Sites usage guidelines

Using the steps below as a template, create your own customized guidance for your site owners on how sites are set up and managed at your organization. Each section provides guidance about what to include, sample text to help you get started, and links to resources to learn more about each area.

To download: [PDF](PDF)

Introduction

Guidance:

- Provide a short introduction to frame your guidelines. If you have broader business or digital resource use policy, link to it if it applies to SharePoint sites as well.

Sample text:
A SharePoint site is designed to be a powerful tool for team collaboration and communication. [enter your IT/productivity service org] administers the Microsoft 365 service your site is built on. The goal is to make it easy to accomplish your business goals.

General guidelines

Guidance:

- Provide general policy statements that you want your users to follow. These may include key business uses you have defined for sites, internal communication policies, or security and privacy guidelines.

Resources:

- [Plan your SharePoint site](#)
- [Guide to the Modern Experience in SharePoint](#)

Sample text:

*Here are some things to keep in mind as you work with your SharePoint sites. Refer to [**insert your organizations name**] business resource use policy. These policies apply to all SharePoint site usage.*

Guidelines for creating your site

Guidance:

- Provide basic procedural guidance. How does someone get a SharePoint site? It may be via the "create site" link on SharePoint home or you may have a unique provisioning process for your organization.
- If you have specific site templates that you want your site owners to select during self-provisioning, include that info in this section.
- Include information on custom provisioning solutions.
- Are there any ownership or site classification requirements your organization has implemented?
- When you set up your site, it's important to select the appropriate site classification level. Include references or links to your your organization's data classification guidelines.

Resources:

- [Manage site creation in SharePoint Online](#)
- [Secure SharePoint Online Sites and Files](#)
- [Branding and site provisioning solutions for SharePoint](#)

Sample text:

*Sites can be created via the "create site" link at [**insert your SharePoint link**].*

You should have two site owners who are both full time employees at your org.

*When you set up your site, it's important to select the appropriate site classification level. [**Insert Link to your organization's data classification guidelines**].*

Your sites designs and customizations

Guidance:

- Provide information on design guidelines. Does your organization have or allow custom themes? Or do you stick with out of the box options?
- Do you have specific templates or web parts you want site owners to use? Explain those so they understand why and how.
- Does your organization allow custom scripts and add-ins?
- We recommend creating a way for site owners to engage with your team when they want to customize a site. Set up a service ticket category or form to make it easy to contact you.

Resources:

- Manage site creation
- SharePoint site theming overview
- Plan customizations, solutions and apps for SharePoint Online

Sample text:
*It's important that your site meet your business needs. If you need to create a custom add-in or deploy a resource intensive app, work with our internal team. For more information, contact [**insert information on how to contact your IT team**].*

Sharing guidelines

Guidance:

- Provide information on the way your company has set up sharing. If you have modified the settings from the defaults, you can tell your site owners what the sharing settings are for your organization, including for external sharing.

Resources:

- Plan your permissions strategy

Sample text:

Your site and its contents can be shared internally within our organization or externally with your customers or partners.

As site owner, you will receive access requests when someone shares your site. You can approve or decline any requests sent to you.

Capacity guidelines

Guidance:

- Provide information on the capacity limitations for sites. Do you have set space limits? Tell your site owners how much space they get and if you have a process and policy for requesting more.

Resources:

- Manage site storage limits

Sample text:

Your site allows for _____ MB/GB of storage. You're encouraged to remove unused sites and files.

Managing Access

Guidance:

- Provide detailed information on site access. What are your processes and policies for managing site access? What level of control do your site owners have? If you manage access on behalf of your site owners, let them know that you will be reviewing site permissions regularly to keep them in line with your organization's policies. Explain how you will communicate changes to permissions to them.

Resources:

- Secure SharePoint Online Sites and Files

Sample text:

Plan to review your site's permissions on a regular basis and set the level of access appropriately.

Site lifecycle policy

Guidance:

- Provide your organizations lifecycle policy for sites. Does your organization set site expirations automatically or with a managed process? Do you set Office 365 Group expiration policies that impact SharePoint team sites? Let your site owners know when their site will expire, how they will be notified, what will happen and what they need to do to extend their site.
- Setting this policy requires Microsoft 365 global admininistrator permissions.
- Does your organization take extra measures related to site backup and restore? Let your site owners know how long the backup is available and if needed, how to get a site restored.

Resources:

- Office 365 Group Expiration Policy