRCW.

<u>3</u>. Chapter 1 of reference (c) defines what permanent and temporary records are. It defines non-records as working papers, preliminary or intermediate drafts, reports and related papers, memoranda, preliminary worksheets, or notes and similar materials that are summarized in final or other form; Charts, diagrams, and other graphic materials prepared from source material and used for briefing or training activities; duplicate copies of materials used for reference. Non-record materials should be destroyed when no longer needed for reference.

    <u>4</u>. Reference (f) states properly managed electronic records lessen the need for additional or larger storage space, network support, and equipment, saving money.

    (7) <u>Custom functionality</u>. Standard features will be used to the fullest extent possible. Requests for custom functionality will be made through the SM or ASM, SCM, then the IMSD. All custom functionality must be properly recorded and documented to ensure it is supported by IMO developer staff and included in test plans during software upgrades. Contact the IMSD for the process to record and document these. See enclosure (1) for description of what custom functionality is.

    (8) <u>SharePoint Designer</u>. Available to II MEF IMO SharePoint Developer positions only.

5. <u>Administration and Logistics</u>

    a. Technical questions related to this Order may be forwarded to the Collaborative Services Manager.

    b. The II MEF IMO is the Office of Primary Responsibility for correspondence related to this Order. Recommendations for changes to this Order should be submitted to the II MEF IMO via the chain of command.

6. <u>Command and Signal</u>

    a. <u>Command</u>. This Order is applicable to all military personnel, civilians, and contractors assigned or attached to II MEF.

    b. <u>Signal</u>. This Order is effective the date signed.

B. N. Wolford
Chief Of Staff

DISTRIBUTION: A/B

Definitions and Acronyms

22d, 24th, and 26th MEUs. Marine expeditionary units (MEUs) are O6-level MAGTFs assigned to II MEF. They are major subordinate elements.

2d MARDIV. 2d Marine Division. The ground combat element of II MEF. It is a MSC.

2d MAW. 2d Marine Aircraft Wing. The aviation combat element of II MEF. It is a MSC.

2d MEB. 2d Marine Expeditionary Brigade. The 2d MEB Command Element (CE) is a standing O7-level MAGTF CE and is a MSC of II MEF. Other than the CE, there are no permanently assigned forces within 2d MEB.

2d MLG. 2d Marine Logistics Group. The logistics combat element of II MEF. It is a MSC.

ASM. Alternate Site Manager. Alternate Site Managers carry out the duties of the site manager when the site manager is unable to or as directed. ASMs are required to complete the same training and certification as SMs. ASMs are appointed by site owners. .

Application. An application is any program designed to perform a specific function for the user.

CDRM. Command Designated Records Managers. Appointed in writing by Commanders. CDRMs will be a company/field grade officer, staff noncommissioned officer (SNCO), or civilian equivalent.

Collaboration. A process where by two or more people or organizations work together in an intersection of common goals by sharing knowledge, learning and building consensus.

Collaborative Workspace. A web-based place where organizations can conduct collaboration. Includes the NIPRCW and SIPRCW.

Content. Any list, document or text contained in a site or arranged on a site page.

Content Manager. A content Manager is anyone who has access to place content on sites.

CSM. Collaborative Services Manager. A member of the II MEF IMO staff, the CSM manages II MEF site collections and provides guidance for MSC Site Collection Managers. Provides guidance to II MEF Command Element Site Managers.

Custom Functionality. Additional code added or alterations made to the out of the box NIPRCW or SIPRCW. Custom functionality includes, but is not limited to: custom workflows, custom web parts that were installed by MCEITS and are used on a site, customizations to master pages, highly customized lists (beyond what is taught in basic site manager class), and custom sites and functionality created by developers.

EIS. Electronic Information Systems. An EIS is a system that manages and provides access to computerized federal records and other information.

G-6. General staff assistant chief of staff for communications. Each MSC G-6 maintains a helpdesk for customer connectivity issues and desktop hardware and software support.

II MEF. II Marine Expeditionary Force

II MIG. II MEF Information Group. An MSE of II MEF. Provides C2 enablers to II MEF CE.

IMSD. The Information Management Service Desk (IMSD) provides support for the NIPRCW and SIPRCW, along with other Command and Control systems.

