

ERA-InfoTech Limited

Standard Operating Procedure (SOP): Document Management in SharePoint

This document contains instructions on how to use SharePoint to manage internal and external documents.

SI No.	Document Version	Date	Author	Reviewed By	Change Area
1	1.0.1	19-02-2024	Wajdan Mahbub	Business Process Team	Draft of steps
2	1.0.2	27-02-2024	Wajdan Mahbub	Business Process Team	Draft of steps
3	1.0.3	28-02-2024	Wajdan Mahbub	Business Process Team	Additional steps
4	1.0.4	10-03-2024	Chandrika & Sehtab		Standard folder structure

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1) Purpose

This standard operating procedure (SOP) document provides clear and consistent guidelines for using SharePoint to store and manage internal and external project documents. This SOP seeks to ensure that all employees follow a standardized approach to document management, thereby maintaining quality, efficiency, and security while reducing the risk of errors, overlapping work and inconsistencies.

2) Scope

This SOP applies to all employees responsible for leading or working on internal or external projects at ERA Infotech. This SOP covers the following types of projects:

- Software development
- Software integration
- Software testing
- Major or minor updates

3) Activity List

- Create a project site
- Edit project site
- Create folders
- Upload project documents
- Create metadata tags and terms
- Upload and use new templates

4) Project Site

4.1) Create Project Site

The project manager is responsible for creating the project's SharePoint site, where all project related documents will be stored.

1. Login to ERA's SharePoint.
2. Click on 'Create Site'.
 - o Each project will have its own site.



3. Select 'Team site'.
4. From the list of templates, select 'Project Management'.



5. After reviewing the template, select 'Use template'.
6. Enter the project's name under 'Site name' and description under 'Description'.



Site name *

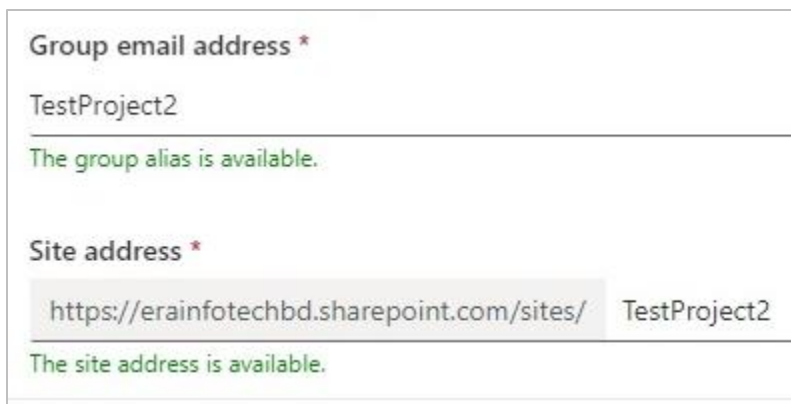
Test Project 2

The site name is available.

Site description

This is a test project.

7. Entering the 'Site name' automatically populates the 'Group email address' and 'Site address' fields.
 - o If the group email address is already taken, you can modify it to ensure the project team has a valid email address.



Group email address *

TestProject2

The group alias is available.

Site address *

https://erainfotechbd.sharepoint.com/sites/ TestProject2

The site address is available.

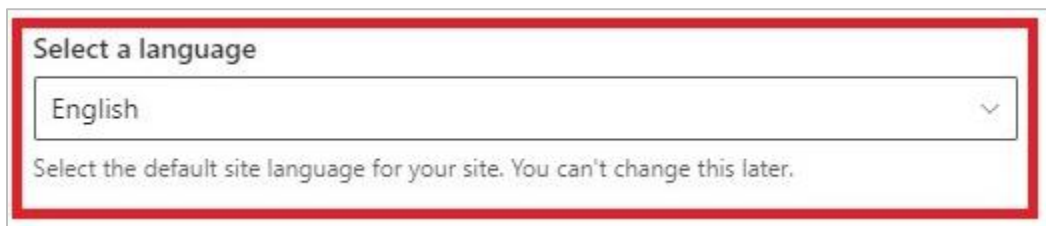
8. For 'Privacy settings', choose 'Private - only members can access this site'.



