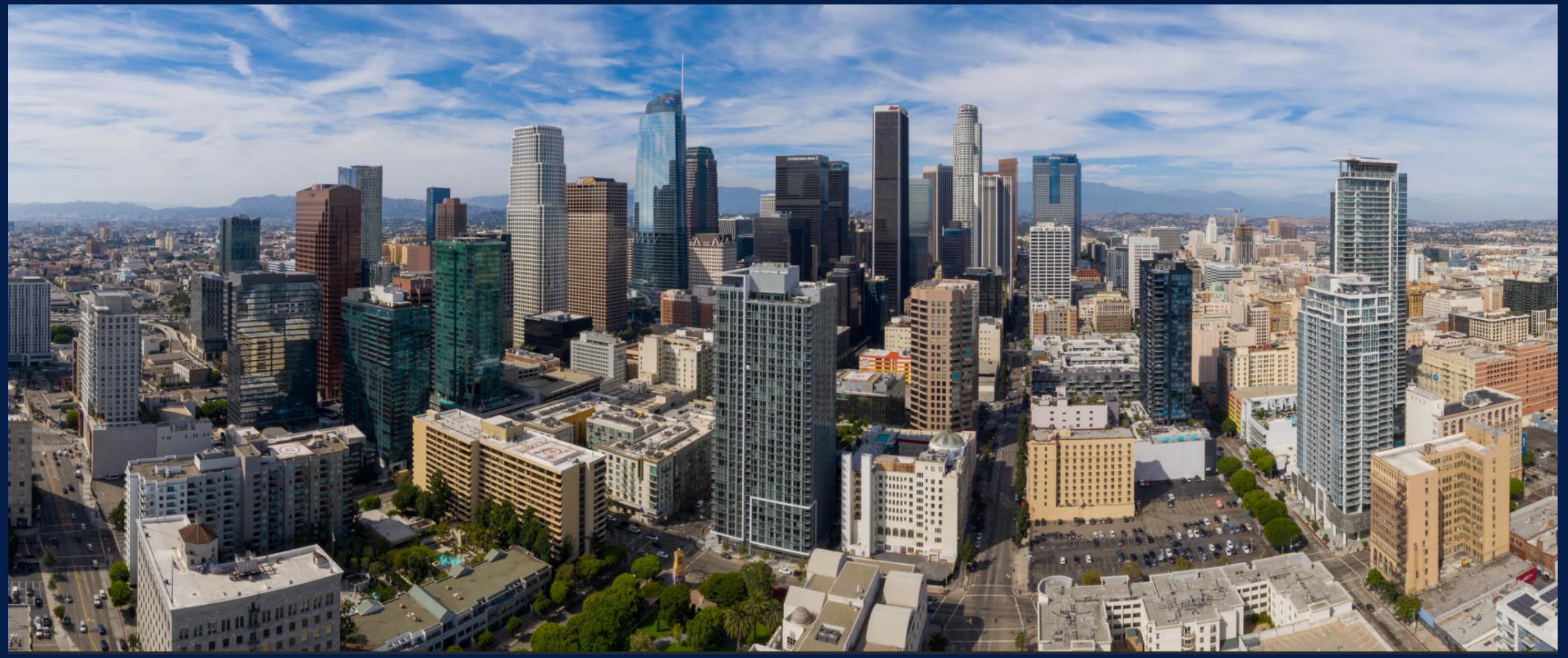
ShareSquared, Inc.

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

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- A public-facing application that enables website visitors to search for “published” records and/or request “unpublished” records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 (Info@ShareSquared.com) with questions, etc.

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ShareSquared: Overview

Background

- Microsoft-centric products and services firm since 2005
- 13 Microsoft MVPs and 5 Microsoft Certified Masters in our history
- **Customers in US and Canada** 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

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ShareSquared: Areas of Expertise

Centralize and Manage Content

Portals and Collaboration

- Intranets
- Extranets
- Collaboration Portals
- Content Mgmt. and Publishing

Document Management

- Controlled Processes
- Templates
- Migrations
- Classification
- Metadata Driven Search

Compliance and Automation

ECM and Records Management

- Support legal and regulatory requirements
- Automate retention and disposition
- Legacy ECM/ERM Migrations
- Document Imaging

Process Automation

- Electronic forms and workflows
- Replace manual processes and one-off productivity applications
- Save time and reduce errors

