All Partners Access Network

APAN Applications Generalized Governance for End-Users

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Document Version

All published versions of this document have been approved by the APAN Technical Director and/or MPCO APAN Capability Lead:

Version	Editor	Date	Comments
1.0	Arlana DeLeo	01/25/2019	Technical Director Review
1.1	Arlana DeLeo	07/22/2019	Minor edits for phone#, vendor app name
2.0	Arlana DeLeo	12/08/2020	Clarify application storage/retention caveats; see https://community.apan.org/support/m/info/262852 for complete list of changes
2.1	Arlana DeLeo	12/18/2020	Reviewed by MPCO APAN Project Lead; consolidation of statements & concise verbiage to remove ambiguity for guidelines (additional explanation/instructions are contained within KB articles)
2.2	Arlana DeLeo	01/06/2021	Updated links to KB (Adobe Connect upgraded on 12/21/2020)
2.3	Arlana DeLeo	08/08/2021	Updated links to KB (SharePoint upgraded on 06/25/2021)
2.4	Lucy Pabon	03/21/2023	Updated review of all APAN information and retention policy
2.5	Lucy Pabon	01/17/2025	Updated language, links, contact information and ticket submission process

Contents

1. Background

The APAN platform consists of a wide variety of applications that may be loosely or tightly integrated. Examples, use-cases, and other information regarding our current tools and capabilities are found on the APAN website at https://www.apan.org/pages/tools-communities .

This document informs APAN users and community owners about overarching guidelines and "governance" for use of the various applications available on the APAN platform. Guidance contained in this document will be reviewed on a yearly basis or at any time a new capability or feature becomes available.

For the purpose of this document, the term "community" may refer to any site, group, portal, meeting room, or other type of collaborative workspace defined by any of the various APAN applications.

2. Rules for all Platforms

A. Management of Communities

1. Community Owner Responsibilities for all applications:
   https://community.apan.org/support/w/kb/19184/sharepoint-site-overview/#What_are_my_responsibilities_as_an_APAN_Community_Owner
2. Best practice for assigning new/additional owners:
   a. Per the Community Owner Guidelines (COG), "owner" access should be limited to only a handful of individuals who absolutely need to manage membership and/or content for the community, e.g., 2-3 owners per 100 members
   (May be more or less, depending on purpose & type of collaborative information exchange).
3. If the original Community Owners are not responsive to requests from other users or APAN staff, any verified US DoD/Gov POC (to include the APAN Technical Director) may request another respective community member or another US DoD/Gov POC as an alternate owner; otherwise, APAN Admins may delete the community per the established community guidelines.
   a. New or additional owners must review APAN Community Owner Guidelines
   https://community.apan.org/support/m/info/139431 and submit a signed Community Owner Acknowledgement (COA) form.
   https://community.apan.org/support/m/info/139434 .
   b. Virtual, LIVE APAN training is required for all new community owners and any owner who may not have received training in the past year. Training information will be sent via the new community request ticket. Training information is also available at https://community.apan.org/support/p/apanu .

B. Review of All APAN Information

The APAN application service provider removes obsolete data whether public or non-public to include CUI approved data, from the system to conserve server resources. APAN is not an official records management system. Communities not used for 2 or more years will be deleted without prior notice to community owners.

Determination of dated content that deems a community as "inactive" is performed by system administrators who run reports on an as needed basis and provide these to the APAN Knowledge Managers (KMs). The KMs manually review the community usage of the various applications on a yearly basis or more frequently if necessary.