IMO. The Information Management Officer (IMO) is a special staff officer who reports to the Chief of Staff and develops and refines the processes and procedures necessary to harness information for the command and guide daily staff actions. The IMO works with staff section information managers to understand, facilitate, and improve information flow. (MCTP 3-30B)

Information. Facts, data, or instructions in any medium or form. The meaning that a human assigns to data by means of the known conventions used in their representation. The communication or reception of knowledge or intelligence.

Information Management. The function of managing an organization's information resources for the handling of data and information acquired by one or many different systems, individuals and organizations in a way that optimizes access by all who have a share in that data or a right to that information. (JP 3-0)

Knowledge Management. The integration of people and processes, enabled by technology, to facilitate the exchange of operationally relevant information and expertise to increase organizational performance.

Landing Page. A landing page is the default page that displays for a unit, command, section, etc...

MSC. Major subordinate commands (MSCs) are commands assigned to II MEF. MSCs have commanding generals. All MSCs are stakeholders in the NIPRCW / SIPRCW.

MISTC. Marine Air-Ground Task Force (MAGTF) Integrated Systems Training Center. Provides timely and relevant training in both the art and science of C2 to commanders, staffs, and individual Marines, in order to enable them to act more decisively and effectively than the enemy. East Coast location is at Camp Johnson. Falls under Command and Control Training and Education Center of Excellence (C2TCOE).

MAGTF. Marine air-ground task force. The Marine Corps' principal organization for all missions across a range of military operations, composed of forces task-organized under a single commander capable of responding rapidly to a contingency anywhere in the world.

MCEITS. Marine Corps Enterprise Information Technology Service, located in Kansas City Mo, provides NIPR and SIPR SharePoint portal services to USMC units. II MEF SharePoint portals are housed here.

MCIEast. Marine Corps Installations East. Provides local 24 hour helpdesk for customer connectivity issues and desktop hardware and software support.

MCOG. Marine Corps Operations Group (Formerly MCEN) provides path to MCEITS, establishes and maintains network infrastructure.

MSCs/MSEs. Major Subordinate Commands (MSCs) include 2d MARDIV, 2d MAW, 2d MLG, and 2d MEB CE. Major Subordinate Elements (MSEs) include II MIG, 22d MEU, 24th MEU, and 26th MEU.

NIPRCW. The Non-Secure Internet Protocol Router Network Collaborative Workspace provides an unclassified environment for site owners to conduct collaboration.

Organizational Site. A site maintained by a single unit or department, designed to represent a single business area within an organization.

Page. A page (or web page) is an arrangement of lists, calendars, document libraries, and text. There can be multiple pages contained within a site.

PII. A person's identifiable information protected by the Privacy Act of 1974, also referred to as Personal Information or Personally Identifiable Information.

SCM. A Site Collection Manager (SCM) is anyone given access to manage a site collection.

SharePoint group. A SharePoint group is a collection of users who all have the same set of permissions, or permission level. SharePoint groups are used to simplify the task of assigning and managing site access. Rather than track site or content access one person at a time, SharePoint groups are used to assign the same permission level to many people at once.

SIPRCW. The Secure Internet Protocol Router Network Collaborative Workspace provides a Secret classified environment for site owners to conduct collaboration.

Site. A Site (or Web Site) is a grouping of lists, calendars, document libraries, workflows, and pages. Sites are either top-level sites or subsites of the top-level site.

Site Collection. A site collection is a group of sites included within a single top-level site allowing over-arching control of all sites it contains.

Site Collection Manager. A site collection manager is anyone given access to manage a site collection.

SM. The Site Manager is given site manager access. They are trained and are considered the command's subject matter expert (MSE) for the NIPRCW / SIPRCW.

Site Owner. Commanders and general/special staff principals serve as the site owners of site collections and sites. All information contained on a site owned by the site owner is the responsibility of the site owner.

Site User. A site user is anyone who accesses the information contained on a site.

SR. Service Request. A record of a user's requirements created by the ISMD to track all requests for IM services.

Taxonomy. A way of classifying things or concepts by similarities in structure, use, concepts, relationships or intent. The II MEF SharePoint Taxonomy is a complete diagram of the organizational relationship (arrangement) of sites within the II MEF SharePoint. All approved sites appear within this diagram.

