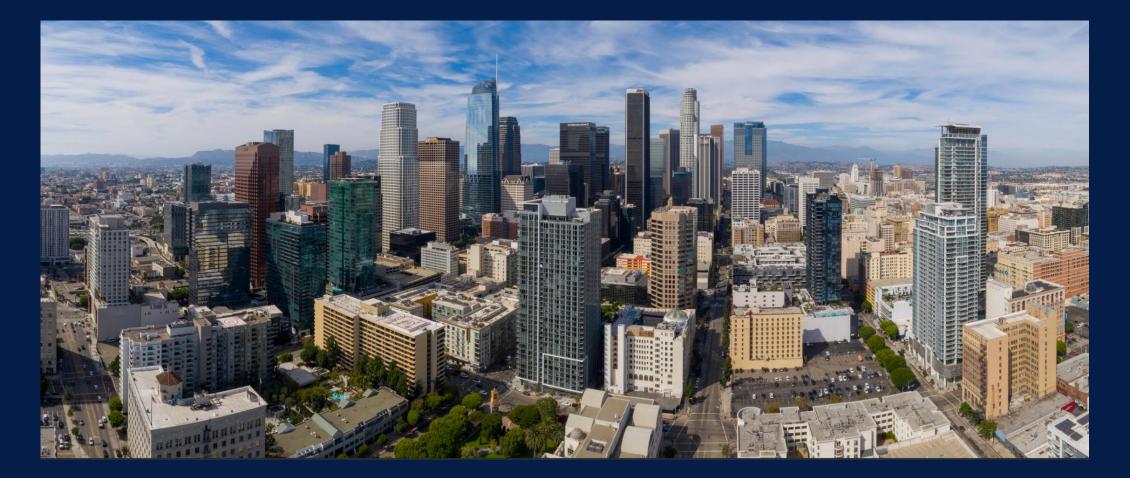
ShareSquared, Inc.

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





Webinar: Presenters



Become a Power Automate Pro: Tips, Techniques, and Demonstrations to help you build sophisticated Power Automate solutions

Jim Duncan

Chief Architect Microsoft Certified Master



David Kruglov

Managing Director





Webinar: General Information

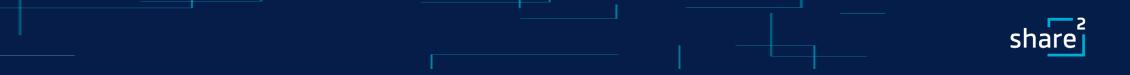
Objectives

- Teach you how to build highly-functional, modular, and reliable Power Automate Flows
- Entice you to work with ShareSquared on any Microsoft 365, SharePoint, Power Platform, and Dynamics 365 initiatives (e.g. Mentoring, Support, Projects, etc.)

*** Special Rates for MISAC members through the end of September ***

Notes

- This series is intended for people who are relatively new to Power Automate and for experts who want to learn how to build commercial-grade Power Automate Flows
- Please ask questions at any time and we will either answer them in context or at the end of the session
- The recording and presentation will be provided in a subsequent email



Webinar: Series Overview

Session #1 - Thurs Sept. 12th:

- Using Connectors to access data sources
- Generating documents in a Flow
- Extending Flow capabilities with Solutions

Session #2 - Wed Oct 9th:

- Creating modular workflows using Child Flows
- Optimizing Flows using Expressions
- Implementing effective error handling

Session #3 – Date TBD:

Customer Showcase





Webinar: Use Case Review

5



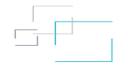
A Public Records Request solution that includes:

- SharePoint Online as the repository for documents/records
- Using Permissions, Location, Taxonomy and Sensitivity Labels to control which records are viewable on the public website
- A public-facing application that enables website visitors to search for "published" records and/or request "unpublished" records
- An internal application used to track, route, and respond to records requests
- Using Microsoft Purview eDiscovery to compile responses
- Using Retention Labels and Policies to manage document/record lifecycles

Note: This use case was the context for our May/June webinar series and was used to demonstrate various Power Automate features only (i.e. the Microsoft Dataverse, Power Pages, etc. are not generally required to implement Flows)



Closing: Questions and Next Steps



- Was this helpful / what you were looking for?
- Is there any other information you need?
- Feel free to email us (<u>Info@ShareSquared.com</u>) with questions, etc.







