Centralized SharePoint & Document Control Plan

- Project: Project Lone Star Relocation (LSR-2026)
- Client: Global Tech Solutions (GTS)
- Prepared by: Project Management Team Lead (Contractor)
- Date: 2025-10-16

1. Governance & Compliance Mandates

This plan establishes the **SharePoint project site** as the single, authoritative **Source of Truth (SOT)** for Project LSR-2026. All documentation must comply with the following standards:

- **ISO 27001:** Adherence to documentation control standards (A.8.2) to maintain information security, confidentiality, and integrity.
- **Audit Readiness:** All final records must be immediately accessible for internal and external audits (e.g., SOC 2, FedRAMP controls).
- **Retention:** Documents must be categorized and tagged to meet GTS's defined information retention policies.
- **Data Center Standards (ANSI/TIA-942):** Documentation related to physical infrastructure, facility schematics, and testing must meet traceability requirements.

2. SharePoint Site Structure (Information Hub)

The site structure is designed around the core PM disciplines and physical/operational domains of the move.

2.1 Top-Level Folder Structure (Libraries)

Folder Name	Description	Mandatory Permissions	Audited Check-In/Out
00 - Governance & Logs	Centralized location for all control documents. **Managed solely by PM Team Lead.**	PM Team Lead (Edit), Steering Committee (Read)	Yes
01 - Planning & Baseline	Approved Project Charter, SOW, Communication Plan, and Master Schedule Baseline.	All Leads (Read), PM Team Lead (Edit)	Yes

02 - Facilities & Construction	All Houston permits, vendor contracts, construction drawings (CDs), and punch lists.	Facilities Lead (Edit), All Leads (Read)	Yes
03 - IT & Operations	Network schematics, ORR checklist, system configuration data, and cutover procedures.	IT Lead (Edit), All Leads (Read)	Yes
04 - Move Logistics	Move Manifests (PII must be masked), move schedules, and vendor manifest agreements.	Facilities Lead (Edit), PM Team Lead (Edit)	Yes
05 - Meeting Minutes & Decisions	Repository for all meeting packages (agendas, minutes, action item closure proof).	All Team (Contribute)	No (Minutes are final)

99 - Final Records	**Locked library for final, signed-off deliverables only.** Access restricted post-closeout.	Sponsor (Read), PM Team Lead (Upload Only)	Yes

2.2 Key Logs (SharePoint Lists)

The following lists will be created and enforced as the single data source for project control:

- **Risk Register (Mandatory):** Tracks identification, Probability x Impact rating, mitigation plan, owner, and escalation status.
- **Issue Log (Mandatory):** Tracks current problems, root cause, resolution plan, and escalation path date/time.
- **Action Item Tracker (Mandatory):** Tracks all assigned tasks from meetings, including owner, due date, and closure evidence.
- **Decision Log:** Records all formal decisions made by the Client PM or Steering Committee.
- **Change Request Log:** Records every formal scope/schedule/budget change request (CR).

3. Technical Control and Naming Conventions

3.1 Naming Convention Standard

All official files and deliverables **MUST** follow this standard to ensure quick searching and traceability:

`[Project ID]-[Discipline]-[Document Type]-[Descriptor]-[Version].ext`

Field	Example	Description
Project ID	`LSR2026`	Project Lone Star Relocation 2026
Discipline	`GOV` / `FAC` / `IT` / `LOG`	Governance, Facilities, IT,

		Logistics
Document Type	PLAN / RPT / CR / SCH	Plan, Report, Change Request, Schedule
Descriptor	Comm / Final / HOU	Communication Plan, Final Approval, Houston Permit
Version	V1.0 / V1.1	Major/Minor revision control
Example Filename	LSR2026-IT-PLAN-Cutover-V1.0.docx	

3.2 Version Control & Auditing

- **Mandatory Check-In/Check-Out:** Enabled for all documents in libraries 00-04 to prevent simultaneous editing and accidental overwrites.
- **Major/Minor Versions:** Team Leads use minor versions (e.g., 1.1, 1.2) for drafts; major versions (e.g., V2.0) are reserved for files submitted for formal review/approval.
- **Final Approval:** The final, approved copy must be converted to **PDF format** before final sign-off and storage in the relevant library.

3.3 Permissions Summary

Permissions are strictly managed to limit editing rights to the accountable team leads for their respective domains, preventing unauthorized changes:

- **Visitors (External Vendors):** Read-only access to only the 02-Facilities and 04-Move Logistics folders, limited to contracts and relevant schematics.
- **Members (All Core Leads):** Edit/Contribute to Logs; Read access to all folders.
- **Owners (Client PM & Sponsor):** Full Control.
- **PM Team Lead (Contractor):** Edit/Contribute to all Log lists and all folders in 00-Governance.

4. Operational Transition & Closeout

Upon formal sign-off of the Operational Readiness Review (ORR) and physical completion, the following steps will be executed:

1. **Final Document Verification:** The PM Team Lead confirms all final project documents (as per the ORR checklist) have V-Final status and are in PDF format.
2. **Archiving:** All V-Final documents are copied to the **99 - Final Records** locked library.
3. **Site Lock-Down:** All **Edit/Contribute** permissions are revoked. The entire site is switched to **Read-Only** access for a period of [Specify Retention Period], ensuring the auditable record is preserved.