Integration, Analytics, and Public Portals

Integration and BI

- Connect to back-office systems (e.g. HRIS, ERP)
- Bidirectional updates
- Data Visualization
- Dashboards
- Process Improvement

Public Portals and Dynamics 365

- 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

Gimmal

RECORDPOINT

collabware

VisualSP

DocuSign

bindtuning

KnowledgeLake

Aquaforest Searchlight 365

harmon.ie

wand
precision classification for search

dryvIQ

Sharegate

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ShareSquared: Solution Accelerators

Taxonomy Package

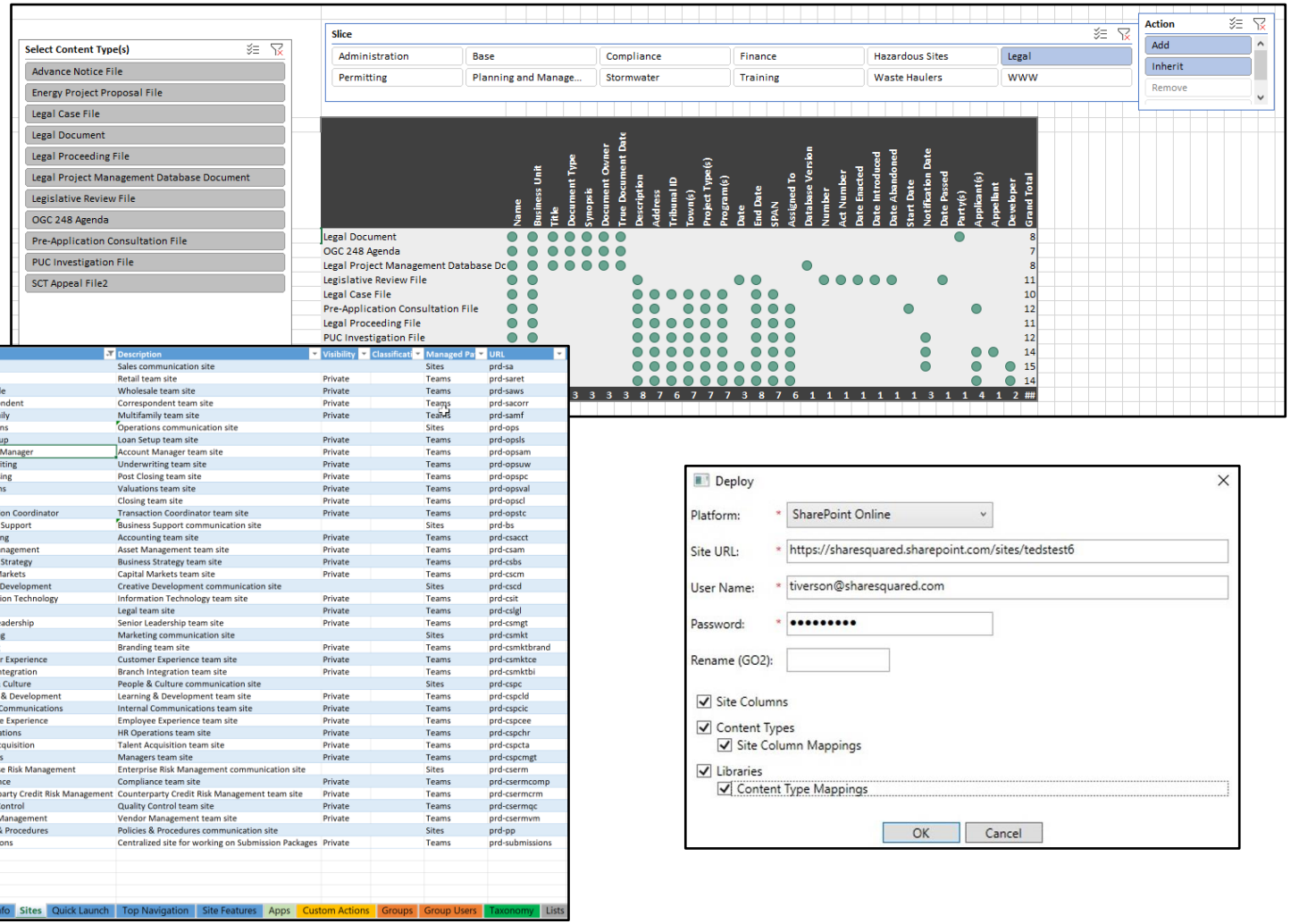
- Prebuilt Content Types
- IA Workbook
- Deployment Utility

Portal Deployment Package

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

Compliance Package

- Compliance Workbook
- Deployment Utility



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.

