

Outline iTrain proposal to develop SharePoint

Meeting date: MSMTM 17 February 2026

Report by: Lynn Balfour, Head of Business Support

1. Purpose of report

Following an introductory workshop delivered for the BST, iTrain have submitted a proposal for a follow up workshop which would cover the next phase of OSIC's Microsoft 365 and SharePoint journey. The details are included in the attached report for consideration by SMT.

2. Recommendations for SMT

- (i) Read iTrain proposal and have follow up discussion
- (ii) Decide on whether to proceed with next session
- (iii) Discuss budget implications
- (iv) Consider whether this report should be published in full

Next Steps: Planning Your SharePoint Framework & Microsoft 365 Modernisation

For the Office of the Scottish Information Commissioner (FOI)

Following our Introduction Workshop and discussions with [Lynn Balfour](#), the next phase of your Microsoft 365 and SharePoint journey is to move from early familiarisation to **structured planning and governance**, so that your new environment is purposeful, scalable and compliant.

This document sets out practical next steps for FOI, including planning, decision-making, governance, and preparation for future implementation.

Suggested Overall Sequence of next steps (details on following pages)

1. Review SharePoint framework slides (completed internally).
2. Create a rough draft of FOI's site collection model.
3. Hold internal stakeholder planning meeting (chaired by iTrain Scotland).
4. Consultant-led technical build of structure (onsite).
5. Begin structured, thoughtful file migration planning.
6. Establish metadata & sensitivity frameworks.
7. Create the secure archival "Vault".
8. Build FOI's SharePoint hub (the "front door").
9. Finalise governance & information management policies.
10. Deliver training and end-user adoption programme.

1. Review: Understanding the SharePoint Site Collection Framework

Relevant materials: [SharePoint Framework Site Collection.pptx](#)

Your next task as an organisation is to reflect on the Site Collection Framework discussed during the session. Key principles include:

- A **Hub Site** acting as the central anchor for all organisational content.
- A set of **Communication Sites** (e.g., policies, HR, internal resources) for broadcasting information.
- A set of **Team Sites** for functional teams who collaborate on shared work.
- Clear **permission groupings**, ensuring that staff only access data appropriate for their role.
- Consistent **libraries, metadata, sensitivity labels and governance rules**.

Your team should review these concepts and begin to consider what a similar framework would look like for FOI.

2. Create Your First Draft: FOI's SharePoint Framework Concept

Using the content from the workshop and your internal knowledge, FOI should create a **rough first draft** outlining:

- Proposed **Hub Site** and its purpose.
- Initial list of **team-based sites** (e.g. Business Support, Commissioner's Office, Operational Teams).
- Initial **communication sites** (e.g. Policies & Procedures, HR Resources, Internal Guidance).
- Which areas require **tighter controls**, including sensitive files linked to investigations, legislative processes, or internal HR records.
- Where **metadata, retention, or sensitivity labels** will be required (informed by Example Metadata Schema.docx and Data Governance.docx).

This doesn't need to be perfect. The goal is simply to begin shaping a model.

3. Hold an Internal Planning Meeting (Chaired by iTrain Scotland)

We agreed the next major step is an internal workshop to refine and validate your draft framework.

Attendees should include:

- The Commissioner
- [Lynn Balfour](#) (Business Support Lead)
- Relevant support staff
- Any staff who will become SharePoint "super users"
- iTrain Scotland (chairing and providing expert guidance)

Purpose of the meeting:

- Review your draft SharePoint structure.
- Agree a **standardised architecture** for your Hub, Communication Sites and Team Sites.
- Identify the **most important data**, "problem areas", and legacy structures that need attention.
- Begin outlining **metadata, permissions, archiving, and security rules**.

This session forms the heart of **Phase 2 – Discovery & Roadmap**, as described in iTrain Scotland- Proposal for Microsoft 365 Cloud Platform Training & Consultancy.docx.

4. Consultant-Led Framework Build (On-Site for Security)

Once decisions are made, iTrain Scotland will work with you to:

- Build each approved **site collection** within the admin centre.
- Apply **permissions, groups, and governance rules** safely and cleanly.
- Construct **sample libraries, content types, and metadata schemas**.
- Ensure everything is aligned with FOI's compliance needs.

All configuration work can be carried out **onsite**, as requested, to avoid security concerns related to external administrative access.

5. Begin Preparing Your File Migration Strategy

A successful SharePoint rollout relies on a clean, purposeful migration—not a simple transfer from the old file server.

Steps FOI should consider now:

- Identify high-value or high-risk documents (case files, decisions, guidance, HR).
- Look for duplicated, outdated or irrelevant documents for potential removal or archiving.
- Map documents to **target libraries** in the new structure—not simply dumping into one folder.
- Begin considering where **sensitive content** must be ring-fenced.

This will greatly reduce migration stress later and increase usability of the final system.

6. Establish Metadata, Sensitivity Labels & Automated Defaults

Considerations:

- What metadata fields are needed (e.g., document type, business area, case reference, retention category).
- Whether metadata should apply:
 - manually,
 - by default at library level, or
 - using **managed metadata** across the organisation.
- Which parts of the organisation require **sensitivity labels** (e.g. Official-Sensitive, Internal, Public).
- Which libraries must be protected from **Copilot** and AI tools (as discussed with [Lynn Balfour](#)).
- Where **automatic rules** should apply to ensure compliance from day one.