Retention Policy:

1. Inactive communities will be deleted by APAN admins after 2 years of inactivity (or in the case of exercises, 2 iterations) and are **not** recoverable.
2. APAN is not a records management, "archive", or storage system. Multiple years' worth of old data will not be stored on any APAN platform application. Community owners may contact the APAN Help Desk and work with the APAN Customer Engagement Services (CES) team for any content they need to keep so that data can be exported off the APAN platform and transferred via DOD SAFE (if feasible). Otherwise, information will be deleted with no advance notice.
   a. Verint Groups KB: https://community.apan.org/support/w/kb/19113/verint-group-overview/#mcetoc_1id0do7crb
   b. SharePoint Sites KB: https://community.apan.org/support/w/kb/19184/sharepoint-siteoverview/#Understand_APAN_Retention_Policy
   c. "Orphaned" virtual meeting rooms, chat rooms, or other content features found on the APAN platform applications that are not explicitly linked to an existing site, group, or portal will be reviewed by APAN admins and may be deleted after 30 days if owners/hosts are unresponsive, or if no documentation can be found regarding who requested the ad-hoc collaborative space(s).
   d. If older information is retained on the APAN platform (upon approval), owners/hosts must remove member/visitor/participant permissions to safeguard access to data.
3. Caveats to the community retention policy may include major HADR events and large-scale operational exercises supported by APAN staff. These will be considered on a case-by-case basis.

Review of Public Information: The 2-year retention policy also applies to all public communities. All Public information will be reviewed by KMs. There are two instances in which public information are allowed SharePoint and Verint.

1. A separate "Public" collection was created on the APAN SharePoint platform to enable site owners across APAN sites to build their splash/landing page(s) or sites that are required to be accessible by anyone on the Internet (unauthenticated users) without detrimentally impacting the security of more private sites on other collections. This is the only SharePoint location where public information is permitted. Full details are located in section 5B on page 8 of this document.

2. Verint community users can submit a service request to set their communities to public, however, the use of this setting is discouraged, and information is provided to owners via training and in the governance.

In the event users set their communities to Public where another setting should be more appropriate, a designated KM will notify them via email about the issue and provide a way ahead. If the community owners do not respond, the KM will execute the appropriate solution.

Training is required for all new community owners. Public community settings are discussed during these training sessions for both SharePoint and Verint communities. New Community Owner Training is available each Tuesday via APAN University Adobe Connect Meeting Room from 1200-1330 Eastern Time. This schedule is subject to change. Please visit https://community.apan.org/support/p/apanu for the latest training updates.

C. Custom Development by End-Users

1. No ad-hoc "solutions", custom WebParts, installation of 3rd-party features, or external application development is allowed by end-users of APAN platform applications other than what is already available with the standard, out-of-the box application capabilities for pages, web parts & widgets.
2. APAN staff members will **not** provide troubleshooting or enhanced support for any custom themes, HTML/XML/JavaScript/CSS code, forms, or templates that have been created/modified by end-users.
   a. APAN administrators may revert the application to its original state or delete and re-create it (which may result in loss of content/members); again, no attempts to "fix" or troubleshoot custom development by end-users is permitted for security reasons.

D. File Name and File Size Limitations

1. File name limitations:
   a. There is a 400 character limit for URLs; **names of the combination of folders and files should not exceed 128 characters.**
   b. Avoid the use of spaces and special characters such as !, @, #, $, %, ^, &, *, <, >, +, - in file names and folder names, as this adds additional characters to the URL – or, depending on the platform used, may cause problems if the file ever needs to be moved or copied to another location.
2. Communities are routinely reviewed to ensure adherence to size restrictions.
   a. Verint: 200 MB maximum per file
   b. SharePoint: 200 MB maximum per file

3. Accounts

A. Password Resets, Disabled Accounts, and Reactivation

1. Password resets are required every 60 days – no exceptions. Password requirements are as follows:
   a. Must contain at least one uppercase letter, one lowercase letter, and one number
   b. At least 15 characters long
   c. No spaces allowed
   d. Cannot contain the word APAN
   e. Cannot contain three or more consecutive letters used in your username

2. Accounts that have not been accessed within 35 days will be disabled; users are able to re-enable their accounts by following the instructions provided on the login screen, or they can submit a ticket here: https://www.apan.org/pages/support using our "Fix Something" portal for account reactivation.
3. Other than what is provided from the automated "forgot password" options, any support requested from the APAN Help Desk staff for password reset requires verification of identity, which may include email verification or onsite confirmation from another military or government staff member known by the APAN CES staff and/or validated with a government phone number.