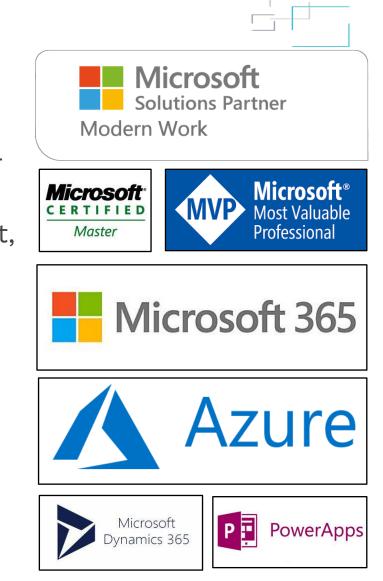
ShareSquared: Overview

Background

- Microsoft-centric products and services firm since 2005
- 13 Microsoft MVPs and 5 Microsoft Certified Masters in our history
- <u>Customers in US and Canada</u> include State and Local Gov't, Utilities, Transportation/Ports, Financial Services, Real Estate, Manufacturing, Healthcare, etc.

Differentiators

- Microsoft Certified Masters
- Solution Accelerators and Products
- Compliance-centric solutions
- Records Management Certified





ShareSquared: Example Local Government Customers

- City of Cupertino SharePoint Online-based Training and Certification Management Solution
- State of Washington, Department of Ecology Power Platform-based Water Rights Permit Application Solution
- County of San Mateo M365 Modern Intranet, Taxonomy, and Compliance Solution and Content Migration
- East Bay Municipal Utilities District M365-based SOP Management solution
- City of Salt Lake City Modern Intranet Solution and M365 Migration
- Port of Long Beach M365 Support and .NET Development
- City of Petaluma M365 Modern Intranet, Collaboration Portal, Content Migration and Classification solution
- Imperial County M365 Support and Ongoing Implementation services
- Centinela Youth Services M365 Collaboration Portal solution and Migration from Dropbox
- Kings River Conservation District M365 Collaboration Portal solution, Migration and Classification of documents from File Shares to M365
- Imperial Irrigation District SharePoint 2016 to SharePoint 2019 Upgrade including KnowledgeLake, Custom Components, Integration, etc.,
- San Francisco Public Utilities Commission M365-based SOP Management solution
- Preservation of Affordable Housing M365 Intranet and Collaboration Portal solution
- Ben Franklin Transit SharePoint Design, Evaluation, Improvements and Ongoing Technical Support
- Ventura County Fire Dept. SharePoint Design and Branding
- Colorado Housing and Finance Authority M365 Intranet and Collaboration Portal solution, Direct Effect Award Process
- Solid Waste Authority of Palm Beach County M365 Modern Intranet and Content Migration
- Northern Wyoming Community College District SharePoint 2013 to M365 Migration and Modernization
- Contra Costa Water District M365 Migration, Workflow, Modernization and Records Management Solution
- Fairfield Suisun Sewer District Modern M365 Intranet and EDRMS Solution
- Union Sanitary District SharePoint 2013 to M365 Migration/Modernization and Workflow Solutions
- City of Auburn SharePoint 2013 to 2019 Upgrade, Workflow, Intranet and Agenda Management Solutions
- Golden Valley Electrical Association M365 EDRMS Solution with Gimmal and ongoing support
- City of West Hollywood Content Migration and Modern Intranet Solution
- City of Antioch Modern Intranet Solution
- Port of San Diego eDiscovery Solution
- City of Vallejo Modern Intranet Solution
- San Diego County Water EDRMS Solution with content auto-classification using Netwrix Classifier
- City of Olympia, WA Modern Intranet and Digital Workspace Solution
- Port of Seattle, WA Modern Intranet and Project Management Portal Solution
- Alameda County Water District EDRMS solution
- WaterOne EDRMS Solution with RecordPoint
- City of Belmont Intranet, Project Management and Workflow Solution, and ongoing support
- County of Los Angeles Registrar Recorder/County Clerk Modern Intranet Solution
- County of Los Angeles Dept. of Human Resources Modern Intranet