7. Create the “Vault” – FOI’s Secure Archive

You expressed interest in holding historic or highly confidential documents in a **ring-fenced archive area**.

This would be structured as:

- A **SharePoint Communication Site**
- Locked down to senior staff using strict sensitivity labels
- Used for storing:
 - closed investigations
 - legacy content
 - HR and confidential files
 - anything requiring long-term retention but limited access

We will work with you to design and implement this securely.

8. Build Your Organisation's SharePoint "Front Door"

To support FOI staff, you will create a clean, attractive, user-friendly landing page.

This will likely be:

- A **Communication Site**
- Marked as the **Hub Site**
- Used as the **default homepage** on staff browsers
- Providing navigation to:
 - Team sites
 - Policy and resource libraries
 - HR information
 - Templates and guidance
 - "How we work" pages
 - Metadata and filing rules
 - Key tools (forms, workflows, intranet content)

This ensures staff have a consistent and reassuring place to begin their work.

9. Define Governance & Policy

Using Data Governance.docx and earlier discussions, FOI will need governance rules covering:

Governance topics:

- Site creation rules
- Who owns what (site owners, library owners, admins)
- Version control
- Retention & deletion rules
- Sensitivity labels
- File naming conventions
- Access/permission standards
- Expectations for working in the cloud
- Rules for using Copilot safely
- Escalation paths for data issues

These can be packaged into a concise "FOI Information Governance Handbook".

10. Training Workshops & End-User Adoption Planning

Once the structure is established, we will run workshops for:

- General end-users (how to store, find, co-author and manage documents)
- Super-users (site owners, Business Support staff)
- Admins (governance and managing the structure)
- Specialist groups (e.g., those handling sensitive case information)

We will also provide written guidance and policy documents for staff.

How iTrain Scotland Can Support You Throughout the Programme

iTrain Scotland can provide support across both the **technical build** and **organisational adoption** of your new Microsoft 365 and SharePoint environment. Our role is to guide you through the more complex elements, establish a strong foundation, and then equip your internal staff with the skills and confidence to take forward day-to-day ownership.

Building the Initial SharePoint Framework (Technical Foundation)

We can take the lead in designing and constructing the initial structure of your SharePoint environment, including:

- Creating the **Hub Site**, departmental **Team Sites**, and organisational **Communication Sites** in line with the structure agreed during the planning meeting.
- Configuring **permissions, groups**, and **access controls** to ensure appropriate separation of sensitive information.
- Setting up **document libraries, content types, managed metadata**, and **default metadata rules**, including the trickier aspects such as centrally managed taxonomies.
- Implementing **sensitivity labels** (e.g., Official-Sensitive) and applying them to locations where Copilot or AI access should be restricted.
- Creating an **archival "Vault"** site for ring-fenced storage of confidential or long-retention materials.
- Ensuring the entire structure complies with your governance expectations and public-sector duties (retention, auditability, consistency).

All of this work can be carried out **onsite** to avoid any security concerns related to external administrative access.

Supporting Governance, Policies & Compliance

We can assist in drafting and operationalising the governance and information-management structures you will need, including:

- **Retention policies**, lifecycle rules and automated governance templates.
- **Administrative policies**, including naming conventions, storage standards, Copilot guidance, and internal information-handling expectations.
- Metadata standards and controlled vocabularies that support searchability, compliance and consistency.
- Practical governance guidance for staff, tailored to the workflows of the Commissioner's Office.

These elements will integrate directly with the structure created during the discovery and roadmap phase.

Designing Your SharePoint “Front Door”

To help staff engage confidently with the new environment, we can design:

- A clean, modern **Communication Site** to act as the official landing page for staff.
- Page layouts, branding, navigation and user-experience design aligned to how staff work.
- A structure that supports easy access to policies, documents, guidance, tools and team areas.
- Recommendations on browser start-page deployment and simple onboarding for staff.

The goal is a recognisable, intuitive “home base” that anchors the organisation's digital workplace.

Training, Upskilling & Long-Term Capability-Building

Once the core system is in place, we can provide a full programme of support to hand over the reins to your internal team:

- **Super-user and site-owner training** for Business Support and key staff.
- **End-user workshops** covering filing, metadata, search, co-authoring, version control and safe cloud working.

- **Admin-level coaching** to give internal staff confidence in managing permissions, retention, and site lifecycle.
- Optional **drop-in clinics**, refresher sessions, and ongoing office-hours support.
- Written **guidance documents**, policy summaries, and workflow sheets aligned to your governance model.

Our long-term aim is not to embed permanent reliance on external support, but to ensure **your team becomes self-sufficient**, confident, and capable of maintaining and growing the environment responsibly.

Ongoing Guidance & Partnership

We can continue to support the Scottish Information Commissioner through:

- Periodic reviews of your SharePoint structure
- Adjustments to metadata or governance as the organisation evolves
- Advice on Copilot, automation, and future enhancements
- Support with new departmental requirements or changes in legislation or compliance

This ensures your system remains aligned with best practice and continues to serve the organisation effectively.