



Transform the way you store, find, govern, and use enterprise content

## Challenges

### Understanding Existing Content

FSSD's content spanned several repositories including SharePoint 2010 and File Shares. Migrating these repositories to Microsoft 365 required careful analysis of the content to identify Redundant, Obsolete, and Trivial (ROT) content, and to determine the appropriate target sites/libraries.

### Taxonomy

The content repositories had little to no taxonomic structures or metadata. The challenge was to design and deploy an enterprise taxonomy in Microsoft 365 to meet FSSD's search and records management requirements. Content classification using SharePoint Syntex will further enhance these capabilities.

### Migration

Documents in legacy repositories were unmanaged leading to issues with search, increasing storage requirements, and making it impossible to manage the lifecycle of documents in a consistent manner. Once in Microsoft 365, documents can be identified against USD's Retention Schedule and managed using ADG and policies.

### Content Lifecycle/Records Management

The SharePoint 2010 implementation was devoid any real content governance. The new enterprise taxonomy and retention policies were implemented to align with FSSD's Retention Schedule. Additionally, role-based OneDrive and Exchange retention policies were configured to align with NARA's Capstone approach.

### Project and Change Management

The 100% remotely-delivered project was managed using an M365-based project portal to house all project artifacts including the Project Online project plan and recorded Microsoft Teams meetings. As users were new to M365, virtual training and knowledge transfer were provided via Microsoft Teams.

## Case Study Summary

Fairfield-Suisun Sewer District (FSSD) serves more than 135,000 residential, commercial and industrial customers in central Solano County, about 40 miles northeast of San Francisco. It owns and operates a system of sanitary sewers and pumping stations; and oversee wastewater collection and treatment, water recycling and stormwater management services.

With documents in on-premises repositories including a past-end-of-life SharePoint 2010 environment and File Shares, FSSD engaged ShareSquared to migrate its content to Microsoft 365 and implement a comprehensive records management solution. ShareSquared's taxonomy package, with over 70 prebuilt Content Types, was used to jump-start the design and deployment of an enterprise taxonomy. The modern site structures, Branding, Taxonomy, Web parts and Add-ons were deployed using ShareSquared's Portal Deployment Utility. The migration included the implementation of an enterprise taxonomy, a comprehensive records management solution, and content classification.

***"Implementing a holistic records management solution on Microsoft 365 helped us to comply with regulatory requirements and mitigate risk, as well as to enhance internal collaboration and productivity."***

**Meg Herston**

Director of Environmental Services



## Results and Outcomes

- Content resides solely in M365 vs. in unmanaged, siloed repositories
- Content is managed against the records retention schedule and deleted when no longer needed
- Records are destroyed in accordance with legal, regulatory, and organizational policies
- Legacy content repositories including SharePoint 2010 can be decommissioned
- Content findability greatly improved with the implementation of an enterprise taxonomy and content classification
- Internal team collaboration and sharing has significantly increased
- Remote workers have 24/7 access to the M365 solution
- M365's adaptive and responsive design yielded a solution that is mobile friendly

## Strategy and Solution Components

### Foundation



#### Discovery and Analysis

- Inventory and analyze content sources
- Identify ROT
- Document regulatory requirements



#### Design

- Architecture design and planning
- Develop governance policy
- Taxonomy and retention policies



#### Deployment

- Modern site structures
- Taxonomy and retention policies
- Microsoft Teams

### Content



#### Content Migration

- SharePoint 2010
- File Shares



#### Feature Implementation

- Board Agenda Solution
- Custom branding and web parts
- Content Classification

### Adoption



#### Change Management

- Envisioning sessions
- Context Sensitive Training System
- Knowledge transfer and training



*Transform the way you store, find, govern, and use enterprise content*

[www.ShareSquared.com](http://www.ShareSquared.com)

**800.445.1279**

ShareSquared specializes in O365-based Content Services solutions including Intranet/Extranet Portals, Enterprise Content and Records Management, file-share and legacy ECM content migrations, and process automation/workflow. Our expertise includes planning, design, governance, taxonomy, branding, workflow, integration, BI, and custom development.