Privacy settings

Private - only members can access this site

9. For language, select 'English'.



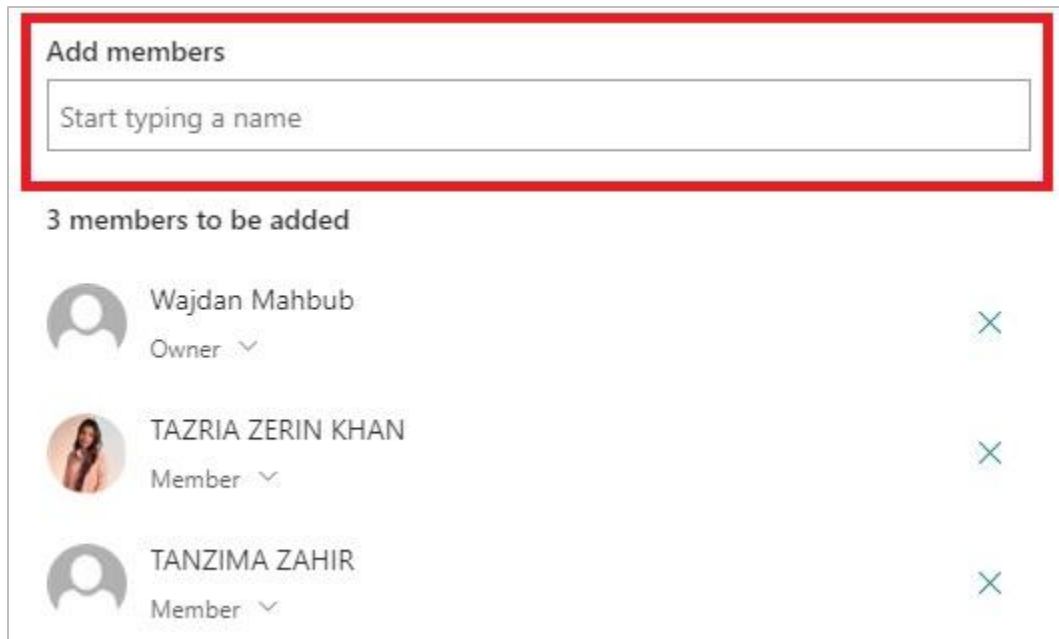
Select a language

English

Select the default site language for your site. You can't change this later.

10. Select 'Create site'.
11. Add members of the project team to the site.
 - o Set the permission for the project manager to 'Owner'.




- o All other project team members will have their permission set to 'Member'.



Add members

Start typing a name

3 members to be added

	Wajdan Mahbub Owner ▾	✕
	TAZRIA ZERIN KHAN Member ▾	✕
	TANZIMA ZAHIR Member ▾	✕

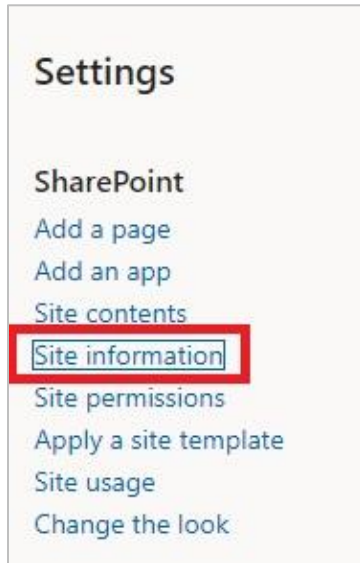
12. Click 'Finish'.

4.2) Edit Project Site

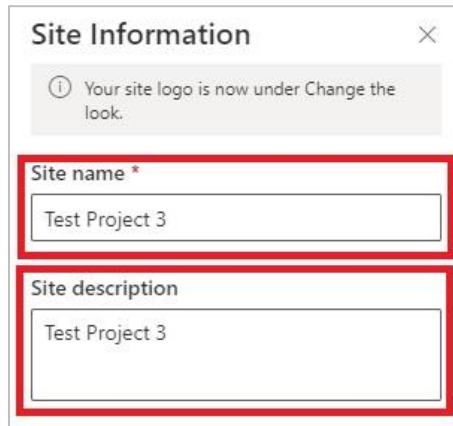
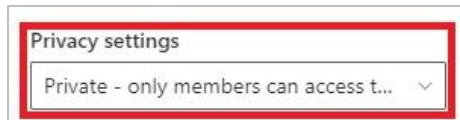
1. Click on the 'Settings' button.



2. Select 'Site Information' from the dropdown menu.



3. You can edit the site's name, description and privacy settings.

A screenshot of the 'Site Information' dialog box. It has a title bar with a close button. Below the title bar is a message: 'Your site logo is now under Change the look.' Below this are two text input fields: 'Site name *' and 'Site description'. Both fields contain the text 'Test Project 3' and are highlighted with red boxes.A screenshot of the 'Privacy settings' dropdown menu. The dropdown is open, showing the selected option 'Private - only members can access t...' and a downward arrow.

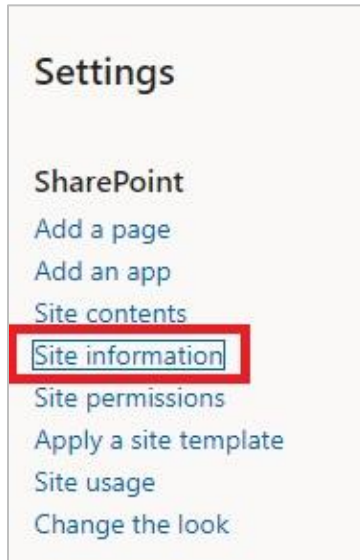
4. Click 'Save' once the edits have been made.