ShareSquared: Areas of Expertise

	lize and Content	Complia Auton	nce and nation		n, Analytics, olic Portals
Portals and Collaboration	Document Management	ECM and Records Management	Process Automation	Integration and BI	Public Portals and Dynamics 365
 Intranets Extranets Collaboration Portals Content Mgmt. and Publishing 	 Controlled Processes Templates Migrations Classification Metadata Driven Search 	 Support legal and regulatory requirements Automate retention and disposition Legacy ECM/ERM Migrations Document Imaging 	 Electronic forms and workflows Replace manual processes and one-off productivity applications Save time and reduce errors 	 Connect to back-office systems (e.g. HRIS, ERP) Bidirectional updates Data Visualization Dashboards Process Improvement 	 Public-facing partner, customer, etc. portals and websites Custom Applications Dynamics 365 Implementation and Customization



ShareSquared: Microsoft Certifications & Programs

Microsoft Partner Network Certifications and Designations

- Modern Work Enterprise Solutions Partner
- Microsoft Content Services Partner Program
- Microsoft Purview Partner Program (new)
- Microsoft Graph API Incubation Program (new)
- Microsoft Adoption and Change Management Advanced Specialization
- Gold Competency in Cloud Productivity
- Gold Competency in Cloud Platform
- Gold Competency in Collaboration and Content
- Gold Competency in Datacenter
- Silver Competency in Small and Midmarket Cloud Solutions
- Silver Competency in Messaging
- Silver Competency in Enterprise Mobility Management
- Microsoft Cloud Accelerate Partner
- Microsoft Office365 FastTrack Partner
- Member of the Microsoft Technology Adoption Program (TAP)
- Member of the Microsoft Partner Research Panel (MSPRP)

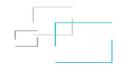








ShareSquared: Reseller / Implementation Partners







ShareSquared: Solution Accelerators



Taxonomy Package

- Prebuilt Content Types
- IA Workbook
- Deployment Utility

Portal Deployment Package

- Portal Creation Workbook
- Deployment Utility
- Deploy Modern Sites, Branding, Taxonomy, Add-ons, etc.

Compliance Package

- Compliance Workbook
- Deployment Utility

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	Compliance team site	Private	Teams	prd-csermcomp		Content Type	Mannings		
	Counterparty Credit Risk Management team site Quality Control team site	Private	Teams	prd-csermcrm prd-csermgc		- content type	mappings		
	Vendor Management team site	Private	Teams	prd-csermym					
rocedures	Policies & Procedures communication site		Sites	prd-pp			OK	Cancel	
15	Centralized site for working on Submission Packages	Private	Teams	prd-submissions	L				



ShareSquared: Products

User Adoption Package

- Taxonomy Tiles
- Advanced Search
- Folksonomy Capture

Public Access Portal

- Provides public access to documents in M365
- Template-Driven search interface
- Standard Forms, PRR, Permits, etc.

Taxonomy Tiles for Outlook

- Inbox Monitoring
- Tile Gallery
- Document Scanning and Conversion
- Windows Version