# Fairfield Suisun Sewer District Project Visuals

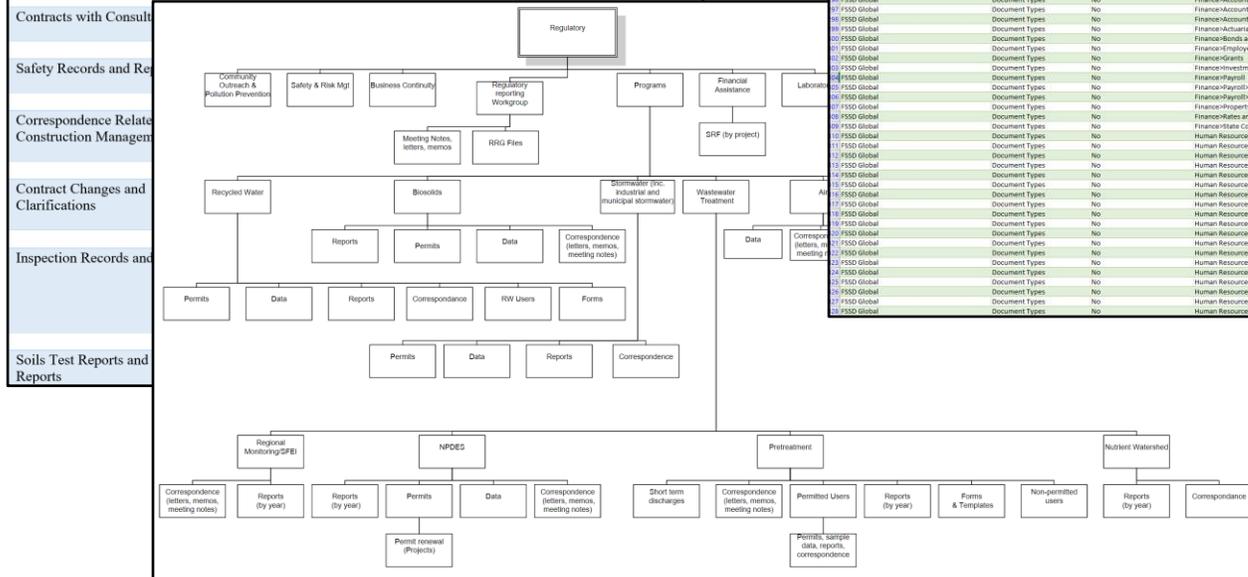


## Records Retention Schedule

<b>Construction Management</b>	<i>(Includes capital, major maintenance, reclaimed water, collection system and drainage maintenance projects)</i>	
Planning and Engineering	Contracts with consultants, correspondence, meeting minutes, project status reports for Board, plans, specifications, reports, easement preparation, permits including environmental permits	Project completion + 10
Planning and Engineering	Technical memoranda, predesign reports, technical reports	Indefinite
Bid Sets	Plans and Specs used for bidding but not construction	Project Completion + 1
Bids	Bids and rejected bids	Project completion + 10
Awards of Contract		Project completion + 10