Workflow. A way for a user to connect an automated business process to a document in the II MEF portal. SharePoint workflows are pre-programmed mini-applications that streamline and automate a wide variety of business processes. Workflows can range from collecting signatures, feedback, or approvals for a plan or document, to tracking the current status of a routine procedure. SharePoint workflows are designed to save you time and effort, and to bring consistency and efficiency to tasks that you perform on a regular basis

II MEF Site Taxonomy

II MEF CE Collection

- **CE Staff** — 1 site per general/special staff – others will be pages
  - Pages
- **Exercise** — 1 site per exercise – others will be pages
  - Pages
- Pages

II MIG CE Collection

- **CE Staff** — 1 site per executive/special staff – others will be pages
  - Pages
- **Exercise** — 1 site per exercise – others will be pages
  - Pages
- **Battalions**
  - **CE Staff** — 1 site per executive/special staff – others will be pages
    - Pages
  - **Companies**
    - Pages
  - Pages

Key

- Pages
- Sites

MEB Site Taxonomy

MEB Collection

3 Collections: 22d MEU, 24th MEU, 26th MEU

CE Staff — 1 site per general/special staff – others will be pages

Pages

Exercise — 1 site per exercise – others will be pages

Pages

Pages

MEU Site Taxonomy

MEU Collection — 3 Collections: 22d MEU, 24th MEU, 26th MEU

CE Staff — 1 site per executive/special staff
– others will be pages

Pages

Exercise — 1 site per exercise
– others will be pages

Pages

Pages

Attached Units — 3: ACE, GCE, LCE

CE Staff — 1 site per executive/special staff
– others will be pages

Pages

3

Division Taxonomy

2d MARDIV Collection

- **CE Staff** — 1 site per general/special /special staff – others will be pages
  - Pages
- **Exercise** — 1 site per exercise – others will be pages
  - Pages
- Pages

Separate Bns Collections — 6 Separate Battalion collections: 2dmardivhq, 2daabn, 2dceb, 2dlarbn, 2dreconbn, 2dtankbn
- Pages

Div Regiments — 4 Regiment collections: 2d, 6th, 8th, 10th Marine Regiments

- **CE Staff** — 1 site per executive/special staff – others will be pages
  - Pages
- **Exercise** — 1 site per exercise – others will be pages
  - Pages
- Pages
- **Battalions**
  - **CE Staff** — 1 site per executive/special staff – others will be pages
    - Pages
  - **Companies** — 1 site per company – others will be pages
    - Pages
  - Pages

4

MAW Taxonomy

2d MAW Collection

- **CE Staff** — 1 site per general/special staff
  — others will be pages
  - Pages

- **Exercise** — 1 site per exercise
  — others will be pages
  - Pages

- Pages

- **Separate Squadrons**
  - Pages

MAW Groups — 6 Group collections:
MAG14, MAG26, MAG29, MAG31, MACG28, AGSD

- **CE Staff** — 1 site per executive/special staff
  — others will be pages
  - Pages

- **Exercise** — 1 site per exercise
  — others will be pages
  - Pages

- Pages

MLG Taxonomy

1 collection

2d MLG Collection

CE Staff — 1 site per general/special staff – others will be pages

Pages

Exercise — 1 site per exercise – others will be pages

Pages

Pages

Separate Bns

CE Staff — 1 site per executive/special staff – others will be pages

Pages

Companies — 1 site per company – others will be pages

Pages

Pages

Regiments

CE Staff — 1 site per executive/special staff – others will be pages

Pages

Battalions

CE Staff — 1 site per executive/special staff – others will be pages

Pages

Companies — 1 site per company – others will be pages

Pages

Pages

6

UNITED STATES MARINE CORPS
II MARINE EXPEDITIONARY FORCE
INFORMATION MANANAGMENT OFFICE
PSC BOX 20132
CAMP LEJEUNE,NC 28542-0181