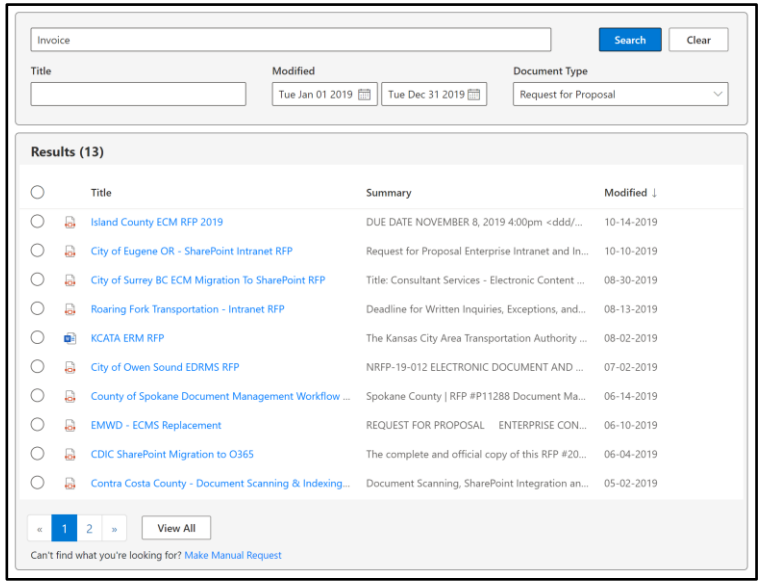
Taxonomy Tiles for Outlook

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

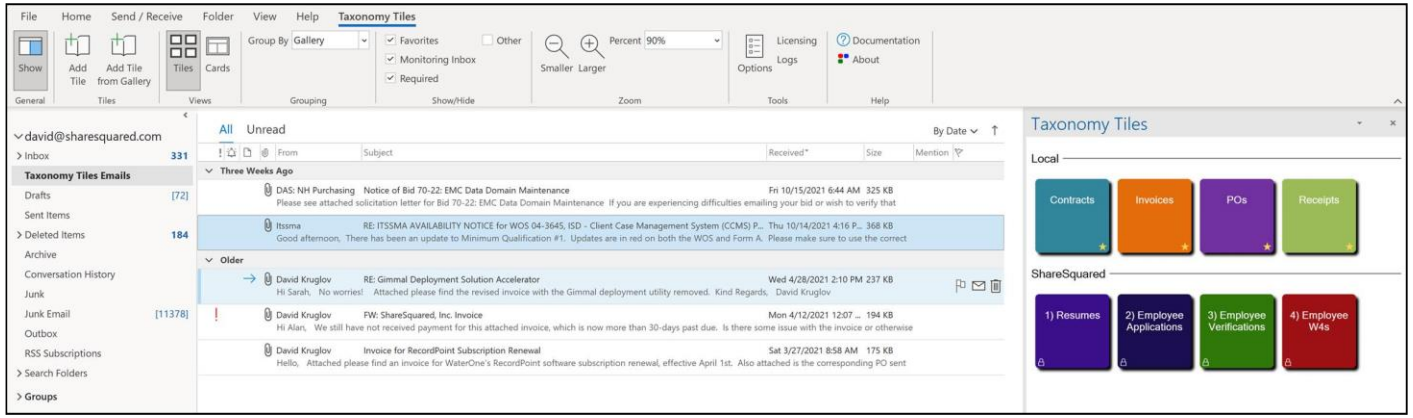
Multilingual for Microsoft 365

- Pre-translated Webpart, Page, and List content

Public Access Portal



Taxonomy Tiles for Outlook



Union Sanitary District

www.unionsanitary.com

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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