## M365 Portal Creation Workbook

Managed Metadata										Records Management									
Item ID	Item Name	Item Type	Item Description	Item Status	Item Location	Item Process	Item Retention	Item Authority	Item Action	Item ID	Item Name	Item Type	Item Description	Item Status	Item Location	Item Process	Item Retention	Item Authority	Item Action
1	Construction Management-Awards of Contract	Document Types	Construction Management-Awards of Contract	Yes	CO006	No	10 Years	FS502e-dofForm	Destroy	1	Construction Management-Bids	Document Types	Construction Management-Bids	Yes	CO007	No	10 Years	FS502e-dofForm	Destroy
2	Construction Management-Contract Changes and Clarifications	Document Types	Construction Management-Contract Changes and Clarifications	Yes	CO008	No	10 Years	FS502e-dofForm	Destroy	2	Construction Management-Contract Close Out	Document Types	Construction Management-Contract Close Out	Yes	CO009	No	10 Years	FS502e-dofForm	Destroy
3	Construction Management-Inspection Records and Reports	Document Types	Construction Management-Inspection Records and Reports	Yes	CO011	No	10 Years	FS502e-dofForm	Destroy	3	Construction Management-Photographs and Videos	Document Types	Construction Management-Photographs and Videos	Yes	CO012	No	10 Years	FS502e-dofForm	Destroy
4	Construction Management-Planning and Engineering	Document Types	Construction Management-Planning and Engineering	Yes	CO013	No	10 Years	FS502e-dofForm	Destroy	4	Construction Management-Records and Reports	Document Types	Construction Management-Records and Reports	Yes	CO014	No	10 Years	FS502e-dofForm	Destroy
5	Construction Management-Planning and Engineering-Project Documents	Document Types	Construction Management-Planning and Engineering-Project Documents	Yes	CO015	No	10 Years	FS502e-dofForm	Destroy	5	Construction Management-Safety Records and Reports	Document Types	Construction Management-Safety Records and Reports	Yes	CO016	No	10 Years	FS502e-dofForm	Destroy
6	Construction Management-Primary Notices and Stop Notices	Document Types	Construction Management-Primary Notices and Stop Notices	Yes	CO017	No	10 Years	FS502e-dofForm	Destroy	6	Construction Management-Technical Documents	Document Types	Construction Management-Technical Documents	Yes	CO018	No	10 Years	FS502e-dofForm	Destroy
7	Construction Management-Progress Payments	Document Types	Construction Management-Progress Payments	Yes	CO019	No	10 Years	FS502e-dofForm	Destroy	7	Construction Management-Purchase of Equipment	Document Types	Construction Management-Purchase of Equipment	Yes	CO020	No	10 Years	FS502e-dofForm	Destroy
8	Construction Management-Purchase of Equipment	Document Types	Construction Management-Purchase of Equipment	Yes	CO021	No	10 Years	FS502e-dofForm	Destroy	8	Construction Management-Records and Reports	Document Types	Construction Management-Records and Reports	Yes	CO022	No	10 Years	FS502e-dofForm	Destroy
9	Construction Management-Records and Reports	Document Types	Construction Management-Records and Reports	Yes	CO023	No	10 Years	FS502e-dofForm	Destroy	9	Construction Management-Soil and Pile Test Reports	Document Types	Construction Management-Soil and Pile Test Reports	Yes	CO024	No	10 Years	FS502e-dofForm	Destroy
10	Finance-Accounting	Document Types	Finance-Accounting	No	FI001	No	7 Years	FS502e-dofForm	Destroy	10	Finance-Accounting-Reports	Document Types	Finance-Accounting-Reports	Yes	FI002	No	6 Years	FS502e-dofForm	Destroy
11	Finance-Accounting-Supporting Reports	Document Types	Finance-Accounting-Supporting Reports	Yes	FI003	No	6 Years	FS502e-dofForm	Destroy	11	Finance-Accounts Payable	Document Types	Finance-Accounts Payable	Yes	FI004	No	7 Years	FS502e-dofForm	Destroy
12	Finance-Accounts Payable	Document Types	Finance-Accounts Payable	Yes	FI005	No	7 Years	FS502e-dofForm	Destroy	12	Finance-Accounts Payable-Paid Invoices	Document Types	Finance-Accounts Payable-Paid Invoices	Yes	FI006	No	4 Years	FS502e-dofForm	Destroy
13	Finance-Accounts Payable-Reports	Document Types	Finance-Accounts Payable-Reports	Yes	FI007	No	4 Years	FS502e-dofForm	Destroy	13	Finance-Accounts Receivable	Document Types	Finance-Accounts Receivable	Yes	FI008	No	4 Years	FS502e-dofForm	Destroy
14	Finance-Actuarial Studies	Document Types	Finance-Actuarial Studies	Yes	FI009	No	4 Years	FS502e-dofForm	Destroy	14	Finance-Assets and Liabilities	Document Types	Finance-Assets and Liabilities	Yes	FI010	No	10 Years	FS502e-dofForm	Destroy
