Union Sanitary District

www.unionsanitary.com

share²

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

Case Study Summary

Union Sanitary District (USD) operates a 33-acre wastewater treatment facility in Union City and provides collection, treatment and disposal services to a total population of over 356,000 in Fremont, Newark and Union City, California. The District maintains over 830 miles of underground pipeline in its service area.

With documents in several on-premises repositories including an aging SharePoint 2010 environment, Alchemy Gold, and File Shares, USD engaged ShareSquared to migrate all of its content to Microsoft 365. The Modern Team Sites, Communication Sites, and Hub sites, Branding, Taxonomy, Web parts and Add-ons were deployed using ShareSquared's Portal Deployment Utility. The migration included the modernization of USD's Taxonomy to support Records Management, Classification of the content, and the redevelopment of several K2 workflows using Power Automate.

"Consolidating our content on the Microsoft 365 platform and modernizing both the user experience and our workflow processes will be a tremendous asset to the District, especially as we now support a mostly remote workforce."

Todd Jacob
IT Administrator, Union Sanitary District

Challenges

Understanding Existing Content

USD's content spanned several repositories including SharePoint 2010, Alchemy Gold, and File Shares. Migrating these disparate 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.

Complex Taxonomy

Each content source repository had different taxonomic structures and metadata. The challenge was to homogenize these disparate taxonomies in Microsoft 365 using a common taxonomy. All existing metadata was preserved in the migration and will be enhanced in the future using SharePoint Syntex.

Modernization

The SharePoint 2010 implementation was based on Classic site structures, various third-party web parts, and SharePoint 2010 and K2 workflows. To address this, Modern site structures were deployed, and all legacy web parts and workflows were reimplemented using M365 built-in features and Power Automate.

Content Lifecycle/Records Management

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.

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.

Results and Outcomes

- Efficiency and productivity enhanced by automating processes using Power Automate
- Content resides solely in M365 vs. in siloed repositories
- Legacy content repositories 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
- 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

Strategy and Solution Components

Foundation

Discovery and Analysis
- Inventory and analyze content sources
- Identify ROT
- 3rd-Party Component Analysis

Design
- Architecture design and planning
- Develop governance policy
- Portal structure and taxonomy design

Deployment
- Modern site structures
- Enterprise taxonomy
- Microsoft Teams

Content

Content Migration
- SharePoint 2010
- Alchemy Gold
- File Shares

Feature Implementation
- Implement People Directory
- Automate business processes
- Content Classification

Adoption

Change Management
- Context Sensitive Training System
- Envisioning sessions
- Admin, Power and End User Training

share²

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

www.ShareSquared.com

800.445.1279

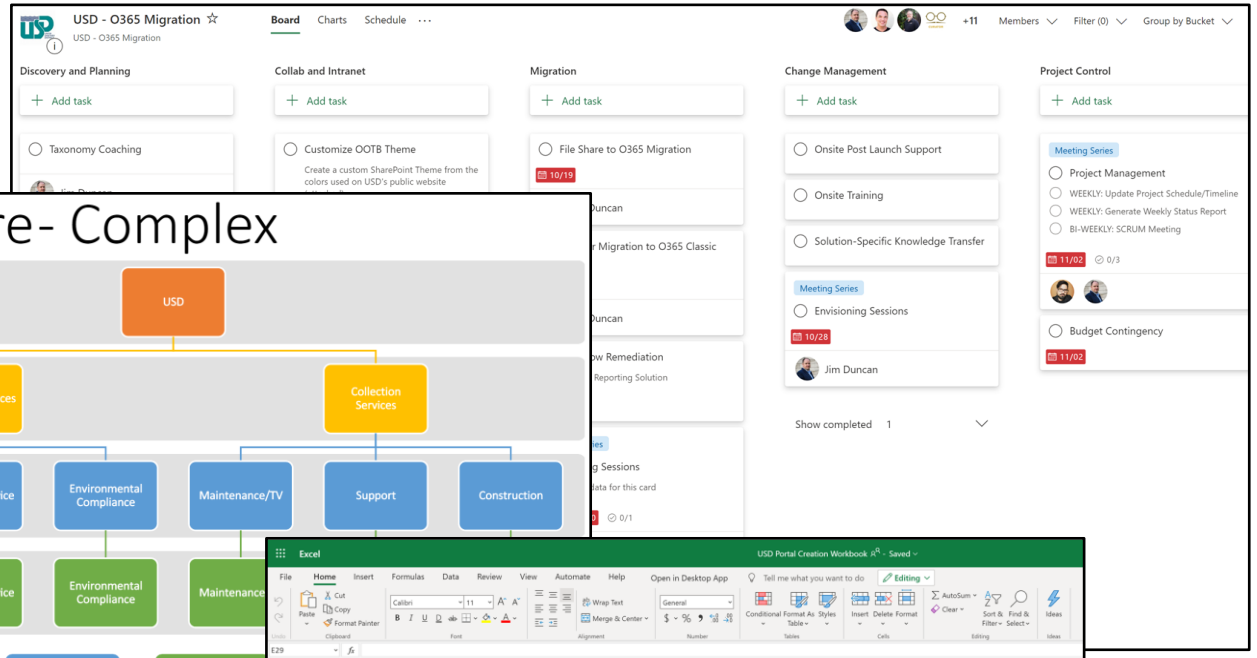
ShareSquared specializes in O365-based Content Services solutions including Intranet/Extranet Portals, Enterprise Content and Records Management, file-share and legacy ECM content migrations, and process automation/workflow. Our expertise includes planning, design, governance, taxonomy, branding, workflow,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