4.3) Delete Project Site

1. Click on the 'Settings' button.



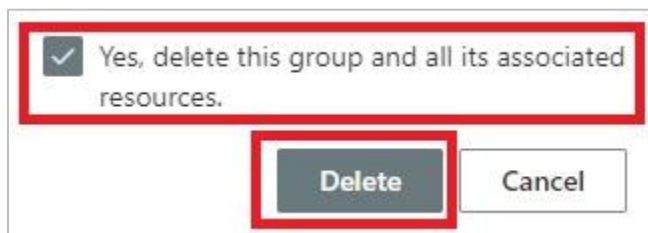
2. Select 'Site Information' from the dropdown menu.



3. Click on 'Delete site'.

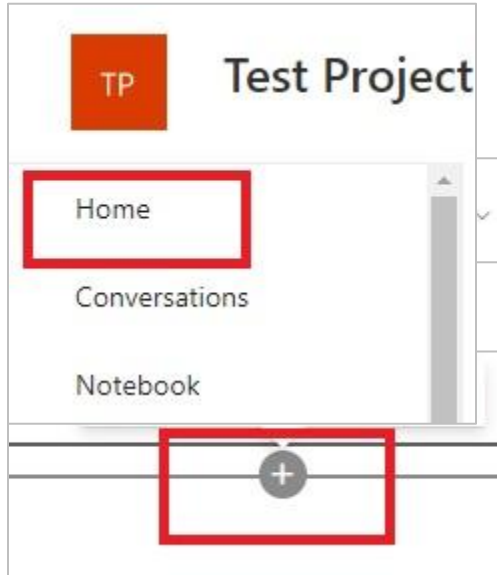


4. Check the box for deleting the group and all associated resources, and then click on 'Delete'.



4.5) Add Web Parts to Site

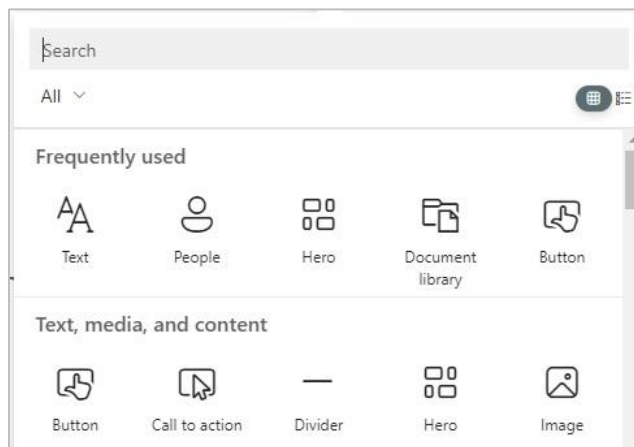
1. Click on 'Home' from the left-hand menu.