15	Finance-Assets and Liabilities	Document Types	Finance-Assets and Liabilities	Yes	FI011	No	10 Years	FS502e-dofForm	Destroy	15	Finance-Employee Training Records	Document Types	Finance-Employee Training Records	Yes	FI012	No	7 Years	FS502e-dofForm	Destroy
16	Finance-Employee Training Records	Document Types	Finance-Employee Training Records	Yes	FI013	No	7 Years	FS502e-dofForm	Destroy	16	Finance-Grants	Document Types	Finance-Grants	Yes	FI014	No	10 Years	FS502e-dofForm	Destroy
17	Finance-Grants	Document Types	Finance-Grants	Yes	FI015	No	10 Years	FS502e-dofForm	Destroy	17	Finance-Investments/Banking	Document Types	Finance-Investments/Banking	Yes	FI016	No	5 Years	FS502e-dofForm	Destroy
18	Finance-Investments/Banking	Document Types	Finance-Investments/Banking	Yes	FI017	No	5 Years	FS502e-dofForm	Destroy	18	Finance-Payroll	Document Types	Finance-Payroll	Yes	FI018	No	7 Years	FS502e-dofForm	Destroy
19	Finance-Payroll	Document Types	Finance-Payroll	Yes	FI019	No	7 Years	FS502e-dofForm	Destroy	19	Finance-Payroll-Processing and Payroll Payables	Document Types	Finance-Payroll-Processing and Payroll Payables	Yes	FI020	No	7 Years	FS502e-dofForm	Destroy
20	Finance-Payroll-Processing and Payroll Payables	Document Types	Finance-Payroll-Processing and Payroll Payables	Yes	FI021	No	7 Years	FS502e-dofForm	Destroy	20	Finance-Payroll-Tax Reports	Document Types	Finance-Payroll-Tax Reports	Yes	FI022	No	5 Years	FS502e-dofForm	Destroy
21	Finance-Payroll-Tax Reports	Document Types	Finance-Payroll-Tax Reports	Yes	FI023	No	5 Years	FS502e-dofForm	Destroy	21	Finance-Property Tax Filings	Document Types	Finance-Property Tax Filings	Yes	FI024	No	10 Years	FS502e-dofForm	Destroy
22	Finance-Property Tax Filings	Document Types	Finance-Property Tax Filings	Yes	FI025	No	10 Years	FS502e-dofForm	Destroy	22	Finance-Rates and Connection Fees Studies	Document Types	Finance-Rates and Connection Fees Studies	Yes	FI026	No	10 Years	FS502e-dofForm	Destroy
23	Finance-Rates and Connection Fees Studies	Document Types	Finance-Rates and Connection Fees Studies	Yes	FI027	No	10 Years	FS502e-dofForm	Destroy	23	Finance-State Controller's Reports	Document Types	Finance-State Controller's Reports	Yes	FI028	No	6 Years	FS502e-dofForm	Destroy
24	Finance-State Controller's Reports	Document Types	Finance-State Controller's Reports	Yes	FI029	No	6 Years	FS502e-dofForm	Destroy	24	Human Resources-Calendar Plan Documents	Document Types	Human Resources-Calendar Plan Documents	Yes	HR001	No	10 Years	FS502e-dofForm	Destroy
25	Human Resources-Calendar Plan Documents	Document Types	Human Resources-Calendar Plan Documents	Yes	HR002	No	10 Years	FS502e-dofForm	Destroy	25	Human Resources-Classification and Compensation Studies	Document Types	Human Resources-Classification and Compensation Studies	Yes	HR003	No	10 Years	FS502e-dofForm	Destroy
26	Human Resources-Classification and Compensation Studies	Document Types	Human Resources-Classification and Compensation Studies	Yes	HR004	No	10 Years	FS502e-dofForm	Destroy	26	Human Resources-CAPERS	Document Types	Human Resources-CAPERS	Yes	HR005	No	10 Years	FS502e-dofForm	Destroy
27	Human Resources-CAPERS	Document Types	Human Resources-CAPERS	Yes	HR006	No	10 Years	FS502e-dofForm	Destroy	27	Human Resources-Deferred Compensation Plan Documents	Document Types	Human Resources-Deferred Compensation Plan Documents	Yes	HR007	No	10 Years	FS502e-dofForm	Destroy
28	Human Resources-Deferred Compensation Plan Documents	Document Types	Human Resources-Deferred Compensation Plan Documents	Yes	HR008	No	10 Years	FS502e-dofForm	Destroy	28	Human Resources-DMV Government Information Documents	Document Types	Human Resources-DMV Government Information Documents	Yes	HR009	No	4 Years	FS502e-dofForm	Destroy
29	Human Resources-DMV Government Information Documents	Document Types	Human Resources-DMV Government Information Documents	Yes	HR010	No	4 Years	FS502e-dofForm	Destroy	29	Human Resources-DMV Records	Document Types	Human Resources-DMV Records	Yes	HR011	No	10 Years	FS502e-dofForm	Destroy
30	Human Resources-DMV Records	Document Types	Human Resources-DMV Records	Yes	HR012	No	10 Years	FS502e-dofForm	Destroy	30	Human Resources-Employee Medical Records	Document Types	Human Resources-Employee Medical Records	Yes	HR013	No	10 Years	FS502e-dofForm	Destroy