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www.ShareSquared.com

800.445.1279

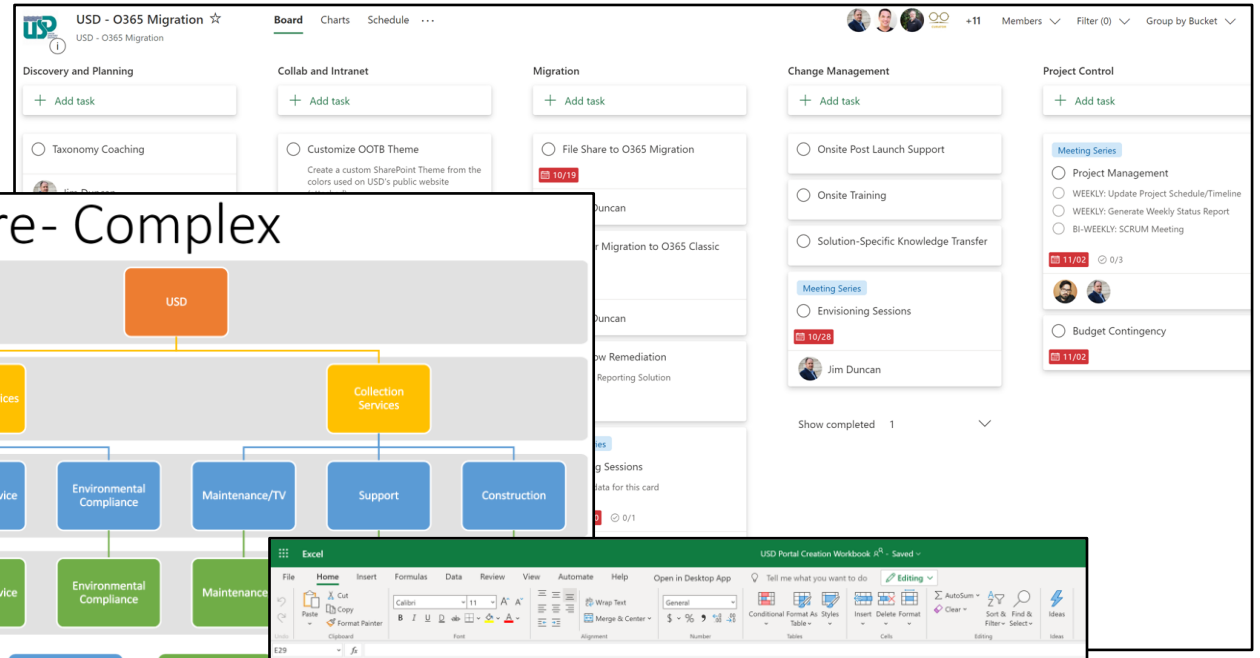
ShareSquared specializes in O365-based Content Services solutions including Intranet/Extranet Portals, Enterprise Content and Records Management, file-share and legacy ECM content migrations, and process automation/workflow. Our expertise includes planning, design, governance, taxonomy, branding, workflow,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