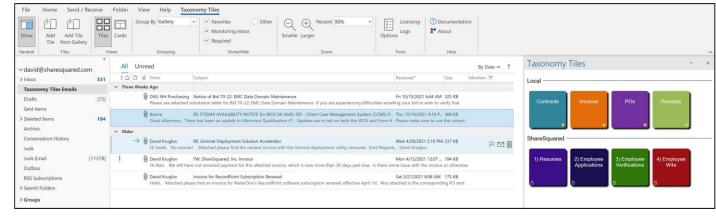
Multilingual for Microsoft 365

Pre-translated Webpart, Page, and List content

Title		Modified Tue Jan 01 2019	Document Type	
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0		Title	Summary	Modified \downarrow
0	•	Island County ECM RFP 2019	DUE DATE NOVEMBER 8, 2019 4:00pm <ddd <="" td=""><td>10-14-2019</td></ddd>	10-14-2019
0		City of Eugene OR - SharePoint Intranet RFP	Request for Proposal Enterprise Intranet and In	. 10-10-2019
0		City of Surrey BC ECM Migration To SharePoint RFP	Title: Consultant Services - Electronic Content	08-30-2019
0	a	Roaring Fork Transportation - Intranet RFP	Deadline for Written Inquiries, Exceptions, and	08-13-2019
0		KCATA ERM RFP	The Kansas City Area Transportation Authority	08-02-2019
0	Ð	City of Owen Sound EDRMS RFP	NRFP-19-012 ELECTRONIC DOCUMENT AND	07-02-2019
0	a	County of Spokane Document Management Workflow	Spokane County RFP #P11288 Document Ma	06-14-2019
0	5	EMWD - ECMS Replacement	REQUEST FOR PROPOSAL ENTERPRISE CON	06-10-2019
0	5	CDIC SharePoint Migration to O365	The complete and official copy of this RFP #20	06-04-2019
0		Contra Costa County - Document Scanning & Indexing	Document Scanning, SharePoint Integration an	. 05-02-2019

Taxonomy Tiles for Outlook

Public Access Portal



Union Sanitary District





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

share

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

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.



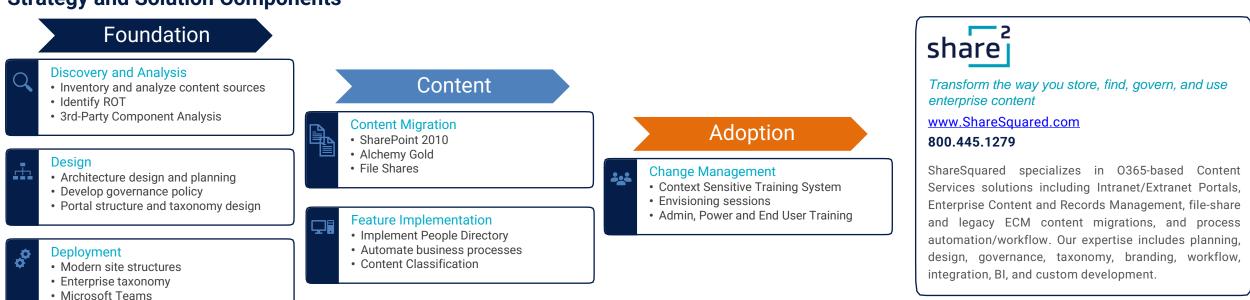


Enhanced Treatment & Site Upgrade Program (ETSU)

Strategy and Solution Components

Results and Outcomes

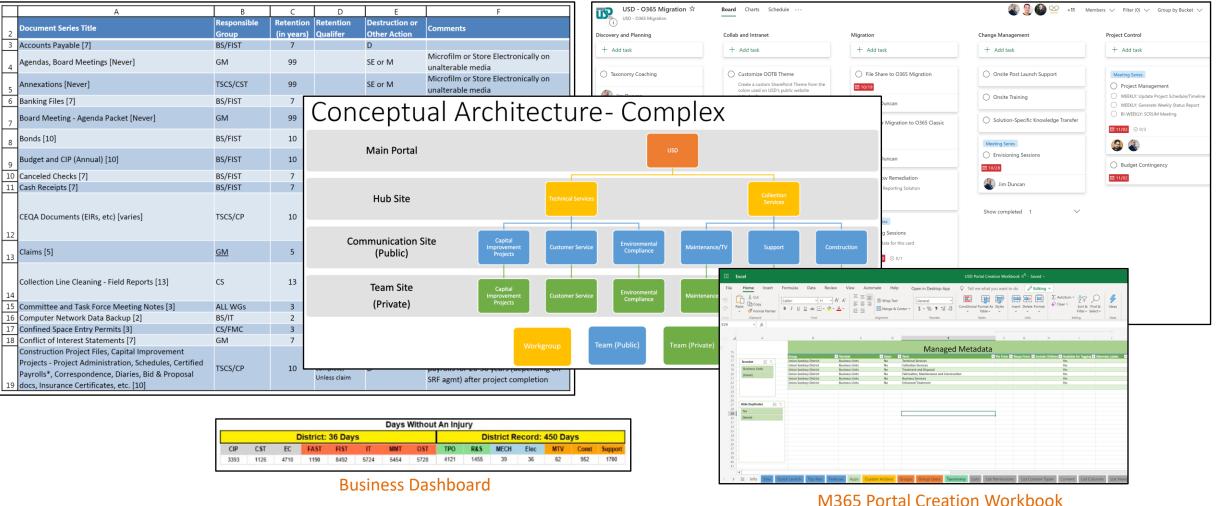
- Efficiency and productivity enhanced by automating processes using Power Automate
- Content resides solely in M365 vs. in siloed repositories
- Legacy content repositories can be decommissioned
- Content findability greatly improved with the implementation of an enterprise taxonomy and content classification
- 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