2. Click on 'Edit'.



3. Hover over a section of the site and click on '+'.
 4. Choose a web part from the toolbox.

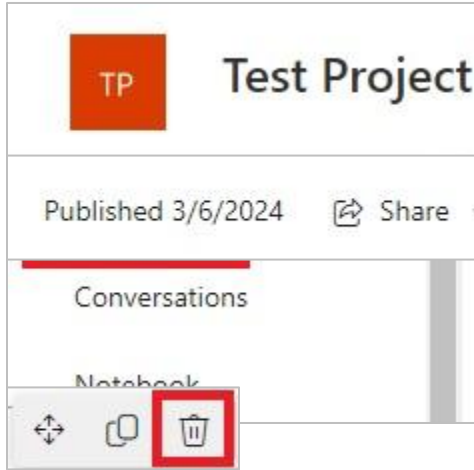


5. Modify the web part as needed.
6. Click 'Republish' to save changes.



4.6) Delete Web Parts from Site

1. Click on 'Home' from the left-hand menu.



2. Click on 'Edit'.

3. Click on a web part you want to delete.

4. From the menu of options, choose 'Delete'.

5. Click 'Republish' to save changes.

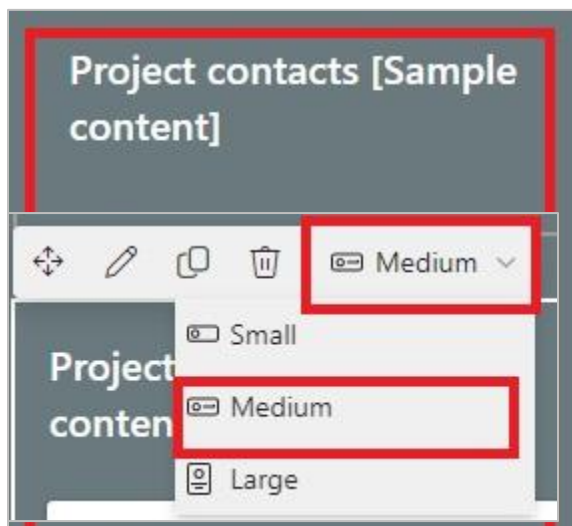


4.4) Project Contact List

1. On the project site, click on 'Edit'.



2. Scroll down to 'Project contacts' and click on it.



3. From the contact list options, choose 'Medium' for layout options.
4. Scroll down and add the names of people you want displayed from the project team.
 - Display the names of the project manager and team leaders.



5. Put in the tagline for the person.



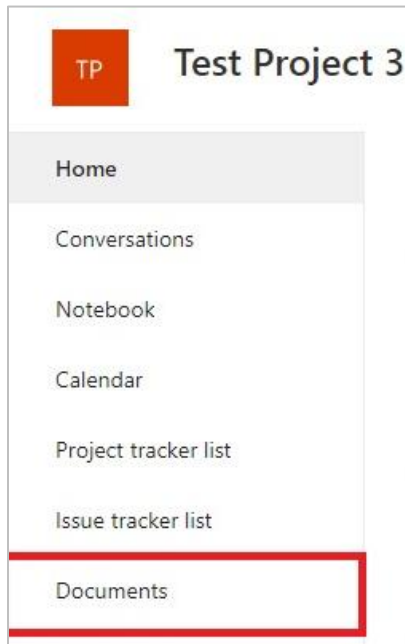
6. Once you are done, click 'Republish'.



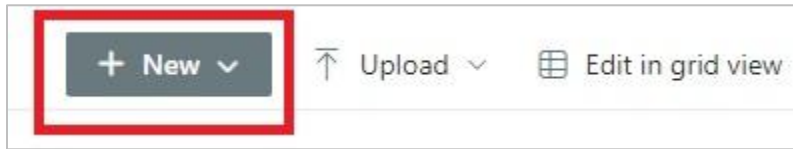
5) Project Folders

5.1) Create Folders

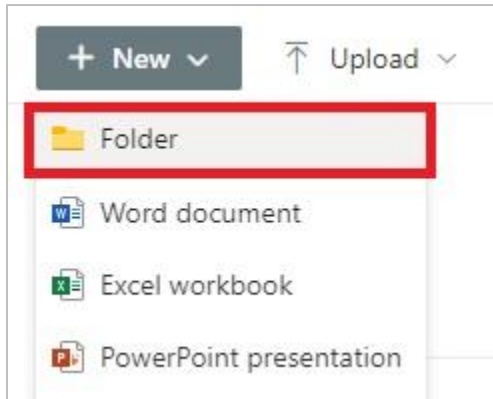
1. From the project's 'Home' menu, click on 'Documents'.



2. From the top ribbon, select '+ New'.



3. From the drop-down menu, select 'Folder'.



4. Put in an appropriate name for the folder from the list below, and keep yellow as the default folder color.

Recommended Folder Structure

The Folder and Subfolder structure provided below must be strictly maintained. In addition to these, if any folder is required to be added inside subfolders, please provide a proper title.

Naming Convention for all Documents: <Document title> <Version> <Date> <Module (If Applicable)>

Folder	Subfolder	Recommended Documents	CMMI Practice Area
Project Management	Project Initiation (PLAN)	*Project Charter *Project Plan (Including Delivery Plans+ Timelines)	Planning
	Project Estimation (EST)	*Resource Allocation & Team Responsibilities	Estimating
	Project Monitoring & Execution (MC)	*Sprint Retrospective * Deviation Logs (Tracking scope creep, budget overruns, and schedule delays) *Stakeholder Feedback & Approvals (Signed documents & feedback from key stakeholders)	Monitor and Control
	Project Reports (MC, MPM)	*Status Reports (Weekly / Monthly updates on project progress) *Performance Metrics & KPIs (Measuring project efficiency & success) *Project Performance Reports (Time, cost, defects, productivity metrics) *Defect Density & Bug Trends Reports - (Tracks quality improvements over time) *Cycle Time & Throughput Analysis (How efficiently teams are delivering work) *Customer Satisfaction & Feedback Surveys (For continuous product/service improvement)	Monitor and Control Managing Performance & Measurement