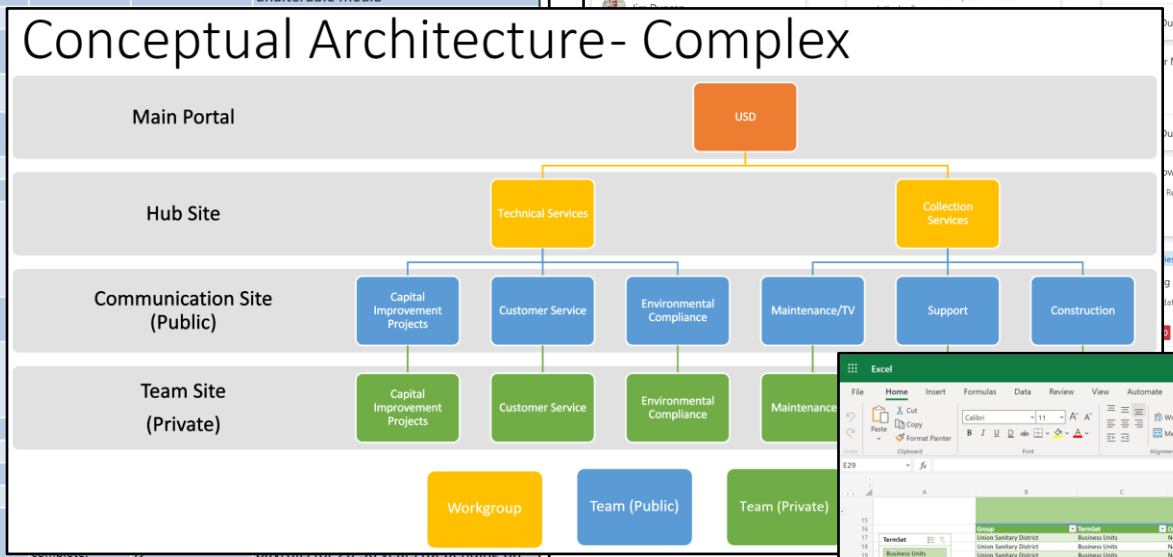
Union Sanitary Project Visuals

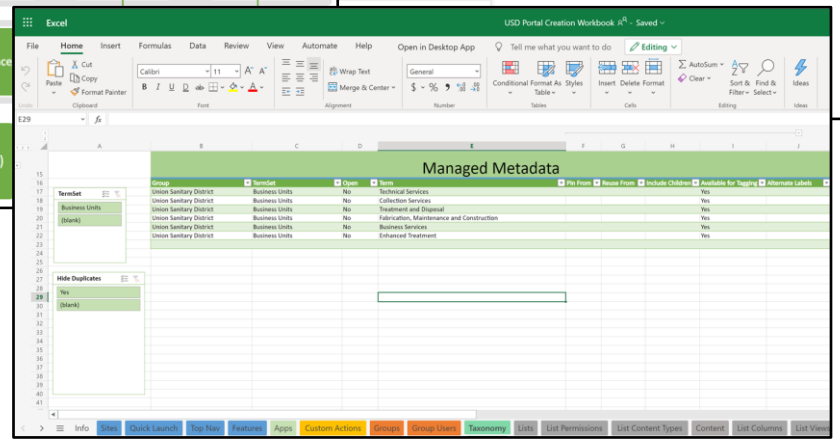
Records Retention Schedule

	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

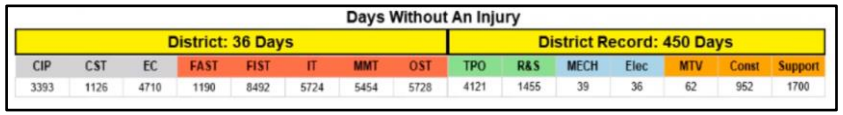
Project Tasks in Planner Synced with Project Online







M365 Portal Creation Workbook



Business Dashboard

Fairfield Suisun Sewer District

www.fssd.com

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

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

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.

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

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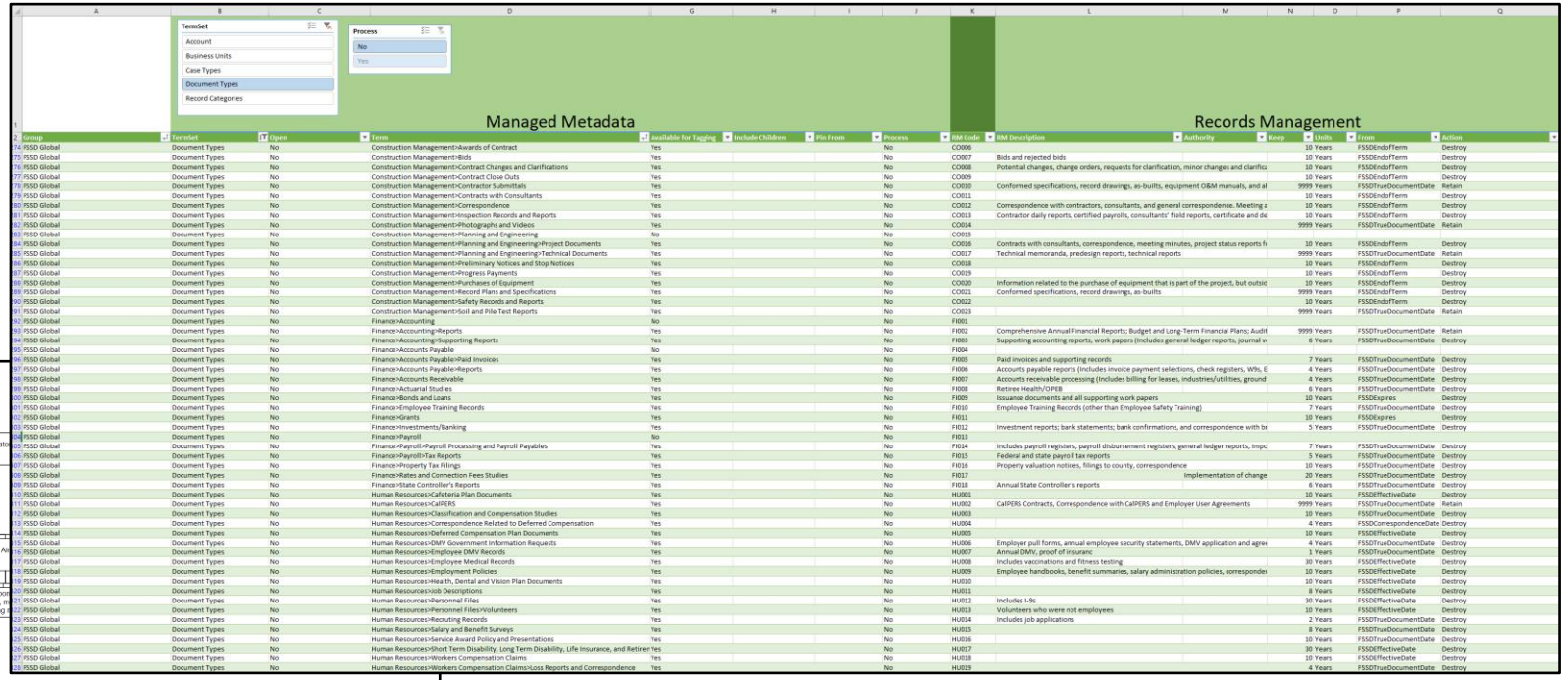
Fairfield Suisun Sewer District Project Visuals