31	Human Resources-Employee Medical Records	Document Types	Human Resources-Employee Medical Records	Yes	HR014	No	10 Years	FS502e-dofForm	Destroy	31	Human Resources-Employment Policies	Document Types	Human Resources-Employment Policies	Yes	HR015	No	10 Years	FS502e-dofForm	Destroy
32	Human Resources-Employment Policies	Document Types	Human Resources-Employment Policies	Yes	HR016	No	10 Years	FS502e-dofForm	Destroy	32	Human Resources-Health, Dental and Vision Plan Documents	Document Types	Human Resources-Health, Dental and Vision Plan Documents	Yes	HR017	No	10 Years	FS502e-dofForm	Destroy
33	Human Resources-Health, Dental and Vision Plan Documents	Document Types	Human Resources-Health, Dental and Vision Plan Documents	Yes	HR018	No	10 Years	FS502e-dofForm	Destroy	33	Human Resources-Identification Documents	Document Types	Human Resources-Identification Documents	Yes	HR019	No	8 Years	FS502e-dofForm	Destroy
34	Human Resources-Identification Documents	Document Types	Human Resources-Identification Documents	Yes	HR020	No	8 Years	FS502e-dofForm	Destroy	34	Human Resources-Inventory	Document Types	Human Resources-Inventory	Yes	HR021	No	10 Years	FS502e-dofForm	Destroy
35	Human Resources-Inventory	Document Types	Human Resources-Inventory	Yes	HR022	No	10 Years	FS502e-dofForm	Destroy	35	Human Resources-Inventory Files/Volunteers	Document Types	Human Resources-Inventory Files/Volunteers	Yes	HR023	No	10 Years	FS502e-dofForm	Destroy
36	Human Resources-Inventory Files/Volunteers	Document Types	Human Resources-Inventory Files/Volunteers	Yes	HR024	No	10 Years	FS502e-dofForm	Destroy	36	Human Resources-Recruiting Records	Document Types	Human Resources-Recruiting Records	Yes	HR025	No	2 Years	FS502e-dofForm	Destroy
37	Human Resources-Recruiting Records	Document Types	Human Resources-Recruiting Records	Yes	HR026	No	2 Years	FS502e-dofForm	Destroy	37	Human Resources-Salary and Benefit Surveys	Document Types	Human Resources-Salary and Benefit Surveys	Yes	HR027	No	8 Years	FS502e-dofForm	Destroy
38	Human Resources-Salary and Benefit Surveys	Document Types	Human Resources-Salary and Benefit Surveys	Yes	HR028	No	8 Years	FS502e-dofForm	Destroy	38	Human Resources-Service Award Policy and Presentations	Document Types	Human Resources-Service Award Policy and Presentations	Yes	HR029	No	10 Years	FS502e-dofForm	Destroy
39	Human Resources-Service Award Policy and Presentations	Document Types	Human Resources-Service Award Policy and Presentations	Yes	HR030	No	10 Years	FS502e-dofForm	Destroy	39	Human Resources-Short Term Disability, Long Term Disability, Life Insurance, and Retirement	Document Types	Human Resources-Short Term Disability, Long Term Disability, Life Insurance, and Retirement	Yes	HR031	No	30 Years	FS502e-dofForm	Destroy
40	Human Resources-Short Term Disability, Long Term Disability, Life Insurance, and Retirement	Document Types	Human Resources-Short Term Disability, Long Term Disability, Life Insurance, and Retirement	Yes	HR032	No	30 Years	FS502e-dofForm	Destroy	40	Human Resources-Workers Compensation Claims/Reports and Correspondence	Document Types	Human Resources-Workers Compensation Claims/Reports and Correspondence	Yes	HR033	No	10 Years	FS502e-dofForm	Destroy
41	Human Resources-Workers Compensation Claims/Reports and Correspondence	Document Types	Human Resources-Workers Compensation Claims/Reports and Correspondence	Yes	HR034	No	10 Years	FS502e-dofForm	Destroy	41	Human Resources-Workers Compensation Claims/Reports and Correspondence	Document Types	Human Resources-Workers Compensation Claims/Reports and Correspondence	Yes	HR035	No	4 Years	FS502e-dofForm	Destroy



## Regulatory Mapping

## OneDrive/Exchange Retention Policies

Role	Default Classification	Has OneDrive	File Quota	Sharing	Document Retention	Auto Pruning	Has Mailbox	Email Archive	Auto Prune	Email Retention
Director	Restricted	Yes	None	External	None	5Y	Yes	1Y	30D	5Y
Supervisor	Restricted	Yes	None	External	None	5Y	Yes	1Y	30D	5Y
Office Worker	Restricted	Yes	None	External	None	5Y	Yes	1Y	30D	5Y
Field Worker	Restricted	Yes	100GB	External	None	5Y	Yes	1Y	30D	5Y

Keep since Modified     Delete unchanged     Move from Inbox     Empty Deleted     Keep in Archive

Unrestricted: Matter of Public Record - Anyone could read  
 Confidential: Contains PII and/or volatile trade secrets  
 Protected: Should only be viewed by staff (Internal)  
 Restricted: Specific staff only

\*Adapted from CAPSTONE methodology