	Risk Management (IRP, RSK, MST, CONT)	Risk Register (Functionality Gaps, Development Gaps, Ensuring Test Coverage, Developer Shortage) Risk Mitigation Plan	Incident Resolution & Prevention Risk & Opportunity Management Managing Security Threats and Vulnerabilities Continuity
	Project Closure	*Project Closure Report *Lesson Learned Report for Process *Improvement in future projects * Handover Documents *Project Documents and Artifacts	
	Meeting Minutes	Project Management Meeting Minutes (With Relevant title and Date)	
	Decision Analysis and Resolution (DAR)	* DAR Documents	Decision Analysis and Resolution (DAR)
	Causal Analysis and Resolution (CAR)	* CAR Documents	Causal Analysis and Resolution (CAR)
Requirement Development and Management	Business Requirements Documents (RDM)	* Draft BRD * Signed BRD	Requirements Development & Management
	Gap Analysis (RDM)	* List of Identified Gap	Requirements Development & Management
	Meeting Minutes (RDM)	Meeting Minutes with Clients	Requirements Development & Management

	Empathy Map and User Journeys (RDM)	Relevant Documents	Requirements Development & Management
	Software Requirement Specification (RDM, TS, PI)	* Draft SRS * Signed SRS * Final Updated SRS with version control and historical changes (After approved Changes)	Requirements Development & Management Technical Solution Product Integration
	Change Request Management (RDM)	* CERD (Change and Enhancement Requirement Documents)	Requirements Development & Management
System Design & Architecture	Database Design (TS, PI, DM, DQ)	* Entity Relation Diagram (ERD) * Data Dictionary (DD) * Data Flow Diagrams (DFD)	Technical Solution Data Management Data Quality Product Integration
	UI/UX Design (TS)	UI Prototype Considering UX	Technical Solution
	Integration Plan (TS, PI)	*Integration Plans	Product Integration Technical Solution
	API Documentation (TS, PI)	*API Documentations	Product Integration Technical Solution
Development	Code Repository information (TS, CM)	GITHUB/Azure DevOps Links	Technical Solution Configuration Management

	Development Guidelines (TS, CM)	*Coding Conventions *Unit Test Confirmation	Technical Solution Configuration Management
	Builds and Versions (TS, CM)	Azure DevOps Repos	Technical Solution Configuration Management
	Peer Review Documents (PR)	Peer Review Documents	Peer Reviews
	Unit Testing (VV)	Unit Testing Document	Verification & Validation
Test Management	Test Plans (VV)	Test Plan document	Verification & Validation
	Test Cases (VV)	Test Cases document	Verification & Validation
	Test Reporting (VV, MPM)	* Test Reports * Final Test Reports * Bugs Screenshots * Test Output Documents	Verification & Validation Managing Performance & Measurement
Deployments	Internal Release (TS, CM)	Internal Release Notes	Technical Solution Configuration Management
	External Release (TS, CM)	Final/External Release Notes with Updates	Technical Solution Configuration Management
	Environment Configurations (TS, CM, ESEC)	*Staging Configurations (Internal) *Production Configurations (Client end) Network and system security documents	Technical Solution Enabling Security Configuration Management










	Deployment (TS)	*Deployment Manuals *Training Documents	Technical Solution
	User & Training Manuals (TS)	*Training Manuals *System Admin Manual *User Manuals	Technical Solution
	Data Migration (DM, DQ)	*Data collection and Intake Template (Common Excel File if Data related diagrams not available from Client) *Data Migration Documents from client (Client provides Data Architecture Diagrams, Data dictionary, Data Governance and Security Policies, Any Compliance or Regulatory Documentation) *Client Approvals for handover - Signed Documents or Email Approvals for Provided Data *Change Logs (if any approved data revisions are provided from client end)	Data Management Data Quality
	Security Management (MST)	VAPT and security related documents	Security Threats and Vulnerabilities
	Rollback Plans (TS, CONT)	Rollback Plans	Technical Solution Continuity
Legal and Compliance	Contracts (SAM)	Legal documents	Supplier Agreement Management
	SLA (SAM)	SLA Agreements or AMC	

Process Management	PMO (PQA, PCM, GOV)	Project Plan Review Checklist	Process Quality Assurance Process Management Governance
		Project Creation Checklist	
		Sprint/ Delivery Plan Checklist	
		Sprint Closure Review Checklist	
		Project Closure Review Checklist	
	System Design (PQA, PCM, GOV)	BRD Review Checklist	
		Gap Analysis Review Checklist	
		SRS Review Checklist	
	Software Architecture (PQA, PCM, GOV)	ADD Review Checklist	
		Peer Review Checklist and Findings	
	Software Engineering (PQA, PCM, GOV)	Development Cycle Completion Checklist	
	QC (PQA, PCM, GOV)	Test Case Review Checklist	

		Test Cycle Completion Checklist	
	Implementation (PQA, PCM, GOV)	Manuals Review Checklist	
		Pre-Go-Live Readiness Checklist	