IN REPLY REFER TO:
5400
IMO
<Date>

From: <Unit Commander or Department Head / Department/Unit>
To: II MEF IMO

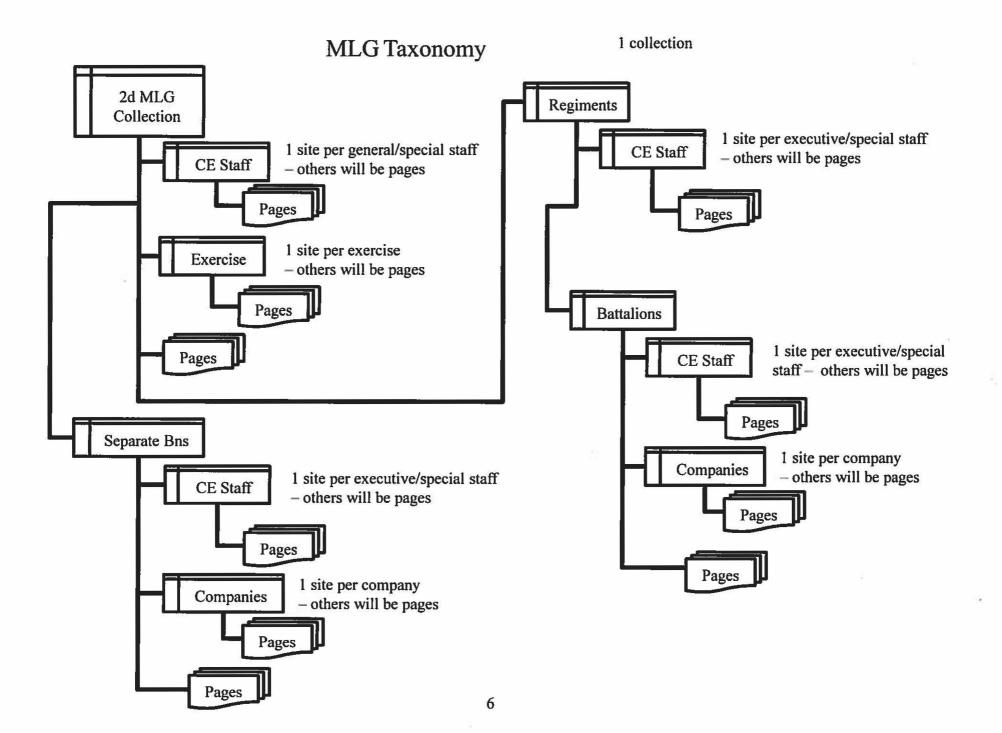Subj: <UNIT NAME> SHAREPOINT SITE COLLECTION ANNUAL AUDIT REPORT
       FOR CALENDAR YEAR <CALLENDAR YEAR>

Ref: (a) II MEF Order 3146.2, "SharePoint Governance and Management"
       (b) SECNAVINST 5720.478, "DoN Policy for Content of Publicly Accessible
           World Wide Web Sites"
       (c) MCO 5210.11F, "Marine Corps Records Management Program"
       (d) MCTP 3-30B, "Information Management"

1. In accordance with reference (a) the subject audit was conducted during the period of
<startdate> through <end date>. The URL for the site collection is
https://eis.usmc.mil/sites/IIMEF.

2. The results of this audit are as follows.

4. Any questions in regards to this may be directed to <POC information.>.

                                              Signature Block

                                                                    Enclosure (3)

Site Manager Quick Reference

Contacts

IMSD
Submit all service requests, project requests and incident reports to: iimefimservicedesk@usmc.mil Tel: 910-451-8614. URL: https://eis.usmc.mil/sites/IIMEF/imo/Pages/IMSD.aspx

Collaborative Services
https://eis.usmc.mil/sites/IIMEF/imo/Pages/CS.aspx

References

Site Manager reference Location
References can be found at: https://eis.usmc.mil/sites/IIMEF/imo/Pages/ResourceLocations.aspx

SharePoint governance order
Latest 3146.1B, SharePoint Governance Order can be found at:
https://eis.usmc.mil/sites/IIMEF/G1/SitePages/Adjutant.aspx

Enclosures to governance order
Electronic versions of this document and other enclosures to Gov order can be found at:
https://eis.usmc.mil/sites/IIMEF/imo/Documents/Forms/CS.aspx

Roles

Site Owner
Unit Commander or general/special staff principal. Responsible for all content on the site. Appoints the Site Managers.