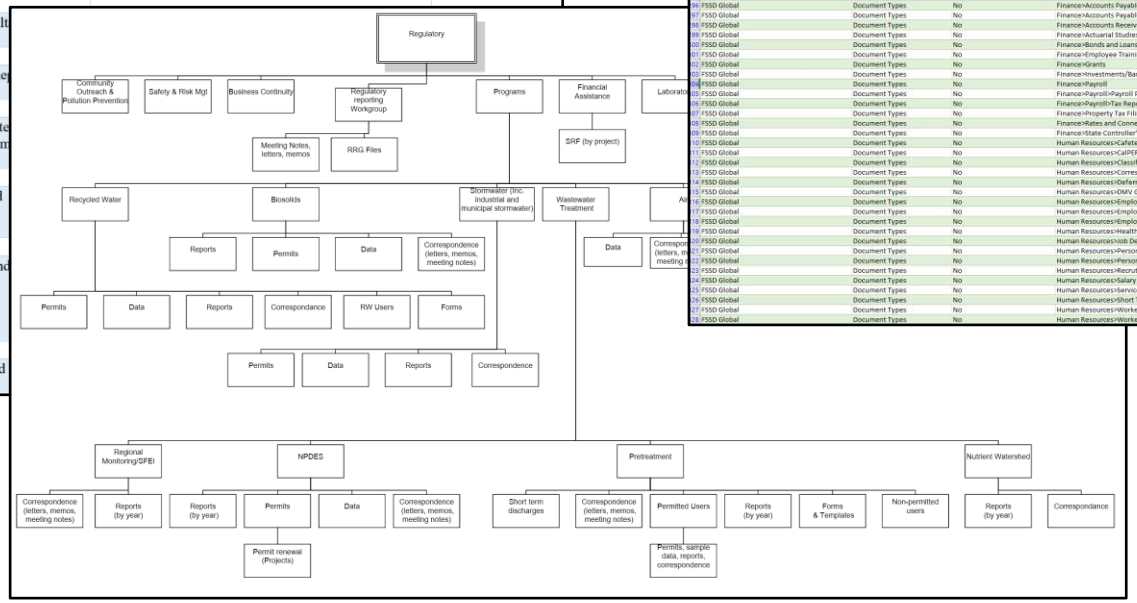
Records Retention Schedule

Construction Management	*(Includes capital, major maintenance, reclaimed water, collection system and drainage maintenance projects)*	
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
Contracts with Consult		
Safety Records and Re		
Correspondence Relate Construction Managem		
Contract Changes and Clarifications		
Inspection Records and		
Soils Test Reports and Reports		

M365 Portal Creation Workbook



Regulatory Mapping



OneDrive/Exchange Retention Policies

		OneDrive					Exchange			
Role	Default Classification	Has OneDrive	File Quota	Sharing	Document Retentio	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