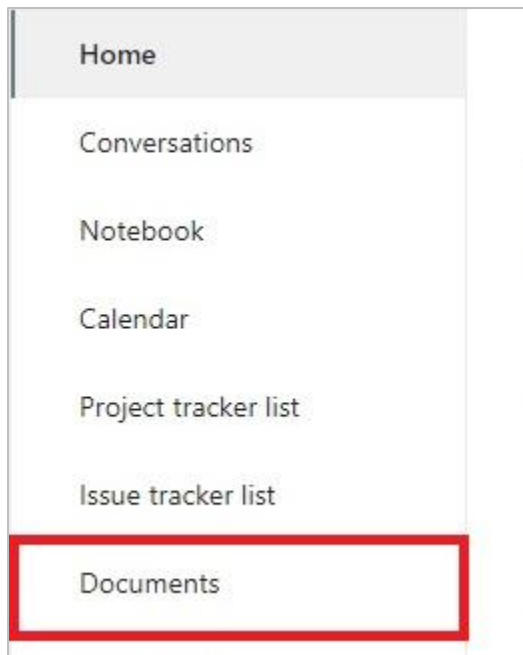
5. Click 'Create' to finish.
6. Repeat steps 2 to 5 to create six folders for your project.
7. Your document library should look like this:

Documents

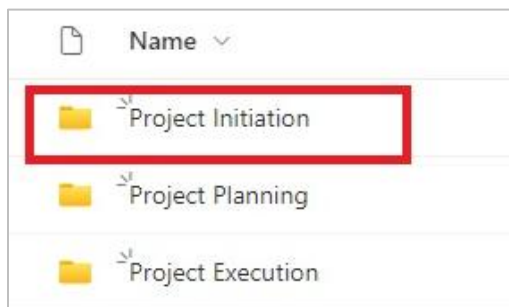
 Name	Modified	Modified By
 Deployments	About a minute ago	Sehtab Moqbul Sarwar
 Development	About a minute ago	Sehtab Moqbul Sarwar
 Legal and Compliance	A few seconds ago	Sehtab Moqbul Sarwar
 Process Management	A few seconds ago	Sehtab Moqbul Sarwar
 Project Management	3 minutes ago	Sehtab Moqbul Sarwar
 Requirement Development and Management	3 minutes ago	Sehtab Moqbul Sarwar
 System Design & Architecture	2 minutes ago	Sehtab Moqbul Sarwar
 Test Management	About a minute ago	Sehtab Moqbul Sarwar

5.2) Upload Project Documents

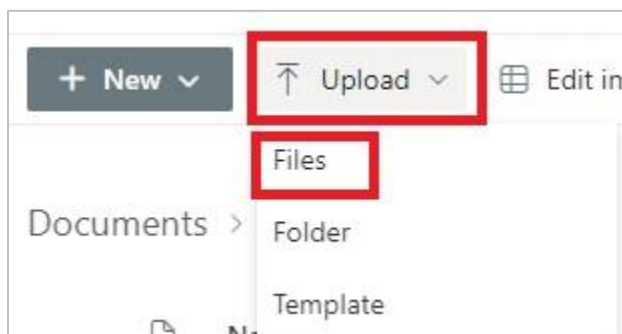
1. From the 'Home' menu, click on 'Documents'.



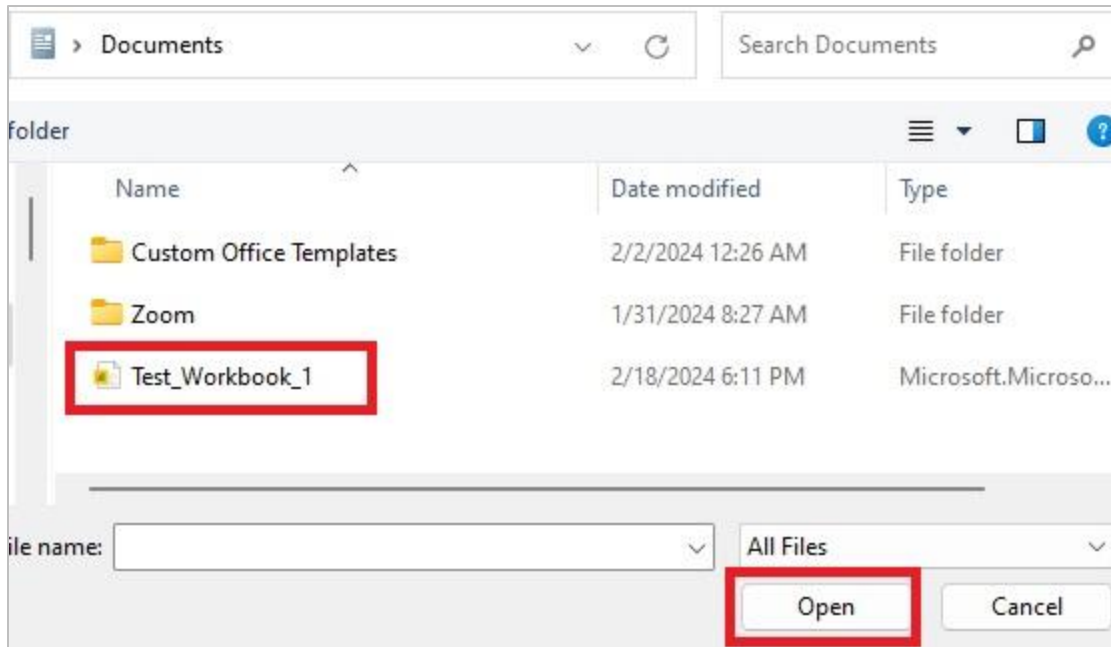
2. Click to enter a project folder.