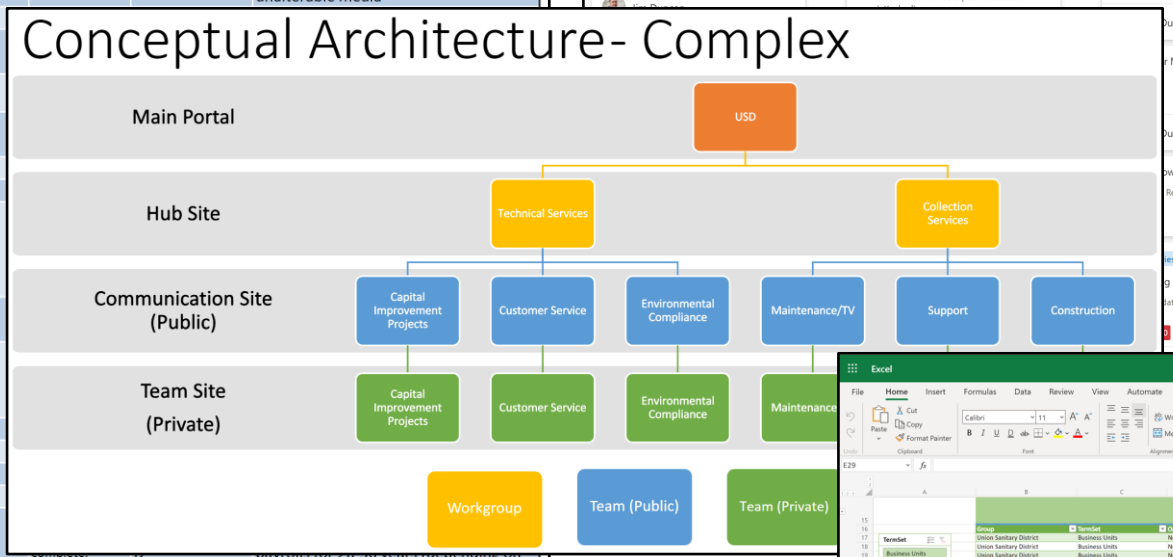
Union Sanitary Project Visuals

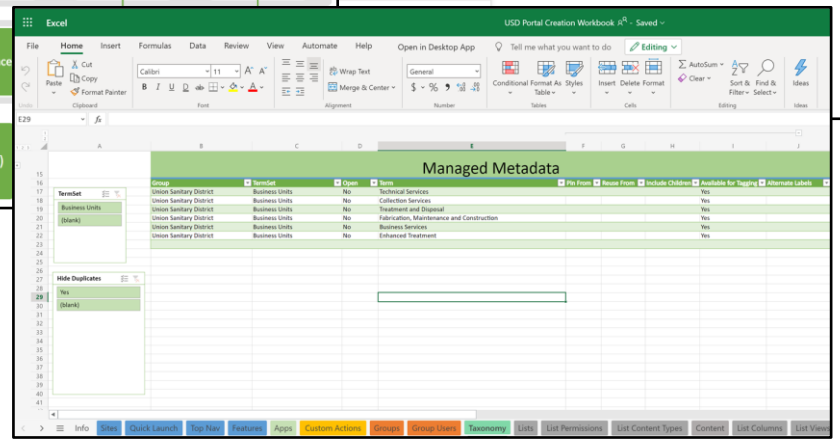
Records Retention Schedule

	A	B	C	D	E	F
2	**Document Series Title**	**Responsible Group**	**Retention (in years)**	**Retention Qualifer**	**Destruction or Other Action**	**Comments**
3	Accounts Payable [7]	BS/FIST	7		D	
4	Agendas, Board Meetings [Never]	GM	99		SE or M	Microfilm or Store Electronically on unalterable media
5	Annexations [Never]	TSCS/CST	99		SE or M	Microfilm or Store Electronically on unalterable media
6	Banking Files [7]	BS/FIST	7			
7	Board Meeting - Agenda Packet [Never]	GM	99			
8	Bonds [10]	BS/FIST	10			
9	Budget and CIP (Annual) [10]	BS/FIST	10			
10	Canceled Checks [7]	BS/FIST	7			
11	Cash Receipts [7]	BS/FIST	7			
12	CEQA Documents (EIRs, etc) [varies]	TSCS/CP	10			
13	Claims [5]	GM	5			
14	Collection Line Cleaning - Field Reports [13]	CS	13			
15	Committee and Task Force Meeting Notes [3]	ALL WGs	3			
16	Computer Network Data Backup [2]	BS/IT	2			
17	Confined Space Entry Permits [3]	CS/FMC	3			
18	Conflict of Interest Statements [7]	GM	7			
19	Construction Project Files, Capital Improvement Projects - Project Administration, Schedules, Certified Payrolls*, Correspondence, Diaries, Bid & Proposal docs, Insurance Certificates, etc. [10]	TSCS/CP	10		Unless claim	SRF agmt) after project completion

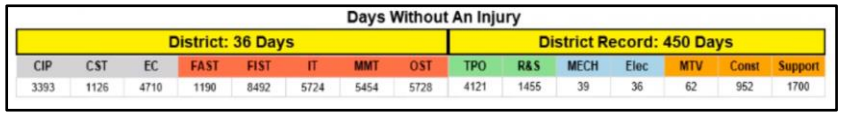
Project Tasks in Planner Synced with Project Online







M365 Portal Creation Workbook



Business Dashboard