Site Collection Managers (SCM)
The II MEF Collaborative Services Manager is the Site Collection Manager for II MEF CE sites. IMOs at all other units ensure the role of Site Collection Manager is filled. SCM will be placed in the SCM group and have full control of all sites in their respective collections. Responsibilities include:

1. Attend the II MEF Site Manager Working Group (SMWG). Generate a brief that includes NIPRCW/SIPRCW status, SMs and ASMs, attendance at workshops, size and usage trends of sites, and any new or non-standard applications in use.
2. Ensure all Site Managers are certified and appointed.
3. Maintain certs and Appointment letters for Site Managers.
4. Ensure all access is controlled by groups.
5. Create groups and assign them access as needed.
6. Ensure access to sensitive information is controlled using by-name entries in a group specifically for that information.
7. Add SMs to and remove SMs from site manager groups as needed.
8. Maintain site structure, create only approved sites. Use pages for additional sub-dividing below the approved structure.
9. Conduct Site Manager Working Groups.
10. Coordinate annual sustainment training (workshop) for Site Managers.

11. Report significant issues to the IMSD.

Site Managers (SM)
The SM will be able to modify pages, add web parts, and add content managers to the contributor group(s) plus anything a Content Manager can do. They will be place in the SM group by the SCM. Responsibilities include:

1. Complete certification and attend quarterly workshops and annual training.
2. Ensure sites are properly formatted per orders.
3. Add and remove Content Managers in content manager groups as needed.
4. Ensure all content posted complies with orders.
5. Attend the SMWG convened by the Site Collection Manager.
6. Maintain copy of your training cert and Appointment letter.
7. Notify Site Collection Manager prior to transferring or deploying.
8. Ensure your contact information is in bottom right hand corner of site.
9. Report significant issues to the Site Collection Manager.

Content Managers (CM)
The CM_will be able to post documents and modify calendars and other lists they are given access to. Responsibilities include:

1. Ensure all content posted complies with orders.
2. Notify the Site Manager prior to transferring or deploying.
3. Report significant issues to the Site Manager.

Site Users
Anyone having read access to a site. The "visitors" group encompasses Site Users. This group will have read access to all areas of the site not specifically restricted. Users will contact their local Site Manager for access.

Site Format
To facilitate staff collaboration, the II MEF site design, layout, navigation, and color scheme will be uniform across all sites.

Major Subordinate Command (MSC) Landing Page
1. CG's Mission Statement.
2. Photos of CG and key command personnel.
3. CCIRS, Battle Rhythm, CG Policies.

Department/Command Landing Page
1. Mission at the top of the page.
2. Organizational Chart just below the mission statement
3. Battle Rhythm just below Organizational Chart
4. Key Personnel just below the Battle Rhythm
5. Applicable Orders/Directives at the top right.
6. Important links just below orders and directives.
7. Site Manager / Alternate Site Manager bottom right.

Standard Unit Landing Page
1. Mission at the top of the page.
2. Site Manager / Alternate Site Manager bottom right.

Content

General

1. Do not use folders in document libraries, use filtered views leveraging metadata.
2. Do not create additional document libraries for each type of document, use filtered views.
3. Do not use spaces or other special characters in library, list, page, or site names except for the underscore (_).
4. Maximum file size that can be uploaded is 250 MB.

Classification

NIPRCW/SIPRCW Information will be treated as "For Official Use Only" and will not be released to the public until reviewed and approved by the Unit Public Affairs Officer in conjunction with the Information Owner.

Sensitive Information

Personally Identifiable Information (PII)

PII information will have appropriate administrative, technical, and physical safeguards. PII includes social security number; age; marital status; race; salary; home phone; other demographic, biometric, financial information.

Protected Health Information (PHI)

PHI falls under the Health Insurance Portability and Accountability Act (HIPPA) will not be allowed on the NIPRCW/SIPRCW. PHI includes medical test results, dental records, health records, and shot records.

Prohibited Items

Scrolling text, twirling images, large icons and pictures are distracting, will cause pages to load slower, offer little or no information, are inappropriate to the intended purpose of the portal and will not be used. A small unit icon, not to exceed 60x60 pixels, can be used in place of the default site icon. Commercial logos and links to commercial sites can be interpreted as an official endorsement and are therefore not authorized. This includes, but is not limited to links to non-government weather information, news channels, charitable institution advertisements, and logos from government contracted companies.

Naming Conventions

Content posted will follow proper naming conventions as detailed MEFO 3146.1B.

Required Metadata

Metadata is information used to properly categorize and find information. Required metadata is identified in 3146.1B.