Union Sanitary Project Visuals



Records Retention Schedule



M365 Portal Creation Workbook

Project Tasks in Planner Synced with Project Online



Fairfield Suisun Sewer District





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

share

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 FSSD'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.

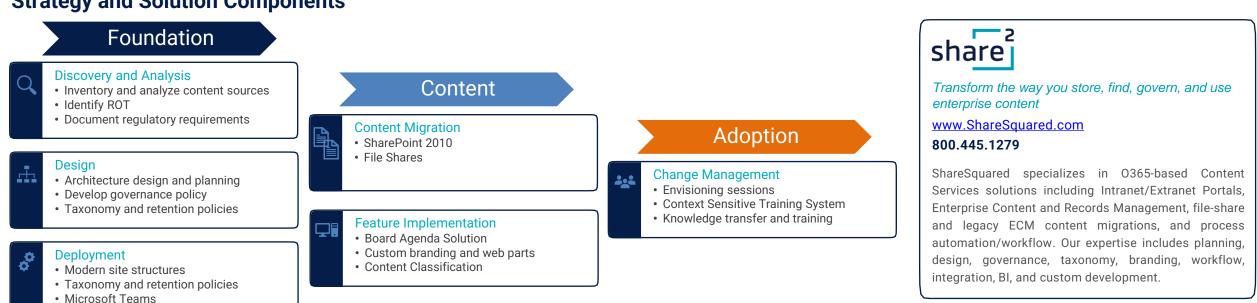




Strategy and Solution Components

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





Fairfield Suisun Sewer District Project Visuals



Records Retention Schedule Construction Management (Includes capital, major maintenance, reclaimed Process water, collection system and drainage maintenance Account No projects) lusiness Units ase Types Contracts with consultants, correspondence, meeting Document Types Planning and Engineering Project completion minutes, project status reports for Board, plans, $+10^{-1}$ lecord Categories specifications, reports, easement preparation, permits Managed Metadata **Records Management** including environmental permits Planning and Engineering Technical memoranda, predesign reports, technical Indefinite ontrart Changes and Clarifica Potential changes, change orders, requests for clarification, minor changes and clarific 10 Years 10 Years 9999 Years 10 Years 10 Years 10 Years 9999 Years Destroy Destroy IntDate Retain Destroy Destroy Destroy ItDate Retain reports Conformed specifications, record drawings, as-builts, equipment OBM manuals, and al Correspondence with contractors, consultants, and general correspondence. Meeting a Contractor daily reports, certified payrolis, consultants' field reports, certificate and de nt>Inspection Records and R nt>Photographs and Videos Bid Sets Plans and Specs used for bidding but not construction Project Completion + 1 ment>Planning and Engineering ment>Planning and Engineering>F racts with consultants, correspondence, meeting minutes, proje 10 Years ument Types sument Types chnical memoranda, predesign reports, technical repor 9999 Years 10 Years FSSDEndofTerm Destroy Bids Bids and rejected bids Project completion cument Types cument Types onstruction Management>Progress Payments onstruction Management>Purchases of Equipment tion related to the purchase of equipment that is part of the project, but outsid 10 Years FSSDEndofTerm Destroy +10cument Types onstruction Management>Record Plans and Specificatio onstruction Management>Safety Records and Reports Conformed specifications, record drawings, as-builts 9999 Years 10 Years FSSDEndofTerm FSSDEndofTerm Destroy Destroy Retain ocument Types ocument Types 9999 Years nance>Accounting Awards of Contract Project completion Comprehensive Annual Financial Reports; Budget and Long-Term Financial Plans; Audit Supporting accounting reports, work papers (includes general ledger reports, journal w ument Types 9999 Years 6 Years FSSDTrueDocumentDate Retain FSSDTrueDocumentDate Destro +10cument Types nance>Accounts Payable nance>Accounts Payable>Paid Invoices Paid invoices and supporting records 7 Years FSSDTrueDocumentDate Destroy 4 Years 4 Years 6 Years 10 Years 7 Years 10 Years 5 Years PSSDTrueDocumentDate