B. Account Deletion or Email Change Requests

1. Requests to delete an account or change an existing account's email address:
   a. Users must verify their identity by sending a message from the current email address associated with the account they are requesting to delete.
   b. Users may change their own primary/recovery email address associated with their APAN account by logging in and updating their "My account" settings.
   c. If a user does not have access to his/her original account due to the email address being inaccessible/changed, the user must submit a ticket to the APAN Help Desk using an alternate .gov/.mil address to verify original account ownership (or transfer of posts to new account) - in this situation, requests to delete/change an account from anything other than a .gov/.mil email domain are not valid.

4. Verint Groups

A. Overarching Verint Guidelines

1. These guidelines avoid errors, application malfunction, and possible data corruption when attempting to export data:

a. Membership: managing membership for a group of hundreds (let alone thousands) of people can quickly become cumbersome; speak to an APAN KM about other platform options for separating membership permission groups for more manageable access control.

b. Media Galleries:

- i Files per gallery: no more than 500 items (less if large images or video files are shared)
- ii Size of each gallery application: no more than 2GB

c. Blog: no more than 200 posts per application

d. Forum: no more than 100 posts per application

e. Wiki: no more than 200 pages

f. Recommended max number of nested sub-groups: no more than 50.

2. Any user with "owner" access may delete a group or any of its sub-groups, applications, content, or members. Deleting a group is a permanent action. A deleted group cannot be recovered.

3. If any customization to a group's "edit this theme" are performed in violation of the COG, the group may be reverted or may be completely deleted.

5. SharePoint Sites

A. Overarching SharePoint Guidelines

1. Maximums:
   a. Site collection size – 100 GB
   b. Individual site size – 5 GB
   c. Number of items per site (also includes all sub-site items) – 50K
   d. Number of nested sub-sites – 50
   e. Number of items per library/list – 4.5K
   f. Number of users per permission group – 5K
   g. WebParts per page – 25

2. Any user with owner or "full" access may delete site or items/lists/libraries, content, or members. Some of these may be recovered within a limited time. Contact the APAN helpdesk for assistance if necessary.

3. APAN will *not* provide troubleshooting support for any customization done to any SharePoint sites including but not limited to:
   a. InfoPath customizations to forms or workflows.
   b. Any use of SharePoint Designer by Site Collection Administrators
   c. 3rd-Party features or WebParts customized by end-users, including custom Java script/code.
   d. Modifications to the standard, out-of-the-box templates, or default role-based permission sets

e. External database connections are not supported. If owners connect an external database and the connection is broken, APAN staff will not troubleshoot these issues, they are the sole responsibility of the community owner.

f. Master page - the APAN Master Page must never be modified by customers, as this is required for site functionality and security features across the entire platform.

g. Custom HTML/XML/JavaScript/CSS code, forms, or templates that have been created/modified by end-users.

4. Site Collection Admin (SCA) access will be provided on a case-by-case basis to be determined by APAN staff; SCAs must complete additional training and sign an APAN SCA acknowledgement from

a. Refer to SharePoint SCA guidelines located at https://community.apan.org/support/m/info/144575

b. Training should be coordinated with your designated KM.

c. SCA Acknowledgement form: https://community.apan.org/support/m/info/144567

5. Site owners must adhere to permission-related recommendations in the COG & KB (and sub-articles) at https://community.apan.org/support/w/kb/31318/security-and-permissions/

6. Note additional guidelines for SharePoint registration lists at https://community.apan.org/support/m/info/305795

B. Public SharePoint Site Collection and Use of External-Facing Portals

1. A separate "Public" collection was created on the APAN SharePoint platform to enable site owners across APAN sites to build their splash/landing page(s) or sites that are required to be accessible by anyone on the Internet (unauthenticated users) without detrimentally impacting the security of more private sites on other collections.