3. Click on 'Upload' and select 'Files'.



4. Select a file or files from the window and click 'Open'.



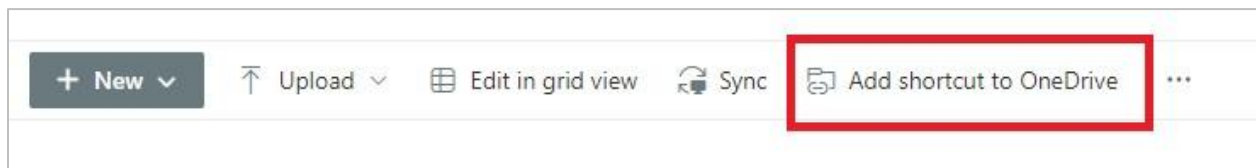
5. Your uploaded file or files should appear in the folder.

Name	Modified	Created By	Modified By
Test_Workbook_1.pbix	About a minute ago	Wajdan Mahbub	Wajdan Mahbub
Test_Workbook_2.pbix	A few seconds ago	Wajdan Mahbub	Wajdan Mahbub

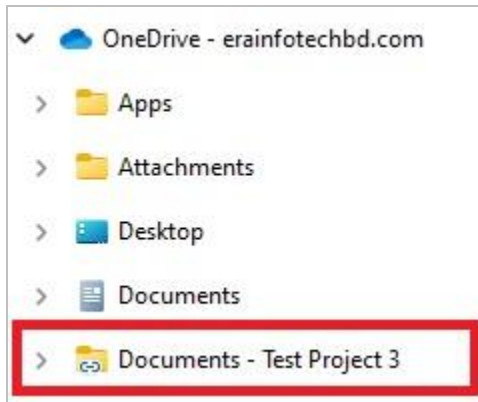
6. Repeat steps 2 to 4 to upload all project documents as they become available.

5.3) Add Shortcut to OneDrive

1. To create a folder's shortcut in OneDrive, click on 'Add shortcut to OneDrive'.



2. Wait for the folder to be created.
3. Open File Explorer from the start menu, and click on OneDrive.
4. You should see your folder added to OneDrive's list.



5.4) Synch with OneDrive

1. Click on the 'Sync' button.
 - o The synch feature will only work if you have setup OneDrive from your laptop or desktop.



2. The SharePoint OneDrive will happen automatically.

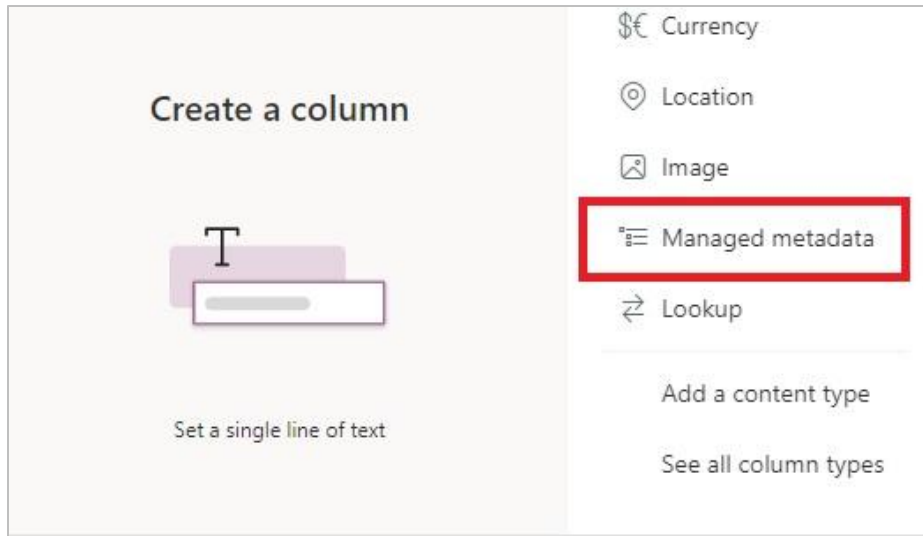
5.5) Add Metadata Columns to Document Library

Use metadata tags and terms to ensure documents meet the needed requirements when uploaded to SharePoint.