Destroy PSSDTrueDocumentDate Destroy PSSDTrueDocumentDate Destroy PSSDTrueDocumentDate Destroy PSSDExpires Destroy PSSDTrueDocumentDate Destroy Accounts payable reports (includes invoice payment selections, check registers, Wb, Accounts receivable processing (includes billing for leases, industries/utilities, ground ment Types ment Types Contracts with Consu Accounts receivable processing (includes billing for leases, industri Retiree Health/OPEB Issuance documents and all supporting work papers Employee Training Records (other than Employee Safety Training) Regulatory nce>Actuarial Studies nce>Bonds and Loans Finance-Tendovee Training Rec Finance-Tendovee Training Rec Finance-Newstments/Banking Finance-Newstments/Banking Finance-NewsID-Payroll Process Finance-Payroll>Tax Reports Finance-Property Tax Filings Destroy Safety Records and Re Regulatory reporting Workgroup Financial Assistance Safety & Risk Mot Programs Labora FSSDTrueDocumentDate Destroy FSSDTrueDocumentDate Destroy FSSDTrueDocumentDate Destroy ment Types ment Types notices, filings to county 10 Years 20 Years Correspondence Relat entDate Destroy ance>State Controller's Report 6 Year Construction Manager SRF (by project) cument Types iuman Resources>Cafeteria Plan Docu 10 Years FSSDEffectiveDate Destroy Meeting Notes, letters, memos **RRG Files** 99 Years uman ResourcessClassification and 10 Years FSSDTrueDocumentDate Destroy Stormwater (Inc. industrial and unicipal stormw** 10 Years FSSDEffectiveDate Destro 4 Years 1 Years Contract Changes and Recycled Water Biosolids Nastewater Treatment ument Type HU007 Annual DMV, proof of insura ESSDTrueDocumentDate Destroy uman Resources>Employee DMV Records 1 Years 30 Years 10 Years 10 Years 10 Years 30 Years 10 Year -assimumeutocimentatia Destroy FSSUFFectiveOste Destroy Clarifications Emolouse handbooks banefit sum Health, Dental and Vision Plan Do Data Reports Data Permits Inspection Records an Destroy Destroy Destroy e Award Policy and Presentatic Term Disability, Long Term Disa Permits Data Reports RW Users Forms Soils Test Reports and Permits Data Reports Correspondence OneDrive Exchange Reports 🔽 File Quota 🔄 Sharing 🔄 Document Reter Default Class n 🔽 Has OneDrive Email Archive Auto Prune Email Rete Role Auto Pru Has Mailbox None External 30D Restricted Yes None External None 5V Yes 30D 5Y Supervisor 1Y Office Worker Restricted None External None 5Y Yes 30D 5Y Regional Monitoring/SFEI Yes 1Y NPDES Pretreatment trient Watersh Field Worker Restricted Yes 100GB External None 5Y Yes 30D 5Y Keep since Modified Delete unchanged 👆 Move from Inbox 🛛 👆 Empty Deleted 👆 Keep in Archiv Matter of Public Record - Anyone could rear Short term discharges Unrestricted Reports (by year) Reports (by year) Permits Data Permitted Use Reports (by year) Forms & Templates Non-permitter users Reports (by year) Confidential Contains PII and/or volatile trade secrets Protected Should only be viewed by staff (Internal) Permits, sample data, reports, Permit renewal (Projects) Specific staff only Restricted Adapted from CAPSTONE methodolog

M365 Portal Creation Workbook

Regulatory Mapping

OneDrive/Exchange Retention Policies