2. Security & Policies:
   a. By default, anonymous access has been activated.
   b. No namespace prefix will be allowed, except for page name.
   c. No content migration from a secure site to the public site or its landing page unless approved by a designated KM/CES or HD team member.
   d. Site Owners will be placed in a new SharePoint User Group to add/update pages.
   e. Only Site Owners will have "contribute" permission to add or update page content.
   f. No user will be given access to site features for the public landing page(s)
   g. Specific public sites may be created to allow select Site Owners to manage full sites w/ contributor access; KM review/approval required.
   h. Absolutely no automated workflows or connections to post files from external sources are permitted within APAN SharePoint sites.

3. Navigation
   a. All URLs for new Public SharePoint Sites will be built as subsites under https://sites.apan.org/public/default.aspx

6. Adobe Connect Meeting Rooms and Chat Rooms

A. Overarching Guidelines for Collaborative Discussion Rooms

1. Retention Policy:
   a. Community inactivity applies to linked chat & connect rooms; any chat or connect rooms inactive > 2 years will be deleted, to include content (documents and recordings)
   b. Any "orphaned" chat or connect rooms not linked to a community and/or where the community ownership process has not been properly documented will be removed by APAN admins.
2. Room limitation guidelines:
   a. No more than 20 chat rooms per community
   b. No more than 5 connect rooms per community
   c. If more than the above is needed, community owner(s) must create a ticket with APAN Support to address the requirements on a case-by-case basis

B. Specific Recommendations for Adobe Connect

1. Community Owners and anyone else designated as having "host" access are responsible for maintaining and securing access to meeting rooms as well as access to content and recordings generated from the Adobe Connect application.
2. **No recording at the CUI level** will be permitted using Adobe Connect
3. Hosts must always end meeting rooms when a session is completed.
   a. KB instructions for ending meetings at https://community.apan.org/support/w/kb/28892/placea-meeting-on-hold-and-how-to-end-a-meeting
4. Hosts must not keep a meeting session open for more than 12 hours.
   a. End long meeting sessions at least once every 12 hours (via the Adobe Connect meeting room's menu controls; not just closing the browser/window) and **wait at least 15 minutes before restarting,** to avoid corruption or other errors.
   b. Do not make recordings longer than 2 hours.
   c. APAN is not responsible for loss of data due to meeting room corruption - in a 24x7 operational environment, always create a backup room in case the primary room malfunctions for any reason.
5. Community owners (hosts) must notify APAN Help Desk (808-472-7855) **at least 5 business days in advance** regarding plans for any activity involving more than 50 concurrent users and/or more than 10 multiple video feeds displayed in the same room. A Request for No Interruption should be submitted for all events via the ticket system https://www.apan.org/pages/support
6. Minimize amount and size of files uploaded to Adobe Connect Room content folders, file-share pods, etc. – this platform is *not* a file repository, and all content/recordings are considered temporary – use a group, site, or other external site for document storage
   a. APAN staff will delete content and/or recordings older than 30 days for any Adobe Connect meeting room that is exceeding 5GB storage space at any time.

7. Translated Documents

A. Retention policy for use of Translate.apan.org associated with Individual Accounts

1. Any original or translated documents not contained within a community portal will be automatically purged by the system after 180 days (6 months)
2. Purged/deleted translated documents are not recoverable.

8. ArcGIS Portals

A. Overarching ArcGIS Guidelines

1. All requests to use ArcGIS must be submitted via the ticket system https://www.apan.org/pages/support
2. Refer to **ArcGIS Governance documentation** at https://community.apan.org/support/m/info/262838   for details and instructions on various topics, including but not limited to:
    a. Users, Roles, and Permissions
    b. Web Applications, Widgets
    c. Collaborations

9. Additional Resources

Contact the APAN Help Desk for assistance at any time.

1. Web form (create a ticket): https://www.apan.org/pages/support
2. Phone: (808) 472-7855
3. Knowledge Base (KB): https://community.apan.org/support