1. From the 'Home' menu, click on 'Documents'.
2. Click on '+ Add Column'.



3. Select a column type from the list.
 - o To select terms or tags managed by ERA Infotech, select 'Managed metadata'.



4. Click 'Next' to continue.
5. Enter an appropriate column name and description.

Create a column

[Learn more about column creation.](#)

Name *

Description

6. Click on 'Select'.

Term set or term *

Selected: None

Select

7. Make a selection from either 'People' or 'Search Dictionaries'.
 - o Most commonly you will need information from either Department or Job Title.

Select term set or term

Department X

▼ People

> ☒ Department

> ☐ Job Title

☐ Location

▼ Search Dictionaries

☐ Company Exclusions

☐ Company Inclusions

☐ Query Spelling Exclusions

☐ Query Spelling Inclusions

8. Click 'Save' to continue.
9. Set a default value if applicable, otherwise leave it blank.

Default value

Select or type the value

10. Click on the 'More options' dropdown menu.

More options ▼

11. For the 'Display format' option, select 'Term only'.

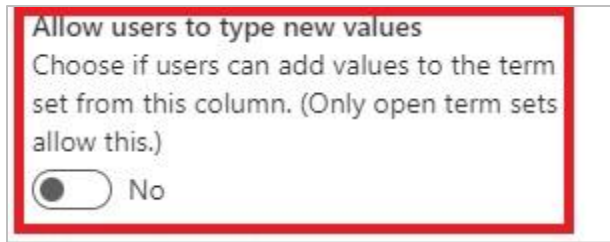
Display format

Choose if the column should display just the term (for example, Sydney) or the term plus its parents (for example, Geolocations: Australia: Sydney)

☒ Term only

☐ Term plus parents

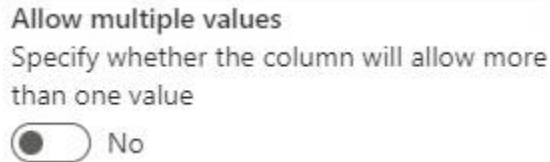
12. Choose 'No' for allowing users to type in new values.
 - o If a tag or term does not exist, please contact the SharePoint administrator to add it in.



Allow users to type new values
Choose if users can add values to the term set from this column. (Only open term sets allow this.)

☐ No

13. You may decide to let users type in multiple values. Ideally, choose 'No' for this option.



Allow multiple values
Specify whether the column will allow more than one value

☐ No

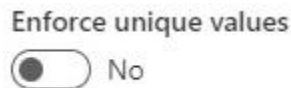
14. Choose 'Yes' for requiring the column contain information.



Require that this column contains information

☒ Yes

15. You may decide to enforce unique values. If you are unsure, select 'No'.



Enforce unique values

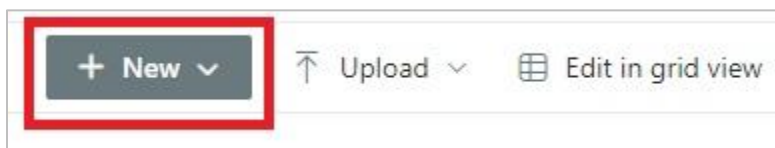
☐ No





16. Click 'Save' to finish.

6) Templates

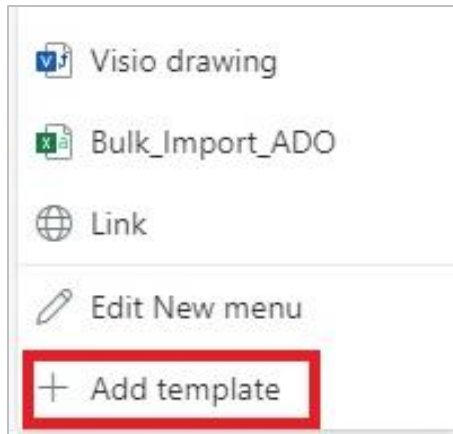
6.1) Upload a Template

1. From the 'Home' menu, click on 'Documents'
2. Click on 'New'.



+ New   Upload   Edit in grid view

3. Click on 'Add template'



4. Select a template and click 'Open'.
5. Wait for the template to upload to SharePoint.
6. To use the new template, click on '+ New' and select your template from the dropdown menu.

7) References

- “Get Started with SharePoint.” Microsoft Support, 2024. <https://support.microsoft.com/en-us/office/get-started-with-sharepoint-909ec2f0-05c8-4e92-8ad3-3f8b0b6cf261>.