Electronic Records Management

Records are specifically defined in 3146.1b and must be properly managed. Site managers will coordinate with the command designated records manager (CDRM) for proper records management.

Custom Functionality

Standard features will be used to the fullest extent possible. Requests for custom functionality will be made through the IMSD. Customizations are listed at: https://eis.usmc.mil/sites/IIMEF/imo/Customizations_Documentation

SharePoint Designer

Only personnel assigned to II MEF IMO with a SharePoint Developer billet will use Microsoft SharePoint Designer.

IN REPLY REFER TO:
5400
IMO
<Date>

From: < Unit> Information Management Officer

To: II MEF Information Management Officer

Subj: <UNIT NAME> SHAREPOINT ELECTRONIC RECORDS MANAGEMENT
        ANNUAL STATUS REPORT FOR CALENDAR YEAR <CALLENDAR YEAR>

Ref: (a) II MEF Order 3146.2, "SharePoint Governance and Management"
        (b) SECNAVINST 5720.478, "DoN Policy for Content of Publicly Accessible
            World Wide Web Sites"
        (c) MCO 5210.11F, "Marine Corps Records Management Program"
        (d) MCTP 3-30B, "Information Management"

1. In accordance with reference (a) the subject audit was conducted during the period of
<startdate> through <end date>. The URL for the site collection is
https://eis.usmc.mil/sites/IIMEF.

2. The results of this audit are as follows.

4. Any questions in regards to this may be directed to <POC information.>.

                                        Signature Block

                                                        Enclosure (5)

UNITED STATES MARINE CORPS
II MARINE EXPEDITIONARY FORCE
INFORMATION MANANAGMENT OFFICE
PSC BOX 20080
CAMP LEJEUNE, NC 28542-0080

From: ==\<Unit Commander or Department Head / Department/Unit>==
To: ==\<Appointee Name / Department/Unit>==

Subj: APPOINTMENT AS ==\<SITE MANAGER or COLLECTION MANAGER>== FOR ==\<UNIT NAME>== WITHIN THE II MARINE EXPEDITIONARY FORCE WEB PORTALS

Ref: (a) DoD Directive 5400.11, "DOD Privacy Program"
(b) SECNAVINST 5720.478, "DoN Policy for Content of Publicly Accessible World Wide Web Sites"
(c) NAVMC 3500.54C, "Command and Control Training and Readiness Manual"
(d) MCO 5210.11F, "Marine Corps Records Management Program"
(e) MCTP 3-30B, "Information Management"
(f) II MEF Order 3146.2B, "SharePoint Governance and Management"

1. You are hereby appointed to serve in the subject role. You are to thoroughly familiarize yourself with the references. Training information and the references can be found under Collaborative Workspace located at: https://eis.usmc.mil/sites/IIMEF/imo/Pages/CS.aspx.

2. This appointment will remain in effect until you leave this unit or are formally relieved by the appointment of another person to serve in this role. This appointment is expected to last for a minimum of one year, from the date of this appointment letter.

3. You are to report any problems encountered or recommendations for improvement to the Site Owner or unit Information Management Officer.

4. You will carry out the assigned duties per the references. This will be in compliance with rules and regulations set forth by the II MEF, the USMC and the Department of Defense.

==Signature Block==

Department Head/Unit Commander (Site Owner) Information:
Full Name:
Rank/Grade:
E-mail Address:
Phone Number:
Organization:
==\<Complete highlighted areas as appropriate>==

Enclosure (6)

IN REPLY
REFER TO:
5400
IMO
<mark><Date></mark>

FIRST ENDORSEMENT

From: <mark><Appointee Name / Department/Unit></mark>
To: <mark><Department Head or Unit Commander/ Department/Unit></mark>

Subj: STATEMENT OF UNDERSTANDING FROM SHAREPOINT <mark><SITE MANAGER or SITE COLLECTION MANAGER> <DEPARTMENT/UNIT></mark>

Encl: (1) SharePoint Site Manager Training Certificate

1. In my appointment as the SharePoint <mark><Site Manager or Site Collection Manager></mark> for <mark><Unit></mark>, I understand and agree to perform my role in accordance with the references.

2. I have attached copies of all required and relevant training certificates.

3. I have read and understand the references and will comply with all rules and regulations stated in these references and have assumed all duties in conjunction with my appointment.

4. A copy of this appointment letter is being provided to the Information Management Officer for the unit I will be Site Collection Manager of.

<mark>Signature Block</mark>

Site Collection Manager Information:

Full Name:
Rank/Grade:
E-mail Address:
hone Number:
Organization:

<mark><Complete highlighted areas as appropriate></mark>

MSC, Regiment, Group Landing Page Format

II MEF and MSC Navigation

The color scheme will be consistent for all II MEF sites. White background with dark letters will be used for text areas below here as that is the easiest to read.

Icon & Site Name - Icon selected will be the same size as the default icon so as not to enlarge the site name area | **Global Navigation**

Current Navigation - [or Left Links] This will contain links to important lists or libraries within your site. Can use "Audience" settings to target links to certain groups such as your unit's contributor group.

Organizational Leadership

| Top leader Pic with bio link | Leader Pic with bio link | Leader Pic with bio link |

Mission: Short narrative with the mission for this unit.

Battle Rhythm: Link to calendar or custom web part with battle rhythm.

CCIRs: Link to Commanders Critical Information Requirements.

CG Guidance: Commanding General's Guidance, Intent, Priorities, Campaign Plan, etc... [placed on page or linked]

Other information may appear here such as POCs. The order of appearance may be changed if needed. May use a tabbed or stacked display

Battalion, Squadron, Department, Command Element Landing Page Format

II MEF and MSC Navigation

The color scheme will be consistent for all II MEF sites . White background with dark letters will be used for text areas below here as that is the easiest to read.

Icon & Site Name - Icon selected will be the same size as the default icon so as not to enlarge the site name area

Global Navigation

Current Navigation - [or Left Links] This will contain links to important lists or libraries within your site. Can use "Audience" settings to target links to certain groups such as your unit's contributor group.

Mission: Short narrative with the mission for this unit.

Organizational Chart / Pictures

```
              ┌──────────────────┐
              │   Top leader     │
              │  910-450-1234    │
              └──────────────────┘
                 ┌──────┴──────┐
        ┌────────────────┐  ┌────────────────┐
        │    Leader      │  │    Leader      │
        │  910-450-1235  │  │  910-450-1236  │
        └────────────────┘  └────────────────┘
```

Battle Rhythm and Key Events

◀ ◦ [use Week view of a calendar web part]

	26 S	27 M	28 T	29 W	30 T	1 F	2 S
7 AM							

Key Personnel

☐ Title   First Name   Rank   Billet   Email   Phone

Other information may appear here - below the 4 elements that are required and listed above. Order may be changed if needed, but all must appear in the center

Note: The gray dashed lines are not part of the design – they were added to separate the different areas of the page for reference purposes.

II MEF IM/C2 Service Desk
email: iimefimservicedesk@usmc.mil

Tel: 910-451-8614

Doctrine and directives – If used, will appear on right side. Avoid wrapping by limiting columns and name length where possible.

Recent posts Will appear on right side.

Important Links Will appear on right side. Can use standard Links or Summary Link Web part.

Site Manager – Will appear on right side. Contains Site Manager and Alternate Manager Names

Unit, Section Landing Page Format

II MEF and MSC Navigation

The color scheme will be consistent for all II MEF sites . White background with dark letters will be used for text areas below here as that is the easiest to read.

Icon & Site Name - Icon selected will be the same size as the default icon so as not to enlarge the site Name area | **Global Navigation**

Current Navigation - [or Left Links] This will contain links to important lists or libraries within your site. Can use "Audience" settings to target links to certain groups such as your unit's contributor group.

Mission: Short narrative with the mission for this unit.

This area will contain important information to be conveyed by this site. Can use "Target Audiences" settings to target the web parts in this area to certain groups if desired such as your unit's contributor group.

Doctrine and directives – If used, will appear on right side. Avoid wrapping by limiting columns and name length where possible.

Other links or documents – If used will appear on right side. Can use "Target Audiences" settings to target the web parts to certain groups. Should limit displayed information so it fits into area neatly.

Site Manager – This is required for all sites. Will contain Site Manager and Alternate Manager Names with links to contact information

Note: The black dashed lines are not part of the design – they were added to separate the different areas of the page for reference purposes.

3